Supplier Registration User Guide

This guide will cover:

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

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procurement.web@kingcounty.gov
206-263-9400

1 Supplier Registration General Information

- Registration is required to receive solicitation notifications, to respond to solicitations, and to maintain your company information. All bids and proposals must be submitted through E-Procurement Supplier Portal.

- 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.

- There are six sections that are required to register; they are Company Details, Contacts, Addresses, Business Classifications, NAICS Codes, and Rosters and Certifications. Before you begin the registration process, gather the following information:
  - ☐ Completed IRS W-9
  - ☐ Company Tax Identification Number (TIN)
  - ☐ Company contact name(s), unique business email address(es), and phone numbers.
  - ☐ Address(es) for receiving purchase orders - must be physical address.
  - ☐ Address(es) for receiving payments.
  - ☐ Company certification details
    - King County Small Contractor & Supplier (SCS) certification
    - Washington State Office of Minority and Women's Business Enterprise certification(s).
  - ☐ NAICS Codes – identify all NAICS commodity codes relevant to your business. Refer to Identifying NAICS Codes User Guide to find a full list of possible NAICS Codes on the website www.naics.com/search.

2 Registration Portal

- Click the following link: **Register Now.**

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

  We recommend a desktop browser to complete registration.

▪ The King County "Supplier Registration" landing page will display. Begin your registration by entering your email to get a one-time access code. Select "Send Access Code."
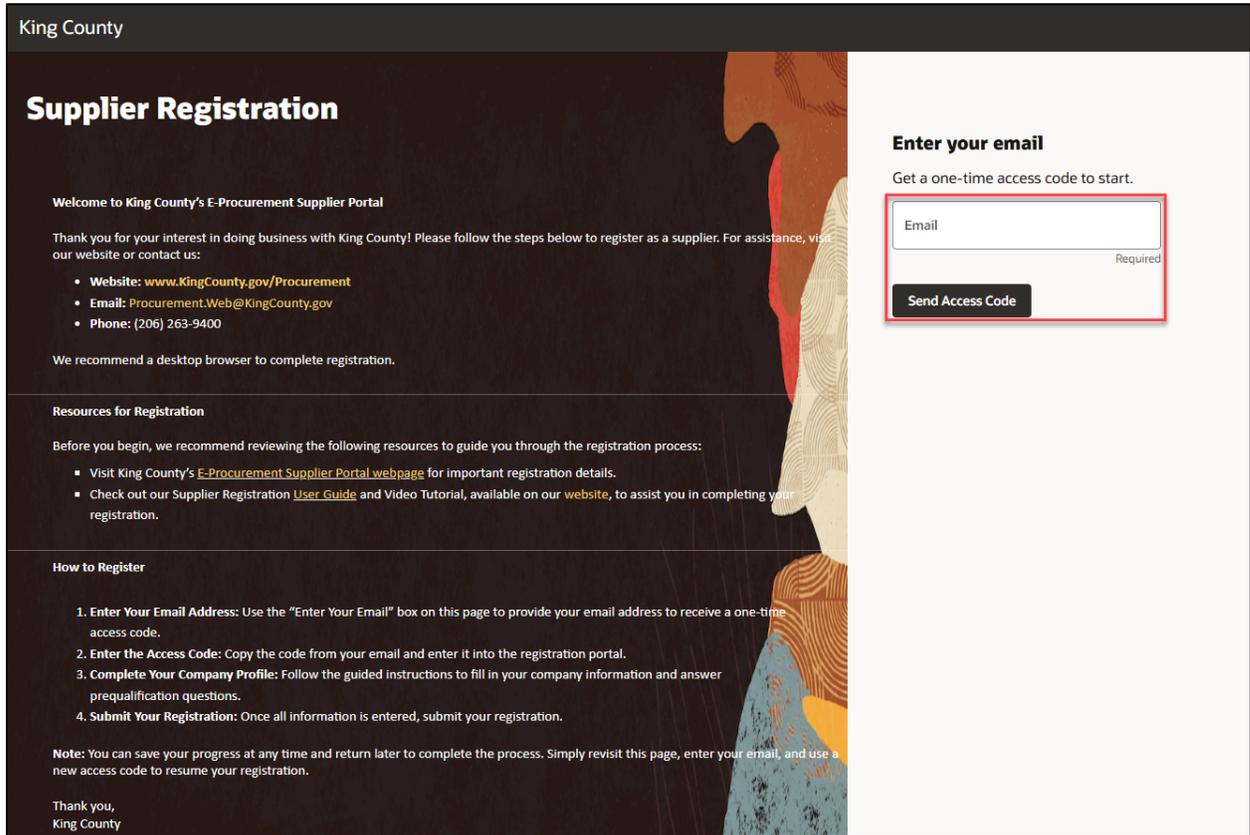
▪ Navigate to your email inbox. You will receive an email from "King County Finance and Procurement System" with the subject "Access Code for Your Supplier Registration." Copy the access code that was emailed. If you do not receive this email, check your junk email.
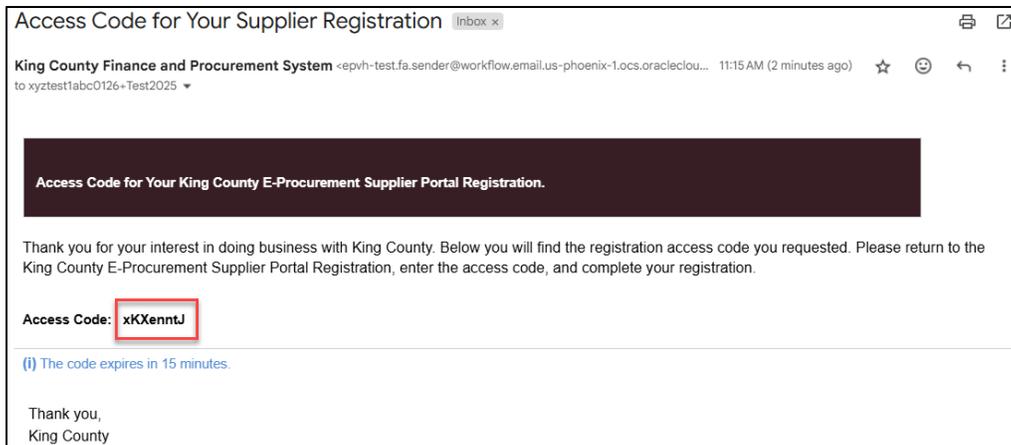
- Navigate back to the registration page, paste the code in the "Access Code" field. Select "Continue."

- If your access code has expired, or you did not receive one, select "Get a new code" to receive a new access code.

Note: You can save your progress at any time and return later to complete the process. Simply revisit the registration page, enter your email, and use a new access code to resume your registration.

3 Register Supplier

- Follow the guided instructions to fill in your company information and answer prequalification questions. On the right side of the page, you will see the different sections you will need to complete, and which step of the registration process you are on. Required fields are labeled "Required" or marked with an asterisk "*."

Company Details

- **"COMPANY DETAILS" REQUIRED SECTION:** In the "Company Details" section, enter registration details:

Field	Registration Details

Supplier/Company Name	▪ ***REQUIRED*** Enter the legal name for your company.
	    o Do not include "Doing Business As" (DBA) name.
	    o Field is limited to 40 characters. Abbreviate if organization name exceeds this length.

Website	▪ Optionally enter a corporate website URL.
Country	▪ ***REQUIRED*** Field will automatically default to United States. Select from the list of values if another County.
Taxpayer ID	▪ ***REQUIRED*** Enter the taxpayer identification number. o Do not include a TIN dash (digits only); enter in the correct format of 9 numbers only, no characters or spaces.
Tax Organization Type	▪ ***REQUIRED*** Select your federal tax classification from the list of values. Use the table below to help guide which option you select based on your IRS W9 selection. *(see table below)*
Supplier Type	▪ Optionally select from the list of values.
IRS W-9	▪ ***REQUIRED*** Use the "Drag and Drop" field to attach a completed W9. Complete an IRS W-9 form and save it to your computer. Navigate back to the King County registration page to attach it. Alternatively, you can select on "Drag and Drop" to open a file explorer. Locate the file you want to attach, select that file, then select "Open."

Table embedded within Tax Organization Type row:

IRS W9 Category		E-Procurement Tax Org Type
Individual/Sole Proprietor		Individual
C corporation		Corporation
S corporation		Corporation
Partnership		Partnership
Trust/Estate		Individual
LLC	C	Corporation
	S	Corporation
	P	Partnership

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- Complete all the required fields. Once you have attached your W-9, it will display the attachment on your company details page. Select "Continue" to navigate to the next section.

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Contacts

- **"CONTACTS" REQUIRED SECTION**: The "Contacts" page will display. Enter contact details. Registration communications will be sent the contact(s) listed. Required fields are labeled "Required" or marked with an asterisk "*."

> Note: there is no limit on the number of contacts under the company profile. User roles can be assigned to specify the responsibilities of each contact.

> 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 email used to begin registration will automatically populate in the "Email" field for the first contact. Verify it is correct or update it if needed.

- Each contact will automatically default to specific settings; review and update each setting based on the access and permissions each contact requires.

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- Administrative contacts will receive general communications from King County. This setting does not establish permissions in the portal. Select "Yes" or "No" to indicate if the contact is an administrative contact.

- The user account option will provide online access to supplier transactions and self-service tasks in the E-Procurement supplier portal. Select "Yes" or "No" to indicate if the contact needs a user account.

  o If a user account is assigned, the contract will receive two default roles: "Supplier Self Service Administrator KC" and "Supplier Bidder KC." Unselect the checkbox if the contact should not have a specific role.

- Below is a matrix of the roles and the access it grants each contact.

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

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- To add additional contacts, select the "+ Add Another Contact" option. Otherwise, select "Continue" to navigate to the next section.

Note: you can "Edit" or "Delete" a contact by clicking on the pencil (edit) or trash icon (delete).

Addresses

- **"ADDRESSES" REQUIRED SECTION:** The "Addresses" page will display. At least one address is required to register your company. Required fields are labeled "Required" or marked with an asterisk "*."

Note: there is no limit on the number of addresses under the company profile. A listed contact can be assigned to each address.

Supplier Registration

Addresses
Enter at least one address.

Instructions: To become an approved supplier with King County, please ensure you add both a "Receive Purchase Orders" address and a "Receive Payments" address. Note that you can use the same address for both purposes. At least one address is required to register your company. Please also complete the "Additional Information" section below.

- The **"Receive Purchase Orders"** address must be a physical street address; Post Office (P.O.) Boxes are not accepted.
- The **"Receive Payments"** address can be either a physical street address or a Post Office (P.O.) Box.

Address 1

Company Details

Contacts

Addresses

Business Classifications

NAICS Codes

Rosters and Certifications

- Enter a name for the address and complete all required fields.

  o A phone number is required for each address.

- Select the contacts that are associated with the address you have entered.

- Select the "Address Purpose" (options are displayed next to the address name field):
  o "**Receive Purchase Orders:**" address will be used for purchase orders. Address must be a physical street address; Post Office (P.O.) Boxes are not accepted.
  o "**Receive Payments**": address will be used for invoicing. Address can be either a physical street address or a Post Office (P.O.) Box.

- o **"Bid on RFQs":** address will be used for quotes. Address can be either a physical street address or a Post Office (P.O.) Box.

> Note: to become an approved supplier with King County, please ensure you add both a "Receive Purchase Orders" address and a "Receive Payments" address. You may use the same address for both purposes.

- Complete the "Additional Information" section at the bottom of the addresses page. You may need to scroll down to complete this section.

- Under "Additional Information," you can optionally select the preferred method of communicating purchasing documents by clicking the dropdown menu and selecting the "Email," "Fax" or "None" option. You must indicate if the listed address is your organization's tax reporting address by clicking the dropdown menu and selecting "Yes" or "No".

- If you need to add more addresses, select the "+ Add Another Address." When all addresses are entered, select "Continue" to navigate to the next section.

Note: you can "Edit" or "Delete" an address by clicking on the pencil (edit) or trash icon (delete).

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 each certification that applies to your company. If no business classifications apply to your company, select the "None of the classifications are applicable" from the dropdown list.

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- Required fields are labeled "Required" or marked with an asterisk "*."

- One certification is allowed per selection. Repeat process for each certification that applies to your company.

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- Use the "Classification" drop-down to select the appropriate classification. Once a classification is selected, select a "Certifying Agency" along with other appropriate fields.

- Use the "Drag and Drop" field to attach a copy of the certification. Alternatively, you can select on "Drag and Drop" to open a file explorer. Locate the file you want to attach, select that file, then select Open. Once you have attached your certificate, it will display the attachment on the business classifications page.

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

- To add additional certifications, select the "+ Add Another Business Classification" option or select "Continue" to navigate to the next section.

Note: you can "Edit" or "Delete" a classification by clicking on the pencil (edit) or trash icon (delete).

NAICS Codes

- **"NAICS CODES" REQUIRED SECTION:** The "NAICS Codes" page will display.

  - A NAICS Code stands for the North American Industry Classification System is the standard used by Federal agencies for classifying businesses based on their primary activity.

  - Identification and selection of NAICS codes are critical components to companies wanting to do business with King County and establishes the solicitation (formal and informal) notifications and invitations received by your company.

- Enter all the appropriate NAICS Codes for all the products and services your company sells or provides or for any industry which may relate to solicitations your firm may be interested in. **At least one code is required to complete registration**.

> Note: IMPORTANT - NAICS codes selected will determine which solicitations you are invited to/receive notifications. Refer to Identifying NAICS Codes User Guide to find a full list of possible NAICS Codes on the website www.naics.com/search.

- Use the "Search by category or description field" to search a category code or description then click enter. Note that the search field does not require the full category code or description, but does require that what is entered is an exact match.

- 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.

- Use the scroll bar on the right hand side of the search results. Scroll down to see additional search results.

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

- Once a code is selected, it will be highlighted and the option to "View Selected" and "Clear Selected" will appear.

- Click on "Clear Selected" to delete all of the NAICS codes you have selected and start over.

- Use the "View Selected" option to confirm or modify the list of NAICS Codes selected.

- Delete a NAICS code by selecting the trash icon. Once confirmed, select the "X" icon to exit the view and return to the NAICS Codes page.

- Add all the applicable NAICS codes. Select "Continue" to navigate to the next section

Rosters and Certifications

- **"ROSTERS AND CERTIFICATIONS" REQUIRED SECTION:** the "Rosters and Certifications" page will display. You will answer additional questions related to the Consultant (Architecture and Engineering) and Small Works (Construction) Rosters, Sustainable Purchasing Certifications, and Small Contractor and Supplier Certification (SCS).

- Rosters are used to award contracts for small capital projects. Roster contracts are not advertised; only roster members may be invited to participate. King County recommends you opt into rosters (select Yes) to streamline future processes.

- The "Rosters and Certifications" page consists of 4 sections. Each section contains questions that are related to the individual area. Answer each question using the radial dials and click "Next Section" in the bottom left corner to proceed to the next section.

- Answer every question in each section. The answer to some questions may create additional questions. For example, when you answer "Yes" to indicate that your firm has one or more sustainable purchasing certifications, additional questions will appear.

- Some questions will also indicate that you need to attach documents if you select "Yes." When you select "Yes," the "Add Attachments" option will display.

- Select "Add Attachments." On the right side of the page, you will see the "Drag and Drop" box. You can drag the file into the "Drag and Drop" box. Alternatively, you can select on "Drag and Drop" to open a file explorer. Locate the file you want to attach, select that file, then select "Open." You will see your attachment listed after attaching it.

- You can remove an attachment by selecting the "X" icon on the right side of the attachment. Once the attachments are confirmed, select the "X" icon on the upper right to exit the view and return to the questions page.
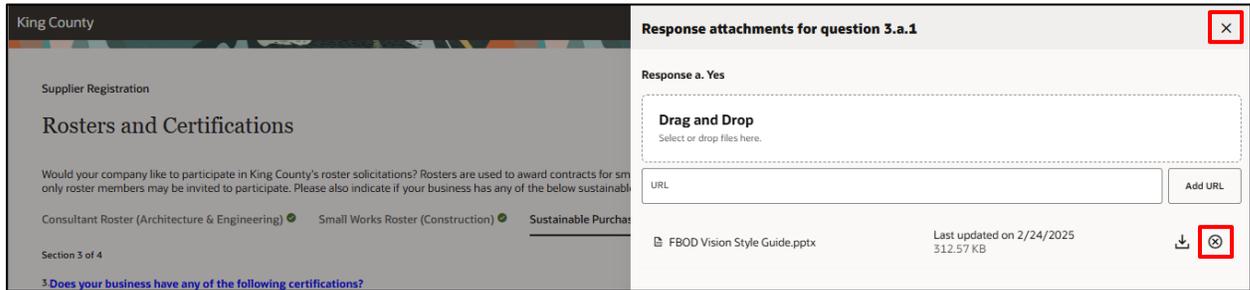
- A green checkmark will appear for each section when all questions are answered.
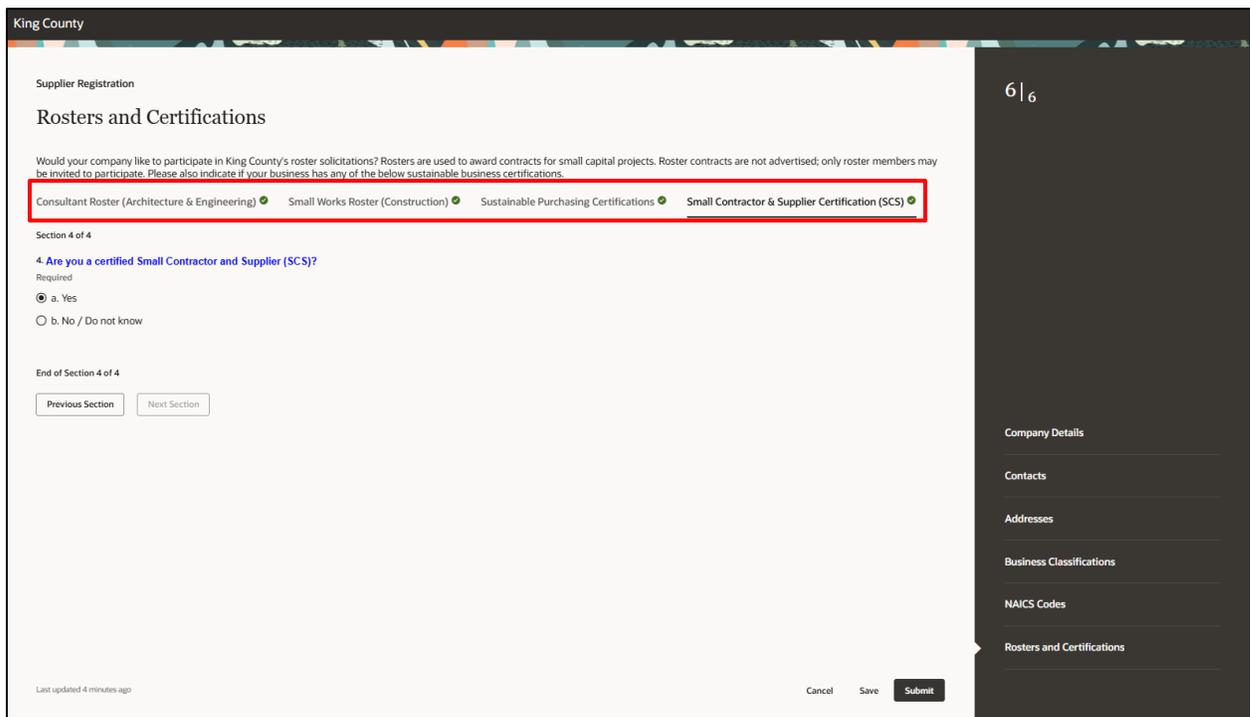
Review and Submit Supplier Registration

- Optionally review the information you entered for each section.

- Select "Submit" when all required information has been provided.

- A "Success" window will display confirming that your registration request was submitted. Review the information on "Next Steps" page to complete your registration in addition to supplemental information on doing business with King County.
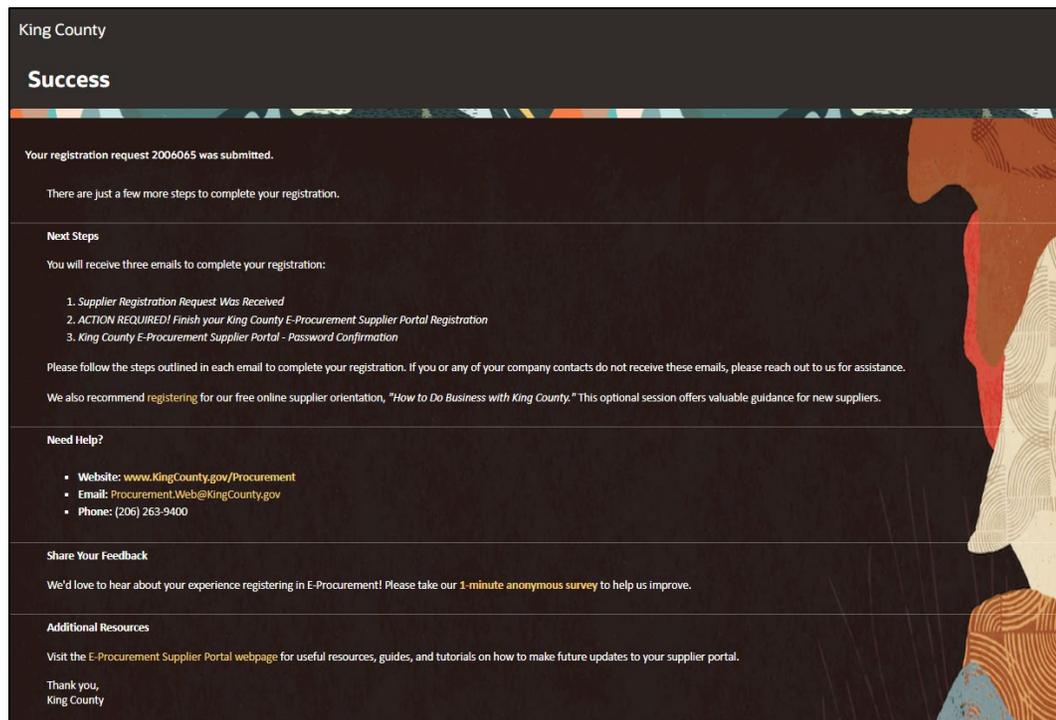
Registration Emails

- **REGISTRATION EMAILS REQUIRED ACTION: do not skip – action is required to finalize your supplier registration.**

- Once the registration is submitted, the company contacts that were created will receive three emails to their registered <u>email</u> account (outside E-Procurement Supplier Portal). Login to the contacts's <u>email</u> account is required.

- **Email 1 of 3:** The first email you will receive will be from "King County Finance and Procurement System" with the subject "Supplier Registration Request Number Was Received." This email is a confirmation that your registration request was received. No action is required for this email.
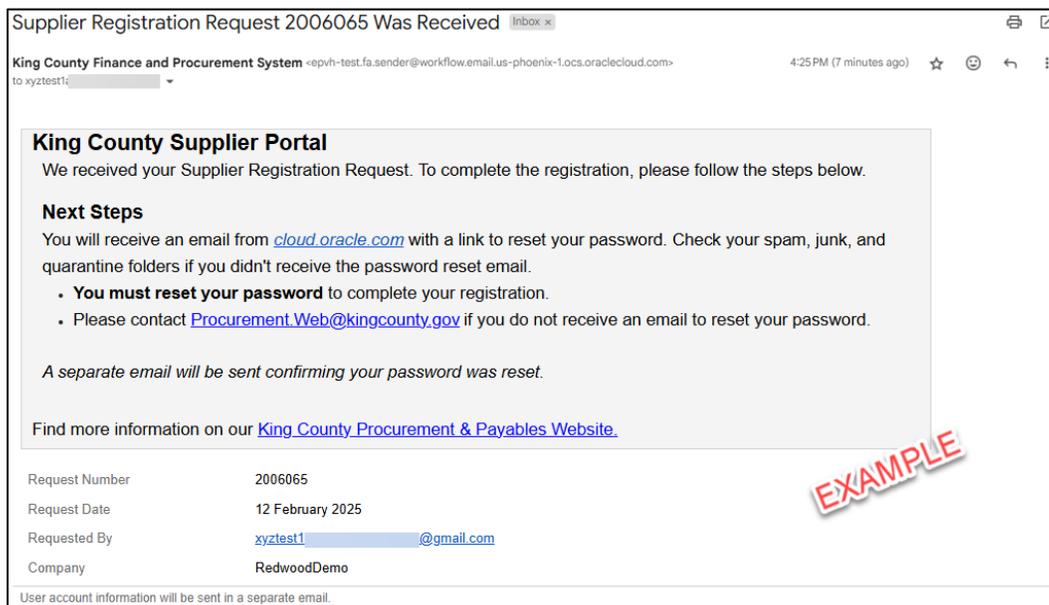
- **Email 2 of 3:** The second email you receive will be from *cloud.oracle.com* with a link to reset your password. Follow the prompts in the email to reset your password. Each contact with a user account will receive an email to reset their password. Check your spam, junk, and quarantine folders if you didn't receive the password reset email. **You must reset your password** to complete your registration. Please email procurement.web@kingcounty.gov if you do not receive an email to reset your password.

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- Set and confirm your password, then select "Submit."

- You will be prompted to login to the supplier portal. **Your User ID will be your email address used to register.**

- **Email 3 of 3:** The third email you receive will be from *cloud.oracle.com* confirming that your password was reset. Once the password has been reset, you will receive a password reset confirmation email. No action is required for this email.

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

King County E-Procurement Supplier Portal – Password Reset Confirmation Inbox ×

epvh-test.fa.sender@workflow.email.us-phoenix-1.ocs.oraclecloud.com   4:41PM (2 minutes ago)
to xyztest1

Dear Jane Smith,

The password for your King County E-Procurement Supplier Portal Account - xyztest1._____@gmail.com - was successfully changed.

If you made this change, you do not need to do anything more.

If you did not request a password reset or if you need assistance, contact Procurement & Payables via email at Procurement.Web@kingcounty.gov or phone at (206)263-9400. You can also visit the Procurement & Payables website at https://kingcounty.gov/procurement for more information.

Thank You,
King County

- **Congratulations!** You are now registered as a supplier with King County. You can now access, view, and respond to solicitations in the E-Procurement Supplier Portal. Review and refer to additional E-Procurement Supplier Portal website resources on:
    - "Identifying NAICS Codes User Guide"
    - "Supplier Profile Maintenance User Guide"
    - "Supplier Reset Password User Guide"
    - "Supplier Questionnaire User Guide"
    - "Supplier Solicitation User Guide"

- End of Registration process.