

Supplier Profile Maintenance User Guide

This guide will cover:

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

1 Sign In

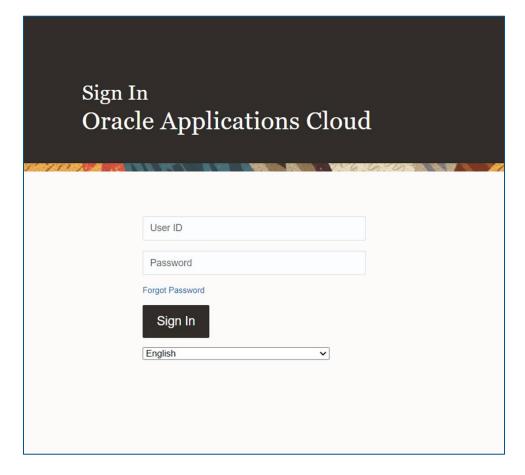
 Go to the <u>E-Procurement Supplier Portal</u>. The "Sign In" page will display. Enter your "User ID" and "Password," then click "Sign In."



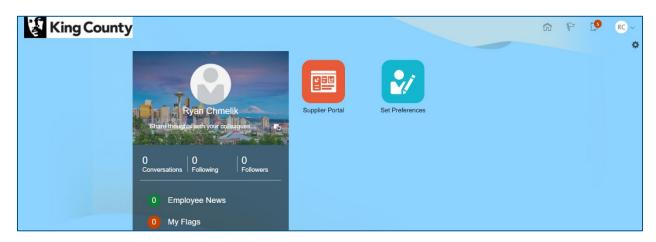
Note: use supporting web browsers: Mozilla Firefox, Google Chrome, Microsoft Edge, and Apple Safari.



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

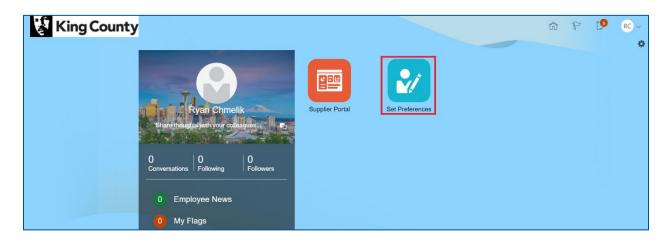


The home page will display.



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.

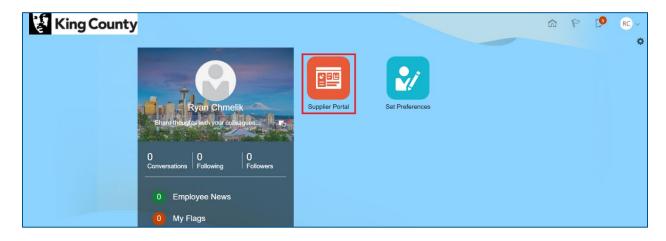
A **Prospective** supplier has access to County solicitations, can respond to solicitations and questionnaires but has not been authorized to receive payment from King County.

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

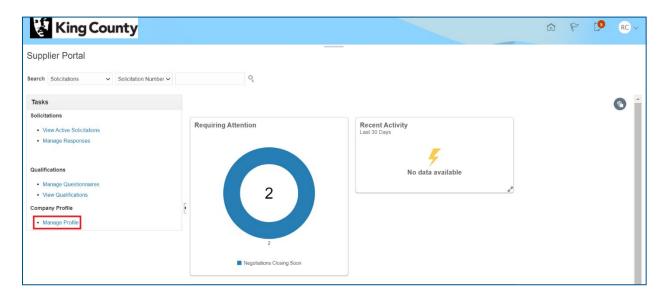
Click the "Supplier Portal" tile.



In the "Company Profile" section, under "Tasks," click on the "Manage Profile" link.



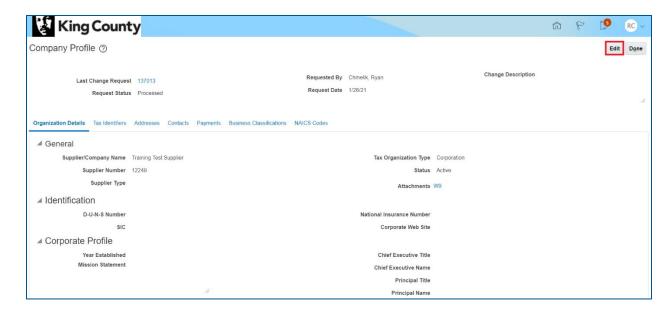
Note: user interface and options will vary depending on users' roles.



 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 "Addresses" page is the default tab. The page must be refreshed to see the editable fields; click on any of the available tabs to refresh the page.



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

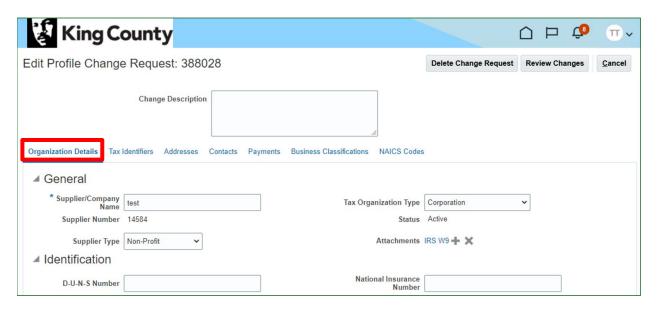


Note: the "Change Description" box is for information purposes only. Changes <u>will not</u> be processed from information entered in this field.



Organization Details

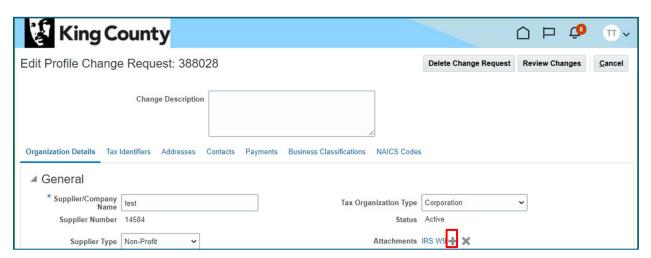
 Click the "Organization Details" tab, enter, or change supplier information as needed.



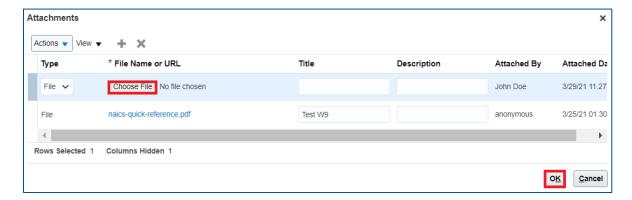
 It is required to attach a completed IRS W-9 form before a supplier can be authorized to receive payment from King County.



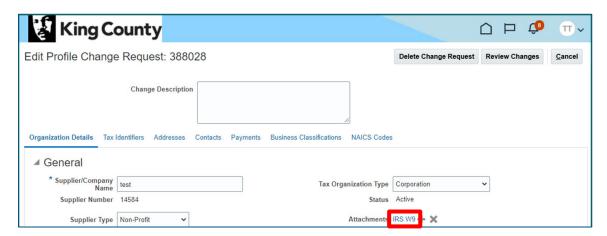
■ If you need to attach a W-9, click the plus "+" icon next to "Attachments" to attach a completed IRS W-9.



 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.

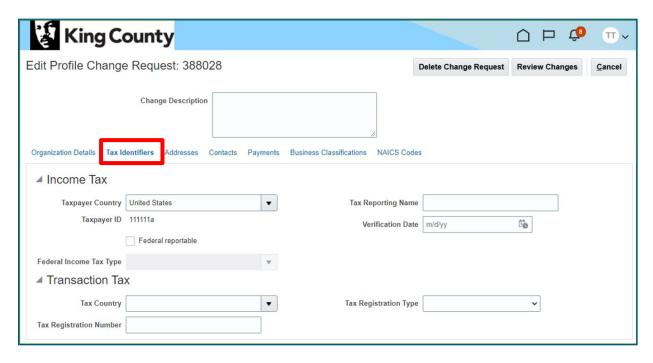


Once the IRS W-9 form is attached, the attachment link will appear.



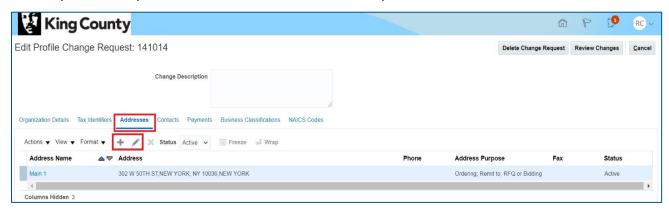
Tax Identifiers

• 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).

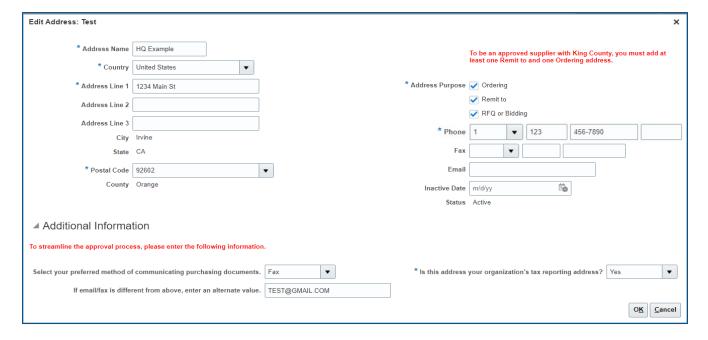
When being promoted to a Spend Authorized Supplier, King County may reformat your address to meet USPS delivery standards.



Note: Additional Information is used to streamline approval process.

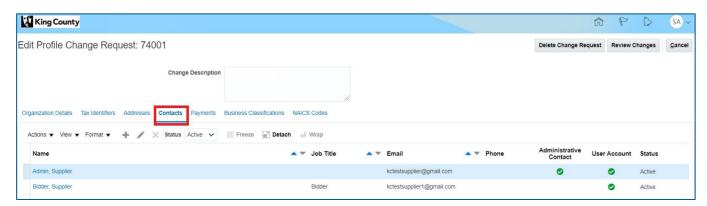
Select your preferred method of communicating purchasing documents and indicate if the address is your organization's tax reporting address.

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

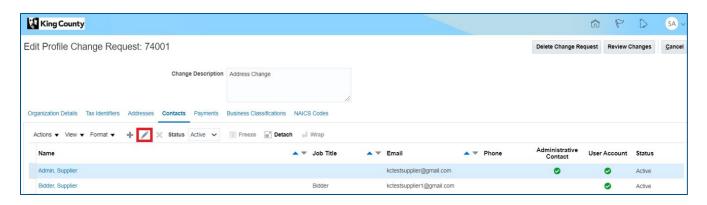


Contacts

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.



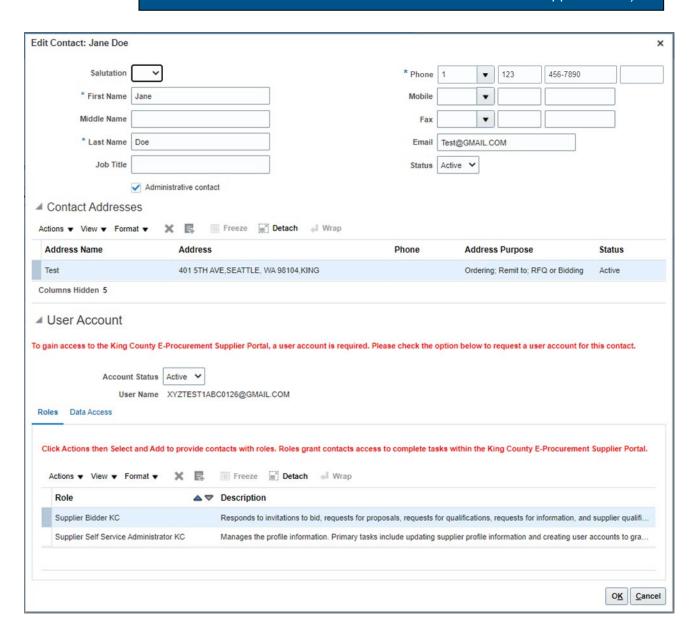
The "Edit Contact" pop-up will display.



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.

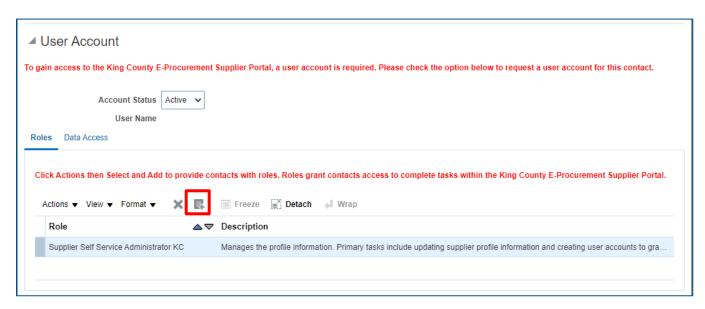
"User Account"- creates user account in the Supplier portal (checking only Administrative Contact will not create a user account in the Supplier Portal).



 To add an additional role(s) to a contact, on the "Roles" tab, click the "Select and Add" icon.

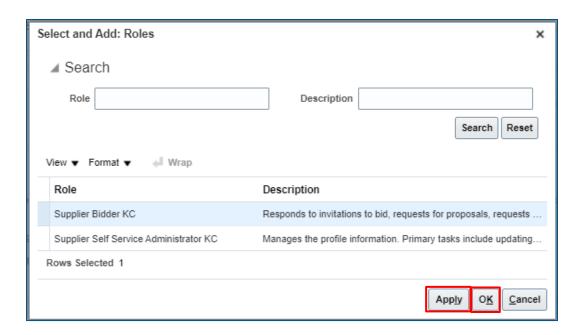


Note: role(s) added will only be added to the specific contact you have open in the "Create Contact" window.

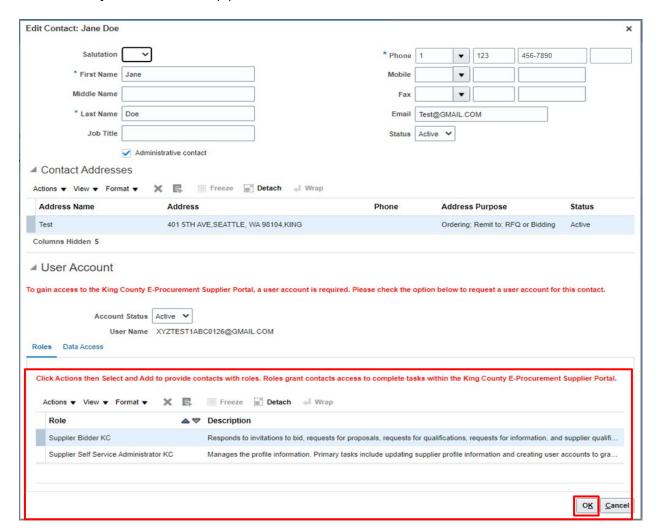


- The "Select and Add: Roles" pop-up will display, highlight the desired role(s), click "Apply" and then click "OK" when complete.
- Below is a matrix of the roles and the access it grants you:

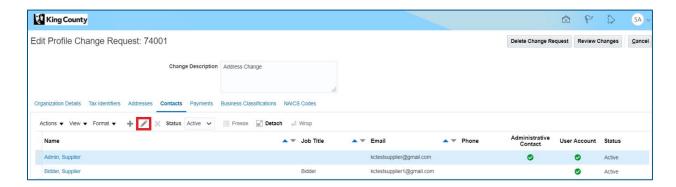
Supplier Roles	View Company Profile	View Company Tax Details	Update Company Profile	Request New Contact/ User	Maintain Contacts/ User	Respond to Qualification Questionnaire	View/ Participate in Solicitations	View/ Download Contract Terms	Access Portal Overview/ Summary Tab
Supplier Self Service Administrator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



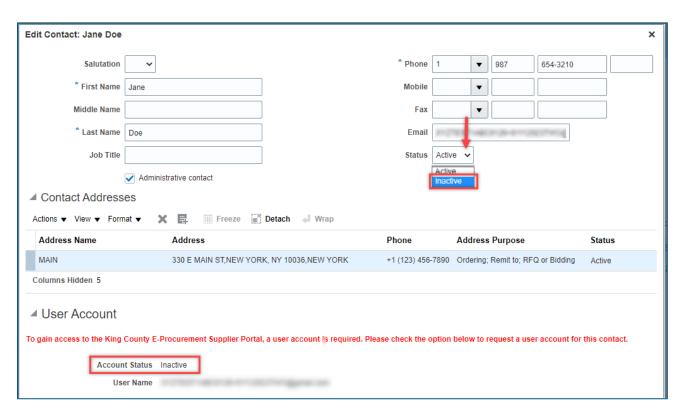
Verify the added role(s), click "OK."



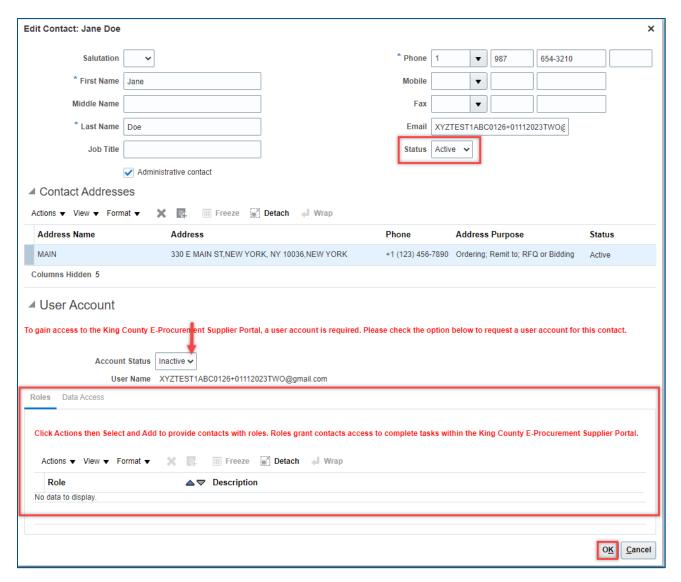
 To inactivate a contact or inactivate a contact's user access to the company profile, highlight the desired contact, click the pencil icon to edit the exisiting contact.



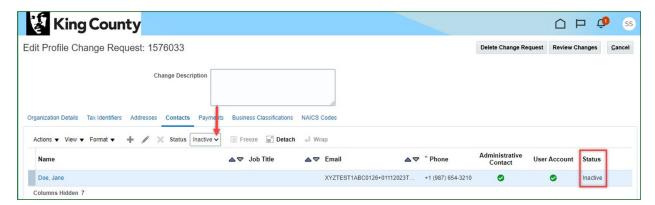
The "Edit Contact" pop-up will appear. Select the "Status" dropdown, and select "Inactive." This action will automatically change the "Account Status" field under the "User Account" to "Inactive." Click "OK." The contact will no longer be listed as an active contact and their company profile access and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

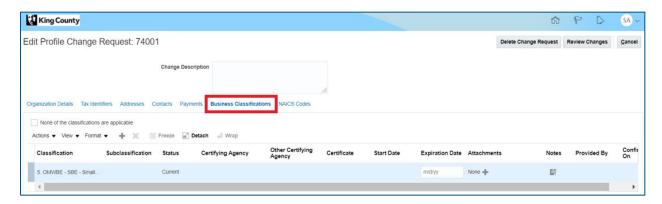


 To view "Active" and "Inactive" contacts, select the "Status" dropdown to "Active" or "Inactive" accordingly.

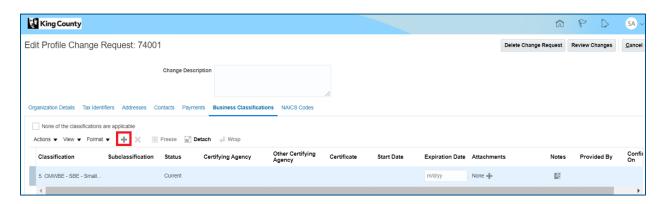


Business Classifications

Click the "Business Classifications" tab.



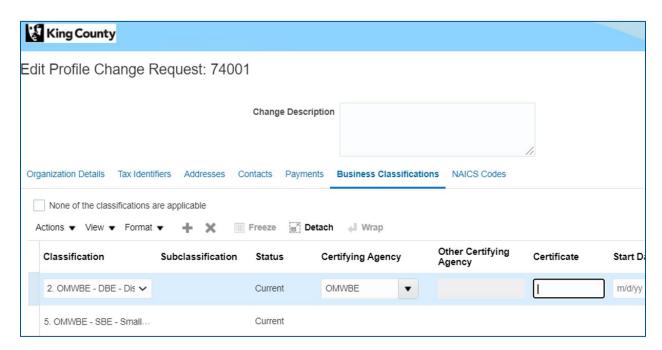
To add a business classification, click the plus "+" icon.



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

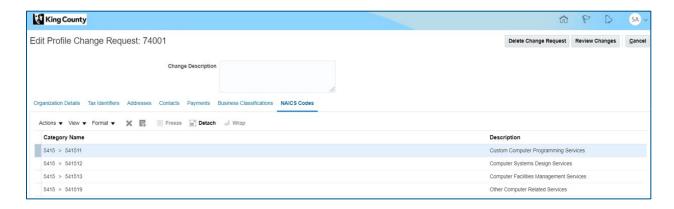


 Verify the business classification addition, add more business classifications as needed.



NAICS Codes

Click the "NAICS Codes" tab.



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



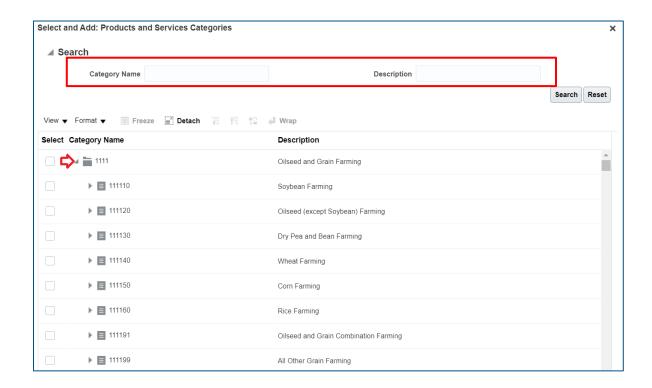
Note: refer to <u>Identifying NAICS Codes User Guide</u> to find a full list of possible NAICS Codes.



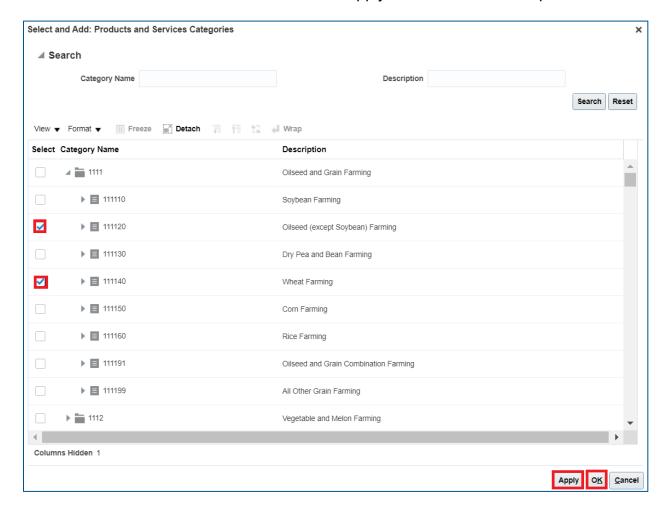
 The "Select and Add: Products and Services Categories" pop-up will display. In order to select the child NAICS codes, click on the arrow to the left of the 4-digit NAICS code to display the child 6-digit NAICS codes.



Note: refer to <u>Identifying NAICS Codes User Guide</u> 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

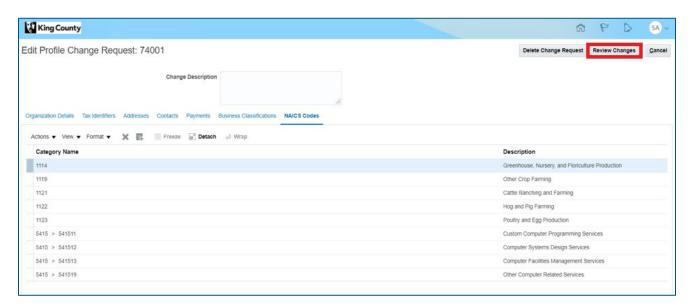


Note: submitting your change request is a two-step process.

You must select both "Review Changes" then "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.

Click "Review Changes."



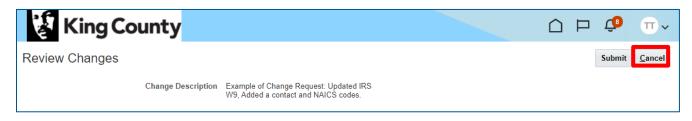
The "Review Changes" page will display. Click "Submit."



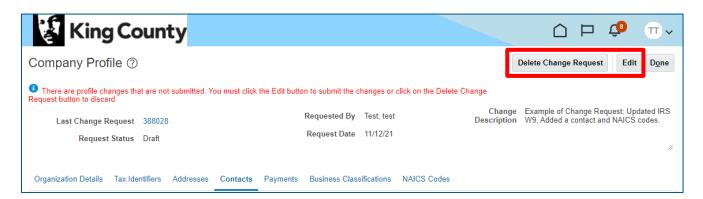
A confirmation pop-up will appear, click "OK."



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.

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

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 Once the supplier changes are approved, the supplier profile reflects the "Request Status;" which will display "Processed."



End of process.