Supplier Profile Maintenance User Guide

This guide will cover:

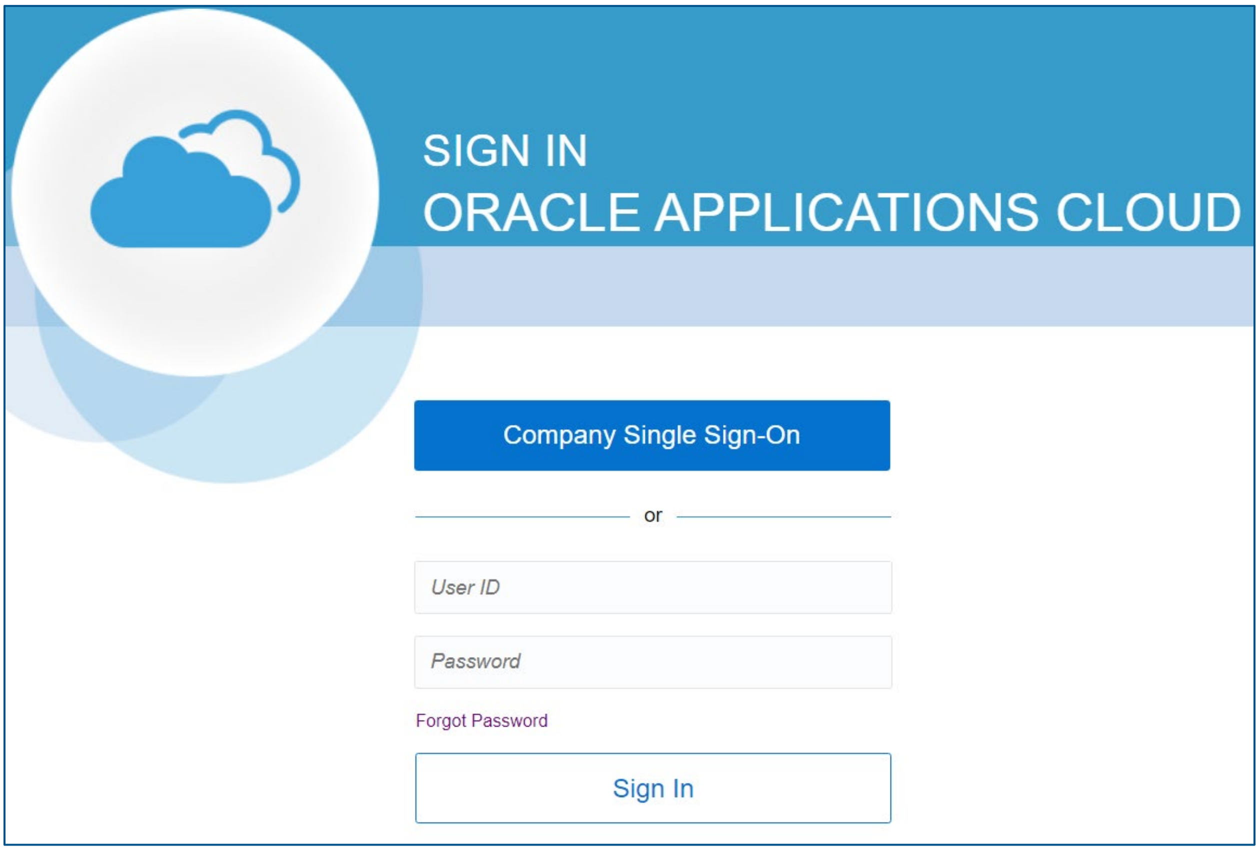
- *How to Maintain your Supplier Profile*
    - *Sign In*
        - *Set Preferences (Time Zone)*
    - *Change Request General Information*
    - *Complete a Company Profile Change Request*
        - *Organization Details*
        - *Tax Identifiers*
        - *Addresses*
        - *Contacts*
     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

1 Sign In

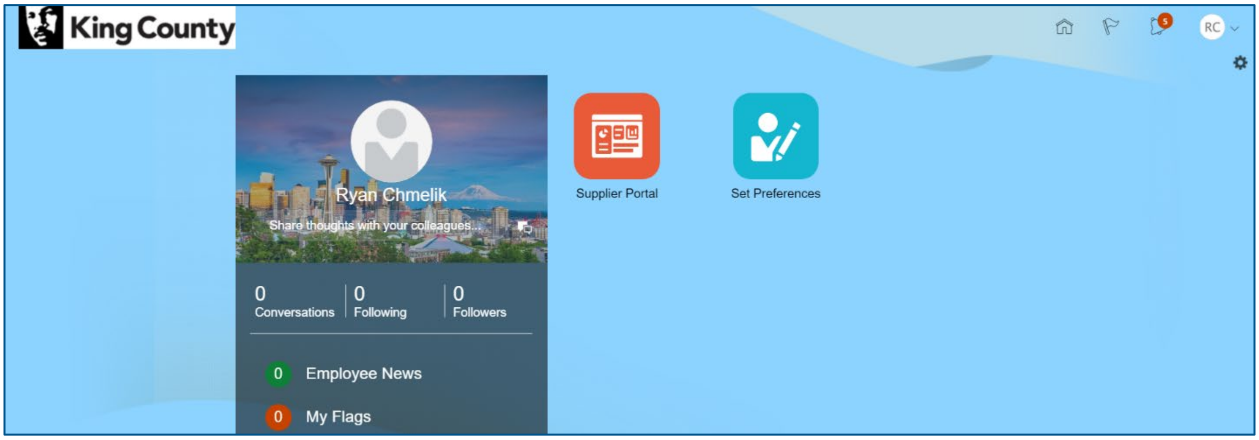
- Go to the E-Procurement Supplier Portal. The “Sign In” page will display. Enter your “User ID” and “Password,” then click “Sign In.”

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

Note: do not use the “Company Single Sign-On” option.

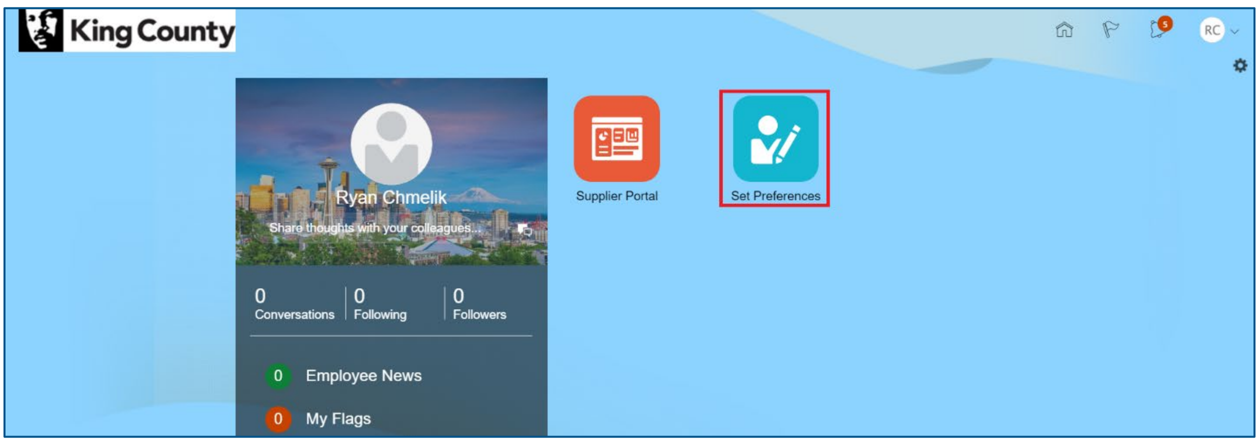


- The home page will display.

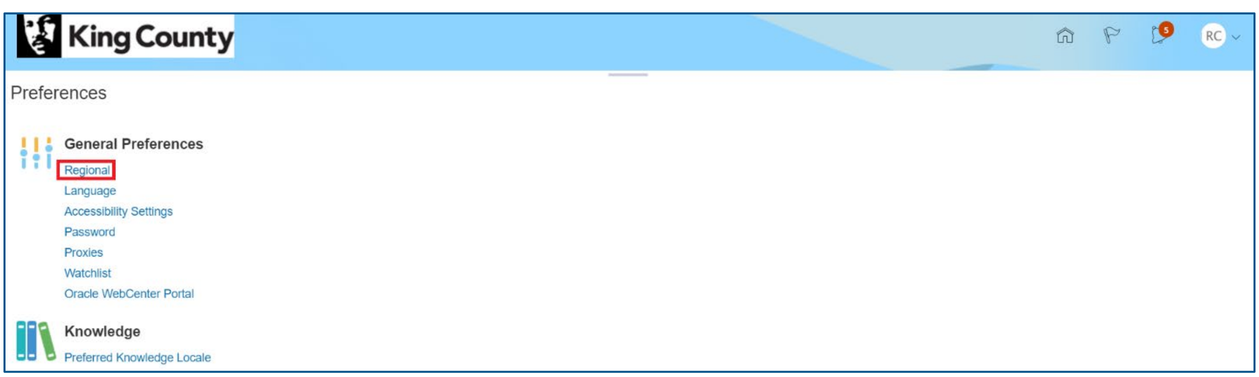


Set Preferences

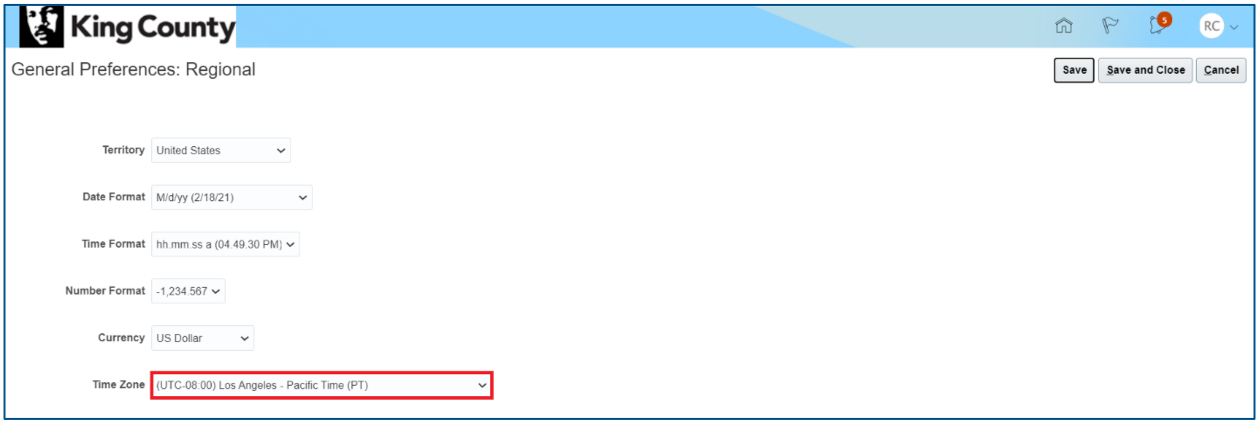
- Click the "Set Preferences" tile.



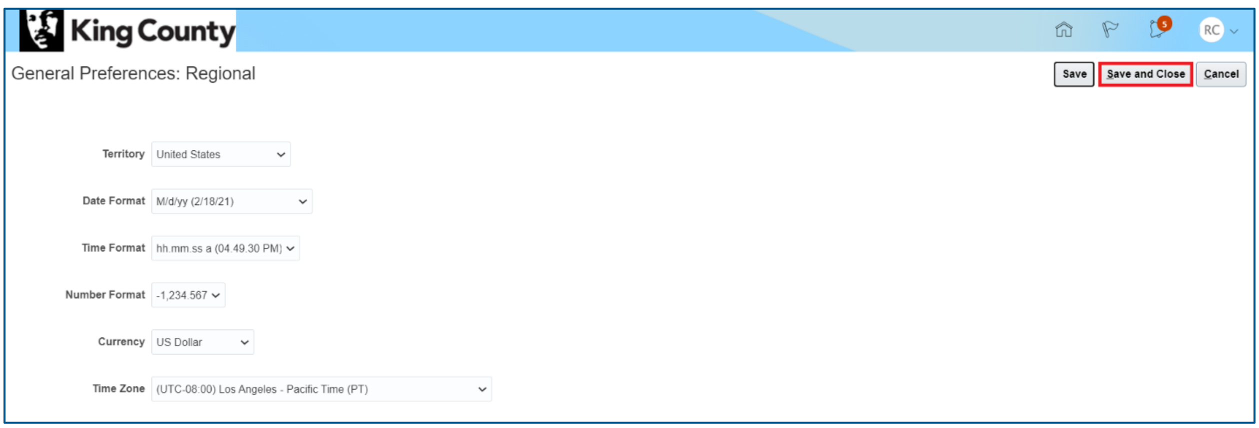
- The "Preferences" page will display, under the "General Preferences" section, click on the "Regional" link.



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



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



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

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

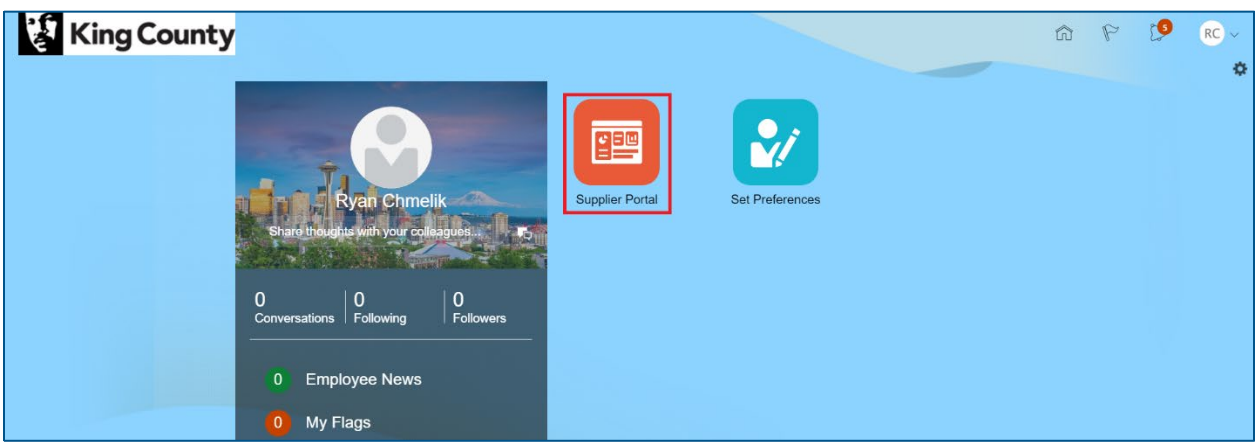
A **Prospective** supplier has access to County solicitations, can respond to solicitations and questionnaires but has not been authorized to receive payment from King County.

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.

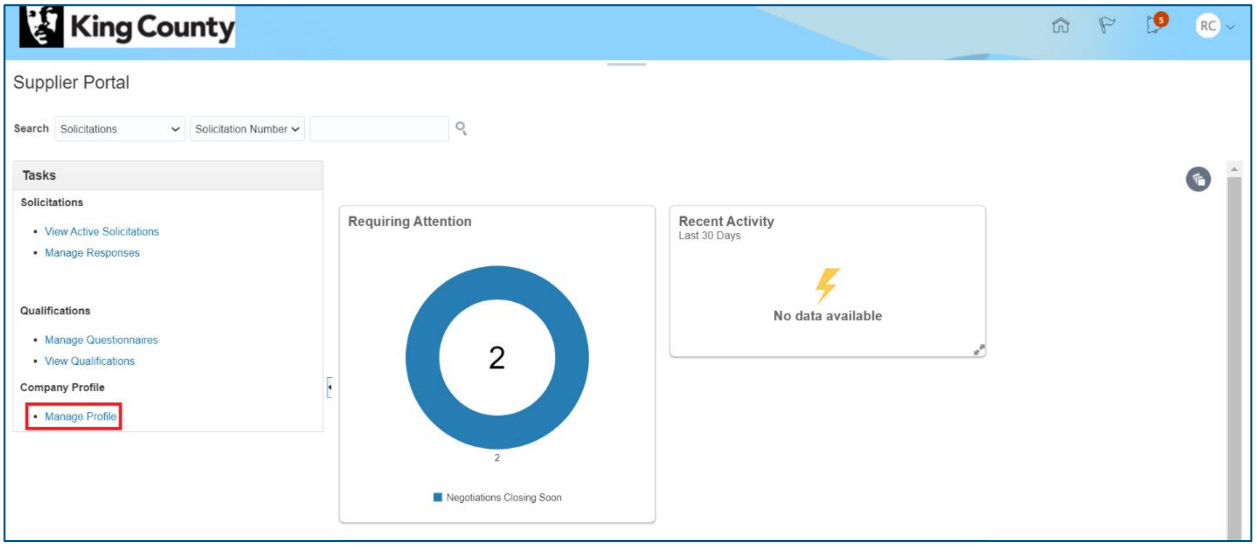
3 Complete Company Profile Change Request

- Click the "Supplier Portal" tile.



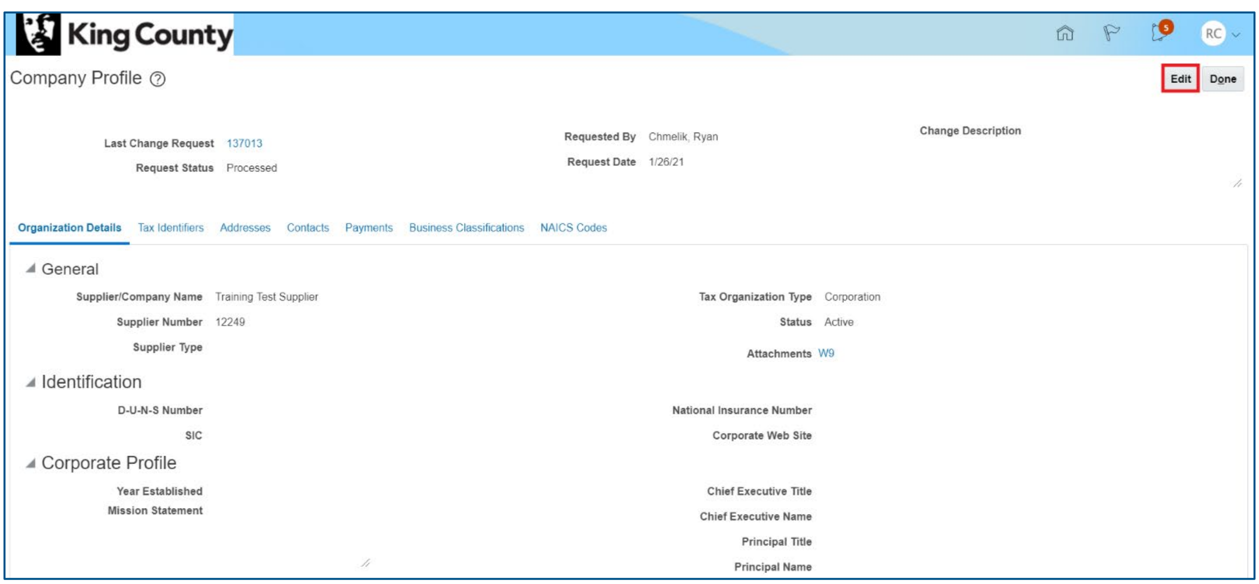
- In the “Company Profile” section, under “Tasks,” click on the “Manage Profile” link.

Note: user interface and options will vary depending on users’ roles.

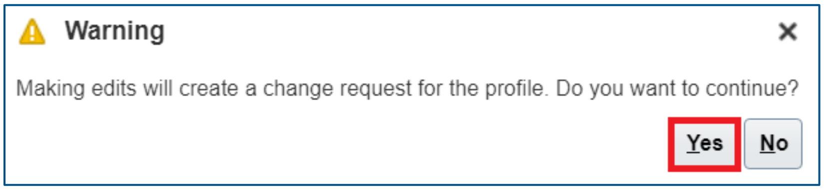


- The “Company Profile” page will display. Click the “Edit” button in the upper right corner to edit company information. The action to edit a tab can be done on any of the tabs.

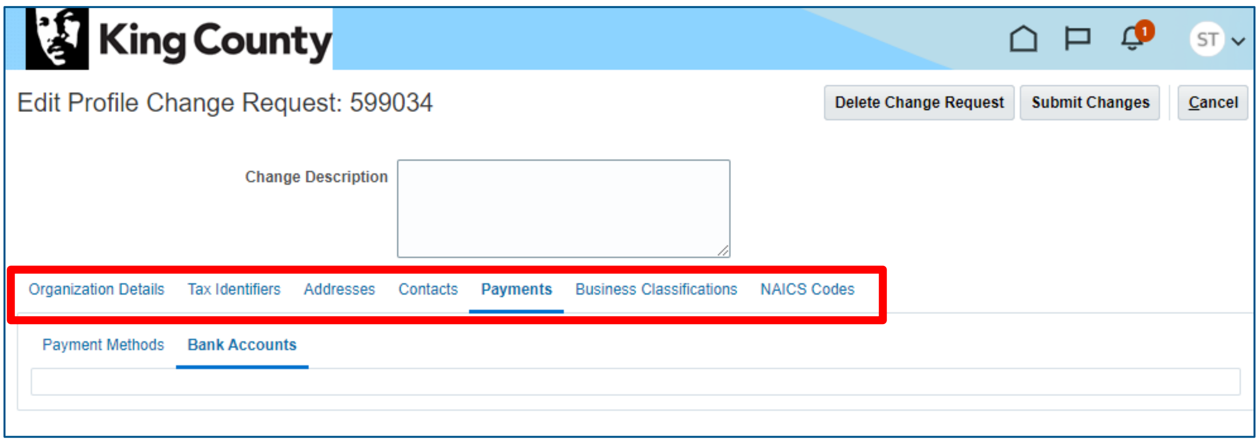
Note: the supplier information in “Company Profile” is the same information entered during Supplier Registration.



- A warning message will display, click "Yes."

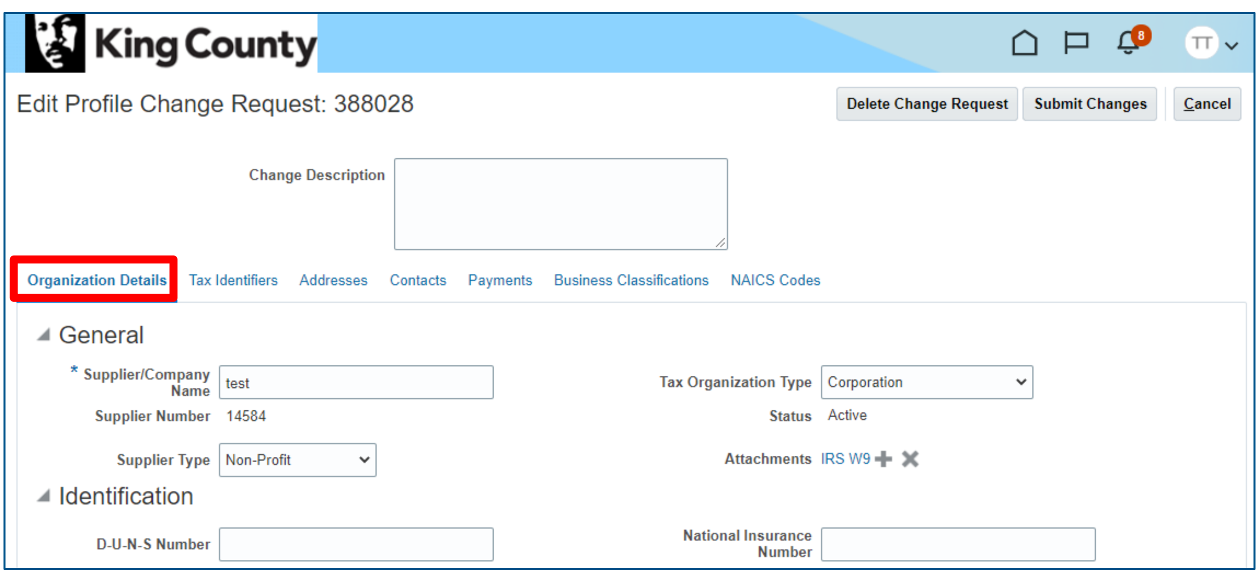


- **IMPORTANT**: The "Edit Profile Change Request" page will appear. The page must be refreshed to see the editable fields; click on any of the available tabs to refresh the page.



Organization Details

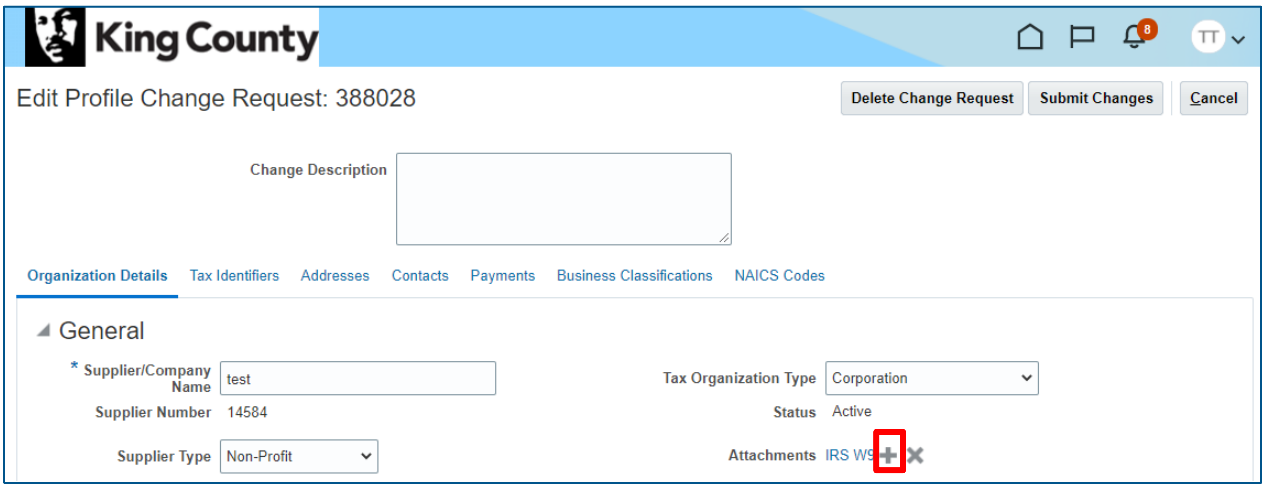
- Click the "Organization Details" tab, enter or change supplier information as needed.



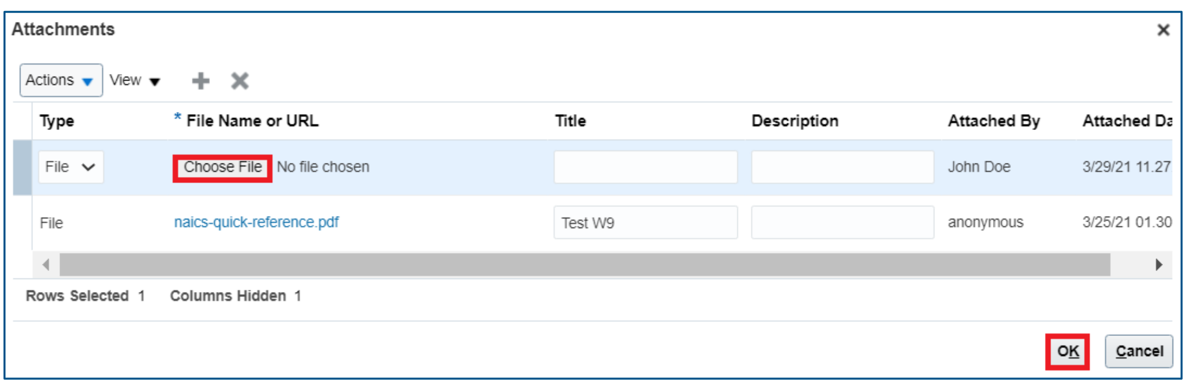
- It is required to attach a completed IRS W-9 form before a supplier can be authorized to receive payment from King County.

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

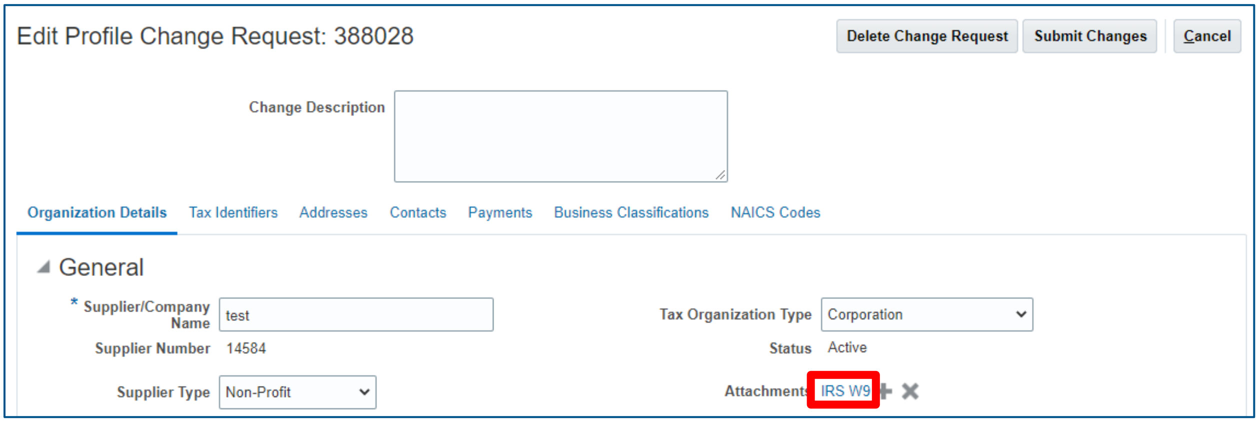
- If you need to attach a W-9, click the plus "+" icon next to "Attachments" to attach a completed IRS W-9.



- The "Attachments" pop-up will appear. Click "Choose File" and select the completed IRS W-9 form. Optionally, enter a "Title" and "Description." Click "OK" when complete.

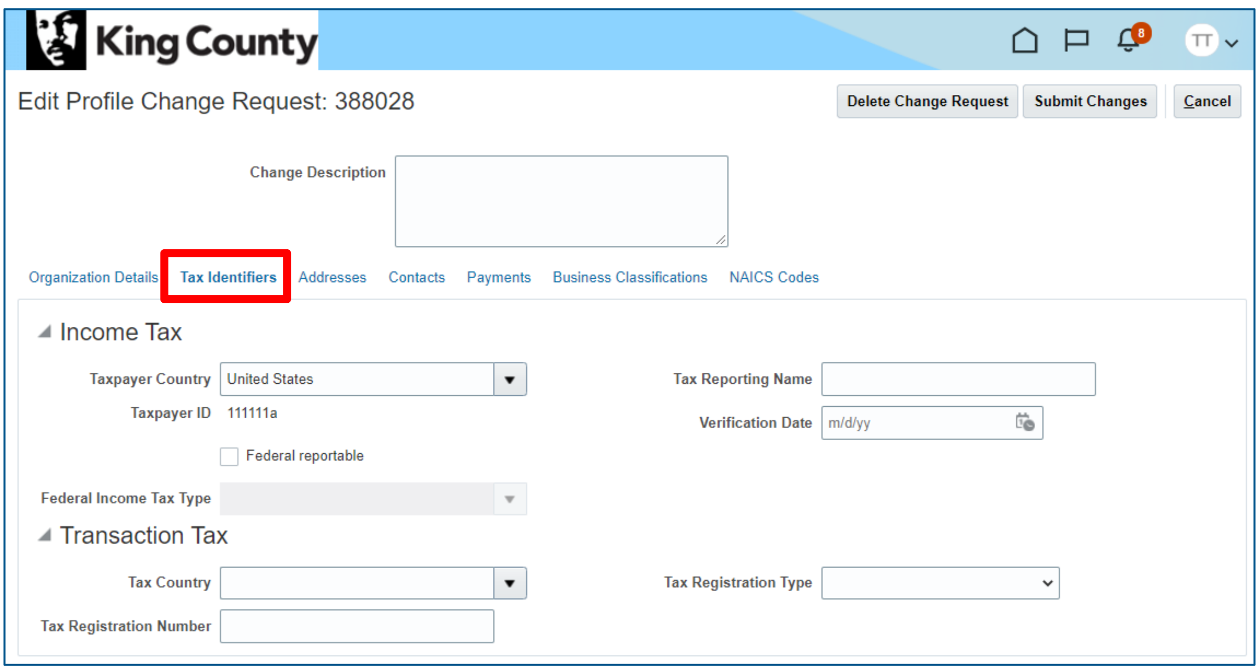


- Once the IRS W-9 form is attached, the attachment link will appear.



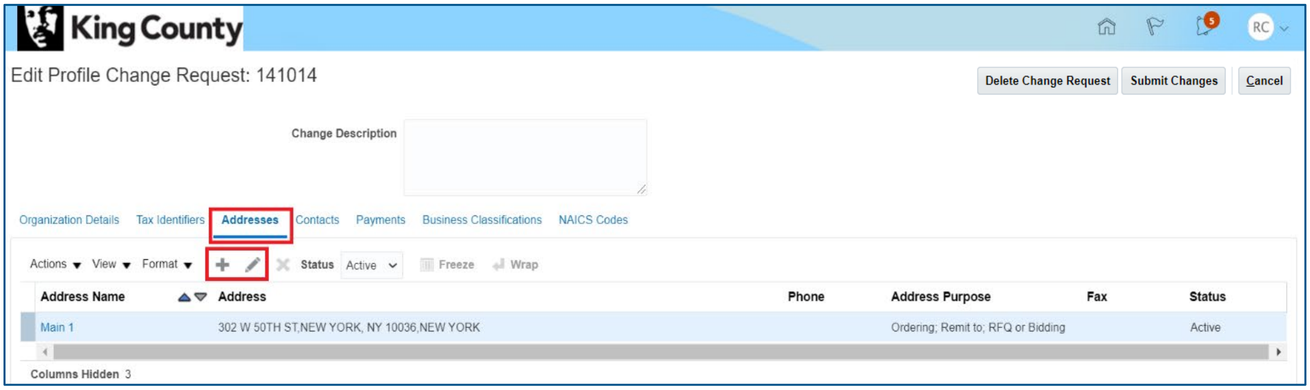
Tax Identifiers

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



Addresses

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



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

The Ordering address must be a physical address (PO boxes are not accepted).

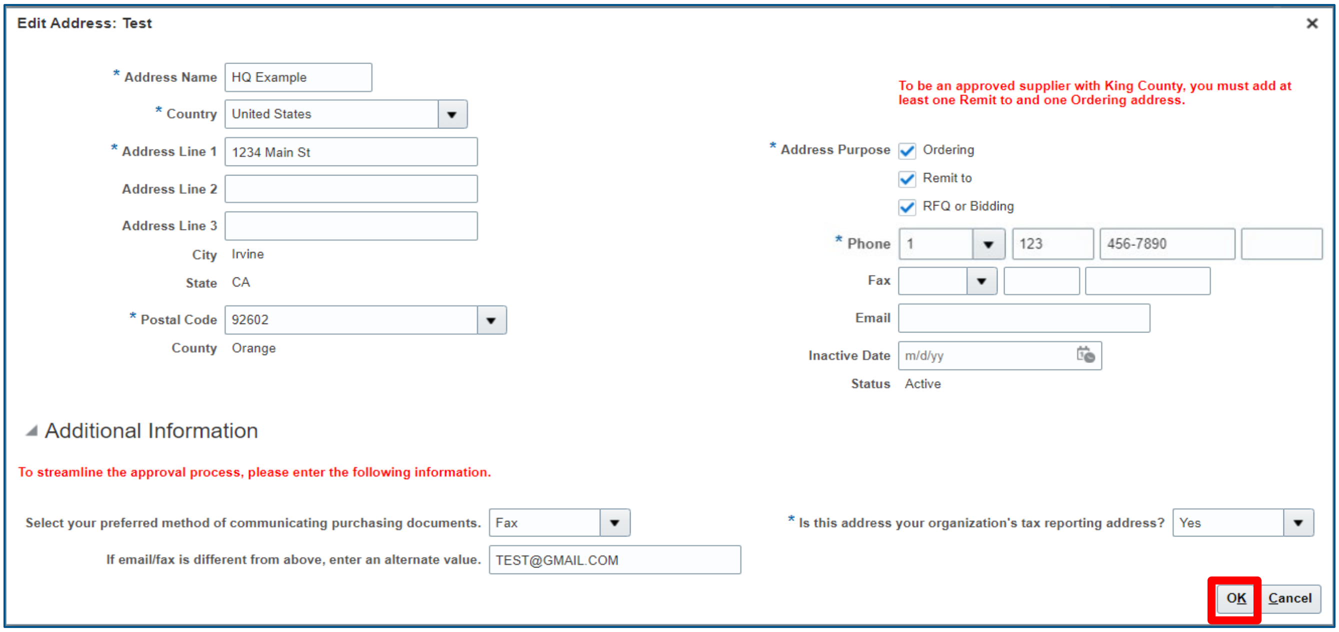
Entering the phone number for each address will allow for anti-fraud validations by the County.

When being promoted to a Spend Authorized Supplier, King County may reformat your address to meet USPS delivery standards.

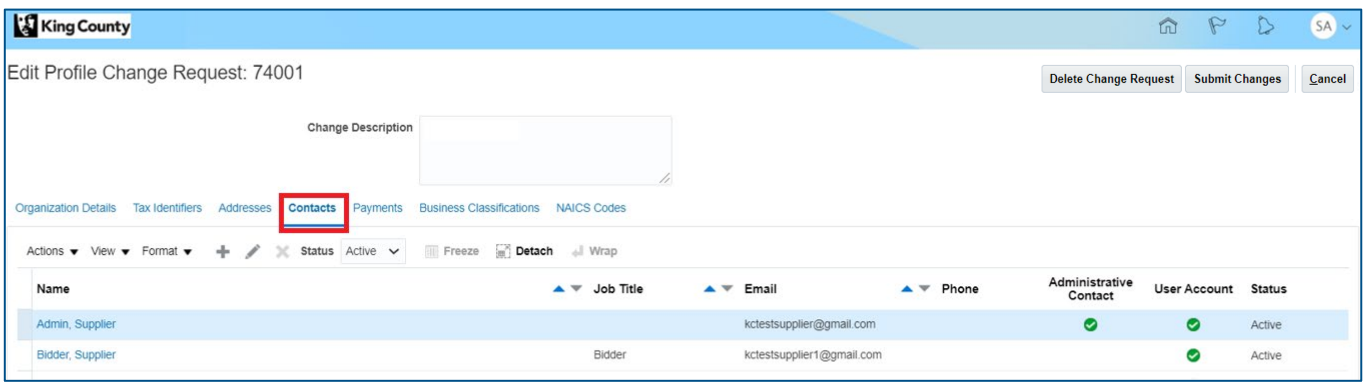
Note: Additional Information is used to streamline approval process.

Select your preferred method of communicating purchasing documents and indicate if the address is your organization’s tax reporting address.

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

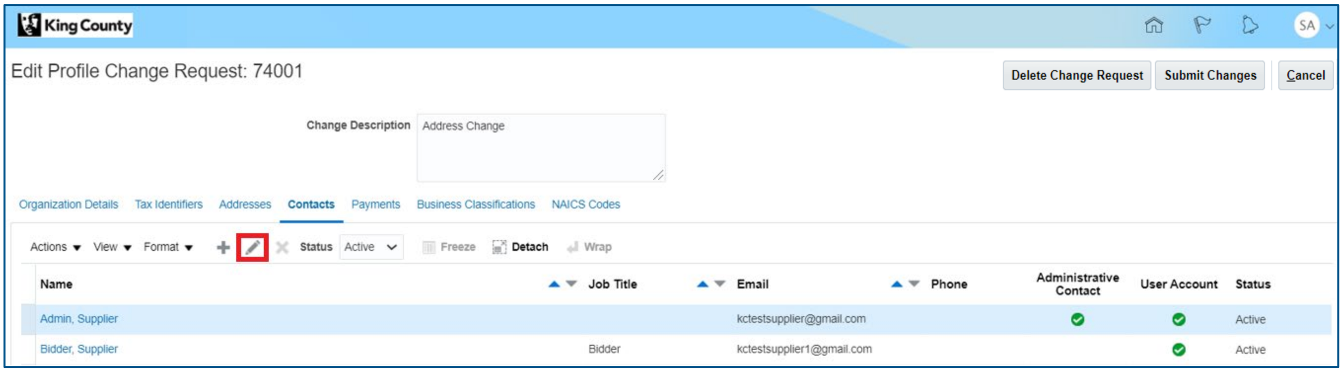


- Click the “Contacts” tab.



- Highlight the desired contact, click the pencil icon to edit an exisiting contact (select the plus “+” icon to add a new contact).

- **For contacts previously created, a phone number is requested.** Select the "Edit" option to enter a phone number. This will allow for anti-fraud validations by the County.

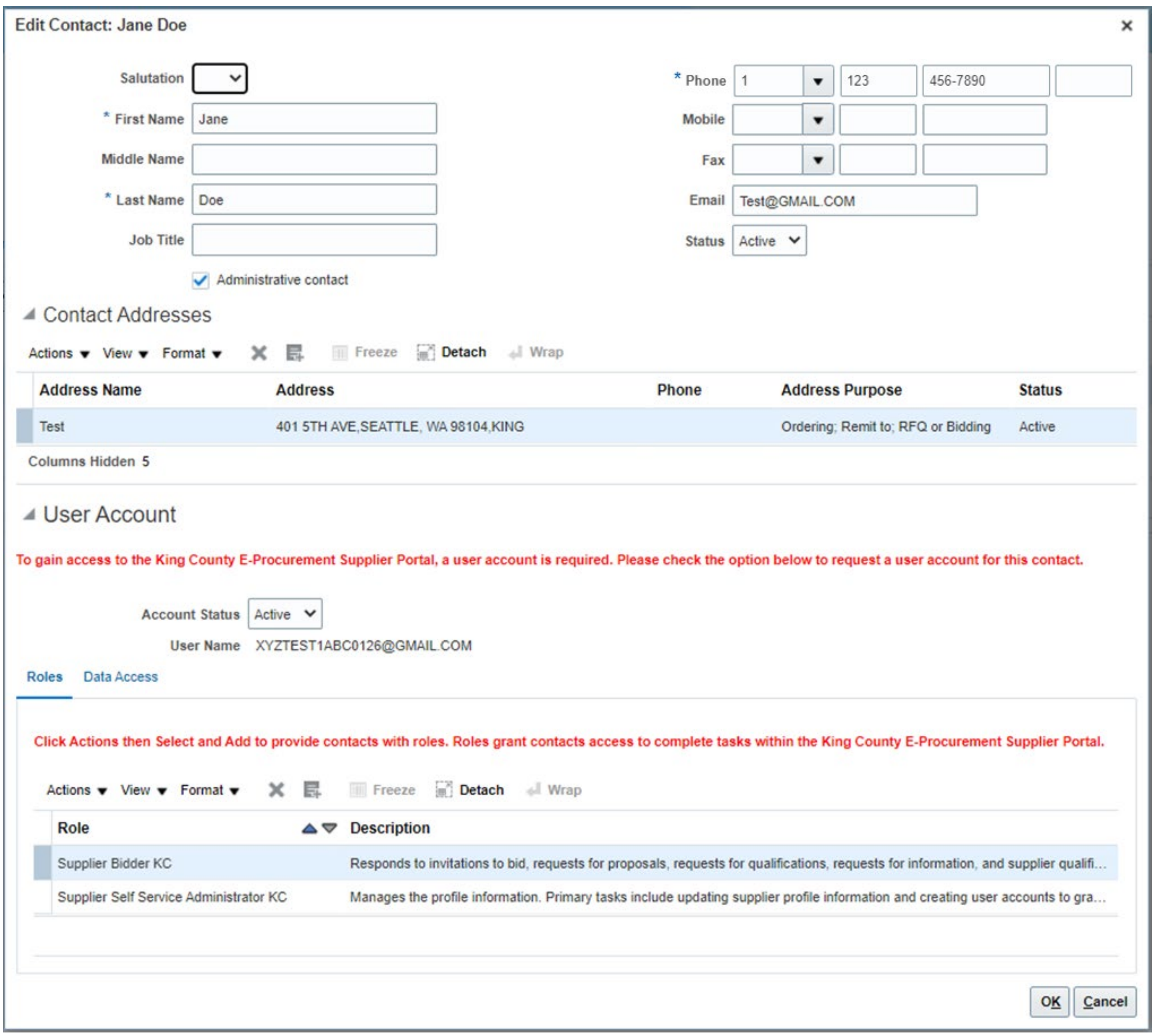


- The “Edit Contact” pop-up will display.

Note: The amount of access to the supplier profile is dependent on the “Administrative contact” and “Request user account” checkbox.

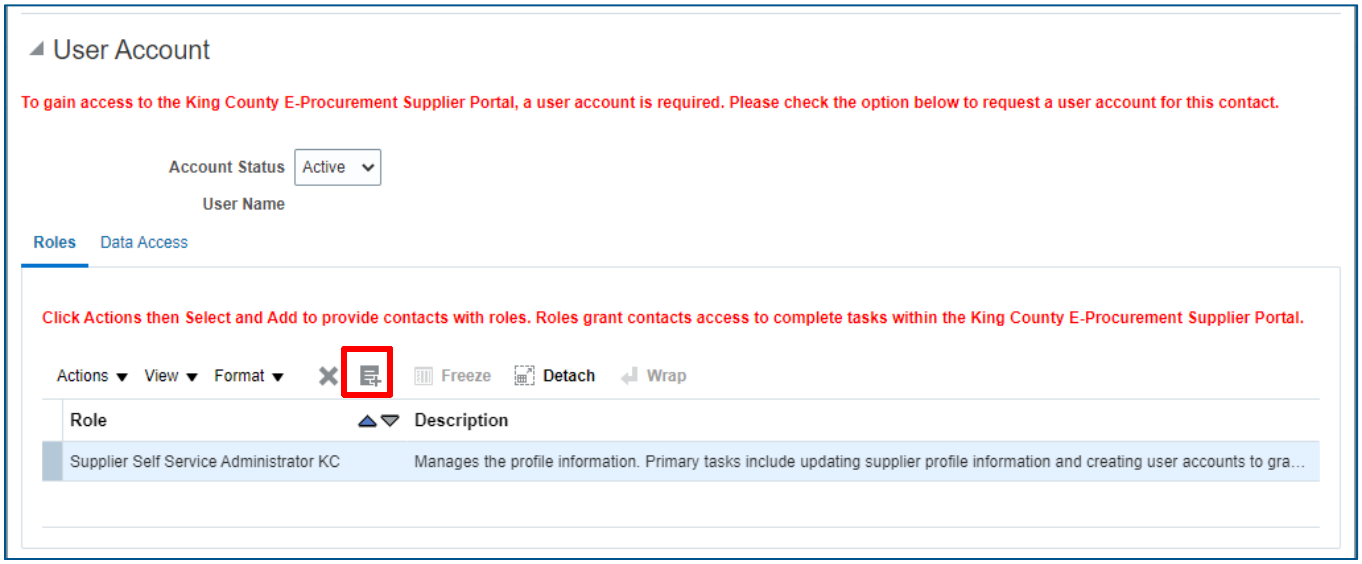
“Administrative contact”- only an Administrative Contact can modify all users and supplier profile values once the supplier is registered and gains access to the Supplier Portal.

“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.

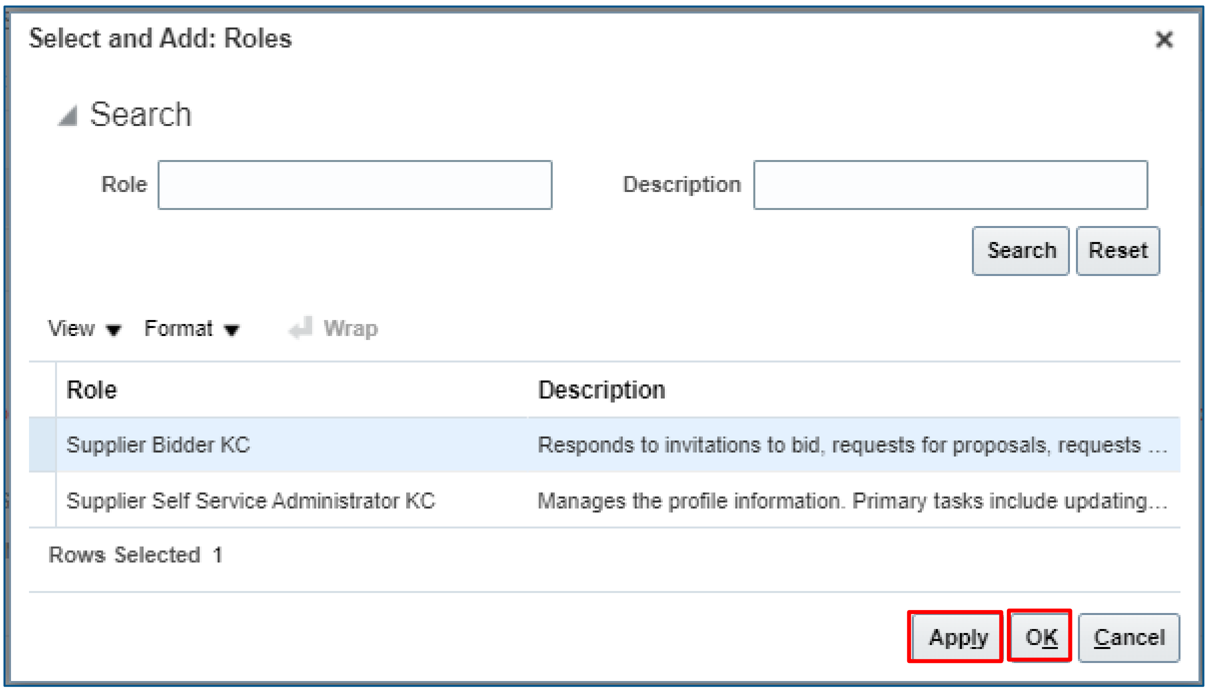
> Note: role(s) added will only be added to the specific contact you have open in the “Create Contact” window.



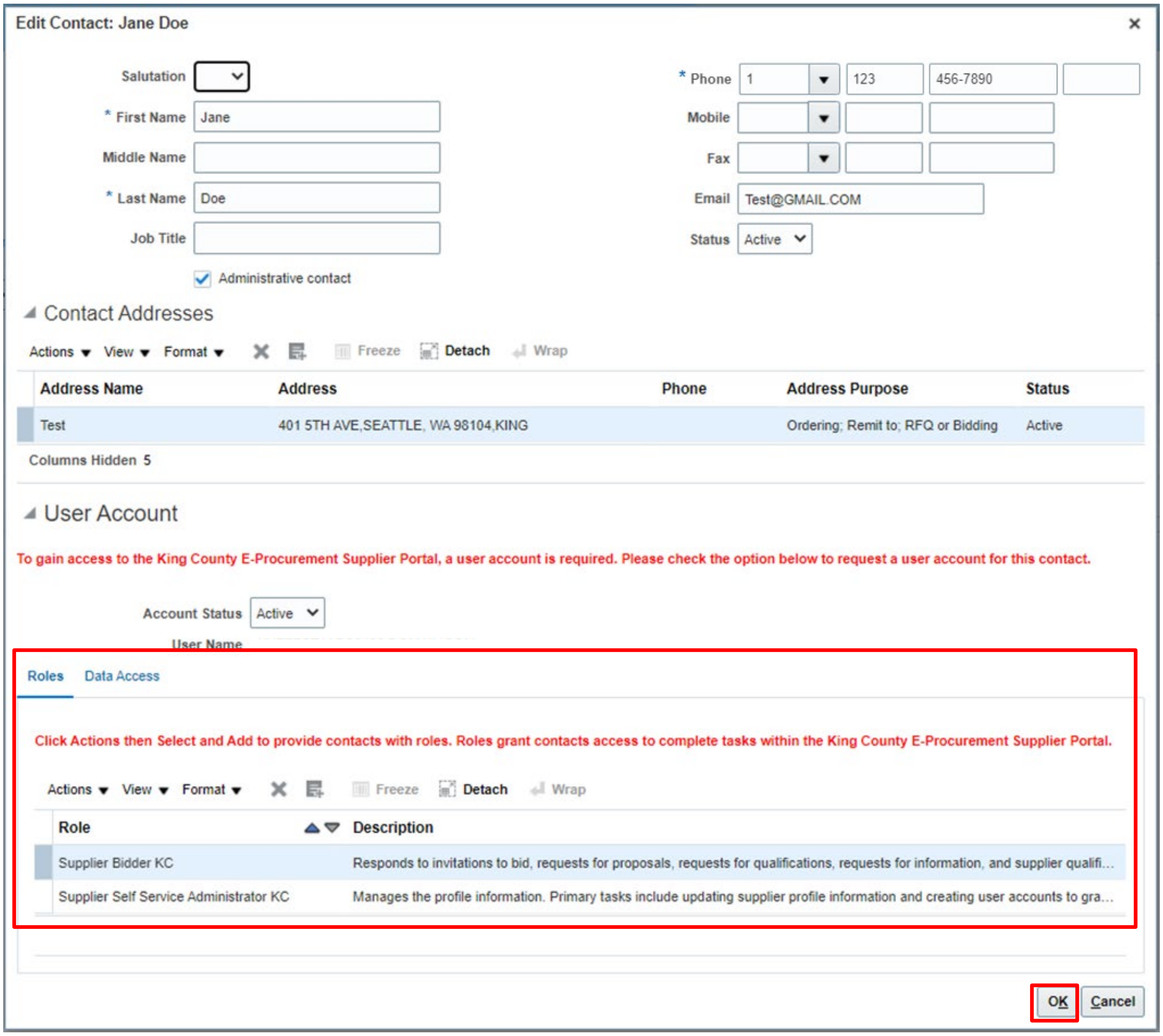
- The "Select and Add: Roles" pop-up will display, highlight the desired role(s), click "Apply" and then click "OK" when complete.

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

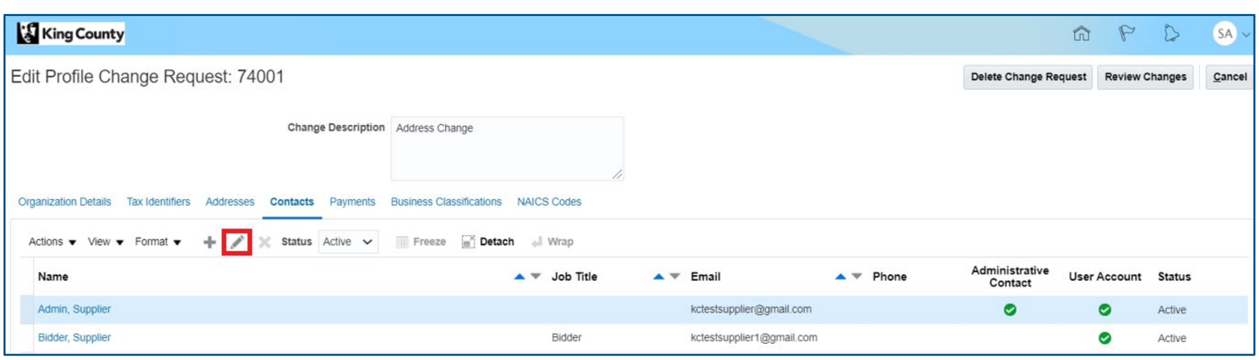
Supplier Roles	View Company Profile	View Company Tax Details	Update Company Profile	Request New Contact/ User	Maintain Contacts/ User	Respond to Qualification Questionnaire	View Company Bank Details	Create/ Update Bank Details	View/ Participate in Solicitations	View/ Download Contract Terms	Access Portal Overview/ Summary Tab
Supplier Self Service Administrator KC	X	X	X	X	X	X	X	X			X
Supplier Bidder KC						X			X	X	X



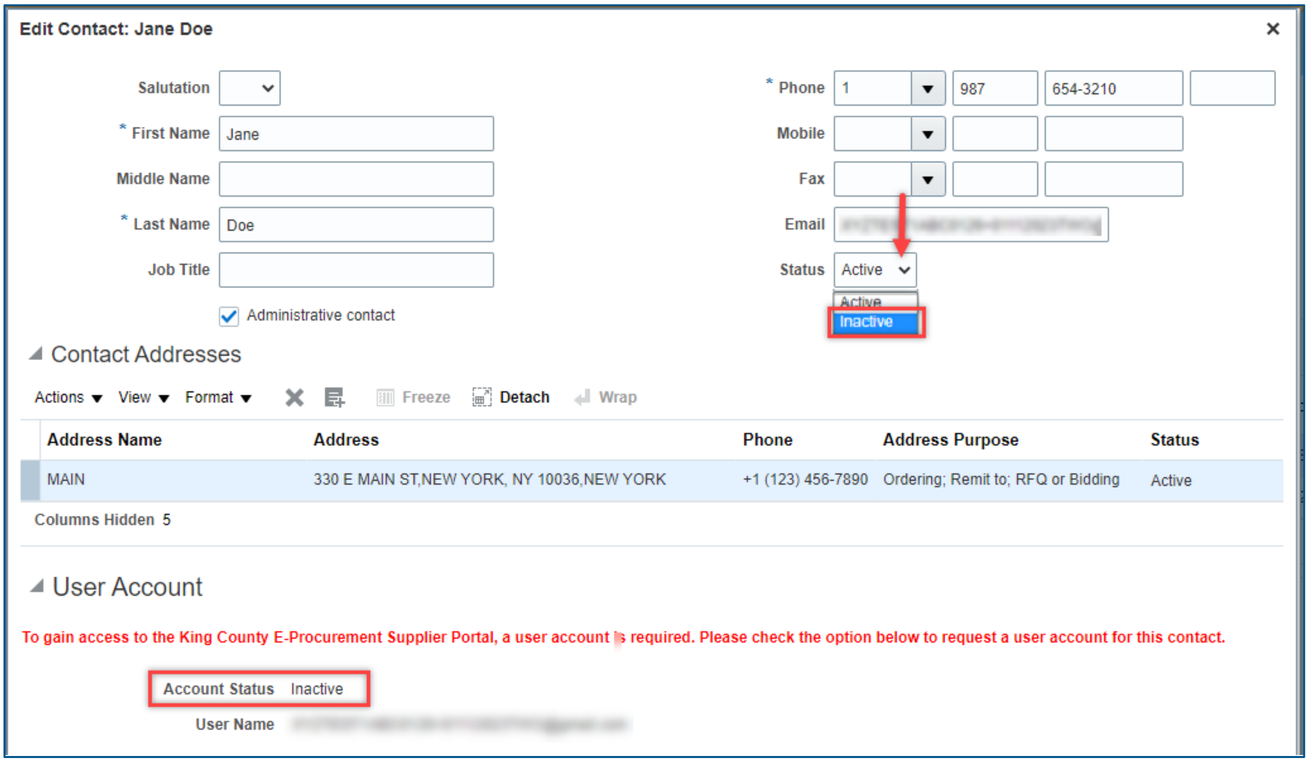
- Verify the added role(s), click "OK."



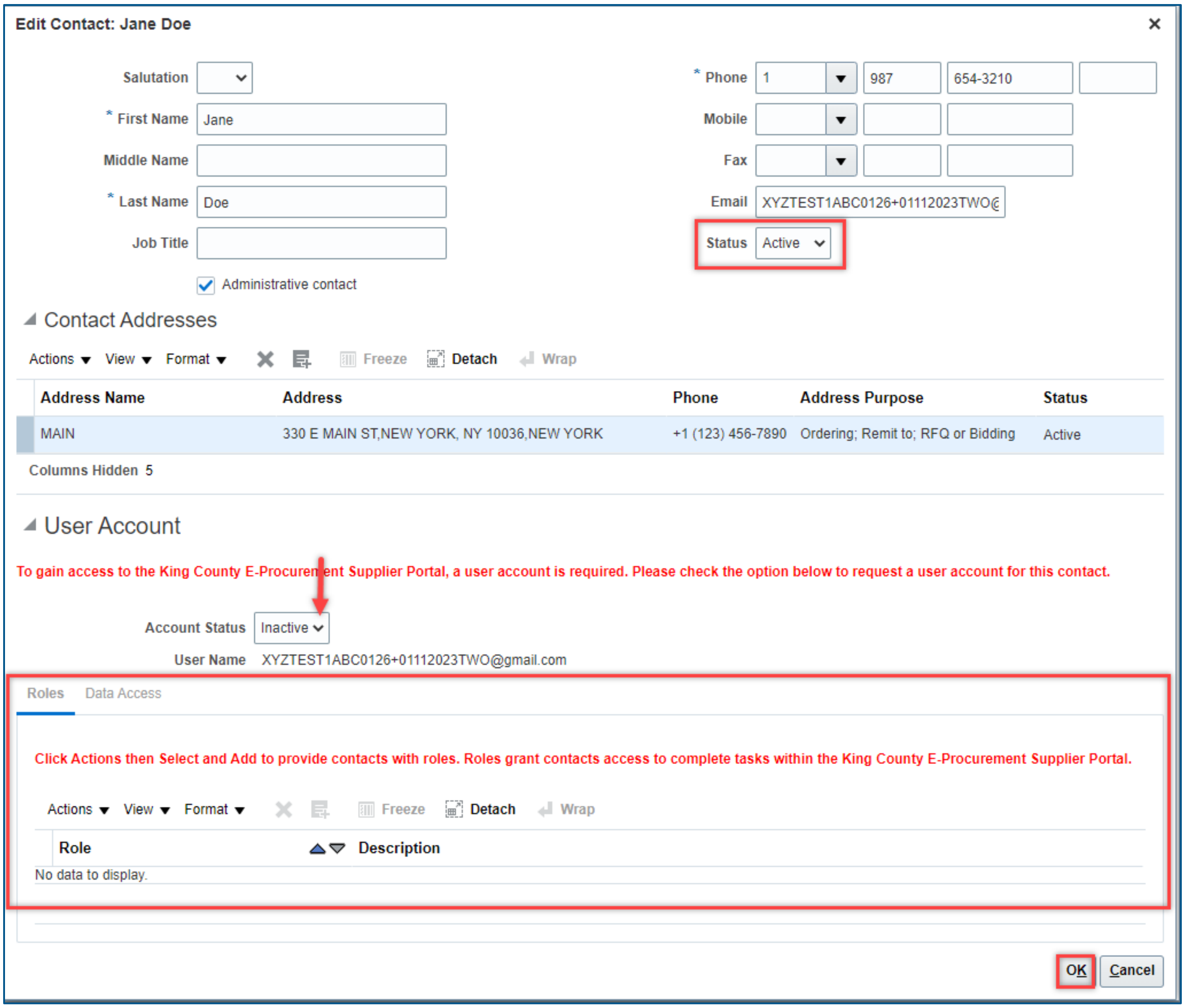
- To inactivate a contact or inactivate a contact's user access to the company profile, highlight the desired contact, click the pencil icon to edit the exisiting contact.



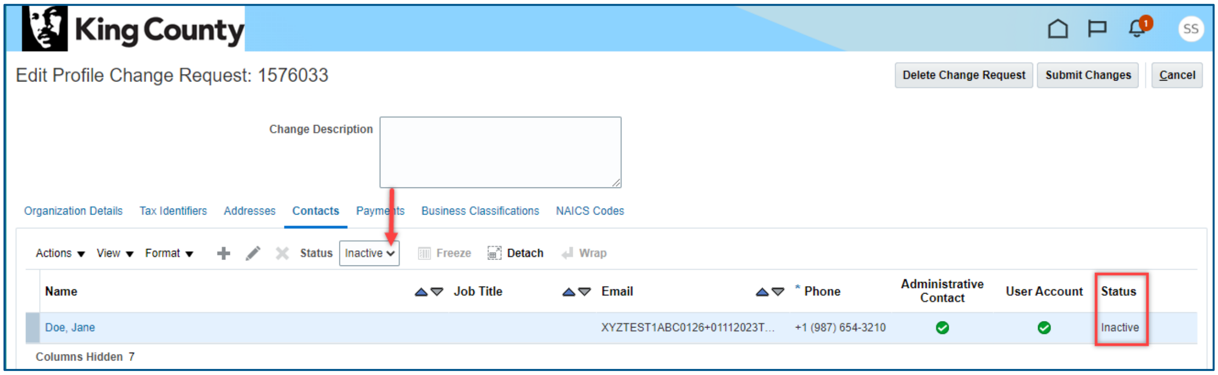
- The “Edit Contact” pop-up will appear. Select the “Status” dropdown, and select “Inactive.” This action will automatically change the "Account Status" field under the "User Account" to "Inactive." Click "OK." The contact will no longer be listed as an active contact **and** their company profile access and assigned roles will be removed.



- If the contact is still a valid point of contact for the company **but** no longer requires a login to the Company Profile, only inactivate the "Account Status" field under the "User Account" section. Under the User Account section, click the “Account Status” dropdown, and select “Inactive.” Click “OK.”

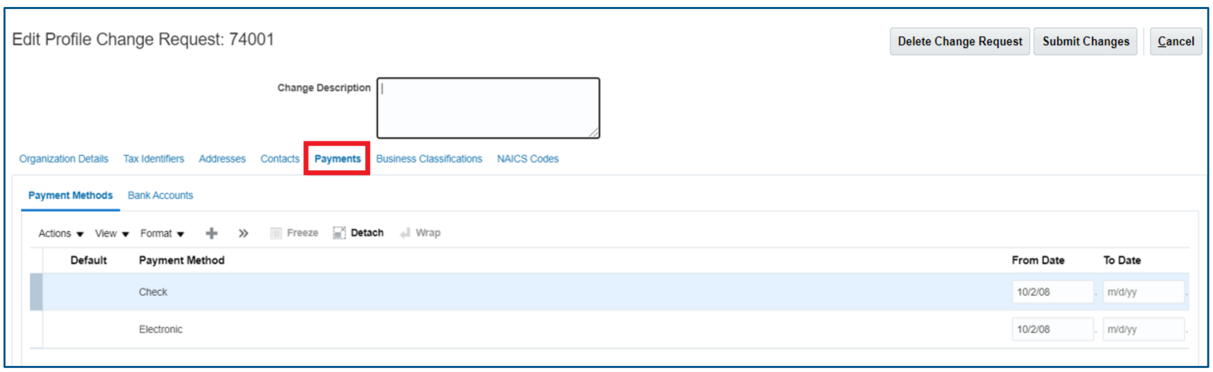


- To view "Active" and "Inactive" contacts, select the "Status" dropdown to "Active" or "Inactive" accordingly.

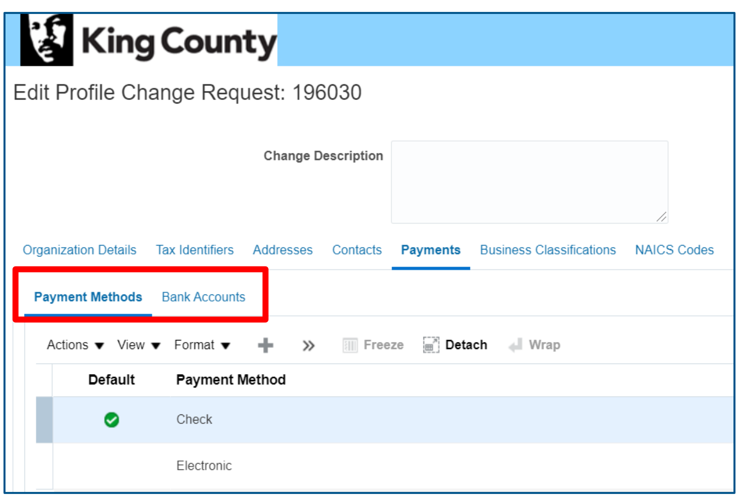


Payments

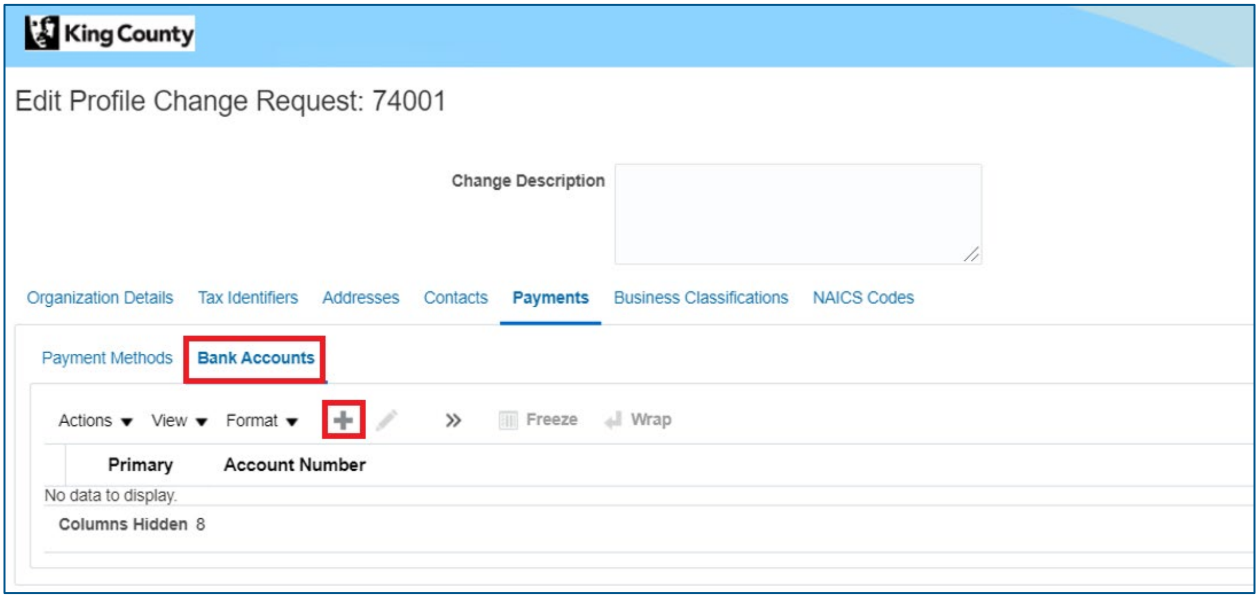
- Click the "Payments" tab.



- 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.

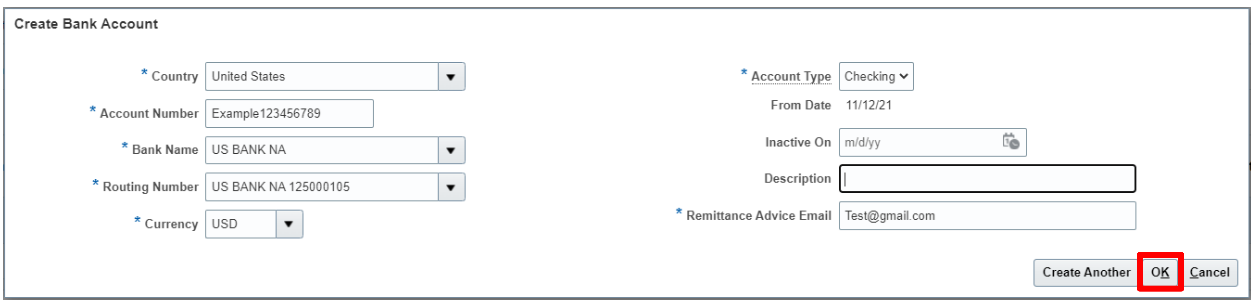


- The "Create Bank Account" window will display. Fields with an asterick "*" are required, enter the appropriate information.

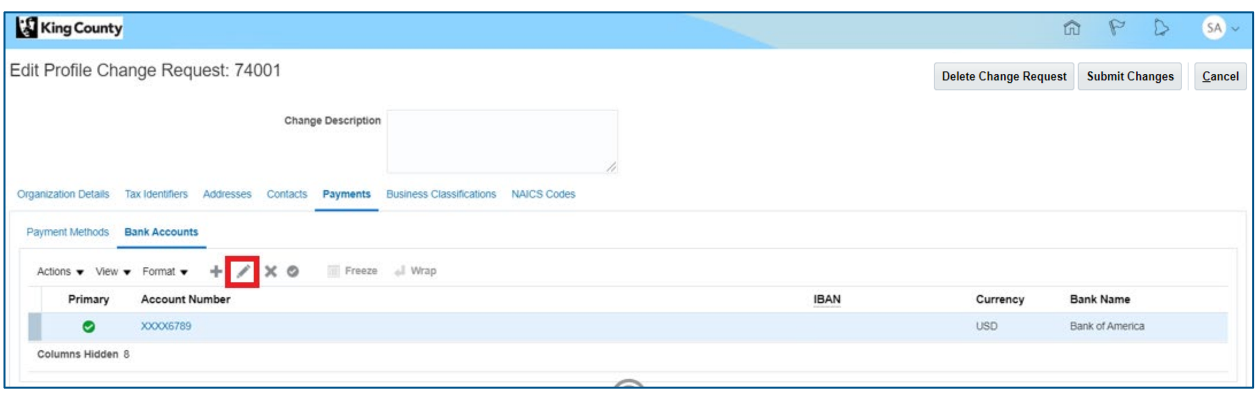
Field	Registration Details
Country	▪ ***REQUIRED*** Select the country where the Bank account is in. ▪ Only U.S. banks are available.
Account Number	▪ ***REQUIRED*** Enter the Account Number.
Bank Name	▪ This field is enabled once the Country is selected (a bank is **required** for King County to be able to pay the supplier). For example, "US Bank NA". ▪ Contact procurement.web@kingcounty.gov if the supplier's bank name is not listed.
Routing Number	▪ 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). ▪ This is your bank routing number. ▪ Complete the field by entering the "Bank Name(space)Bank Routing Number." For example, "US BANK NA 091000022". ▪ Contact procurement.web@kingcounty.gov if the supplier's routing number is not listed.
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 Type	▪ Select either Checking or Savings (this is **required** for King County to be able to pay the supplier).
Remittance Advice Email	▪ Enter the email address where you would like to receive proof of payment. If there are multiple email addresses, separate with a comma and a space.

- Click "OK" when complete.

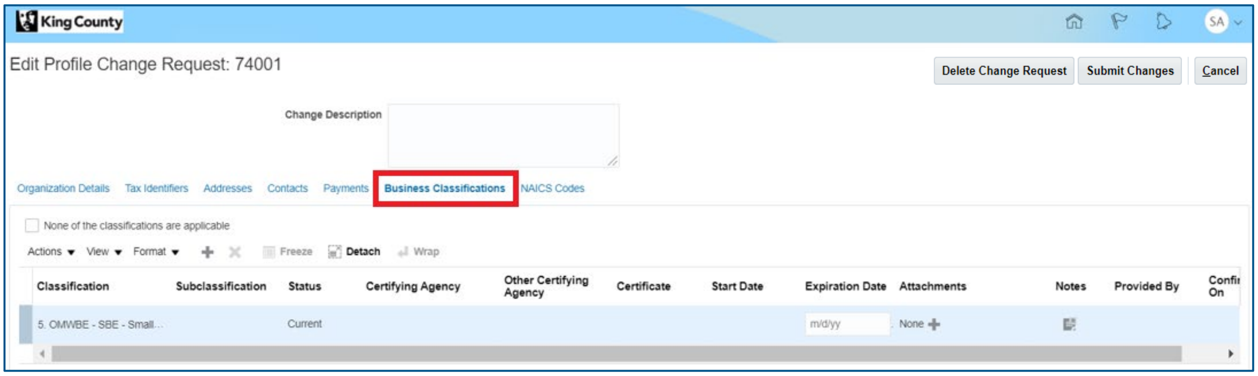


- To edit a bank account, highlight the desired bank account and click the pencil icon. Edit the bank account as desired.

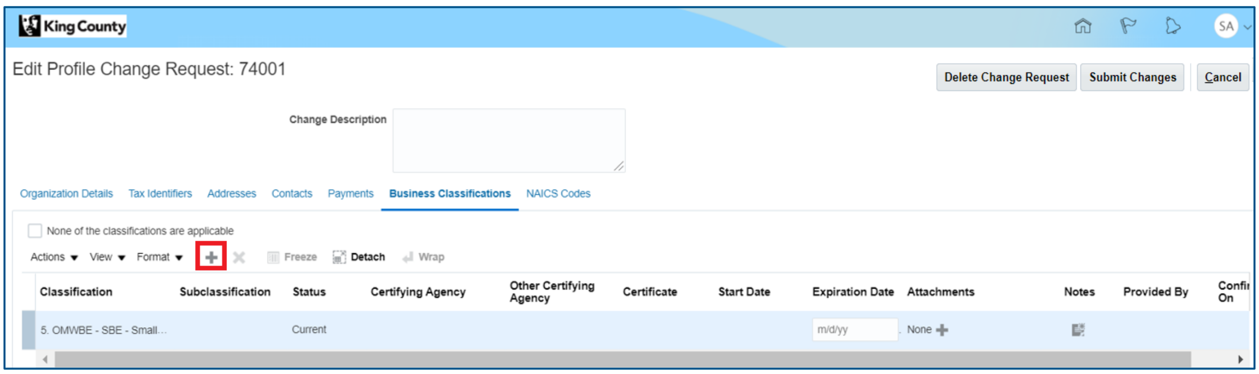


Business Classifications

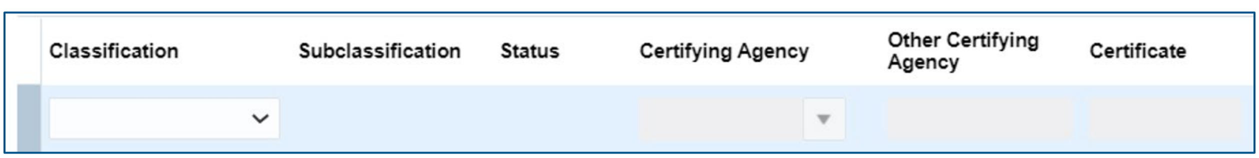
- Click the "Business Classifications" tab.



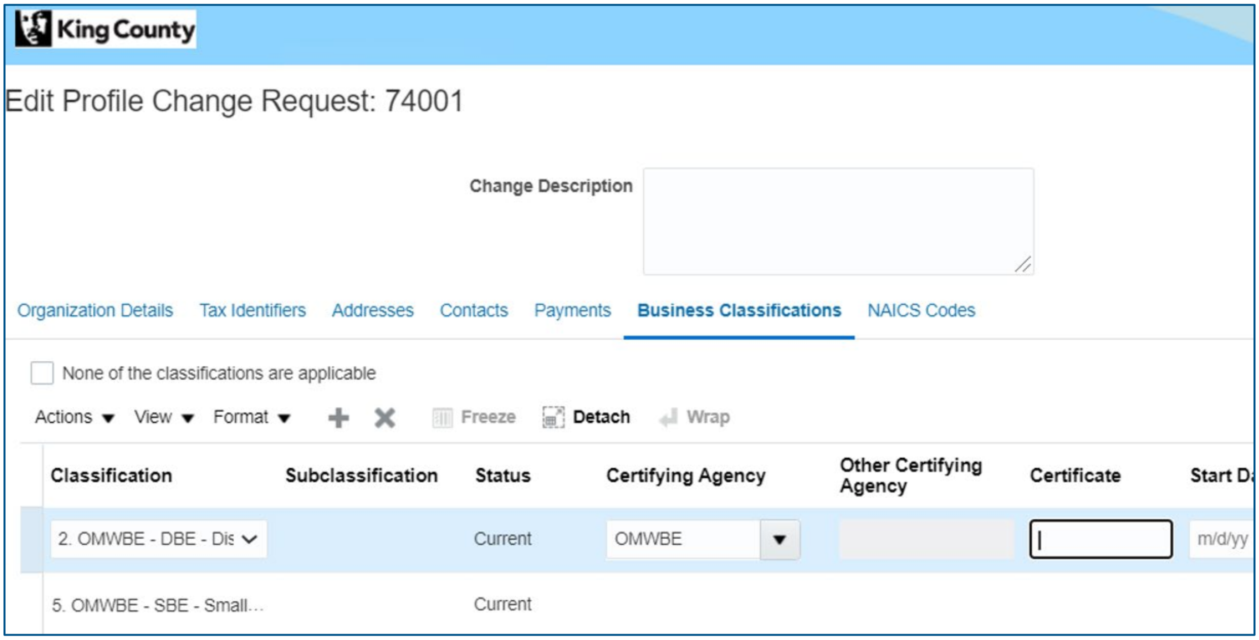
- To add a business classification, click the plus “+” icon.



- When the new business classification row appears, select the classification and other appropriate corresponding information.

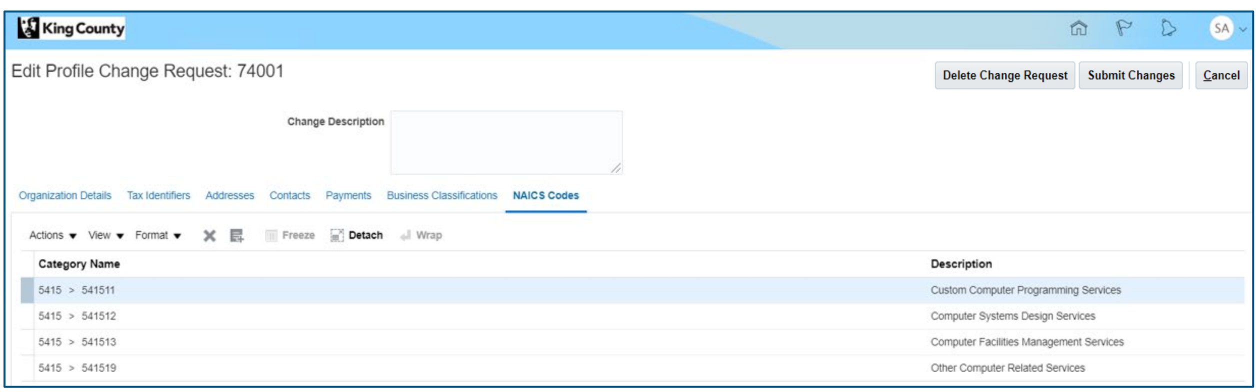


- Verify the business classification addition, add more business classifications as needed.



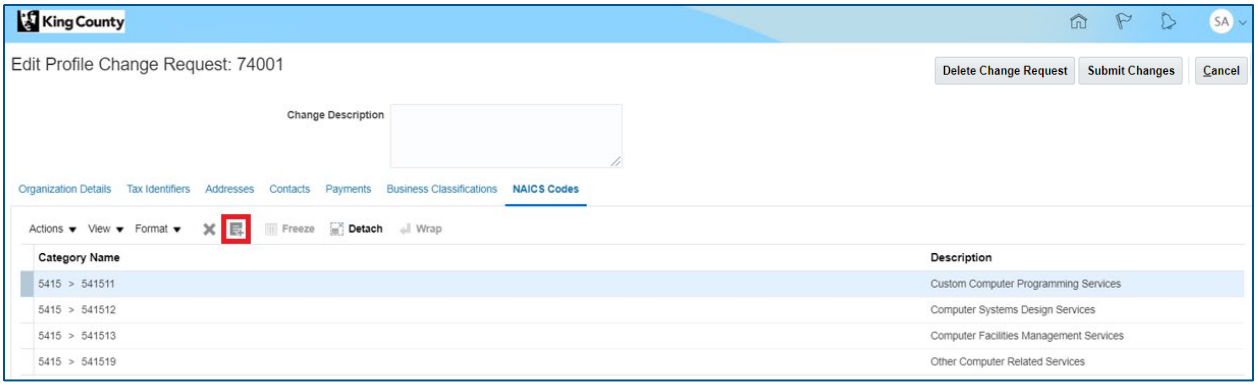
NAICS Codes

- Click the "NAICS Codes" tab.



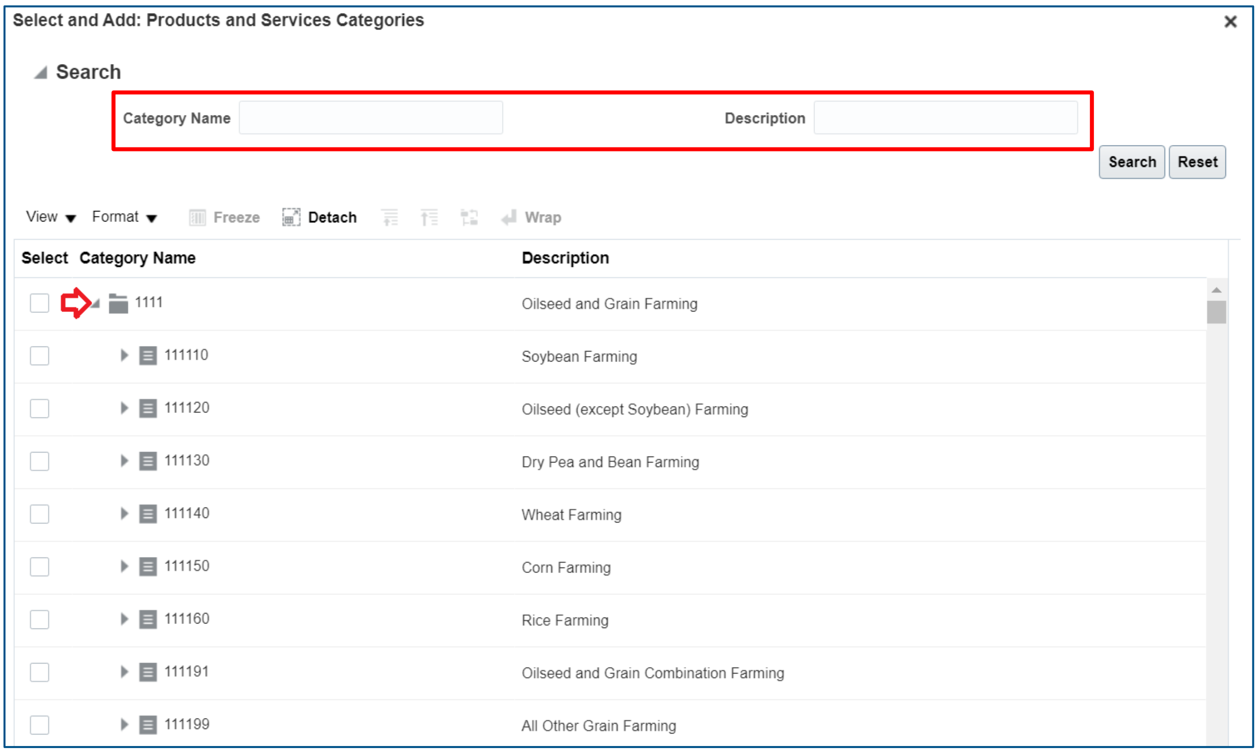
- To add a NAICS code, click the "Select and Add" icon.

> Note: refer to Identifying NAICS Codes User Guide to find a full list of possible NAICS Codes.

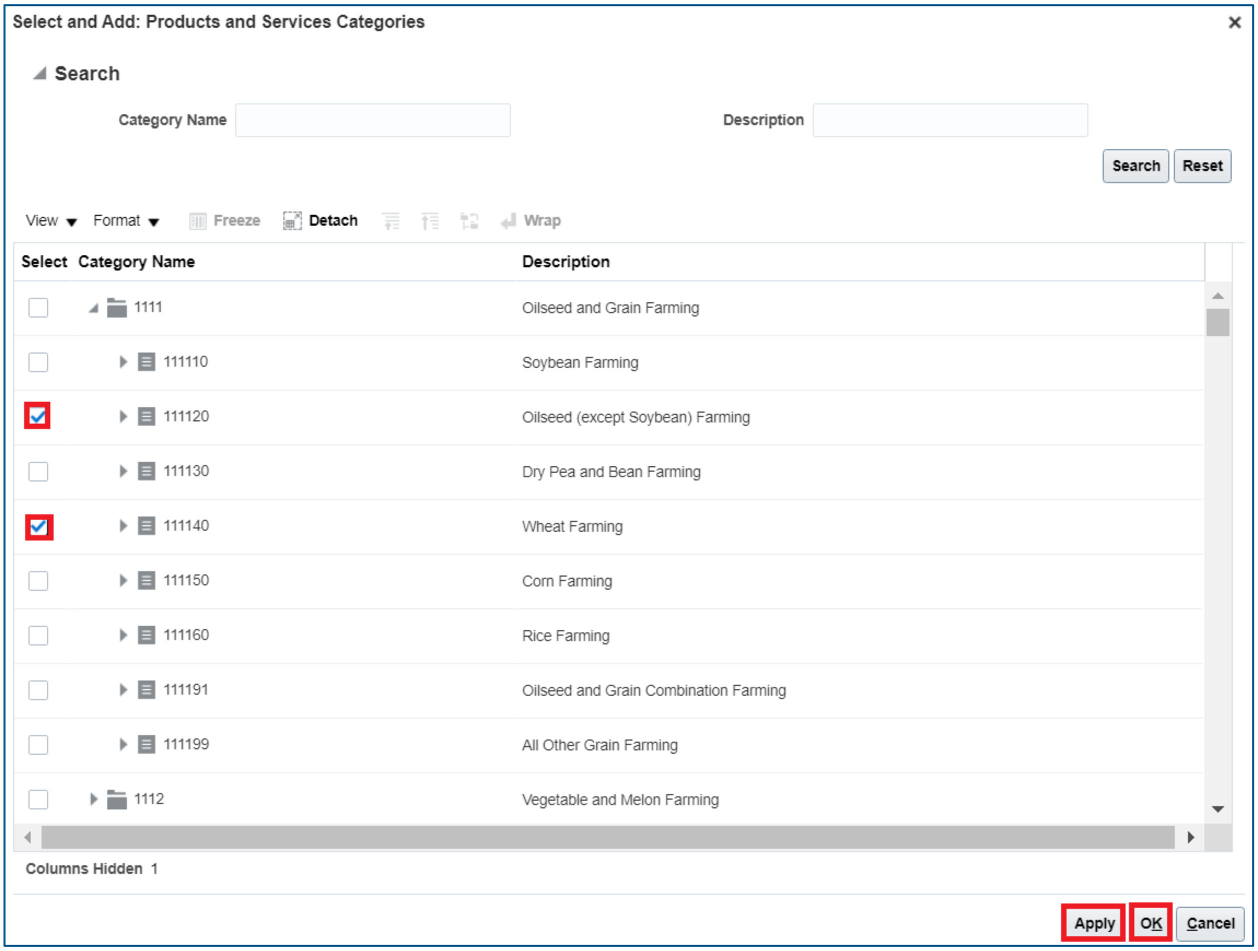


- The "Select and Add: Products and Services Categories" pop-up will display. In order to select the child NAICS codes, click on the arrow to the left of the 4-digit NAICS code to display the child 6-digit NAICS codes.

> 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.

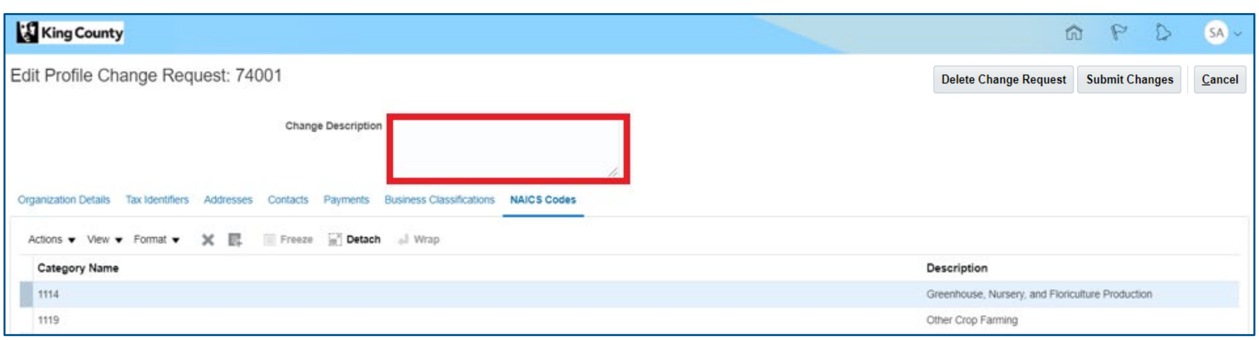


- Select all the appropriate 6-digit NAICS codes by clicking on the checkbox. Or select the 4-digit parent NAICS code to automatically select all of the 6-digit child NAICS codes associated with it. Click "Apply" and "OK" when complete.

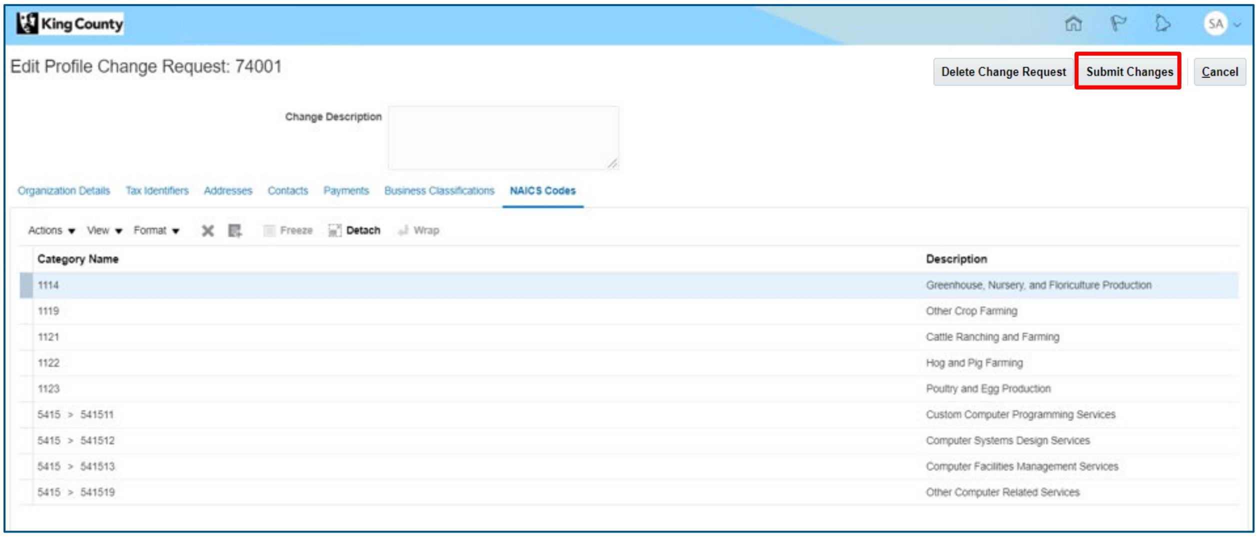


Review and Submit Change Request

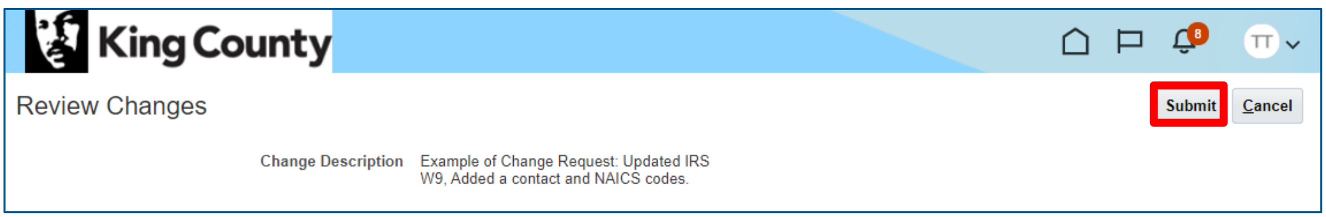
- Enter a "Change Description" (this can be done at anytime when editing tabs).



- Click "Submit Changes."

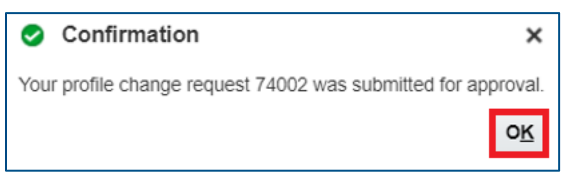


- The "Review Changes" page will display. Click "Submit."

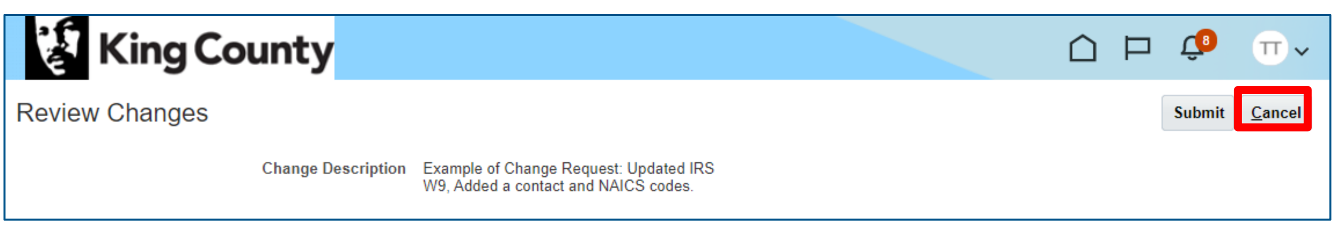


Note: submitting your change request is a two-step process. You must select **both** "Submit Changes" and "Submit" for King County to receive your change request. The profile changes will be not reflected on the supplier profile until the change request is submitted.

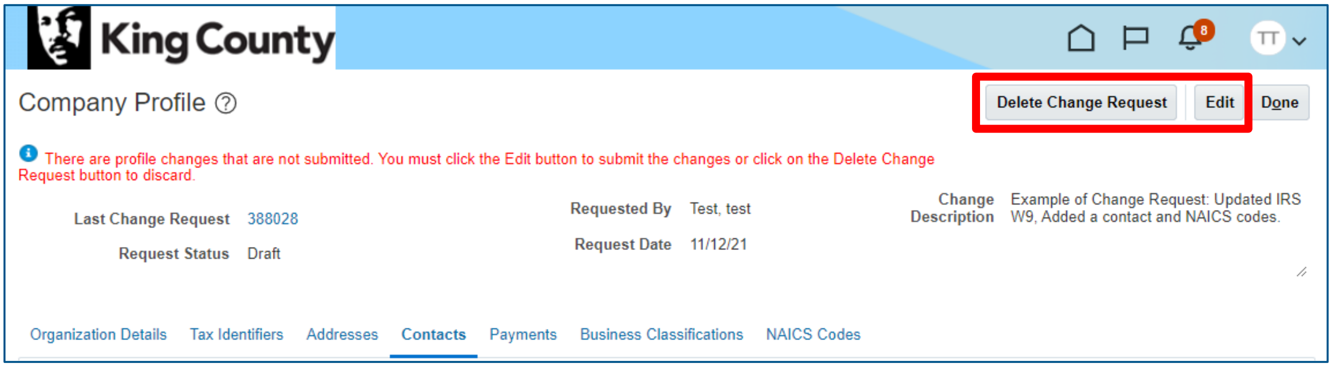
- A confirmation pop-up will appear, click "OK."



- Alternatively, you can cancel the change request by clicking "Cancel."



- If "Cancel" is selected, you will be have the option to "Delete Change Request" or "Edit“ the change request.



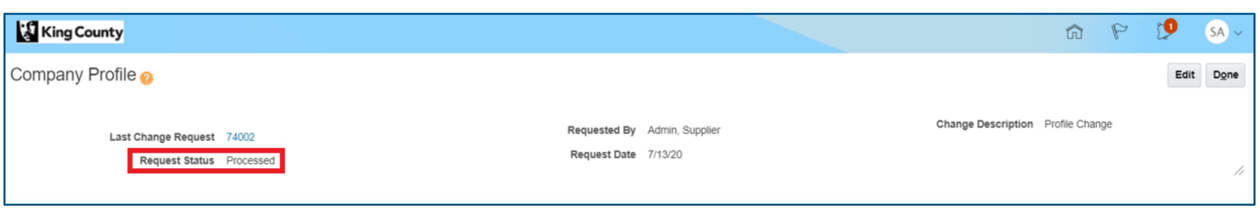
Reminder: Suppliers are assigned one of two statuses’: Prospective or Spend Authorized.

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.