



King County

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*
 - *Business Classifications*
 - *NAICS Codes*
 - *Review and Submit Change Request*

1 Sign In

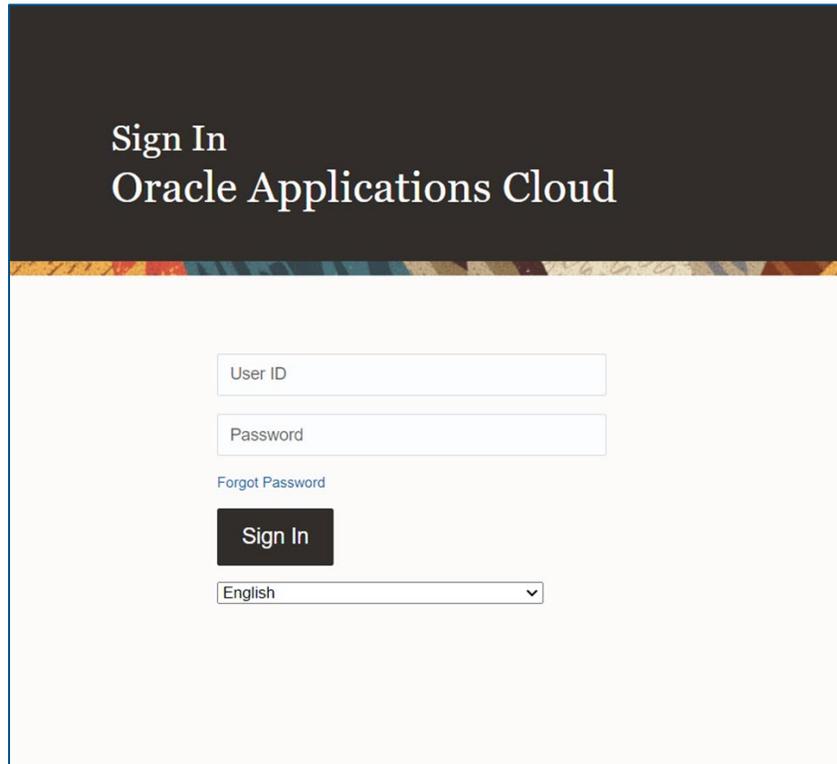
- Go to the E-Procurement Supplier Portal. The “Sign In” page will display. Enter your “User ID” and “Password,” then click “Sign In.”



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



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



Sign In
Oracle Applications Cloud

User ID

Password

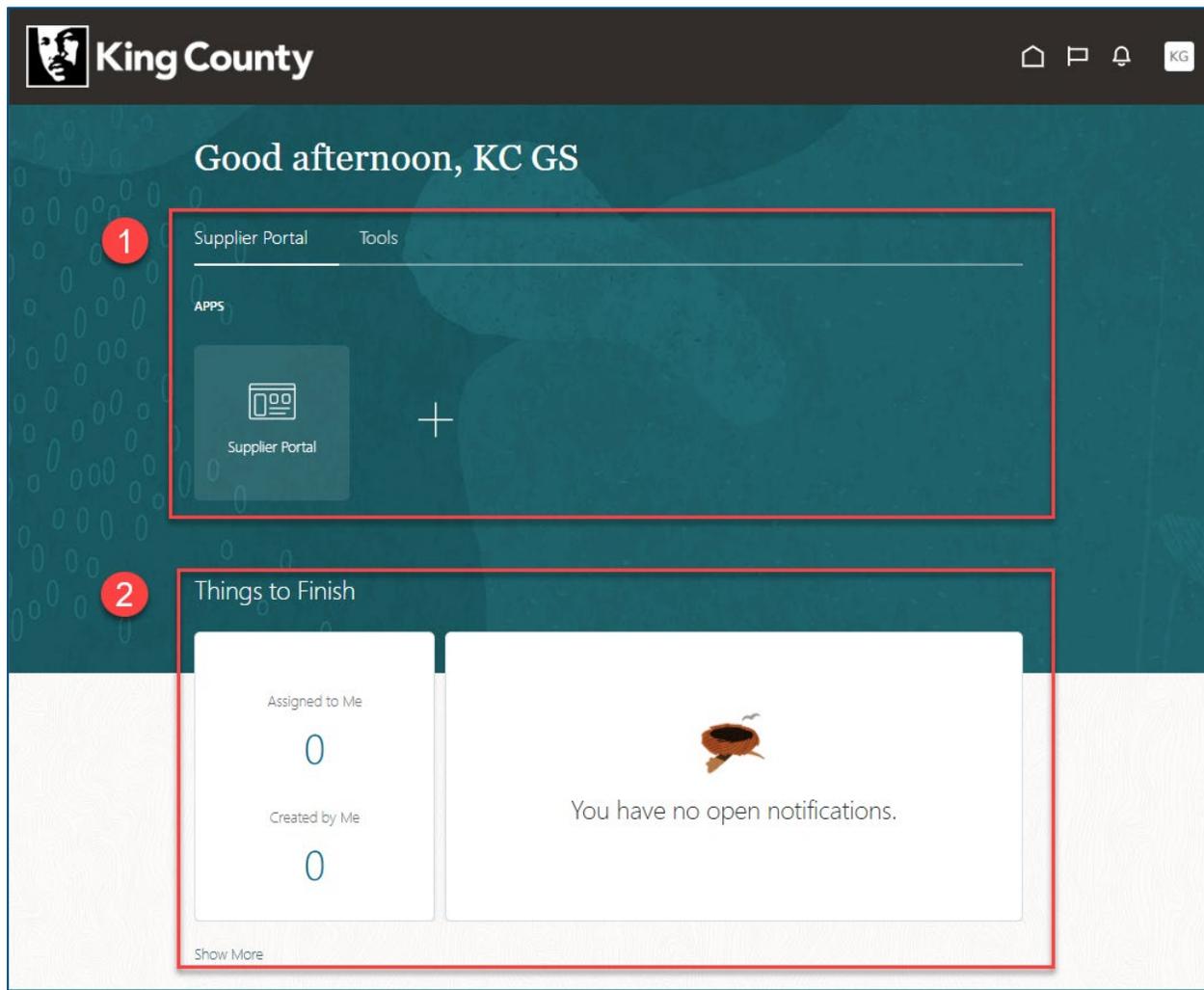
[Forgot Password](#)

Sign In

English

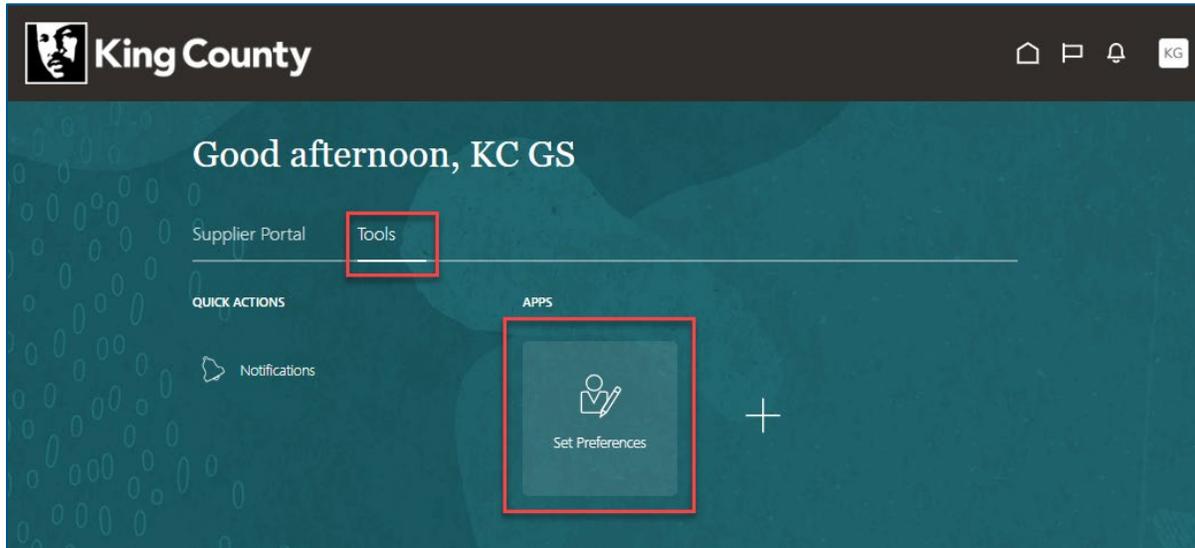
- DISCLAIMER:** The King County E-Procurement Supplier Portal is powered by Oracle. Oracle is transitioning its products to a new theme known as the Redwood theme which offers a new look and feel to the portal. Please note that while the theme of the supplier portal has changed, the *functionality* of the portal has not changed and the process to update your company profile will be as illustrated in this user guide.

- The home page will display.
- There are two areas on the home page:
 1. The home page will have two tabs with applications (APPS) listed under each:
 - Supplier Portal Tab
 - Tools Tab
 2. Things to Finish
 - View a list of your open notifications, and take required actions

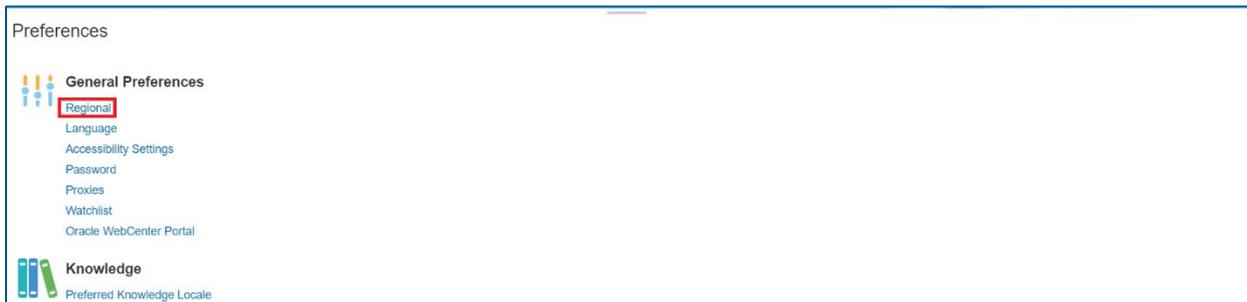


Set Preferences

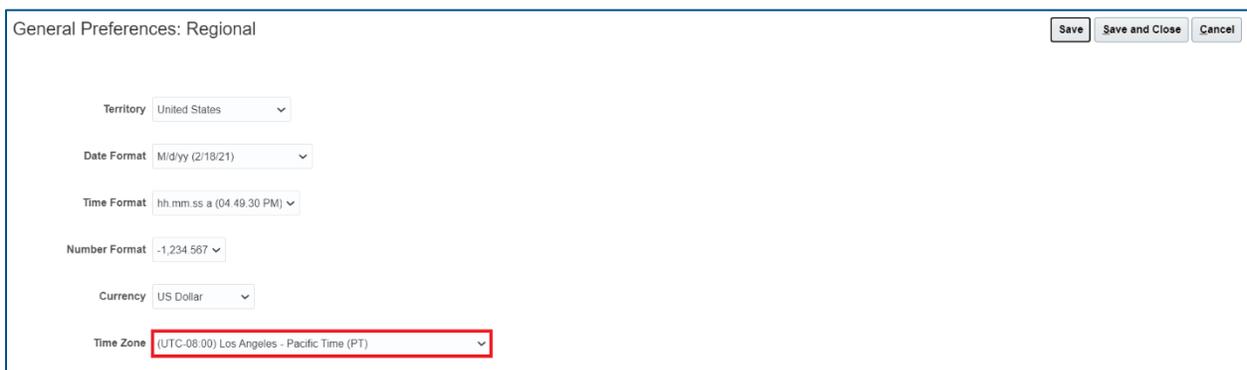
- Click the “Tools” tab, then select the “Set Preferences” application



- 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.

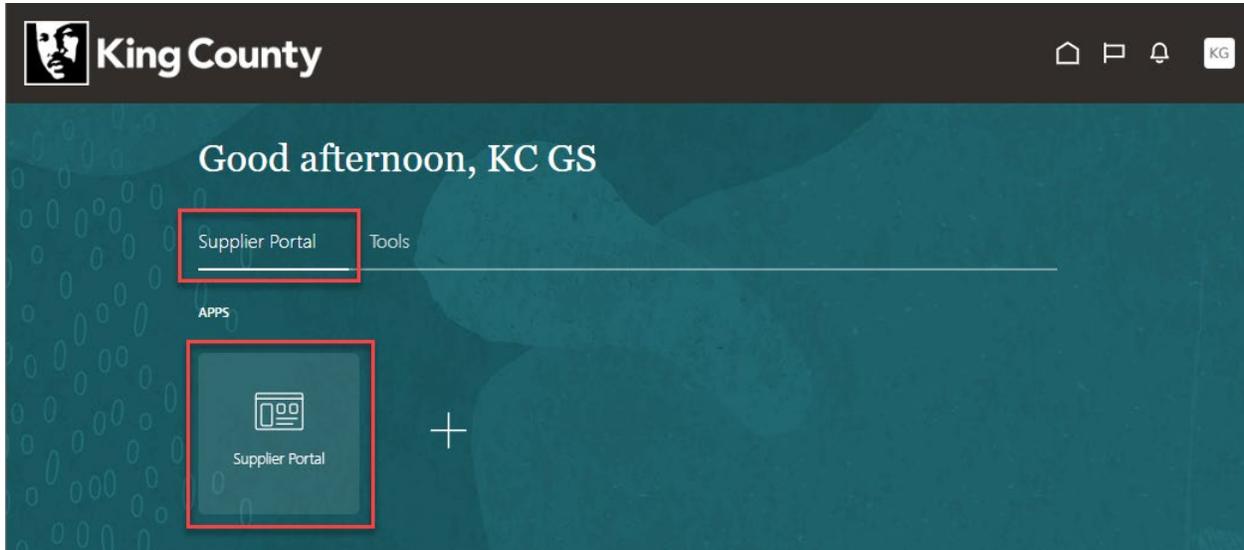
A **Prospective** supplier has access to County solicitations, can respond to solicitations and questionnaires but has not been authorized to receive payment from King County.

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

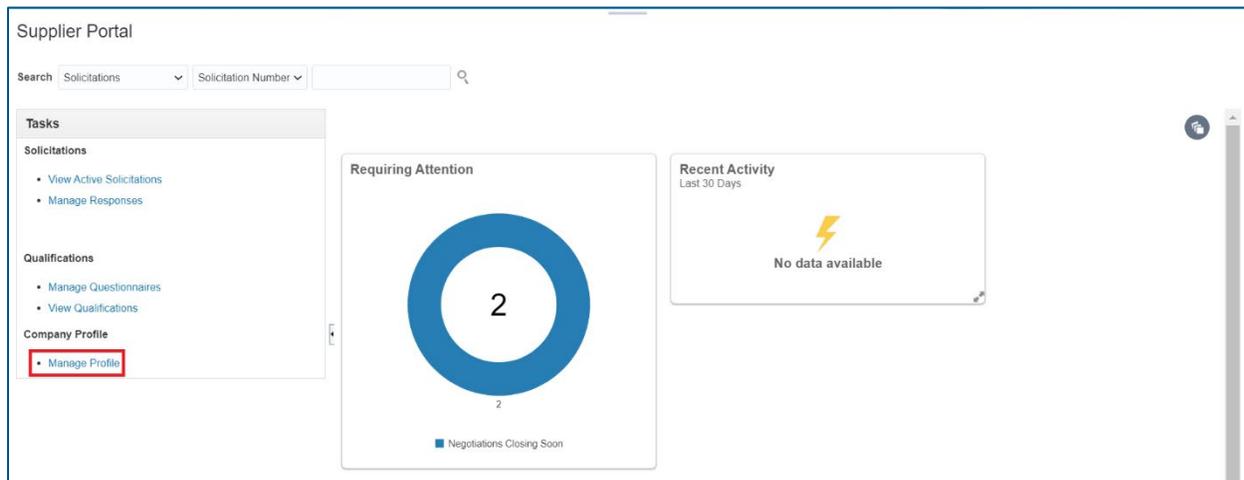
- Click the “Supplier Portal” tab, then the “Supplier Portal” application.



- 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.

Company Profile ⓘ Edit Done

Last Change Request 137013 Requested By Chmelik, Ryan Change Description
 Request Status Processed Request Date 1/26/21

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications NAICS Codes

General
 Supplier/Company Name Training Test Supplier Tax Organization Type Corporation
 Supplier Number 12249 Status Active
 Supplier Type Attachments W9

Identification
 D-U-N-S Number National Insurance Number
 SIC Corporate Web Site

Corporate Profile
 Year Established Chief Executive Title
 Mission Statement Chief Executive Name
 Principal Title
 Principal Name

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

Warning ✕

Making edits will create a change request for the profile. Do you want to continue?

Yes No

- **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.

Edit Profile Change Request: 2582067 Delete Change Request Review Changes Cancel

Change Description

Organization Details Tax Identifiers **Addresses** Contacts Business Classifications NAICS Codes

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



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

Edit Profile Change Request: 74001 Delete Change Request Review Changes Cancel

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications NAICS Codes

Actions View Format Freeze Detach Wrap

Category Name	Description
1114	Greenhouse, Nursery, and Floriculture Production
1119	Other Crop Farming

Organization Details

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

Edit Profile Change Request: 388028 Delete Change Request Review Changes Cancel

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications NAICS Codes

General

* Supplier/Company Name Tax Organization Type

Supplier Number Status

Supplier Type Attachments [IRS W9](#) + X

Identification

D-U-N-S Number National Insurance Number

- 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.

Edit Profile Change Request: 388028

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications NAICS Codes

General

* Supplier/Company Name: test Tax Organization Type: Corporation

Supplier Number: 14584 Status: Active

Supplier Type: Non-Profit Attachments: IRS W9 + x

- 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.

Attachments

Actions View + x

Type	* File Name or URL	Title	Description	Attached By	Attached Date
File	Choose File No file chosen			John Doe	3/29/21 11:27
File	naics-quick-reference.pdf	Test W9		anonymous	3/25/21 01:30

Rows Selected 1 Columns Hidden 1

OK Cancel

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

Edit Profile Change Request: 388028

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications NAICS Codes

General

* Supplier/Company Name: test Tax Organization Type: Corporation

Supplier Number: 14584 Status: Active

Supplier Type: Non-Profit Attachments: IRS W9 + x

Tax Identifiers

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

Edit Profile Change Request: 388028 Delete Change Request Review Changes Cancel

Change Description

Organization Details **Tax Identifiers** Addresses Contacts Payments Business Classifications NAICS Codes

Income Tax

Taxpayer Country: United States

Tax Reporting Name:

Taxpayer ID: 111111a

Verification Date: m/d/yy

Federal reportable

Federal Income Tax Type:

Transaction Tax

Tax Country:

Tax Registration Type:

Tax Registration Number:

Addresses

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

Edit Profile Change Request: 141014 Delete Change Request Review Changes Cancel

Change Description

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications NAICS Codes

Actions View Format **+** Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
Main 1	302 W 50TH ST,NEW YORK, NY 10036,NEW YORK		Ordering, Remit to, RFQ or Bidding		Active

Columns Hidden: 3



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.

Edit Address: Test

* Address Name

* Country

* Address Line 1

Address Line 2

Address Line 3

City

State

* Postal Code

County

* Address Purpose Ordering
 Remit to
 RFQ or Bidding

* Phone

Fax

Email

Inactive Date

Status

To be an approved supplier with King County, you must add at least one Remit to and one Ordering address.

Additional Information

To streamline the approval process, please enter the following information.

Select your preferred method of communicating purchasing documents.

* Is this address your organization's tax reporting address?

If email/fax is different from above, enter an alternate value.

Contacts

- Click the "Contacts" tab.

Edit Profile Change Request: 74001

Change Description

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications NAICS Codes

Actions View Format + ✕ Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Admin, Supplier		kcctestsupplier@gmail.com		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
Bidder, Supplier	Bidder	kcctestsupplier1@gmail.com			<input checked="" type="checkbox"/>	Active

- Highlight the desired contact, click the pencil icon to edit an existing 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.

Edit Profile Change Request: 74001 Delete Change Request Review Changes Cancel

Change Description: Address Change

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications NAICS Codes

Actions View Format +  x Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Admin, Supplier		kctestsupplier@gmail.com		✓	✓	Active
Bidder, Supplier	Bidder	kctestsupplier1@gmail.com			✓	Active

- 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).

Edit Contact: Jane Doe

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

* Phone

Mobile

Fax

Email

Status

▲ Contact Addresses

Actions View Format X Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
Test	401 5TH AVE, SEATTLE, WA 98104, KING		Ordering; Remit to; RFQ or Bidding	Active

Columns Hidden 5

▲ User Account

To gain access to the King County E-Procurement Supplier Portal, a user account is required. Please check the option below to request a user account for this contact.

Account Status

User Name XYZTEST1ABC0126@GMAIL.COM

Roles Data Access

Click Actions then Select and Add to provide contacts with roles. Roles grant contacts access to complete tasks within the King County E-Procurement Supplier Portal.

Actions View Format X Freeze Detach Wrap

Role	Description
Supplier Bidder KC	Responds to invitations to bid, requests for proposals, requests for qualifications, requests for information, and supplier qualifi...
Supplier Self Service Administrator KC	Manages the profile information. Primary tasks include updating supplier profile information and creating user accounts to gra...

OK Cancel

- 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.

▲ User Account

To gain access to the King County E-Procurement Supplier Portal, a user account is required. Please check the option below to request a user account for this contact.

Account Status

User Name

Roles Data Access

Click Actions then Select and Add to provide contacts with roles. Roles grant contacts access to complete tasks within the King County E-Procurement Supplier Portal.

Actions View Format Freeze Detach Wrap

Role	Description
Supplier Self Service Administrator KC	Manages the profile information. Primary tasks include updating supplier profile information and creating user accounts to gra...

- 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	X			X
Supplier Bidder KC						X	X	X	X

Select and Add: Roles X

Search

Role Description

View ▼ Format ▼ Wrap

Role	Description
Supplier Bidder KC	Responds to invitations to bid, requests for proposals, requests ...
Supplier Self Service Administrator KC	Manages the profile information. Primary tasks include updating...

Rows Selected 1

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

Edit Contact: Jane Doe X

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

* Phone

Mobile

Fax

Email

Status

Contact Addresses

Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
Test	401 5TH AVE, SEATTLE, WA 98104, KING		Ordering; Remit to; RFQ or Bidding	Active

Columns Hidden 5

User Account

To gain access to the King County E-Procurement Supplier Portal, a user account is required. Please check the option below to request a user account for this contact.

Account Status

User Name XYZTEST1ABC0126@GMAIL.COM

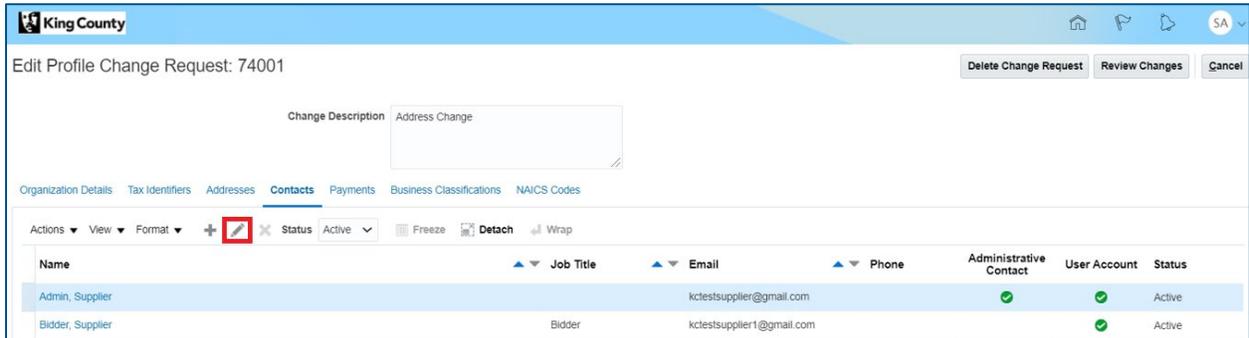
[Roles](#) [Data Access](#)

Click Actions then Select and Add to provide contacts with roles. Roles grant contacts access to complete tasks within the King County E-Procurement Supplier Portal.

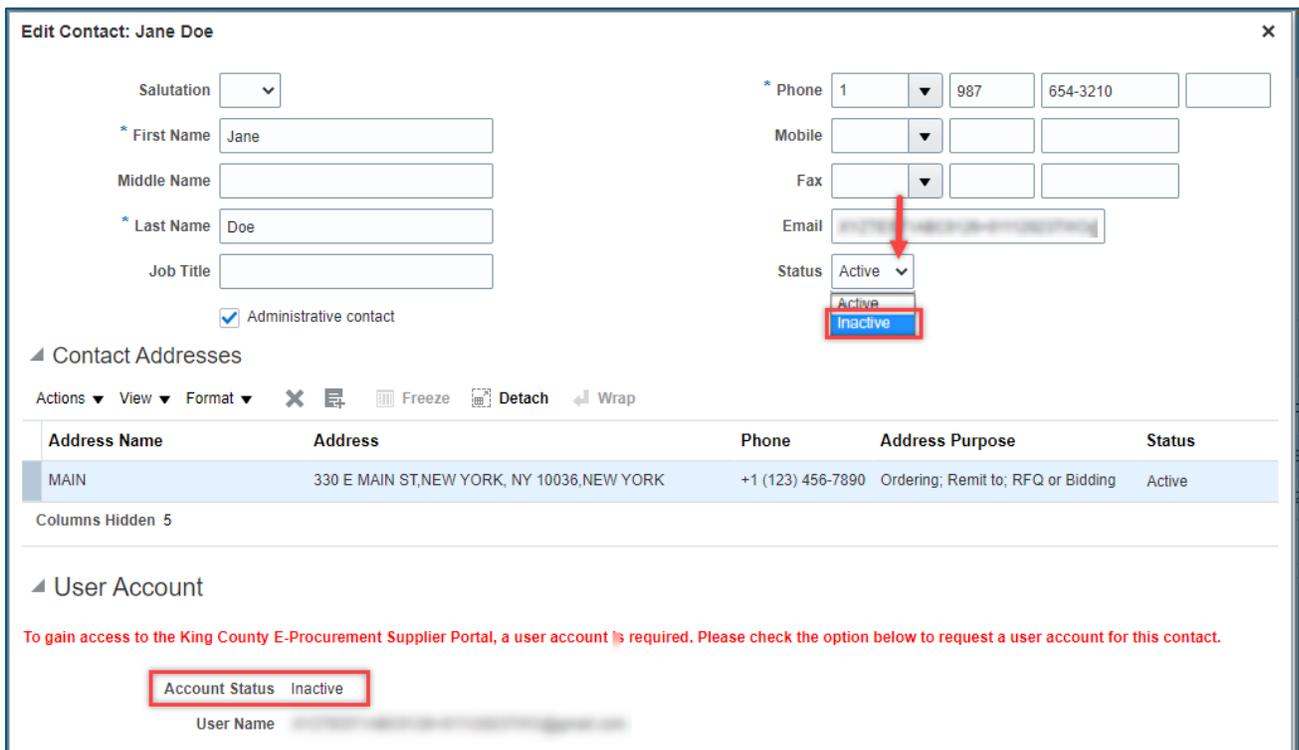
Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Role	Description
Supplier Bidder KC	Responds to invitations to bid, requests for proposals, requests for qualifications, requests for information, and supplier qualifi...
Supplier Self Service Administrator KC	Manages the profile information. Primary tasks include updating supplier profile information and creating user accounts to gra...

- 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 existing 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."

Edit Contact: Jane Doe ✕

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

* Phone

Mobile

Fax

Email

Status Active

▲ Contact Addresses

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
MAIN	330 E MAIN ST,NEW YORK, NY 10036,NEW YORK	+1 (123) 456-7890	Ordering; Remit to; RFQ or Bidding	Active

Columns Hidden 5

▲ User Account

To gain access to the King County E-Procurement Supplier Portal, a user account is required. Please check the option below to request a user account for this contact.

Account Status Inactive

User Name XYZTEST1ABC0126+01112023TWO@gmail.com

Roles Data Access

Click Actions then Select and Add to provide contacts with roles. Roles grant contacts access to complete tasks within the King County E-Procurement Supplier Portal.

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Role	Description
No data to display.	

OK Cancel

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

Edit Profile Change Request: 1576033

Change Description

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications NAICS Codes

Actions View Format + ✕ Status **Inactive** Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Doe, Jane		XYZTEST1ABC0126+01112023T...	+1 (987) 654-3210	✓	✓	Inactive

Columns Hidden 7

Business Classifications

- Click the "Business Classifications" tab.

Edit Profile Change Request: 74001

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments **Business Classifications** NAICS Codes

None of the classifications are applicable

Actions View Format + ✕ Freeze Detach Wrap

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confir On
5. OMWBE - SBE - Small...		Current					m/d/yy	None +			

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

Edit Profile Change Request: 74001

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments **Business Classifications** NAICS Codes

None of the classifications are applicable

Actions View Format + ✕ Freeze Detach Wrap

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confir On
5. OMWBE - SBE - Small...		Current					m/d/yy	None +			

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

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate
<input type="text"/>	<input type="text"/>				

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

Edit Profile Change Request: 74001

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments **Business Classifications** NAICS Codes

None of the classifications are applicable

Actions View Format + X Freeze Detach Wrap

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date
2. OMWBE - DBE - Dis		Current	OMWBE		<input type="text"/>	m/d/yy
5. OMWBE - SBE - Small...		Current				

NAICS Codes

- Click the "NAICS Codes" tab.

Edit Profile Change Request: 74001

Delete Change Request Review Changes Cancel

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications **NAICS Codes**

Actions View Format X Freeze Detach Wrap

Category Name	Description
5415 > 541511	Custom Computer Programming Services
5415 > 541512	Computer Systems Design Services
5415 > 541513	Computer Facilities Management Services
5415 > 541519	Other Computer Related Services

- 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.

Edit Profile Change Request: 74001 Delete Change Request Review Changes Cancel

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications **NAICS Codes**

Actions View Format Freeze Detach Wrap

Category Name	Description
5415 > 541511	Custom Computer Programming Services
5415 > 541512	Computer Systems Design Services
5415 > 541513	Computer Facilities Management Services
5415 > 541519	Other Computer Related Services

- 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 x

Search

Category Name Description

Search Reset

View Format Freeze Detach Wrap

Select	Category Name	Description
<input type="checkbox"/>	1111	Oilseed and Grain Farming
<input type="checkbox"/>	▶ 111110	Soybean Farming
<input type="checkbox"/>	▶ 111120	Oilseed (except Soybean) Farming
<input type="checkbox"/>	▶ 111130	Dry Pea and Bean Farming
<input type="checkbox"/>	▶ 111140	Wheat Farming
<input type="checkbox"/>	▶ 111150	Corn Farming
<input type="checkbox"/>	▶ 111160	Rice Farming
<input type="checkbox"/>	▶ 111191	Oilseed and Grain Combination Farming
<input type="checkbox"/>	▶ 111199	All Other Grain Farming

- 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.

Select and Add: Products and Services Categories

Search

Category Name Description

Search Reset

View Format Freeze Detach Wrap

Select	Category Name	Description
<input type="checkbox"/>	1111	Oilseed and Grain Farming
<input type="checkbox"/>	111110	Soybean Farming
<input checked="" type="checkbox"/>	111120	Oilseed (except Soybean) Farming
<input type="checkbox"/>	111130	Dry Pea and Bean Farming
<input checked="" type="checkbox"/>	111140	Wheat Farming
<input type="checkbox"/>	111150	Corn Farming
<input type="checkbox"/>	111160	Rice Farming
<input type="checkbox"/>	111191	Oilseed and Grain Combination Farming
<input type="checkbox"/>	111199	All Other Grain Farming
<input type="checkbox"/>	1112	Vegetable and Melon Farming

Columns Hidden 1

Apply OK Cancel

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."

Edit Profile Change Request: 74001 Delete Change Request **Review Changes** Cancel

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications **NAICS Codes**

Actions View Format X Freeze Detach Wrap

Category Name	Description
1114	Greenhouse, Nursery, and Floriculture Production
1119	Other Crop Farming
1121	Cattle Ranching and Farming
1122	Hog and Pig Farming
1123	Poultry and Egg Production
5415 > 541511	Custom Computer Programming Services
5415 > 541512	Computer Systems Design Services
5415 > 541513	Computer Facilities Management Services
5415 > 541519	Other Computer Related Services

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

Review Changes Submit Cancel

Change Description Example of Change Request: Updated IRS W9, Added a contact and NAICS codes.

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

✔ **Confirmation** ✕

Your profile change request 74002 was submitted for approval.

OK

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

Review Changes Submit **Cancel**

Change Description Example of Change Request: Updated IRS W9, Added a contact and NAICS codes.

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

Company Profile ⓘ

ⓘ There are profile changes that are not submitted. You must click the Edit button to submit the changes or click on the Delete Change Request button to discard.

Last Change Request	388028	Requested By	Test, test	Change Description	Example of Change Request: Updated IRS W9, Added a contact and NAICS codes.
Request Status	Draft	Request Date	11/12/21		

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications NAICS Codes



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."

Company Profile ⓘ

Last Change Request	74002	Requested By	Admin, Supplier	Change Description	Profile Change
Request Status	Processed	Request Date	7/13/20		

- End of process.