Supplier Profile Maintenance User Guide

This guide will cover:

- How to Maintain your Supplier Profile
  - Sign In
    - Set Preferences (Time Zone)
  - Change Request General Information
  - Complete a Company Profile Change Request
    - Organization Details
    - Tax Identifiers
    - Addresses
    - Contacts
    - Payments
    - Business Classifications
    - NAICS Codes
    - Review and Submit Change Request
1 Sign In

- Go to the E-Procurement Supplier Portal. The “Sign In” page will display. Enter your “User ID” and “Password,” then click “Sign In.”

Note: use supporting web browsers: Mozilla Firefox, Google Chrome, Microsoft Edge, and Apple Safari.

Note: do not use the “Company Single Sign-On” option.
- The home page will display.

[Image of the home page]

**Set Preferences**

- Click the “Set Preferences” tile.

[Image of the Set Preferences page]

- The “Preferences” page will display, under the “General Preferences” section, click on the “Regional” link.

[Image of the Preferences page]
- The “Regional” page will display, click the “Time Zone” drop down and select your appropriate time zone.

![Regional page with dropdown for time zone selection]

- In the upper right corner, click “Save and Close” when complete.

![Save and Close button highlighted on the Regional page]

- In the upper right corner, click the home icon to return to the home page.

![Home icon highlighted on the Regional page]
2 Change Request General Information

- Multiple profile options can be edited in one Change Request. Change requests can be submitted under any tab – make sure to review and submit. A request must be processed before a new one can be opened.

   ![](image1)

   Note: Suppliers are assigned one of two status': Prospective or Spend Authorized.

   A **Prospective** supplier has access to County solicitations, can respond to solicitations and questionnaires but has not been authorized to receive payment from King County.

   A **Spend Authorized** supplier has access to County solicitations, can respond to solicitations and questionnaires, and is authorized to receive payment from King County.

   Prospective supplier profile change requests do not require approvals by King County. Only spend authorized suppliers require approvals when a supplier submits a change request to their profile.

3 Complete a Company Profile Change Request

- Click the “Supplier Portal” tile.

   ![](image2)

- In the “Company Profile” section, under “Tasks,” click on the “Manage Profile” link.

   ![](image3)

   Note: user interface and options will vary depending on users’ roles.
- The “Company Profile” page will display. Click the “Edit” button in the upper right corner to edit company information. The action to edit a tab can be done on any of the tabs.

Note: the supplier information in “Company Profile” is the same information entered during Supplier Registration.

- A warning message will display, click “Yes.”
Organization Details

- Click the “Organization Details” tab, enter or change supplier information as needed.

- It is required to attach a [King County W-9](#) before a supplier can be authorized to receive payment from King County. A standard IRS W-9 will not be accepted.

  Note: an up-to-date King County W-9 is required to be a Spend Authorized Supplier.

- If you need to attach a W-9, click the plus “+” icon next to “Attachments” to attach a completed King County W-9.
- The “Attachments” pop-up will appear. Click “Choose File” and select the completed King County W-9 form. Optionally, enter a “Title” and “Description.” Click “OK” when complete.

![Attachments](image1)

- Once the King County W-9 is attached, the attachment link will appear.

![King County W-9](image2)

**Tax Identifiers**

- Click the “Tax Identifiers” tab; update the supplier information as needed.

![King County Tax Identifiers](image3)
Addresses

- Click the “Addresses” tab. Click the pencil icon to edit an existing address (select the plus “+” icon to add a new address).

- The “Edit Address” pop-up will display, enter the appropriate information, click “OK” when complete.

Note: at least one “Ordering” and one “Remit to” address is required to be a Spend Authorized Supplier.
Contacts

- Click the “Contacts” tab.

- Highlight the desired contact, click the pencil icon to edit an existing contact (select the plus “+” icon to add a new contact).
The “Edit Contact” pop-up will display.

**Administrative Contact** - only an Administrative Contact can modify all users and supplier profile values once the supplier is registered and gains access to the Supplier Portal.

**Request user account** - creates user account in the Supplier portal (checking only Administrative Contact will not create a user account in the Supplier Portal).
To add an additional role(s) to a contact, on the "Roles" tab, click the "Select and Add" icon.

Note: role(s) added will only be added to the specific contact you have open in the “Create Contact” window.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Self Service Administrator KC</td>
<td>Manages the supplier profile information. Primary tasks include</td>
</tr>
</tbody>
</table>

![User Account](image)
- The "Select and Add: Roles" pop-up will display, highlight the desired role(s), click "Apply" and then click "OK" when complete.

- Below is a matrix of the roles and the access it grants you:

<table>
<thead>
<tr>
<th>Supplier Roles</th>
<th>View Company Profile</th>
<th>View Company Tax Details</th>
<th>Update Company Profile</th>
<th>Request New Contact/ User</th>
<th>Maintain Contacts/ User</th>
<th>Respond to Qualification Questionnaire</th>
<th>View Company Bank Details</th>
<th>Create/ Update Bank Details</th>
<th>View/ Participate in Solicitations</th>
<th>View/ Download Contract Terms</th>
<th>Access Portal Overview/ Summary Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Self Service Administrator KC</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Supplier Self Service Clerk KC</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Supplier Bidder KC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Supplier Sales Rep KC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**Select and Add: Roles**

- Search

- Role: Supplier Bidder KC
  - Description: Responds to invitations to bid, requests for proposals, requests for qualifications.

- Role: Supplier Sales Representative KC
  - Description: Responds to invitations to bid, requests for proposals, requests for qualifications.

- Role: Supplier Self Service Administrator KC
  - Description: Manages the supplier profile information. Primary tasks include updating contact information.

- Role: Supplier Self Service Clerk KC
  - Description: Manages the supplier profile information. Primary tasks include updating contact information.
- Verify the added role(s), click "OK."

Payments

- Click the "Payments" tab.
- You should not adjust the "Payment Method" default as it is not used in King County's E-Procurement configuration. If a bank account is provided and is active, it will be used as the preferred payment method.

- To add a new bank account, click on the "Bank Accounts" tab and click the plus "+" icon.
The "Create Bank Account" window will display. Fields with an asterisk "*" are required, enter the appropriate information.

Field | Registration Details
--- | ---
Country | *REQUIRED* Select the country where the Bank account is in.  
| Only U.S. banks are available.
Bank | This field is enabled once the Country is selected (a bank is required for King County to be able to pay the supplier).  
| Contact procurement.web@kingcounty.gov if the suppliers bank is not listed.
Branch | This field is enabled once the "Bank Name" is selected (a bank branch is required for King County to be able to pay the supplier).  
| Branch will be the bank routing number.
Account Number | *REQUIRED* Enter the Account Number.
Currency | Enter the currency (King County will not pay in any currency other than USD and this is required for King County to be able to pay the supplier).
Account Name | Apply a name to the Bank Account listed (this is required for King County to be able to pay the supplier).
Account Type | Select either Checking or Savings (this is required for King County to be able to pay the supplier).

Note: if a separate remittance advice email is required, the suppliers should contact their King County representative to have the email setup.
- Click "OK" when complete.

- To edit a bank account, highlight the desired bank account and click the pencil icon. Edit the bank account as desired.
Business Classifications

- Click the "Business Classifications" tab.

- To add a business classification, click the plus “+” icon.

- When the new business classification row appears, select the classification and other appropriate corresponding information.
- Verify the business classification addition, add more business classifications as needed.

**NAICS Codes**

- Click the "NAICS Codes" tab.
- To add a NAICS code, click the "Select and Add" icon.

Note: refer to Identifying NAICS Codes User Guide to find a full list of possible NAICS Codes.
The "Select and Add: Products and Services Categories" pop-up will display. In order to select the child NAICS codes, click on the arrow to the left of the 4-digit NAICS code to display the child 6-digit NAICS codes.

Note: refer to Identifying NAICS Codes User Guide to find a full list of possible NAICS Codes. The “Category Name” and “Description” search is purposed to be searched for with exact NAICS code numbers or descriptions.

Select and Add: Products and Services Categories

<table>
<thead>
<tr>
<th>Select</th>
<th>Category Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1111</td>
<td>Oilseed and Grain Farming</td>
</tr>
<tr>
<td></td>
<td>111110</td>
<td>Soybean Farming</td>
</tr>
<tr>
<td></td>
<td>111120</td>
<td>Oilsseed (except Soybean) Farming</td>
</tr>
<tr>
<td></td>
<td>111130</td>
<td>Dry Pea and Bean Farming</td>
</tr>
<tr>
<td></td>
<td>111140</td>
<td>Wheat Farming</td>
</tr>
<tr>
<td></td>
<td>111150</td>
<td>Corn Farming</td>
</tr>
<tr>
<td></td>
<td>111160</td>
<td>Rice Farming</td>
</tr>
<tr>
<td></td>
<td>111191</td>
<td>Oilsseed and Grain Combination Farming</td>
</tr>
<tr>
<td></td>
<td>111199</td>
<td>All Other Grain Farming</td>
</tr>
</tbody>
</table>
- Select all the appropriate 6-digit NAICS codes by clicking on the checkbox. Or select the 4-digit parent NAICS code to automatically select all of the 6-digit child NAICS codes associated with it. Click "Apply" and "OK" when complete.
Review and Submit Change Request

- Enter a "Change Description" (this can be done at anytime when editing tabs).

- Click "Review Changes."
- The "Review Changes" page will display. Click "Submit."

Note: the profile changes will be not reflected on the supplier profile until the change request is submitted.

- A confirmation pop-up will appear, click "OK."

Reminder: Suppliers are assigned one of two status': Prospective or Spend Authorized.

A **Prospective** supplier has access to County solicitations, can respond to solicitations and questionnaires but has not been authorized to receive payment from King County.

A **Spend Authorized** supplier has access to County solicitations, can respond to solicitations and questionnaires, and is authorized to receive payment from King County.

Prospective supplier profile change requests do not require approvals by King County. Only spend authorized suppliers require approvals when a supplier submits a change request to their profile.
Once the supplier changes are approved, the supplier profile reflects the "Request Status;" which will display “Processed.”

End of process.