SUPPLIER REGISTRATION MANUAL

Supplier Portal Module

Abstract

Step by step process for new vendors to follow when registering as a supplier for Polk County

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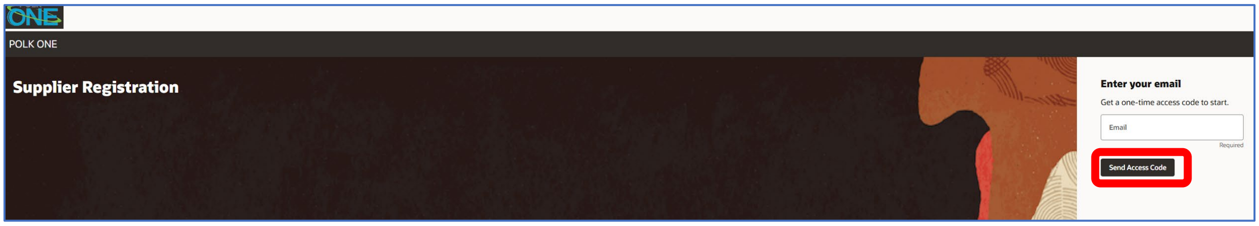
Contents

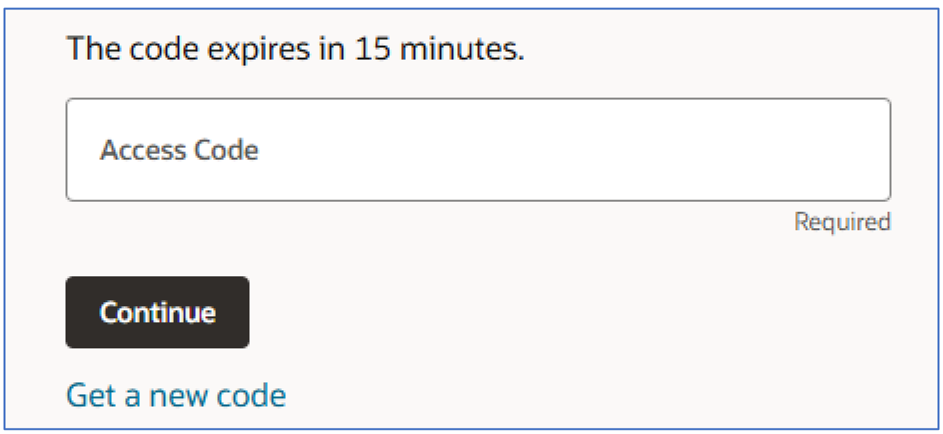
Supplier Registration

Enter your email address to start the registration and click "Send Access Code".

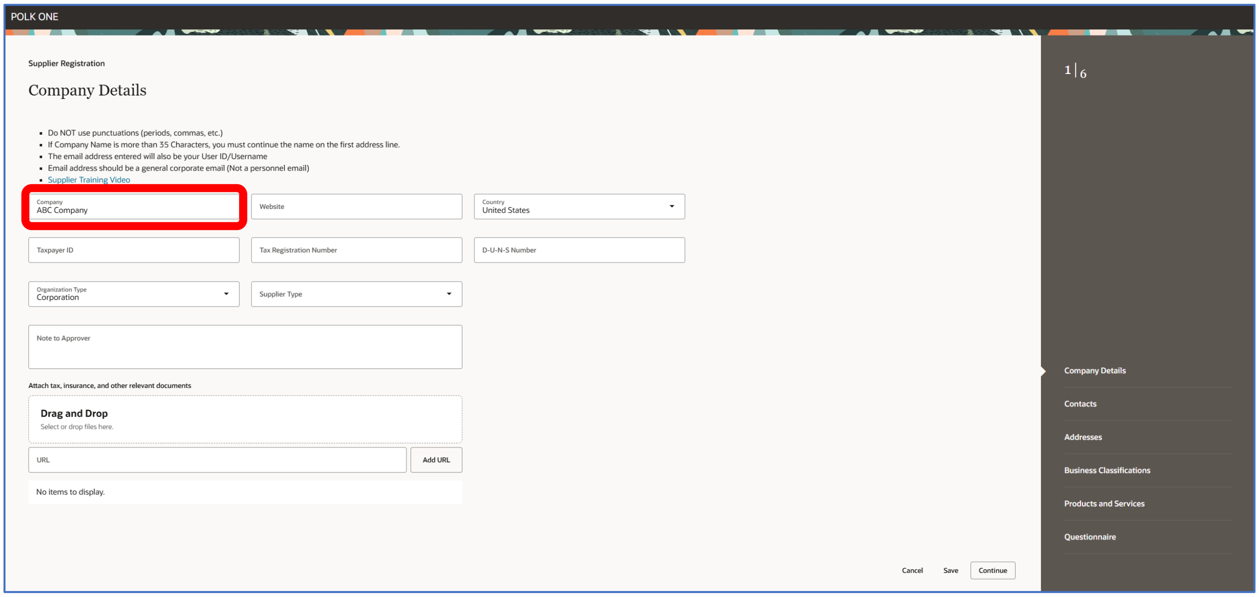


****Please note that the email address entered will be the primary username for the account. We recommend using a general email address for the company (E.g.: info@abc.com, sales@abc.com, etc.)**

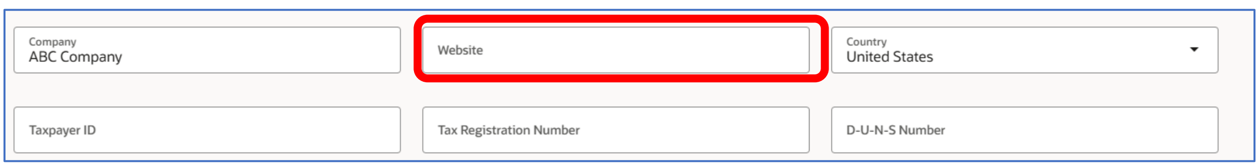
Once you receive the access code in your email, enter the code and click on "Continue"



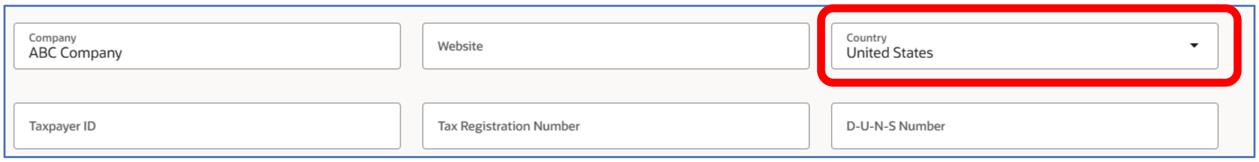
Please fill in all the information in each required field starting with your Company's Name.
The company name should be entered as it appears on your W-9, legal entity name.



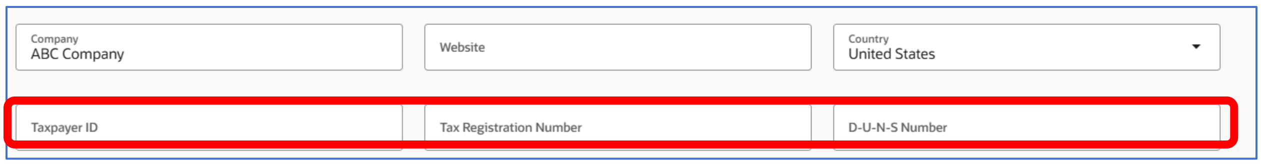
Enter your "Website", optional.



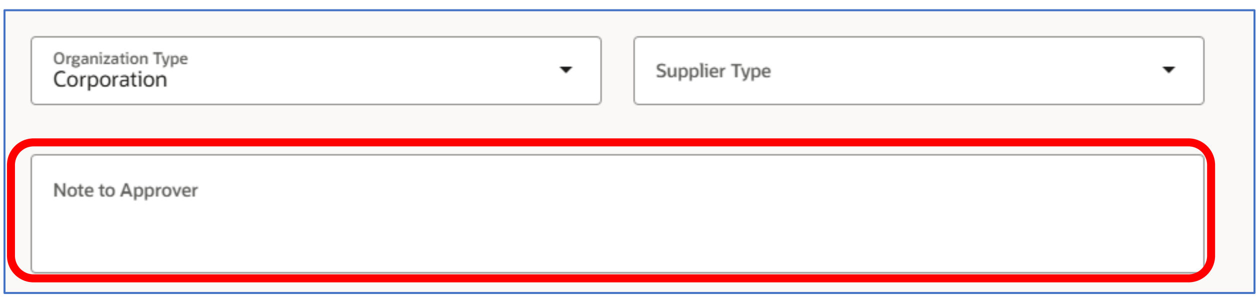
Select the appropriate Tax Country. (Tip: when you start typing the country, a list will form. You may select from the automatically generated list.)



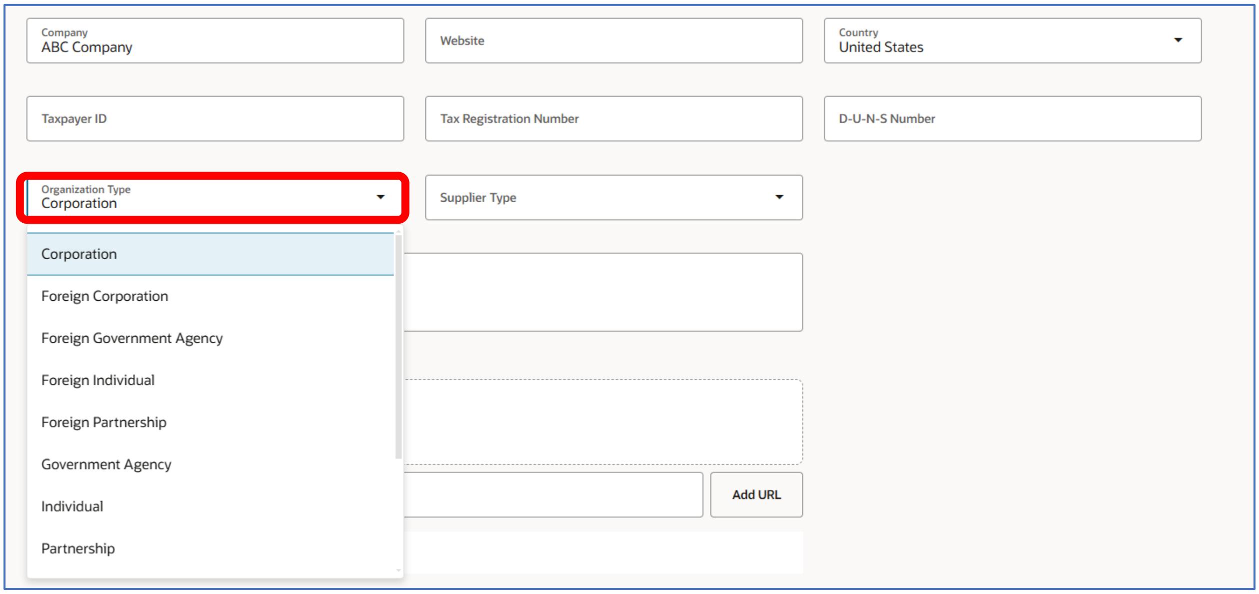
Enter your "Taxpayer ID" information. Please use what is applicable to your business. Note: The Taxpayer ID # is mandatory. Enter your D-U-N-S #, optional.



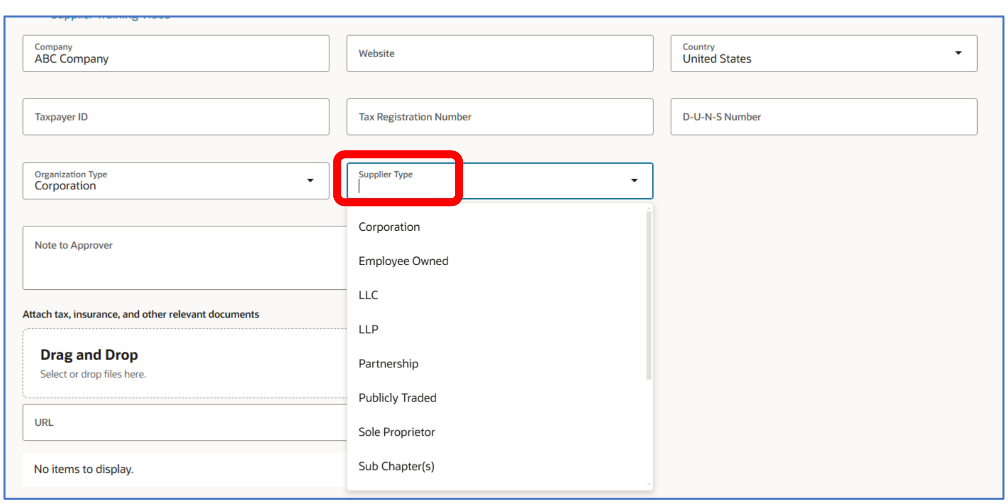
Note: If the Taxpayer ID # entered is applicable to more than one company, enter a note in the "Note to Approver" referencing the additional company name and identify which company is the parent company.



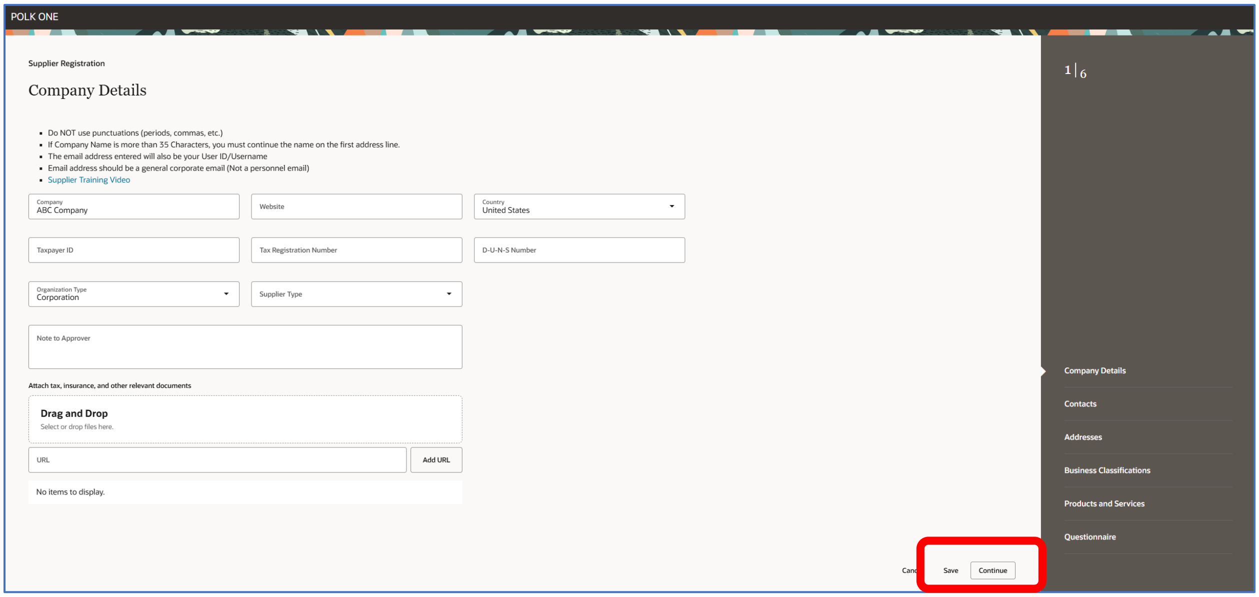
Select your company’s “Tax Organization Type”.



Select your “Supplier Type”

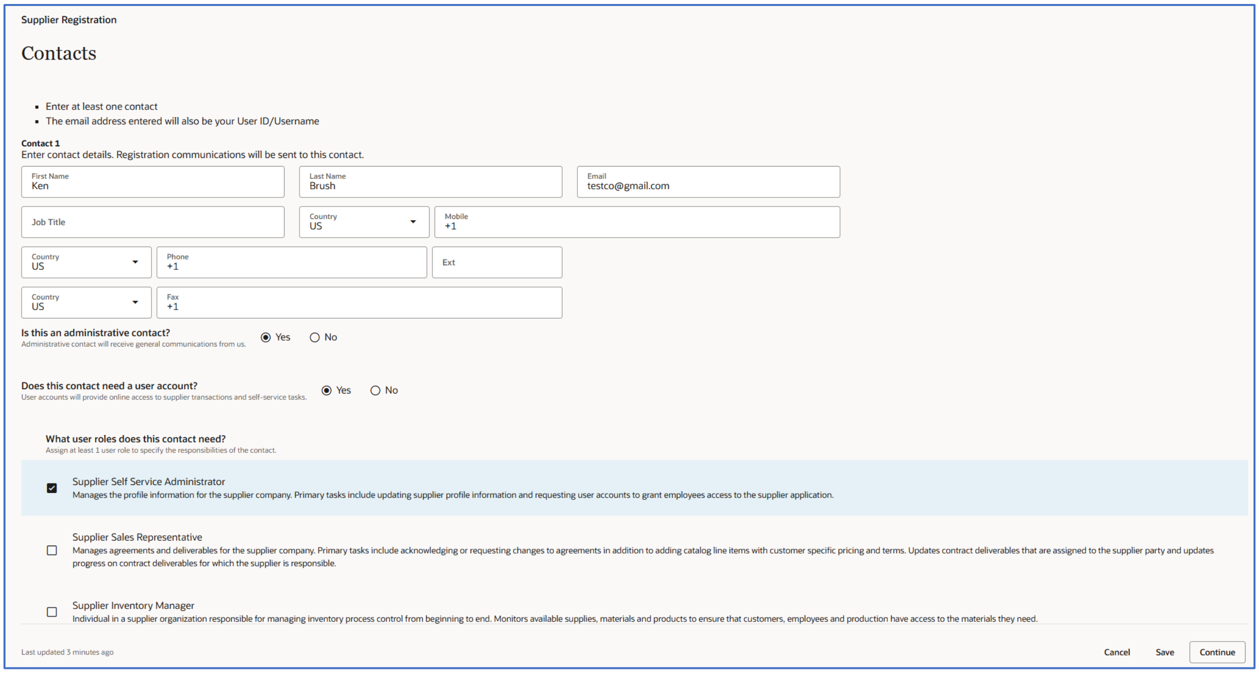


Click Next to continue to the next section

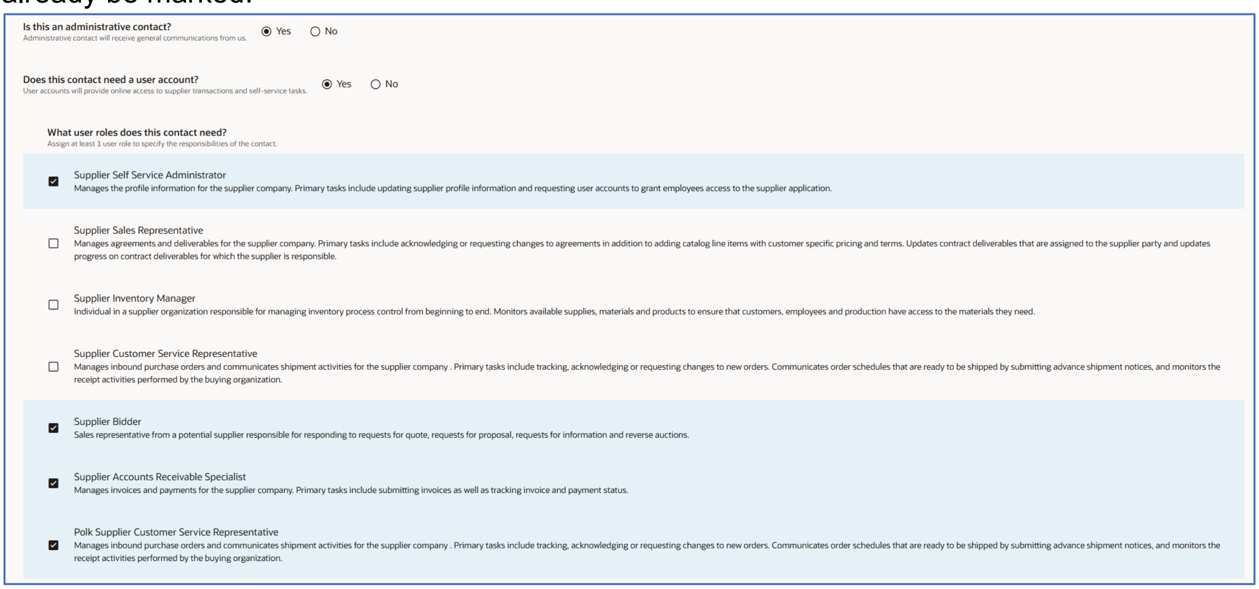


Contacts Screen

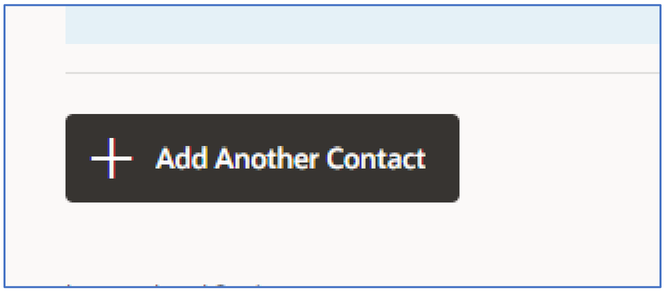
Fill in your contact information. Your email address will automatically be filled in the email address you provided earlier.



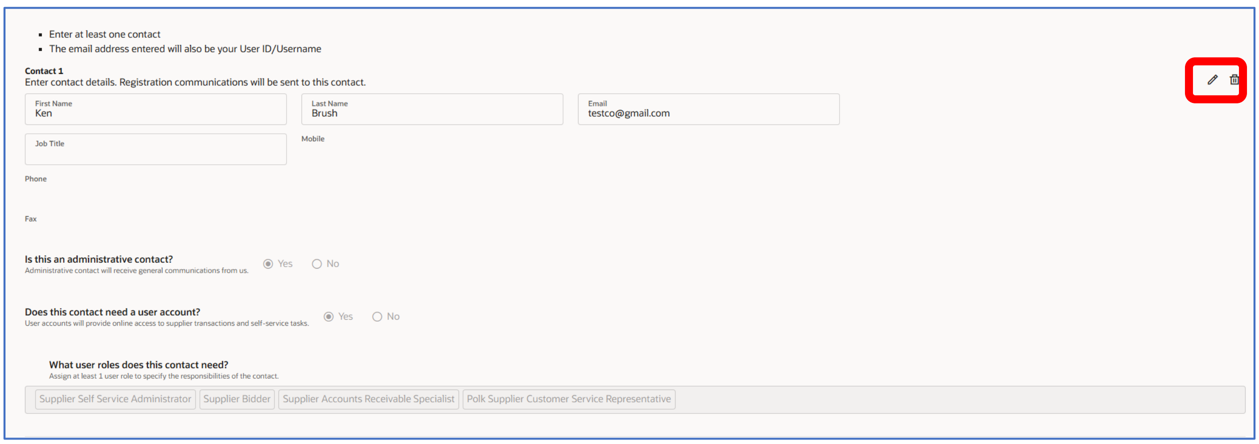
Scroll down to verify the roles and access this user will have. The default roles will already be marked.



You can add additional contacts by scrolling to the bottom and clicking “Add Another Contact”.

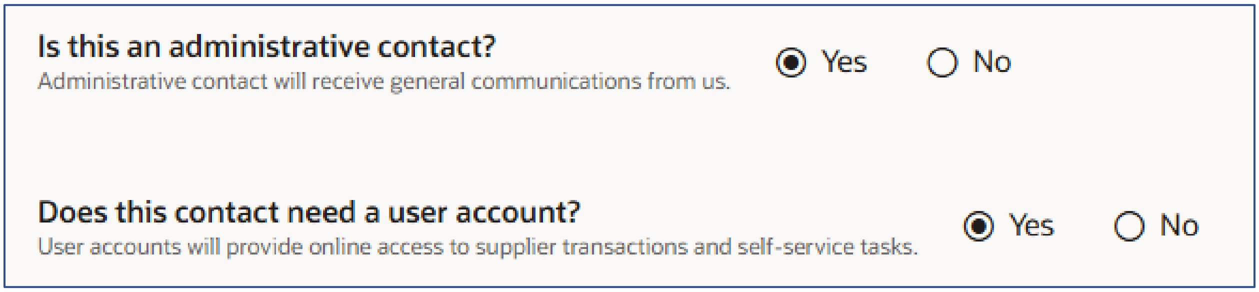


You can edit the contact’s information by clicking “Edit” (pencil icon) on the right-hand side of the contact’s information.



On the “Edit Contact” screen you may change the assigned roles and add or change additional information.

When creating a new contact, the contact may be assigned as an "Administrative Contact" for any changes to the account. You will also have the option to "Request User Account". This will create a log in account for the contact using their email address. The contact will be sent an email to create a password.

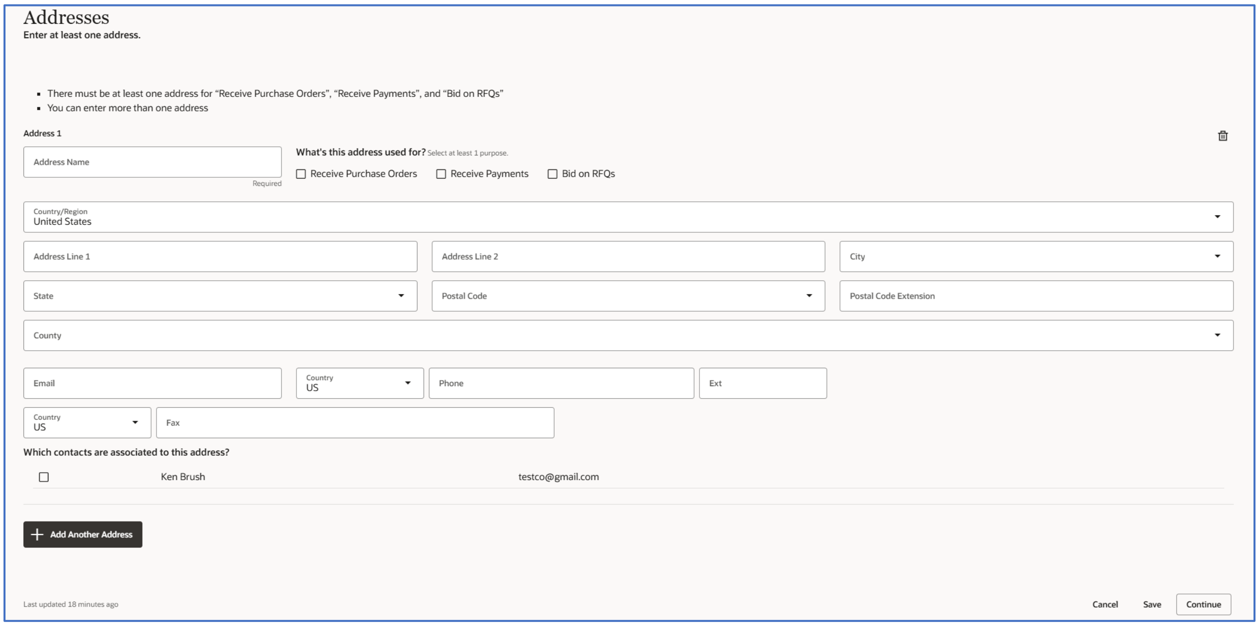


Once the contact information has been entered, click "Continue" on the bottom right to move to the next section "Addresses".

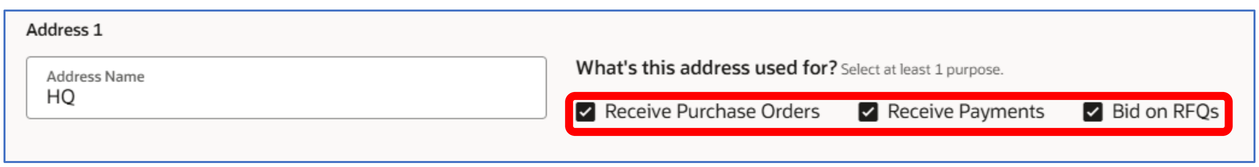
Click "Next" to move to the next section "Addresses".

Address Screen

In this section you must create a minimum of one (1) address for your company. Complete the information required below.



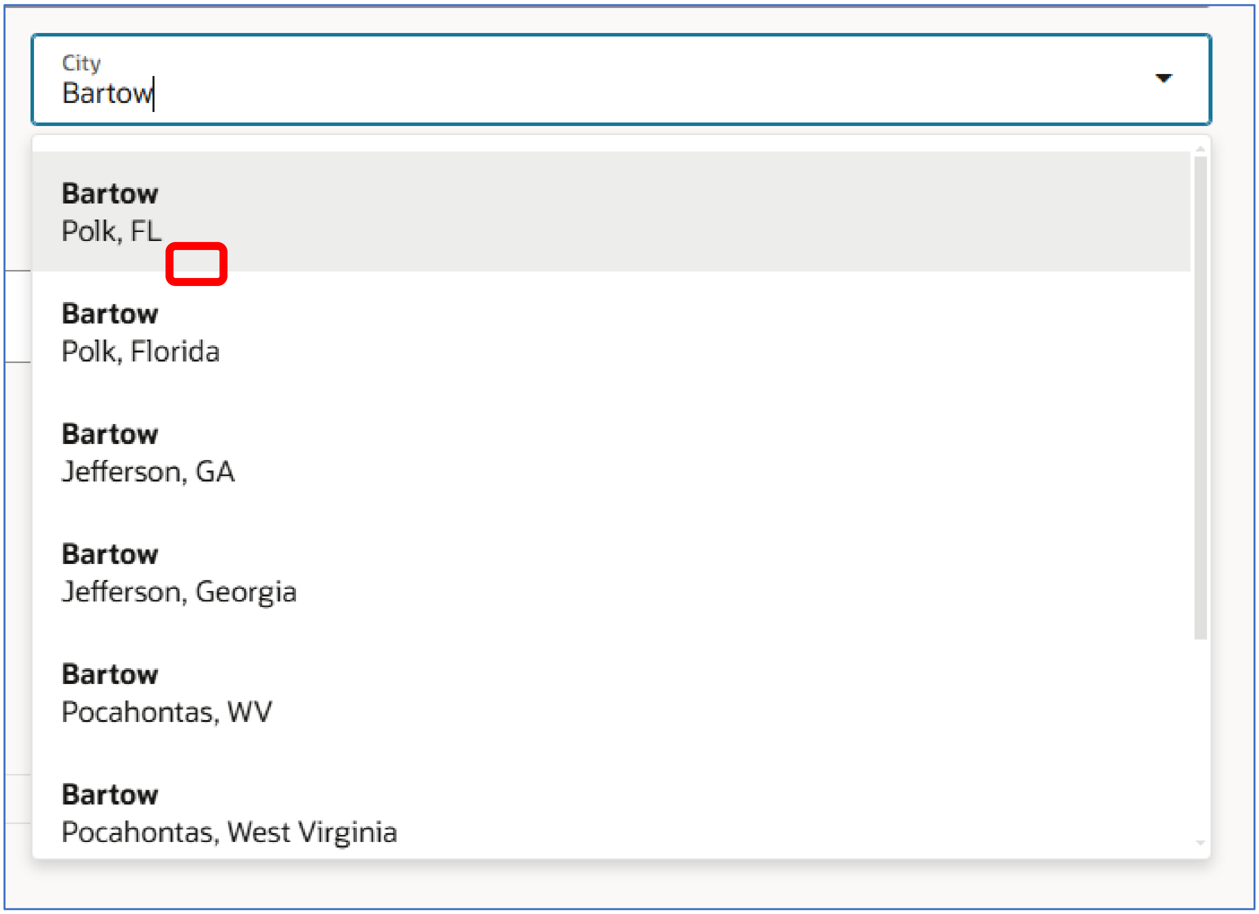
Enter the Address Name (e.g. Headquarters, Main Office, etc.) and select the "Purpose" of the site. Please select all that will apply for the location.



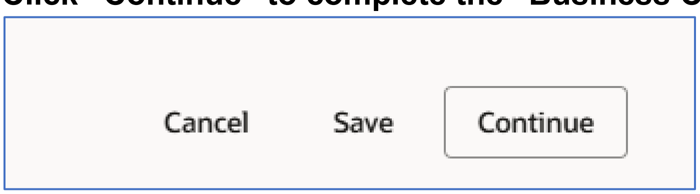
- Ordering- address for purchase orders
- Remit to- address for payments to be sent
- RFQ or Bidding- address to receive bid notices

NOTE: There needs to be at least one address for each address purpose. It is recommended that you select all three Purposes for your primary address.

Once you start typing the name of the City a menu will appear to select from and the State and County will auto-populate.

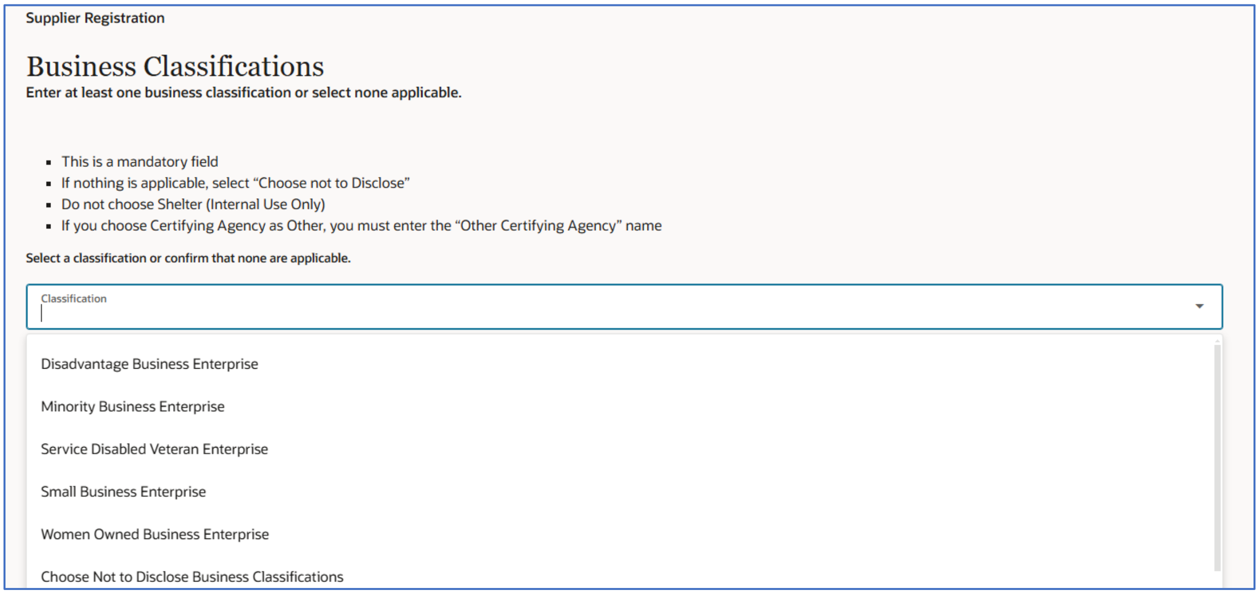


Click “Continue” to complete the “Business Classifications”

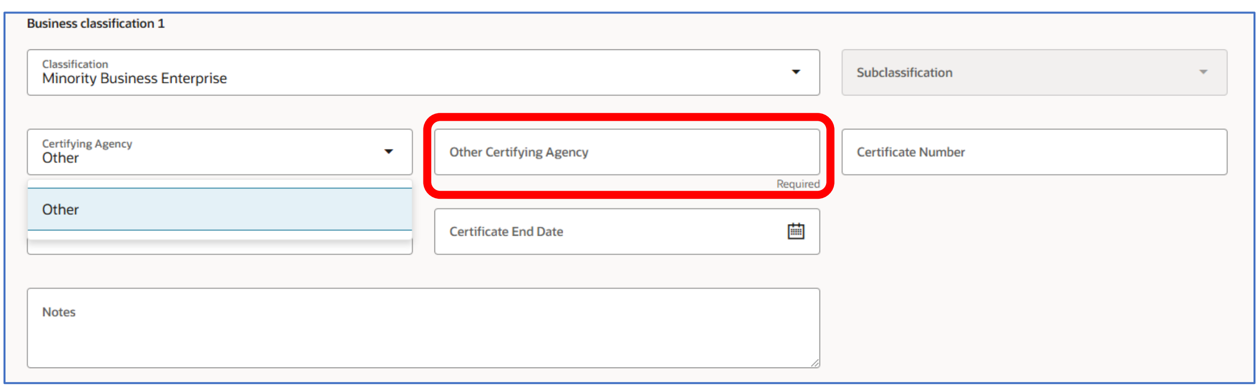


Business Classification Screen

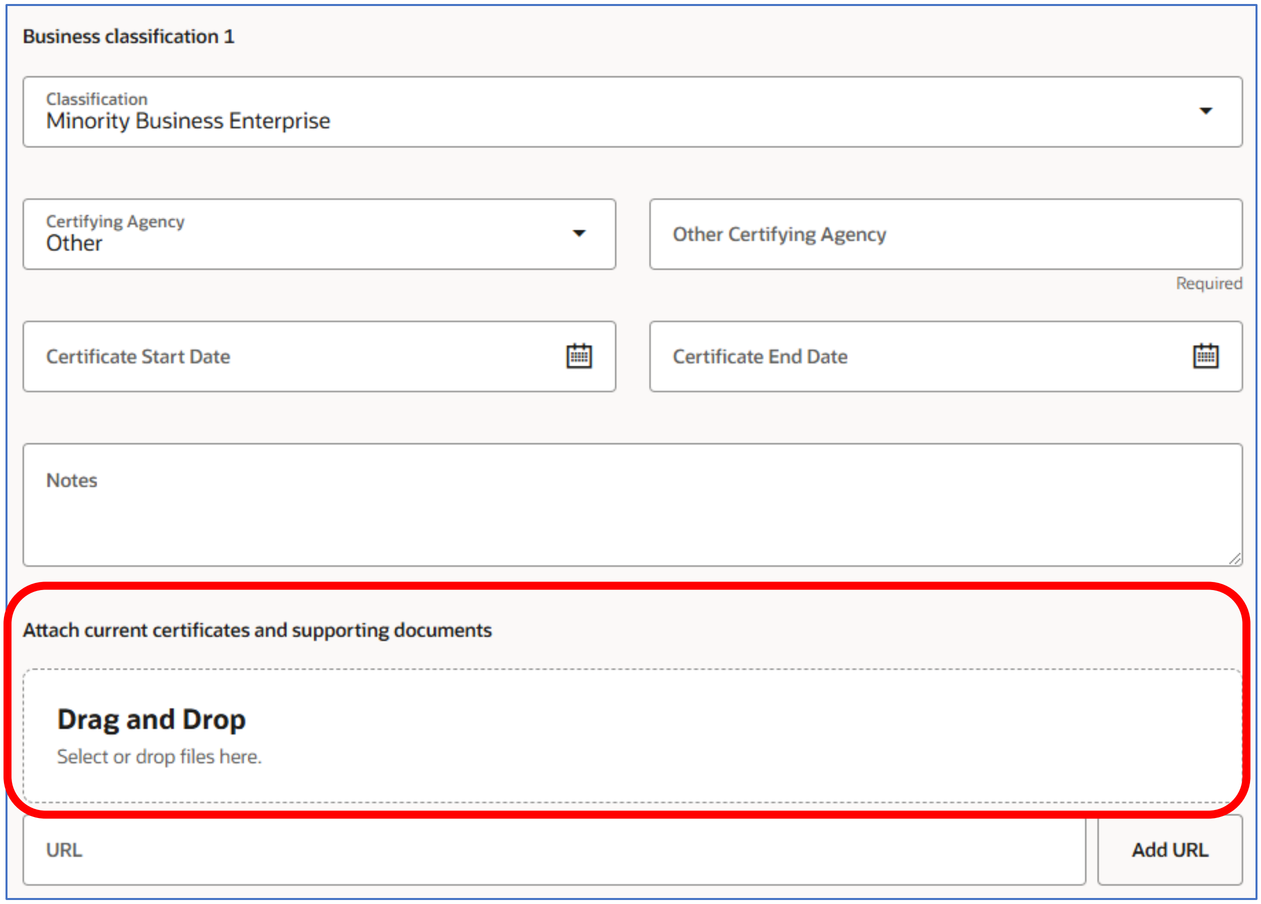
Under Business Classification page you will need to enter your company's classification information. Start by clicking on the drop-down arrow and select all that are applicable to your company. If none apply, or you prefer not to select an item, you may select "Choose Not to Disclose Business Classification".



If you select a Business Classification, the "Certifying Agency" must also be selected by clicking on the drop down, select other, and enter the Agency's name.



Next you will need to attach a copy of your certificate by dragging and dropping in the attachment section.



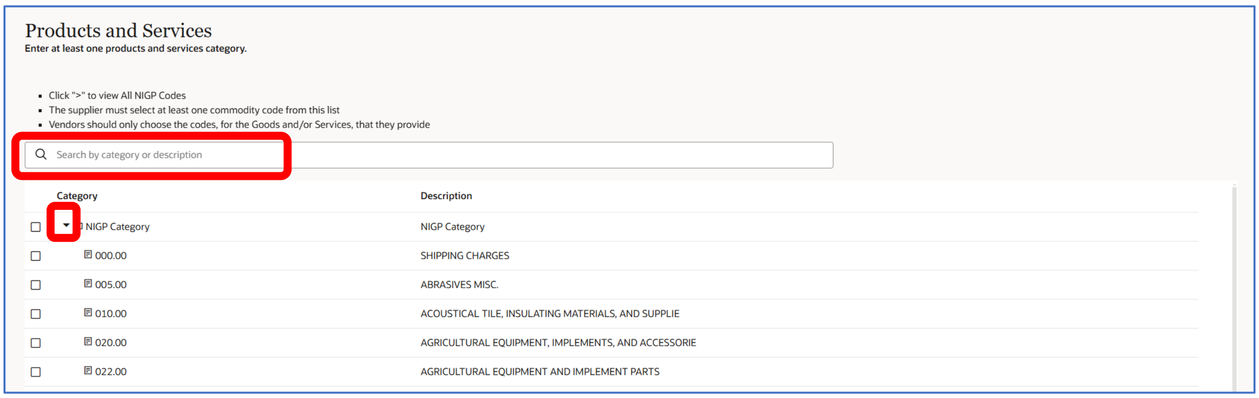
After selecting all applicable all classifications and uploading copies of the certificates, click “Continue” to complete “Products and Services”.

Products and Services Screen

Here you will need to select as many commodity codes as possible that will fall under the commodities/services your company provides.

***NOTE:** notifications for solicitations are sent out based on commodity codes.

You may either search by Commodity Code number, Description, or by selecting the "Expand" button and scrolling through all of the Commodity Codes.



NOTE: All commodity codes beginning with the # 9 are services, all others are for providing the described goods.

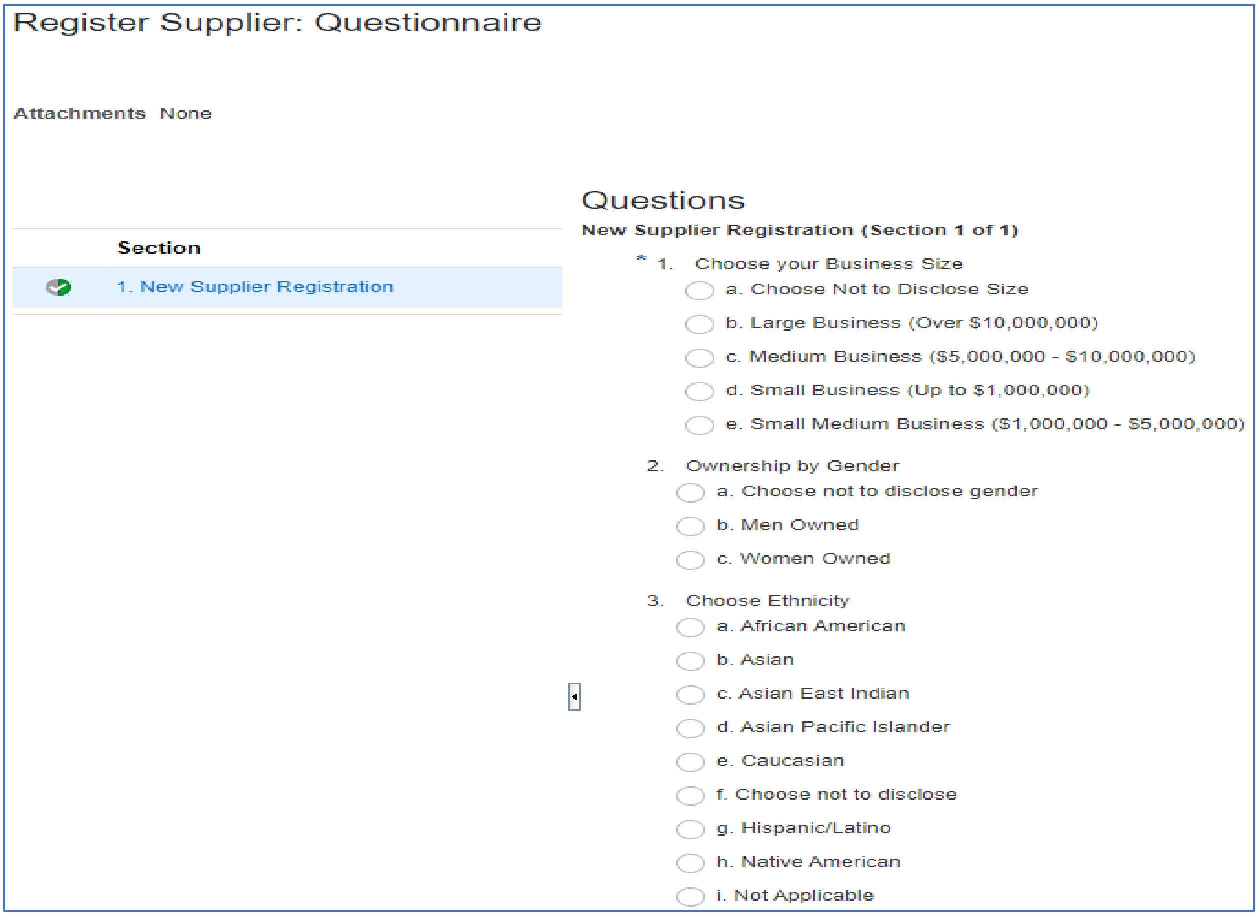
Click on the box to the left of all applicable commodity codes. When you select a commodity code it will be added to the company profile. You can search again to add to the list.

Category	Description
NIGP Category	NIGP Category
000.00	SHIPPING CHARGES
005.00	ABRASIVES MISC.
010.00	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIE
020.00	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIE
022.00	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
025.00	AIR COMPRESSORS & ACCESSORIES MISC.
031.00	AIR CONDITIONING, HEATING & VENTILATING EQUIPMENT,
035.00	AIRCRAFT & AIRPORT EQUIPMENT, PARTS & SUPPLIES
037.00	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS
037.78	SOUVENIRS: PROMOTIONAL, ADVERTISING, ETC.
045.00	APPLIANCES & EQUIPMENT, HOUSEHOLD TYPE MISC.
050.00	ART EQUIPMENT & SUPPLIES
052.00	ART OBJECTS MISC.
055.00	AUTOMOTIVE ACCESSORIES FOR AUTOMOBILES, BUSES, TRA
060.00	AUTOMOTIVE & TRAILER EQUIPMENT & PARTS

After selecting all commodity codes that apply, click "Continue" to complete the "Questionnaire".

Questionnaire

Here you will choose the Ethnicity, Gender, and Size of your company.


Register Supplier: Questionnaire

Attachments None

Section

1. New Supplier Registration

Questions

New Supplier Registration (Section 1 of 1)

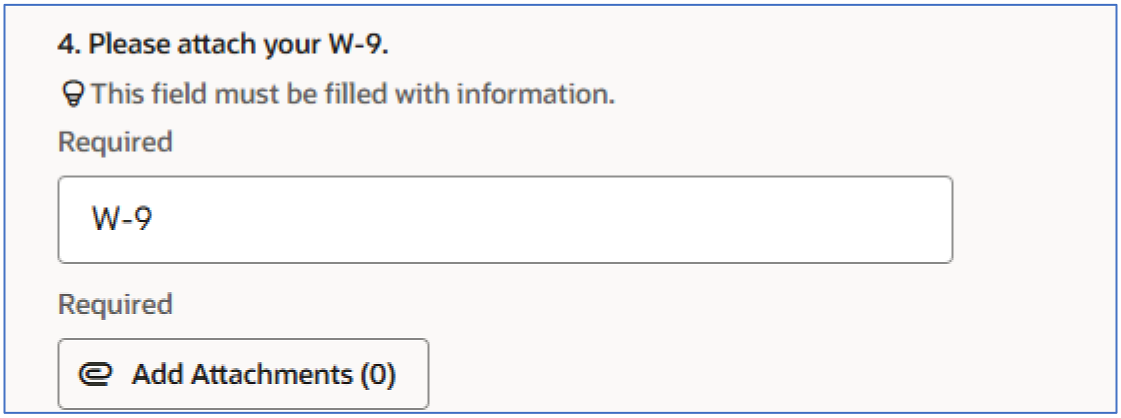
* 1. Choose your Business Size
   - a. Choose Not to Disclose Size
   - b. Large Business (Over $10,000,000)
   - c. Medium Business ($5,000,000 - $10,000,000)
   - d. Small Business (Up to $1,000,000)
   - e. Small Medium Business ($1,000,000 - $5,000,000)

2. Ownership by Gender
   - a. Choose not to disclose gender
   - b. Men Owned
   - c. Women Owned

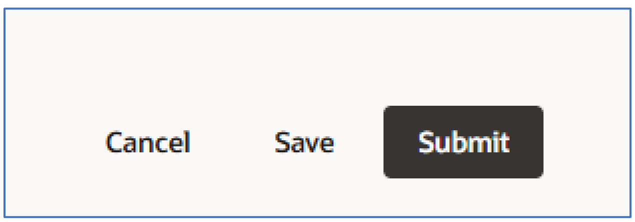
3. Choose Ethnicity
   - a. African American
   - b. Asian
   - c. Asian East Indian
   - d. Asian Pacific Islander
   - e. Caucasian
   - f. Choose not to disclose
   - g. Hispanic/Latino
   - h. Native American
   - i. Not Applicable

- **Business Size:** select the appropriate business size or select “Choose not to disclose” by click on the radial button to the left of your choice.
- **Ownership by Gender**: select the gender of the owner of the company or select “Choose not to disclose” if you choose not to or if it is not applicable.
- **Choose Ethnicity:** select the ethnicity of the owner of the company or select “Choose not to disclose”. “Not Applicable” only applies to those companies that are Publicly Traded, Employee Owned, and Non-profit.

Uploading a copy of your companies W-9 is required. Click on “Add Attachments” and drag and drop to attach your W-9. Acknowledge by typing “W-9” in box 4 as shown below.



After verifying all information has been entered, click “Submit” in the bottom right corner.



Congratulations, you have successfully completed your registration!

What Next?

Procurement staff will review your registration and confirm that the company does not already exist in our database within 1- 2 business days. Upon approval an email confirmation will be sent to the contact and email address that was used to register the company. The email will be sent from POLK ONE and will provide a link to set your password that expires in 72 hours.

If the password is not set within 72 hours, you will follow the forgot password process to reset your password.

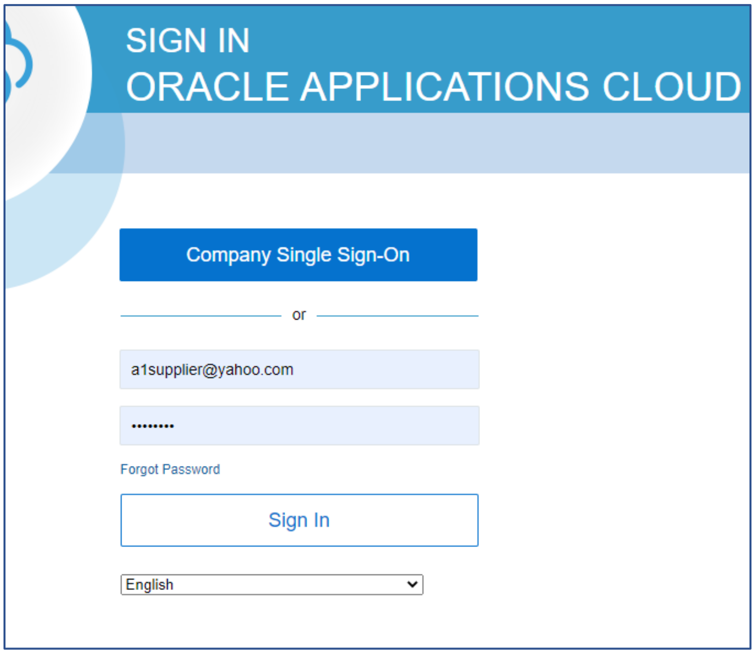
If your company already exists, or the FEIN/TIN number entered already exist, a representative from Procurement will contact you.

Remember to review and update your company information when there are changes in contacts, addresses and commodity codes. Failing to do so could cause you to miss out on an upcoming solicitation, or a purchase order requesting goods and/or services.

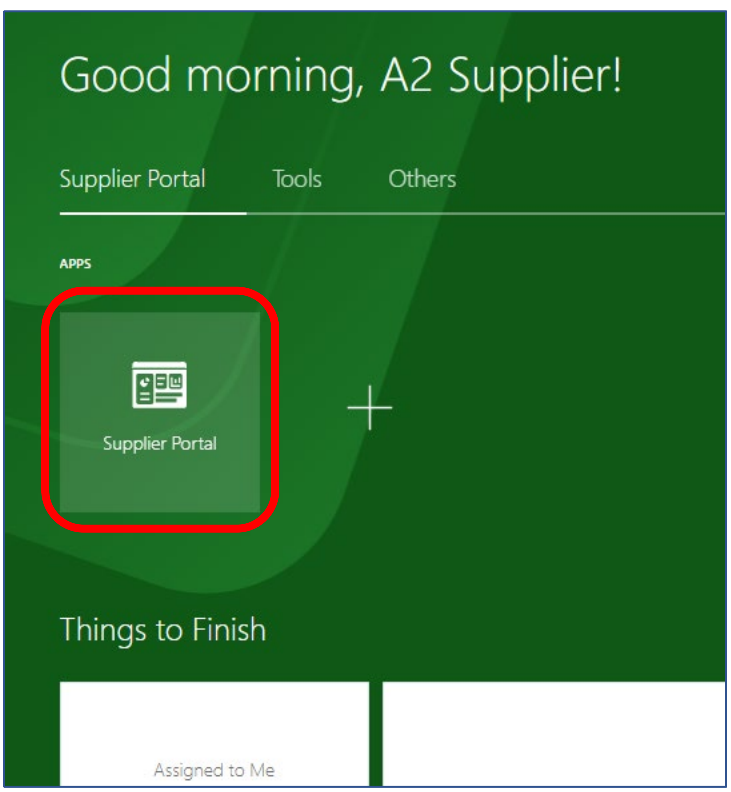
It is solely the responsibility of all vendors to maintain their company information in our database

Navigating the Supplier Portal

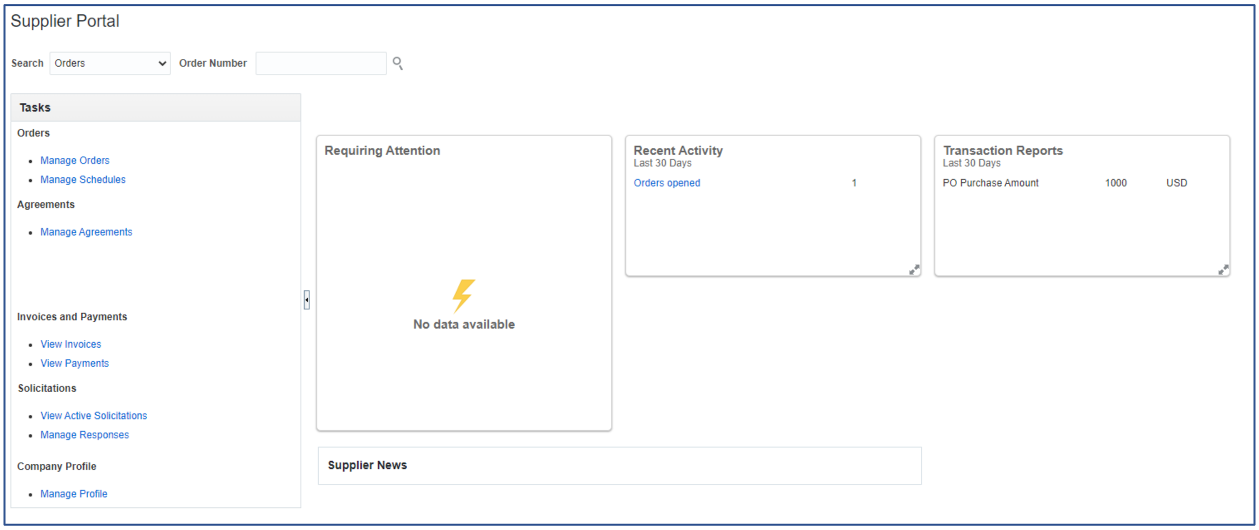
Login by entering your Email address and Password. If you have forgotten you Password, please follow the promotes under "Forgot Password"



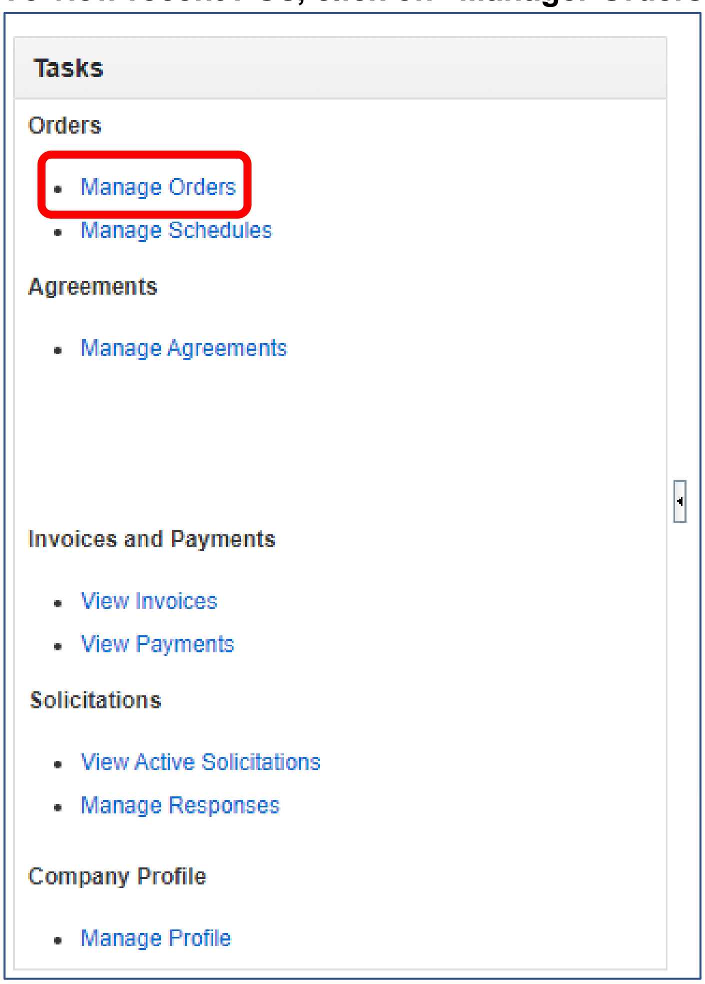
Once you have logged in, click on "Supplier Portal" to manage all of your Purchase Orders.



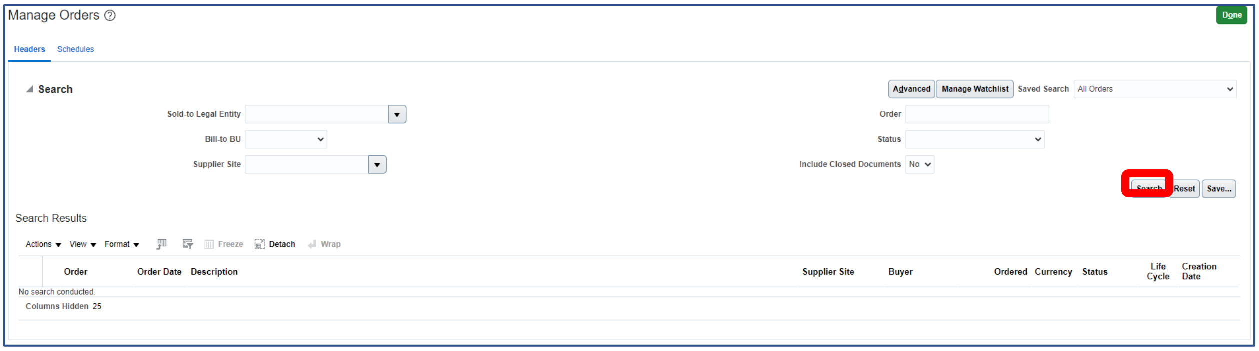
From the "Supplier Portal Dashboard", you will be able to review Purchase Orders, Manager Agreements, View Invoices, View Payments, View Active Solicitations and Manage your Responses, and Manage your Profile.



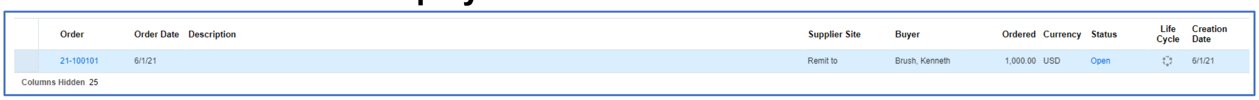
To view recent POs, click on "Manager Orders" under the "Task" menu.



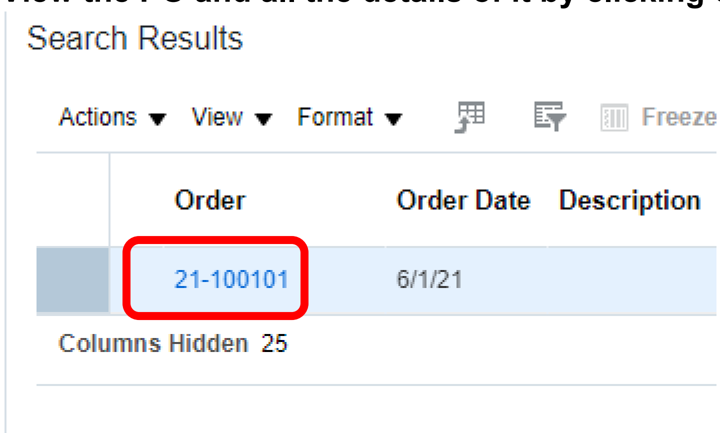
On the “Manager Order” screen, you can search for all the Purchase Orders that have been issued to you Company. (Hint: you can do an empty search by leaving all fields empty and clicking “Search”. This will bring up all POs for your Company.”



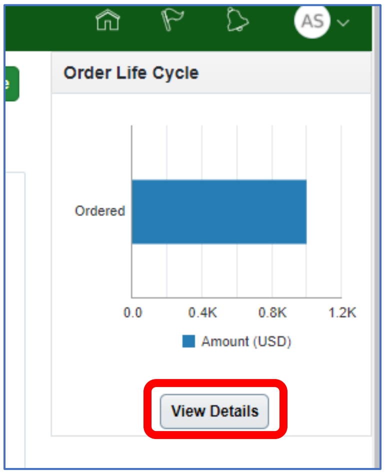
Your search results will display.

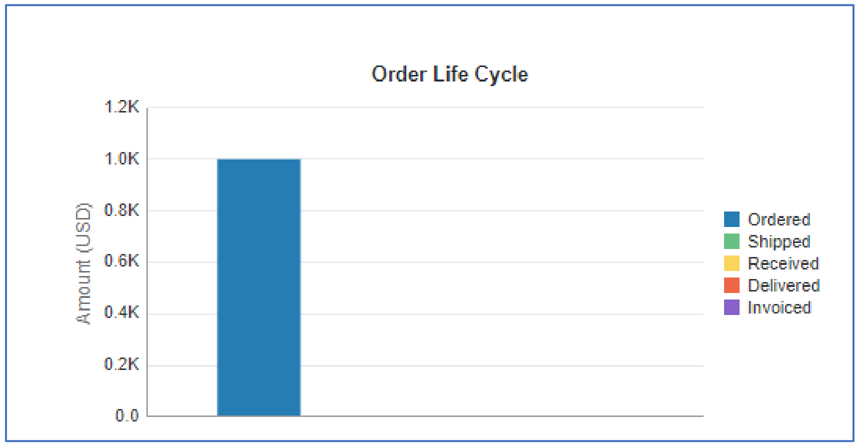


View the PO and all the details of it by clicking on the “Order Number”.



On the right-hand side of the screen, you will see the "Order Life Cycle" graph. This will keep track of the progress of your PO. Click View Details to track Invoices and Receipts.





When an item is received by the County the Order Life Cycle will update.