

# Supplier Registration User Guide

### This guide will cover:

- How to Register as a Supplier
  - o Supplier Registration General Information
  - o Registration Portal
  - o Register Supplier
    - Company Details
    - Contacts
    - Addresses
    - Business Classifications
    - NAICS Codes
    - Rosters and Certifications
    - Review & Submit Supplier Registration
    - Registration Emails

# 1 Supplier Registration General Information

- Registration is required to access solicitation documents and respond to King County Solicitations.
- Note the sections that are required below.



 There is a limit to 1 company profile – based on the Tax Identification Number (TIN). If you think there might be a company profile, contact procurement.web@kingcounty.gov to verify.

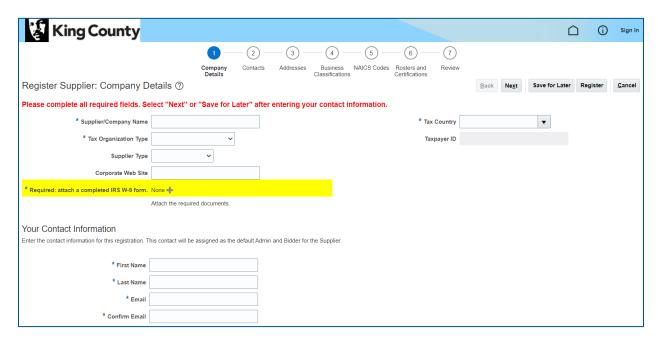
# 2 Registration Portal

Click the following link: Register Now.



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

The King County "Register Supplier" page will display.



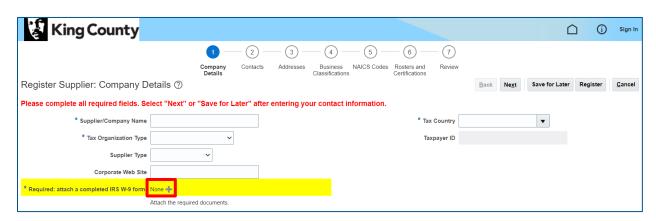
# 3 Register Supplier

## **Company Details**

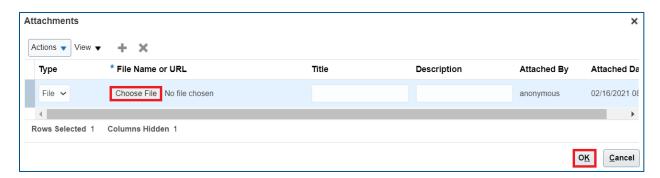
"COMPANY DETAILS" REQUIRED SECTION: in the "Company Details" section, enter registration details:

Field	Registration Details
Supplier/Company Name	<ul> <li>*REQUIRED* Enter the legal name for the supplier.</li> </ul>
	<ul><li>Do not include "Doing Business As" (DBA) name.</li></ul>
	<ul> <li>Field is limited to 40 characters. Abbreviate if</li> </ul>
	organization name exceeds this length.
Tax Organization Type	<ul><li>*REQUIRED* Select from the list of values.</li></ul>
Supplier Type	<ul> <li>Select from the list of values.</li> </ul>
Corporate Web Site	<ul><li>Enter a corporate web site URL.</li></ul>
Tax Country	<ul><li>*REQUIRED* Select from the list of values.</li></ul>
Taxpayer ID	<ul><li>Enter the taxpayer identification number.</li></ul>
	<ul> <li>Attribute will be available after the Tax Country is</li> </ul>
	selected.
	<ul><li>Do not include a TIN dash (digits only); enter in the</li></ul>
	correct format of 9 numbers only, no characters or
	spaces.

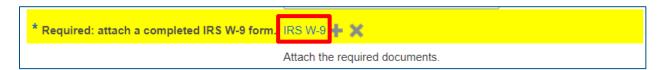
 Complete an IRS W-9 form and save it to your computer. Navigate back to the King County registration page. Attach the completed IRS W-9 by clicking the plus "+" icon.



- Select the File "Type" and upload the IRS W-9 by clicking "Choose File."
   Optionally enter the "Title" and "Description."
- Click "OK" when complete.



Verify attachment has been uploaded.



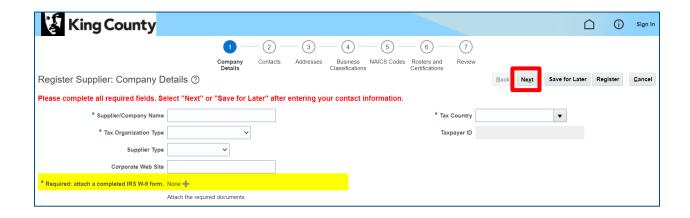
In the "Your Contact Information" section, enter the desired information. Required fields are marked with an asterisk "\*."



In the upper right corner, click "Next."

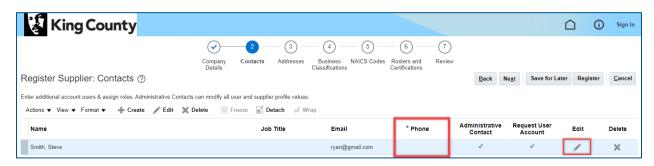


Note: you can click "Save for Later" (next to the "Next" button) after completion of the "Company Details" page to save the information entered and to return later. An email will be sent to the contact email entered. The "Save for Later" button does not submit your supplier registration.

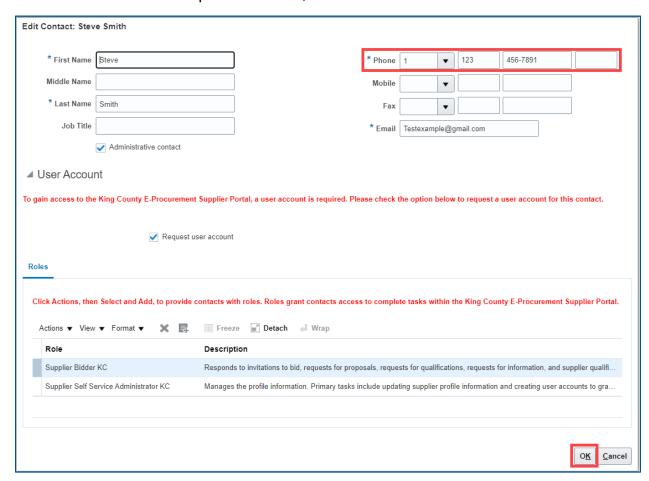


#### Contacts

- "CONTACTS" REQUIRED SECTION: the "Contacts" page will display. The
  contact you entered on the "Company Details" page will automatically populate
  as an "Administrative Contact."
- For the initial contact 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.



Enter the contacts' phone number, then click "OK."



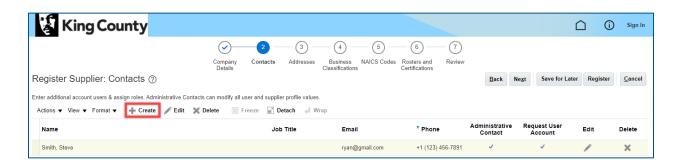
Click "+ Create" to add a new contact.



Note: there is no limit on the number of contacts under the company profile.



Note: all contacts under a company profile will receive notifications on solicitations that match their selected NAICS codes and any changes to that solicitation.



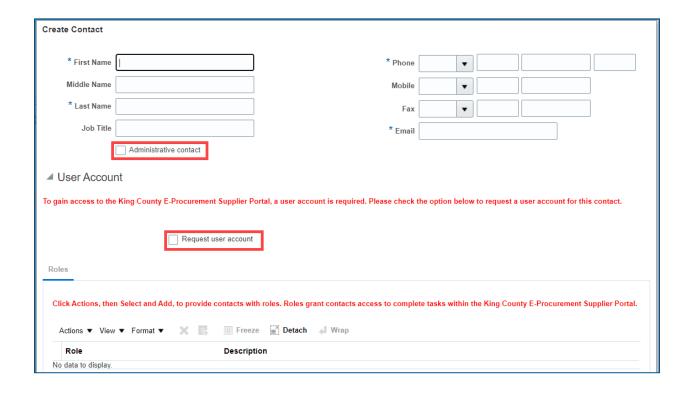
• The "Create Contact" window will display, enter the appropriate contact information.



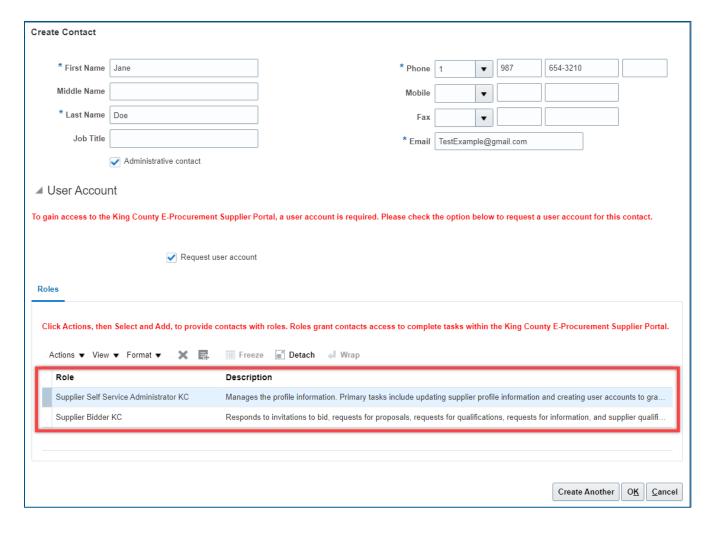
Note: the amount of access to the supplier profile is dependent on the "Administrative contact" and "Request user account" checkbox. Check the box for "Administrative contact" and/or "Request user account" to enable the contact function.

"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).



 If you select the "Request user account" checkbox, default roles (Supplier Self Service Administrator KC and Supplier Bidder KC) will populate (roles will not populate if you only select the Administrative Contact checkbox).





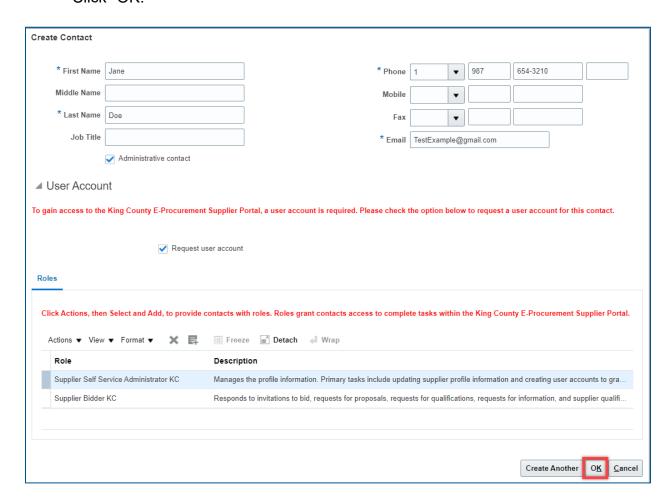
Note: roles added will only be added to the specific contact you have open in the "Create Contact" window.

Note: when hovering your mouse over the description, you will be provided with a description of the role.

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	х	х	х	х	х	x	х	х			х
Supplier Bidder KC						x			х	х	x

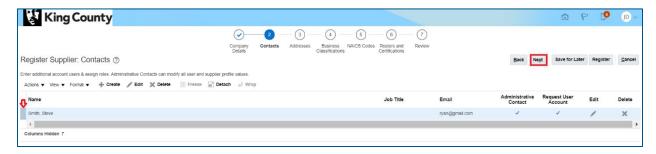
Click "OK."



Confirm the addition of your new contact and click "Next."



Note: you can "Edit" or "Delete" a contact by clicking on the pencil (edit) or "X" (delete) once you have highlighted the desired contact. Click the box next to the contacts name to highlight.



#### Addresses

 "ADDRESSES" REQUIRED SECTION: The "Addresses" page will display, click "+ Create."



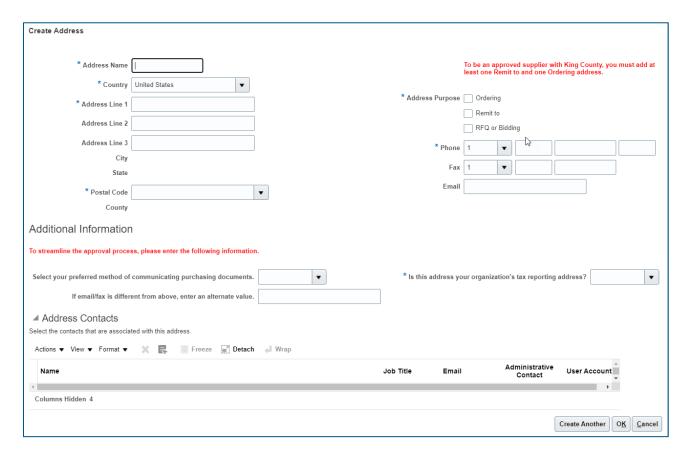
Enter the appropriate supplier information. Required fields are marked with an asterisk "\*."



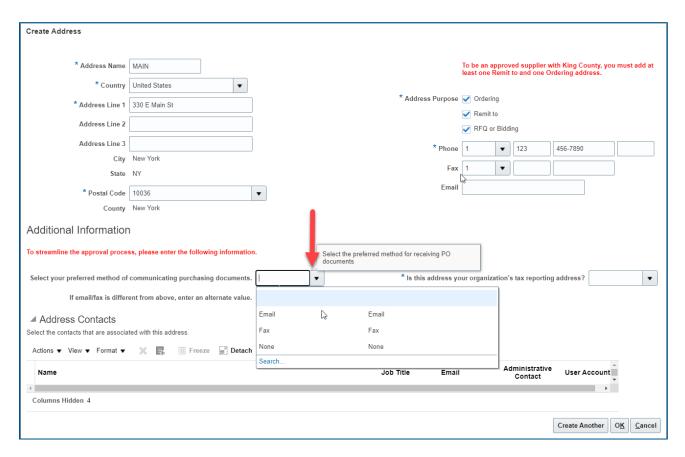
Note: select at least one "Address Purpose." Ordering must be a physical address (PO boxes are not accepted).

Entering the phone number for each address will allow for antifraud validations by the County.

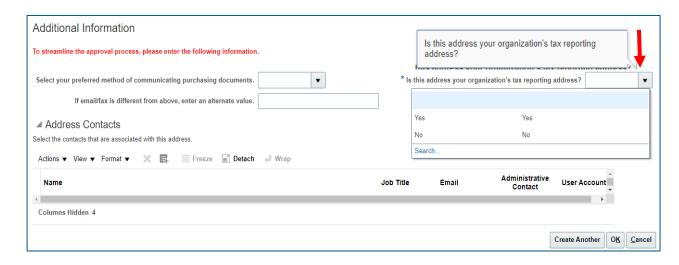
- Select the "Address Purpose":
  - o "Ordering": address will be used for purchase orders.
  - o "Remit": address will be used for invoicing.
  - o "RFQ or Bidding": address will be used for quotes.



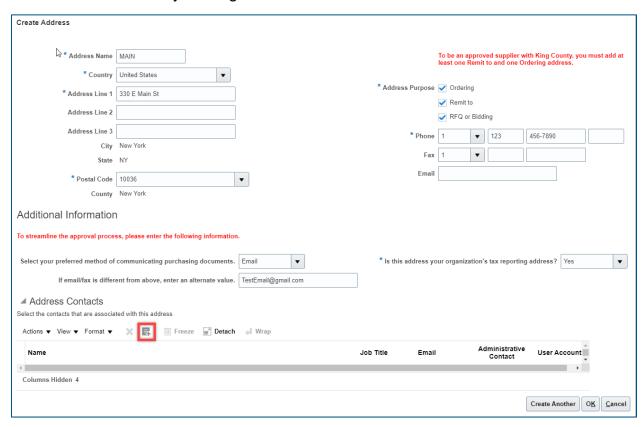
- Once address information is entered, complete the "Additional Information" section to streamline approval process.
- Optionally select the preferred method of communicating purchasing documents by clicking the dropdown menu and selecting the "Email," "Fax" or "None" option.



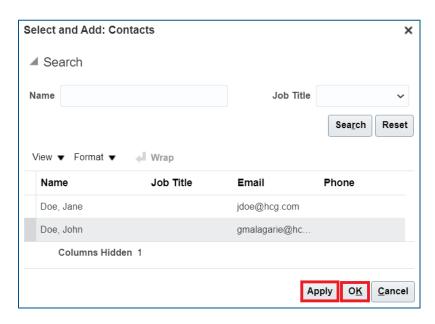
 Additionally, indicate if the listed address is your organization's tax reporting address by clicking the dropdown menu and selecting "Yes" or "No".



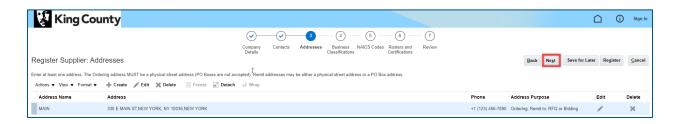
 Once the address and additional information is entered, optionally add a contact to the address by clicking the "Select and Add" icon.



The "Select and Add: Contacts" window will display. Contacts that were added in the "Contacts" section will be available. Highlight the desired contact and click "Apply" and "OK" when complete.



In the upper right corner, click "Next."

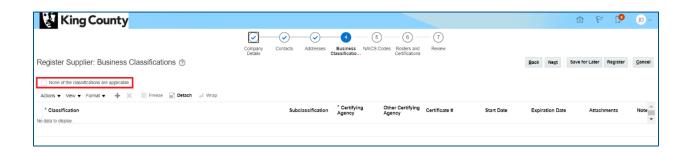


#### **Business Classifications**

"BUSINESS CLASSIFICATIONS" REQUIRED SECTION: the "Business Classifications" page will display; business classifications are small businesses or businesses owned by minority, women, and socially and economically disadvantaged persons. Add all certifications that apply. If no business classifications apply to your firm, select the "None of the classifications are applicable" checkbox.



Note: you will receive an error message if you click the plus "+" icon without filling in the appropriate information. Highlight the created Business Classification line and click the 'X' icon to delete the line and remove the error.



If the supplier is certified, click the plus "+" icon to add a certification.



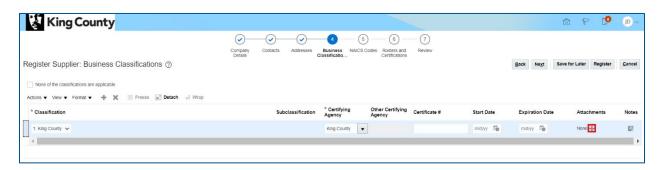
Use the "Classification" drop-down to select the appropriate classification. Once a classification is selected, select a "Certifying Agency" along with other appropriate fields. One certification is allowed per line. Repeat process for each certification that applies to your firm.



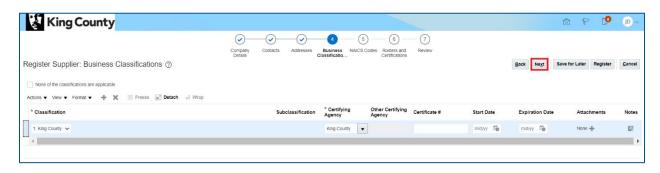
Note: each individual business classification has a "Certifying Agency" attached. Selecting a classification will enable and determine the options available in certifying agency.



Click the plus "+" icon to add an attachment.



In the upper right corner, click "Next."



#### **NAICS Codes**

- "NAICS CODES" REQUIRED SECTION: A NAICS Code is a classification within the North American Industry Classification System.

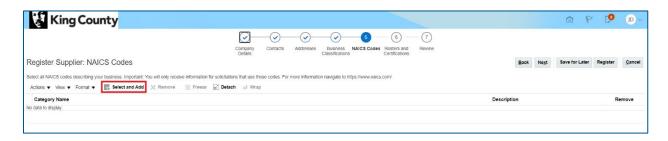
  The NAICS Code System was developed for use by Federal Statistical Agencies for the collection, analysis and publication of statistical data related to the U.S. Economy.
- Identification and selection of NAICS codes are critical components to firms wanting to do business with King County and establishes the solicitation (formal and informal) notifications and invitations received by your firm.
- Select all NAICS codes applicable to your firm.
- The "NAICS Codes" page will display. Enter all the appropriate NAICS Codes for all the products and services the supplier sells or provides, or for any industry which may relate to solicitations a supplier could be interested in.



Note: IMPORTANT - NAICS codes selected will determine which solicitations you are invited to/receive notifications. Refer to <u>Identifying NAICS Codes User Guide</u> to find a full list of possible NAICS Codes.

At least one code is required for all suppliers.

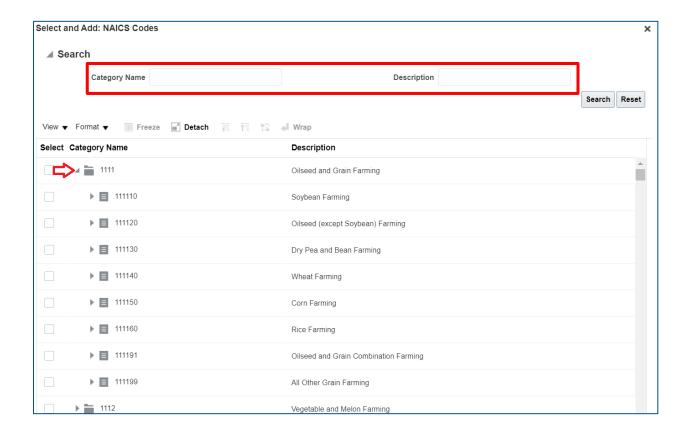
Click "Select and Add."



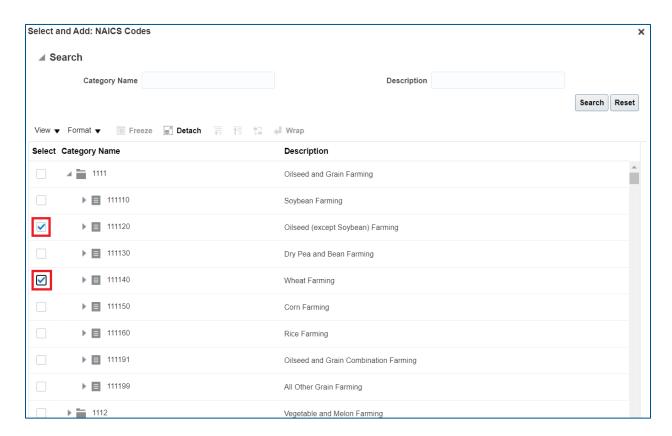
■ The "Select and Add: NAICS Codes" page will display. In order to select the child NAICS codes, click on the arrow to the left of the 4-digit NAICS code to display the child 6-digit NAICS codes.



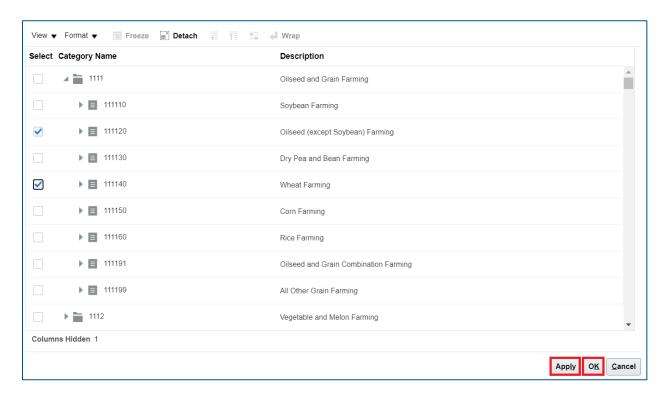
Note: enter the NAICS code **number** in the "Category Name" field to quickly find and select your NAICS codes. The "Category Name" and "Description" search fields require exact matches. Refer to <u>Identifying NAICS Codes User Guide</u> to find a full list of possible NAICS codes and enter exact category names or descriptions.



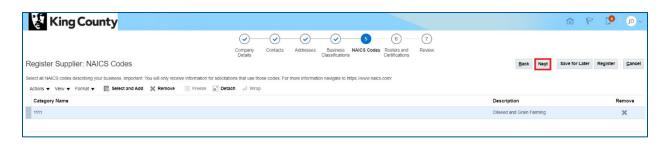
 Select all the appropriate 6-digit NAICS codes by clicking on the checkbox. Or select the 4-digit parent NAICS code to automatically select all of the 6-digit child NAICS codes associated with it.



Click "Apply" and "OK."



Click "Next."

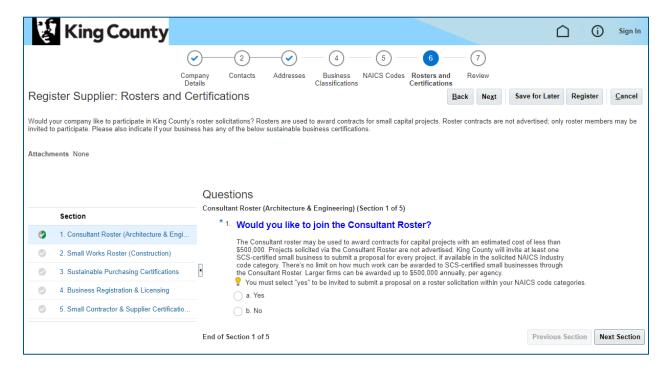


#### Rosters and Certifications

 "ROSTERS AND CERTIFICATIONS" REQUIRED SECTION: the "Rosters and Certifications" page will display. You will answer additional questions related to the Rosters, Sustainable Purchasing Certifications, Business Registration & Licensing, and Small Contractor and Supplier Certification (SCS).



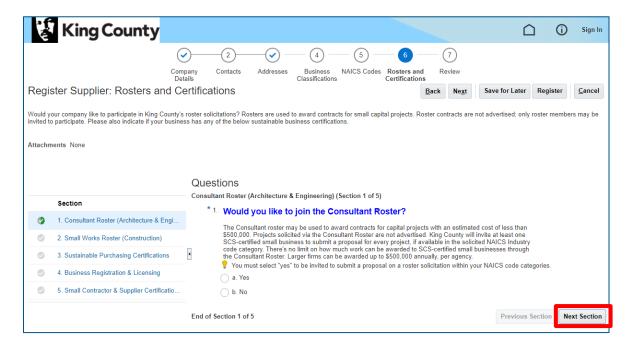
Note: King County recommends you opt into rosters (select Yes) to streamline future processes.



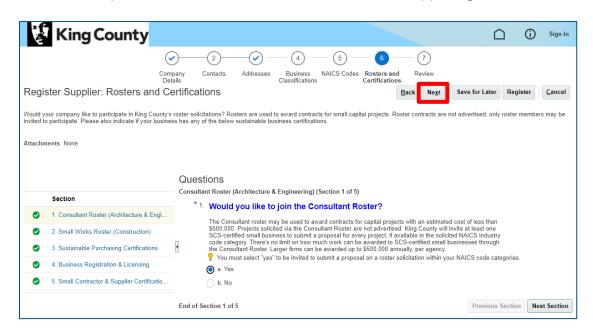
The "Rosters and Certifications" page consists of 5 sections. Each section
contains questions that are related to the individual area. Answer each question
and click "Next Section" in the bottom right corner to proceed to the next section.



Note: answer ALL questions. The answer to some questions may create additional questions.



Once all questions are answered, click "Next" in the upper right corner.



### Review and Submit Supplier Registration

 "REVIEW SUPPLIER REGISTRATION" OPTIONAL SECTION: the "Review Supplier Registration" page will display. Optionally review the information you entered.



• Click "Register" when complete.

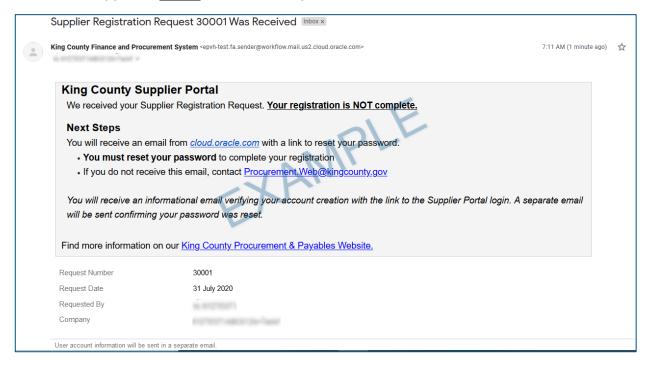


A confirmation window will display, click "OK."



### **Registration Emails**

- REGISTRATION EMAILS REQUIRED ACTION: do not skip action is required to finalize your supplier registration.
- Once the registration is submitted, the supplier will receive a series of emails to their registered <u>email</u> account (outside E-Procurement Supplier Portal). Login to the supplier's <u>email</u> account is required.



The supplier will receive an email to reset their password. Follow the prompts to reset your password.



 Once the password has been reset, the supplier will receive a password reset confirmation email.



Note: in the below example, the supplier's username will be the email used to register.



- The supplier can now access solicitation documents, respond to solicitations, and view solicitations. Review and refer to the other E-Procurement Supplier Portal user guides:
  - o "Identifying NAICS Codes User Guide"
  - o "Supplier Profile Maintenance User Guide"
  - "Supplier Reset Password User Guide"
  - o "Supplier Questionnaire User Guide"
  - o "Supplier Solicitation User Guide"
- End of process.