

# **Supplier Portal**

Instructions Guide(revised 11/23/20)







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### Glossary

Term	Definition
Supplier Portal	This is where outside entities register online and create an account. Once an account is created, a supplier can view and respond to events.
Suppliers	Any entity that registers in the Supplier Portal.
Vendors	Entities that do business with the County. After a supplier has registered, Fiscal AP will create them as vendor if they are selected for an award or a contract.
Events	Events can be bids, RFPs, RFQs, RFBs, or any other solicitations.
Event Preview Date	Open date for suppliers to view the event but not be able to respond.
Event Q and A Dates	The dates that suppliers can submit questions regarding an event.
Event Open Date	Date that suppliers can enter responses.
Event Close Date	Date that suppliers can't enter responses after it passes.
Articles	The high level grouping of multiple terms.
Terms	The terms and conditions language of an event or contract.



### **Supplier Portal**

In this guide, you will be introduced to the following processes:

- Supplier Registration
- Update Supplier Profile
- To Create a new Location/ Contact to Supplier
- Browse Open Events
- To Inquire on an Event
- Ask a Question
- Respond to an Event
- Submit a No Bid Response
- Update Response to an Event

#### **Supplier Registration**

New Suppliers will go to the **Supplier Portal** and register. Suppliers will have the ability to pick their diversity codes, upload their W9 and select their commodity codes.

#### **To Register using Supplier Portal**



In your browser go to <u>https://ccprod-</u> Im01.cloud.infor.com:1442/Imscm/SourcingSupplier/html/SourcingSupplier?csk.S upplierGroup=CUYA&csk.CHP=LMPROC

1. The Supplier Portal home page appears.



- 2. In the top right corner, click Anonymous Anonymous.
- 3. Click the Register link.





The Supplier Registration, Terms and Conditions page appears.

Scroll to the bottom and click to checkmark the Accept the Terms and 4. Conditions check box.



#### 5. Click the Next button.

The Supplier Registration, Contact Information page appears.

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- a. In the User Name field, type a user name you will use in the portal.
- b. In the Password field, type user defined password. The following are the requirements for passwords:
  - Uppercase letters A through Z
  - Lowercase letters a through z
    Base 10 digits (0 through 9)



-Minimum length of 8 characters -password expires every 90 days

- c. In the Confirm Password field, retype user defined password.
- d. In the First Name field, type first name.
- e. In the Last Name field, type last name.
- f. In the middle Phone Number field, type phone number.
- g. In the Email Address field, type email address.
- h. Fill in other fields, as applicable.

#### 6. Click Next.

The Supplier Registration, Company Information page appears.

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- a. In the Company Name field, type company name.
- b. In the Tax Id Type field, select the appropriate tax id type.
- c. In the Tax Id field, type federal EIN number or appropriate tax id type.
- d. In the Country field, select United States of America.
- e. In the Address Line 1 field, type the appropriate address.
- f. In the Address Line 2-4 fields, type additional address information, as appropriate.
- g. In the City field, type the city.
- h. In the State Province field, select the state.
- i. In the Zip Code field, type the zip code.
- j. Select the checkbox for Check If Remit To Address Is The Same As Mailing Address.

Note: Only select this checkbox if the remit to is the same as the mailing address. If it is not, complete the Remit to Name and Address section.



k. Fill in other fields, as applicable.

#### 7. Click the Next button.

The Supplier Registration, Diversity Codes page appears.



- a. Click the Helper List icon 🗐 on the top left corner of the screen.
- b. From the Active Diversity Codes screen, select the appropriate diversity codes.
- c. Click the Attach to Supplier button.
- d. Click the Close button.

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8. Click the Next button.

The Supplier Registration, Questions page appears.

 For question 1 "Can you attach your W9", in the Answer field, select the appropriate response.

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- b. If you answered Yes to question 1, follow the steps below to attach the W9.
  - i. In the Attach document field, click the attach icon 🔳.
  - ii. In the Attach document screen, click the file icon 🖳.



- iii. Navigate in your local PC and select a document.
- iv. Click the Open button.
- v. Click the **OK** button.

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#### 9. Click the Next button.

The Supplier Registration, Commodity Codes page appears.

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- 10. Click the **Helper List** icon is on the top left corner of the screen.
- 11. From the **Commodity Codes** screen, select your applicable commodity code(s).
- 12. Click the Attach to Contact button.
- 13. Click the **Close** button.

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14. Click the Next button.

The Supplier Registration, Proxy Notifications page appears.



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- **15.** Click the **Add** icon  $\boxed{10}$  on the top left corner of the screen.
- **16.** From the **Proxy Notification** screen, fill in all applicable fields to add additional email addresses to receive account notifications.

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#### 17. Click the Next button.

The Supplier Registration, Status page appears.

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	<ul> <li>you have not inserved an imparted questions as part of the regaritation process.</li> </ul>

18. Confirm that your Registration status is complete.

Note: If the Registration status shows as Not complete, review all tabs to ensure all applicable information has been submitted.

- 19. Note your Supplier Number \_\_\_\_\_
- 20. Click the Home icon in the top left corner of the screen.
- 21. Review the registration email that is sent to the registration email you provided.

**Note:** You must log out and log back in to set up your security questions. These questions are required if you ever forget your password.



- 22. In the upper right corner, click your login name.
- 23. Click Sign out.
- 24. In the upper right corner, click Anonymous Anonymous.
- 25. Click Sign in.
- 26. Enter your User Name and Password and click Login.
- 27. You will be prompted to answer 5 security questions. Type the response for **ALL FIVE** questions and click the **save** icon.

Note: Security questions will enable you to reset your password in the future when needed.

28. Click the Home icon in the upper right corner of the screen.

#### **Expected Results:**

• New Supplier is registered and received confirmation email.

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Thank you for registering	
A CHEVRONE	. *
Once your registration status is complete, you will be able to respond to open events and receive notifications fo wants based on your registered commodity enter. The tailowing user name has been established based on you registration details.	
Test/Training	

#### **Update Supplier Profile**

Suppliers can make updates to their profile as needed if they are able to login in.



#### To Update Supplier Profile

- 1. Log into the Supplier Portal.
- 2. Click the My Account tab.
- 3. Click Update Account Information.



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4. Update account information as applicable. Use the tabs on the left side of the screen to view and update additional account information.

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5. Click the **Save** button on the top left corner of the screen.

**Note**: The **Save** button will appear after you have updated information in at least one field and clicked into another field.

#### **Expected Results:**

• Supplier updated their supplier profile.

#### **Create New Supplier Contact and Location**

Suppliers can create new contacts and locations for their supplier profile.

### To Create a New Contact and Location for Supplier



- 1. Log into the Supplier Portal.
- 2. Click the My Account link.
- 3. Click the Update Account Information link.



- 4. Click the My Contact tab on the right side of the screen.
- 5. To create a new contact, click the Create Contact button.
  - a. In the User Name field, type a user name you will use in the portal.
  - b. In the Password field, type a user defined password.
  - c. In the Confirm Password field, retype the user defined password.
  - d. In the First Name field, type the first name.
  - e. In the Last Name field, type the last name.
  - f. In the middle Phone Number field, type the phone number.
  - g. In the Email Address field, type the email address.
  - h. Fill in other fields, as applicable.
- 6. Click the Mailing Address tab.
  - a. In the Country field, select United States of America.
  - b. In the Address Line 1 field, type the appropriate address.
  - c. In the Address Line 2-4 fields, type additional address information, as appropriate.
  - d. In the City field, type the city.
  - e. In the State Province field, select the state.
  - f. In the Zip Code field, type the zip code.
- 7. Click the Next button.
- 8. Click the Helper List icon on the top left corner of the screen.
- From the Commodity Codes screen, select your applicable commodity code(s).
- 10. Click the Attach to Contact button.
- 11. Click the Close button.
- 12. Click the Next button.
- 13. Click the Add icon on the top left corner of the screen.
- 14. From the **Proxy Notification** screen, fill in all applicable fields to add additional email addresses to receive account notifications.
- 15. Click the Next button.



#### Expected Results:

• Supplier created a new contact.

#### **Browse Open Events**

Suppliers will log into Supplier Portal and submit responses, update existing responses, or ask questions to the Buyers.



- 1. Log into the Supplier Portal.
- 2. Click the Browse Open Events link on the left side of the screen.



The Open Events screen will open.

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- 3. Search for an event that you would like to view.
- 4. Double-click the event to open it.
- 5. Review the event details using the tabs on the left side of the screen.
- **Note:** From the **Event Summary** screen, you can ask a question about the event, submit a no bid response, or respond to the event.



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#### To Inquire on an Event

Suppliers can search for events, including historical events, by following the instructions below.



- 1. Log into the **Supplier Portal**.
- 2. Click on Events, then click Search Events.
- 3. You can use any of the available fields to search. For example, in the **Commodity Search** field, type the commodity code you want to see events related to.
- 4. Review the events showing.
- 5. Double-click on the event.

#### Ask a Question

Suppliers will log into Supplier Portal and submit responses, update existing responses, or ask questions to the Buyers.



#### To Ask Question

- 1. Log into the Supplier Portal.
- 2. Click the Browse Open Events link on the left side of the screen.
- 3. Search for an event that you would like to view.
- 4. Double-click the event to open it.
- 5. Review the event details using the tabs on the left side of the screen.



#### 6. Click the Ask A Question button.

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Summary		
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- 7. In the **Question** field, type your question.
- 8. Click the Save icon .
- 9. Click the **Back** arrow on your browser.

#### **Expected Results:**

• Question is asked and sent to the contact on the event.

#### Respond to an Event

Suppliers will able respond to any open event. Supplier must click submit after entering responses.

#### To Respond to Event

- 1. Log into the **Supplier Portal**.
- 2. Click the Browse Open Events link on the left side of the screen.
- 3. Search for an event that you would like to view.
- 4. Double-click the event to open it.
- 5. Review the event details using the tabs on the left side of the screen.
- 6. Click the **Respond Now** button.

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The Event Response screen appears.



- 7. Select the Terms and Conditions checkbox.
- 8. Click the Next button.

The Line Responses screen appears.

9. In the Line Responses screen, click the Respond hyperlink on the right side of the screen.



10. Fill in all applicable fields.

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11. Click the Next button.

The Summary Screen Appears.

12. Click the Event Response button.

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#### 13. Click the Next button.

The Question Responses screen appears.



14. Fill in all question and answer fields. If a question requires an attachment, add the attachment.



- 15. Click the Next button.
  - The Response Attachments screen appears.
- 16. In the Response Attachments screen, click the Create button.



17. In the Attachment field, click the File icon.

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- 18. Select the file to upload.
- 19. Click **Open** button.
- 20. Click the OK button.
- 21. Click the **Next** button. *The Submit Response screen appears.*
- 22. Ensure your response is complete.



Note: If your response is **incomplete**, review all tabs to ensure all applicable information has been submitted.

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- 23. Click the Submit button.
- 24. Click the Home button on the top left corner of the screen.

#### **Expected Results:**

• Responded to sealed event in Supplier portal.

#### Submit a No Bid Response

If a supplier chooses not to bid on an event, they are encouraged to enter a no bid response to give a reason for the no bid.

### To Submit No Bid Response to Event

- 1. Log into the Supplier Portal.
- 2. Click the Browse Open Events link on the left side of the screen.
- 3. Search for an event that you would like to view.
- 4. Double-click the event to open it.
- 5. Review the event details using the tabs on the left side of the screen.
- 6. Click the No Bid button.

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7. In the No Bid Reason field, select the appropriate reason code.

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8. Click the OK button.

#### **Expected Results:**

• Submitted a No Bid response.

#### Update Response to an Event

Supplier will have the ability to update their responses after they are submitted as long as the event has not closed.

### To Update Response to Event



- 1. Log into the Supplier Portal.
- 2. Click the Events link on the top of the screen, then click My Responses.



- 3. Select the Responses Open for Award tab.
- 4. Find the event response you want to update.
- 5. Right-click on the event and click Modify Response.
- 6. Click the Yes button on the Confirmation Required window.
- 7. Click the Unsubmitted Initial Responses tab.
- Note: If the response you are editing is a **Best and Final** or **Pricing** response, click the appropriate tab.
- 8. Right-click on the response you want to edit.



- 9. Click Update. The Event Response screen appears.
- **10.** Update your response as applicable.
- 11. On the Submit Response screen, click the Submit button.
- 12. Click the Home button on the top left corner of the screen.

#### **Expected Results:**

• Response modified by supplier.

#### **Reset Account Password**

If you forget your account password, you can reset it. You must have answered all the security questions when you registered your account in order to complete the password reset process.

#### **To Reset Account Password**

1. From the login screen, click the Forgot your Password? link.



2. Type your User Name and click Reset.





3. Answer your security question and click Reset.

**Note:** If your security question does not display, it was not set up properly during registration and you are unable to reset your password. To have your password reset, go to the Supplier Portal Home Page and click **Contact Us**.

- You will be logged into the system and prompted to type in a new password. Type the new password in both the New Password and Confirm New Password fields.
- 5. Click the Save icon.

teset Password		
Actions.	J Options J	
	Please overwrite the password values below, then press save	
	* Please enter new password and confirm	
	* Click save to complete password reset	
New Password:	1111111111111	

#### **Expected Results:**

• Password reset by supplier.

#### Forgot User Name

If you forget your Supplier Portal user name, you can have it emailed to the account you registered with.

#### **To Retrieve User Name**

1. On the Supplier Portal Home Page, click Forgot User Name.



- 2. Enter the email address you registered with. You will be prompted to enter the email address twice.
- 3. Click the OK button.

**Expected Results:** 

Cuyahoga County Supplier Portal Commented [KN1]: What should they do?



• Your user name will be emailed to you.