



SUPPLIER REGISTRATION



Management & Training Corporation

500 North Marketplace Drive . Centerville . Utah . 84014 - PH 801-693-2600

EXTERNAL SUPPLIER REGISTRATION

1. Log in using the URL provided to you in the email
2. Enter in their applicable company information in the boxes provided. **Please use all CAPS when inputting in information**
 - a. Select *Tax Organization Type* in the dropdown. This should match the type listed on your W-9.
 - b. Select *Supplier Type*. Supplier, Attorney, Carrier, Insurance Company, Utility, Manufacturing, Services, Federal, Public Sector, Government, Tax Authority, Trust, Non-Profit.
 - c. Enter *Corporate Web Site* address.
 - d. Attach any applicable documents by selecting on *(+) icon* (Required: W-9 and small business certification. As applicable: certificate of insurance, business licenses, etc.)
 - e. Enter *D-U-N-S Number* (9 digits).
 - f. Select *Tax Country* in the dropdown or begin typing United for United States and select it.
 - g. Enter *Taxpayer ID* or *Tax Registration Number* (Taxpayer ID is for US-Based Companies; Tax Registration Number is only for non-US Based companies). Social Security Number should only be entered if Sole Proprietor.
 - h. Supplier enters in their *Contact Information* in the boxes provided (*First Name, Last Name, Email/Confirm Email address*).
 - i. Select *Next* button.

Register Supplier: Company Details

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

* Company: BOB'S ELECTRICAL PARTS

* Tax Organization Type: Limited Liability Company

Supplier Type: Supplier

Corporate Web Site: WWW.BOBSELECTRICAL.COM

* Attachments: None

D-U-N-S Number: 987654321

Tax Country: United States

Taxpayer ID: 35-5863663

Tax Registration Number:

Note to Approver:

Your Contact Information

Enter the contact information for communications regarding this registration.

* First Name: BOB

* Last Name: JOHNSON

* Email: BJOHNSON@BOBSELECTRICAL.COM

* Confirm Email: BJOHNSON@BOBSELECTRICAL.COM

Attachments: Required W-9 and Small Business Certification

The screenshot shows the 'Register Supplier: Company Details' form. At the top, a progress bar indicates six steps: 1. Company Details (active), 2. Contacts, 3. Addresses, 4. Business Classifications, 5. Products and Services, and 6. Review. The form includes fields for Company Name (BOB'S ELECTRICAL PARTS) and D-U-N-S Number (987654321). An 'Attachments' modal is open, displaying a table with one row: Vendor Packet (updated 2.22).pdf, Vendor Packet (updated 2), VENDOR PAPERWORK, and attached by Karia Chester. Below the modal, contact information fields are visible: First Name (BOB), Last Name (JOHNSON), Email (BJOHNSON@BOBSELECTRICAL.COM), and Confirm Email (BJOHNSON@BOBSELECTRICAL.COM). Navigation buttons at the top right include Back, Next, Save for Later, Register, and Cancel.

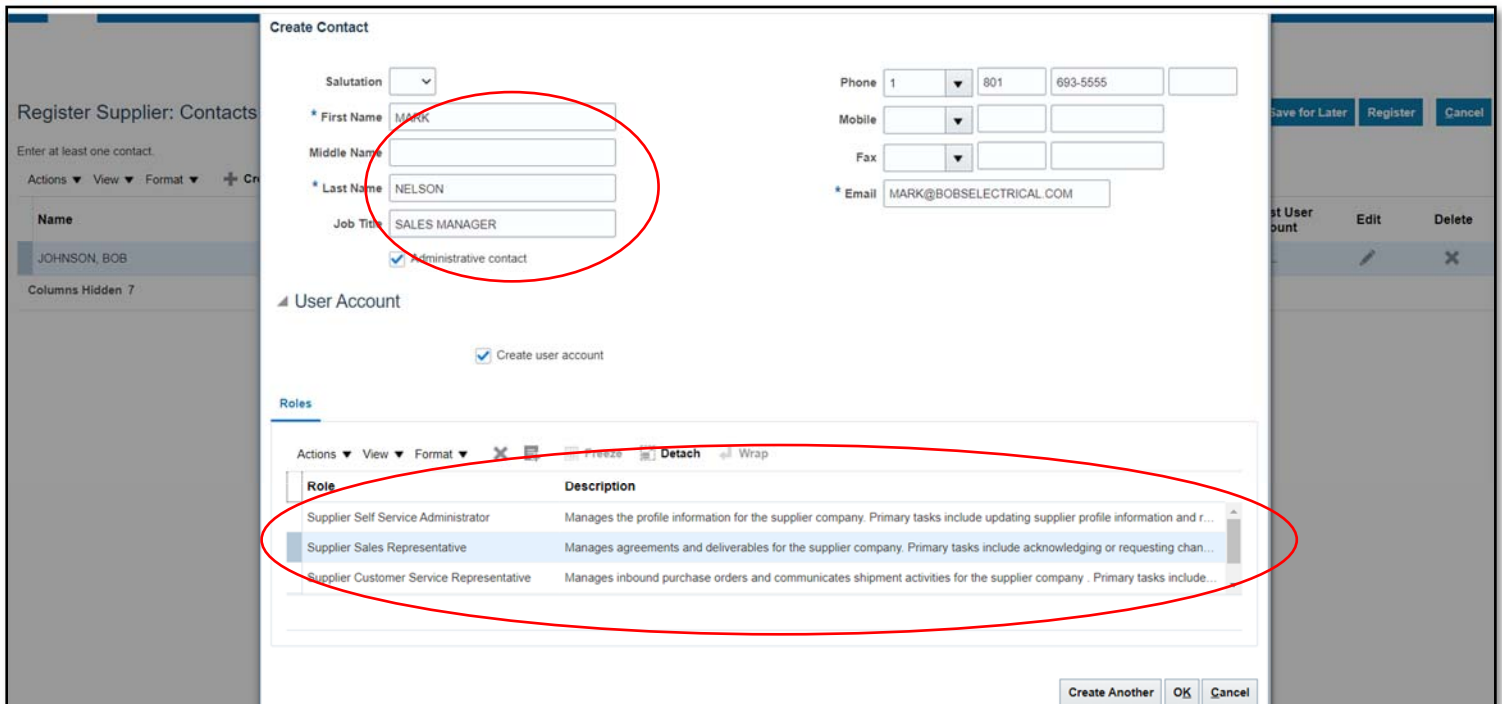
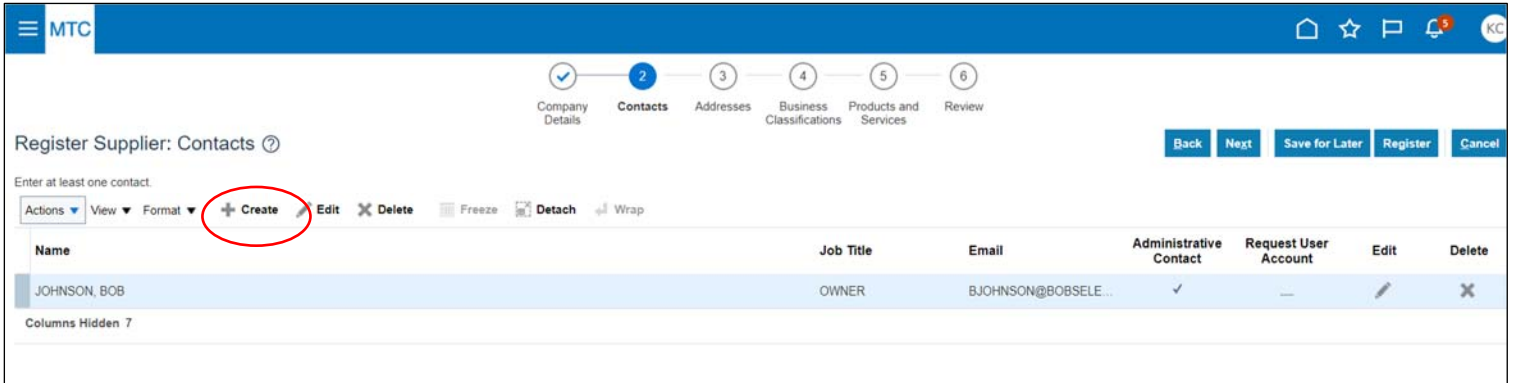
3. Select Next

This screenshot shows the same 'Register Supplier: Company Details' form, but with the 'Next' button in the top right navigation bar circled in red. The form fields are now populated with more information: Company (BOB'S ELECTRICAL PARTS), Tax Organization Type (Limited Liability Company), Supplier Type (Supplier), Corporate Web Site (WWW.BOBSELECTRICAL.COM), D-U-N-S Number (987654321), Tax Country (United States), Taxpayer ID (35-5863663), and Tax Registration Number. The 'Attachments' section shows 'Vendor Packet (updated 2.22)' with a plus icon and a note to 'Attach the required documents.' The contact information fields remain the same. The 'Next' button is highlighted with a red circle to indicate the next step in the process.

4. User can select (+) icon Create to add additional company contacts

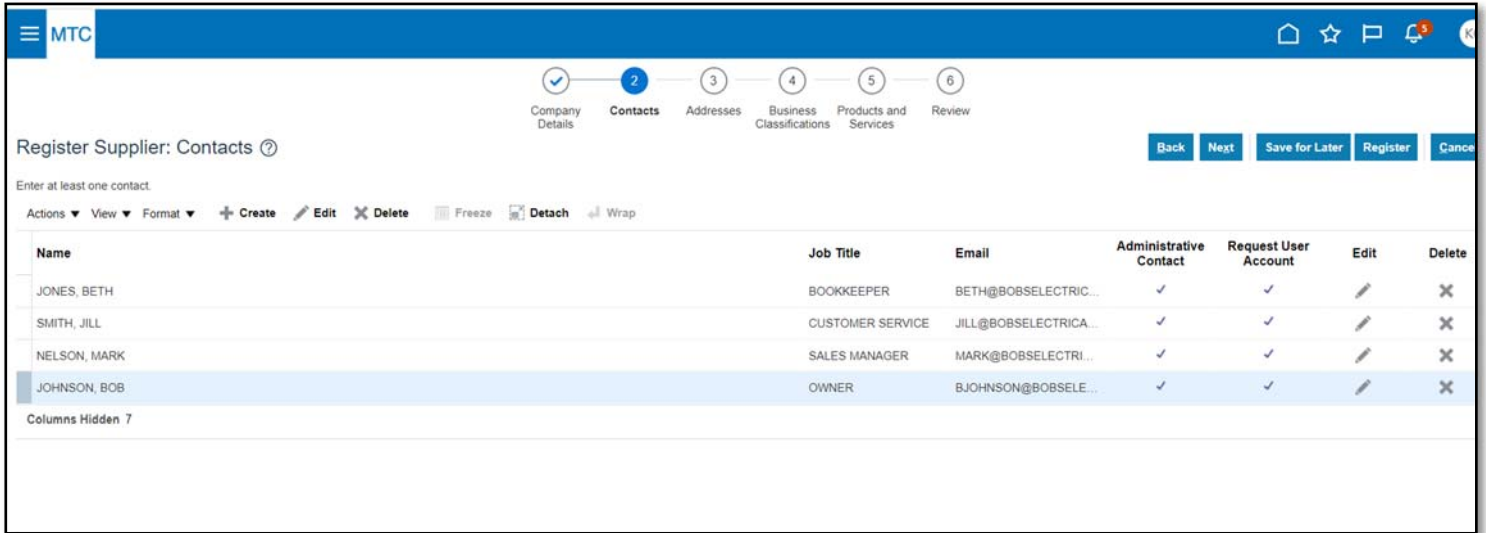
a. Enter name, job title, phone/fax numbers, and email address for contact.

- i. For each contact you create you will need to choose either Supplier Self Service Administrator, Supplier Sales Representative or Supplier Customer Service Representative.
- ii. Administrative Contact is the person we will notify when you have been approved as a spend authorized vendor. If you entered contact information on the previous tab under "Your Contact Info" that individual will automatically come up and be listed as an administrative contact when you are viewing your contact tab.

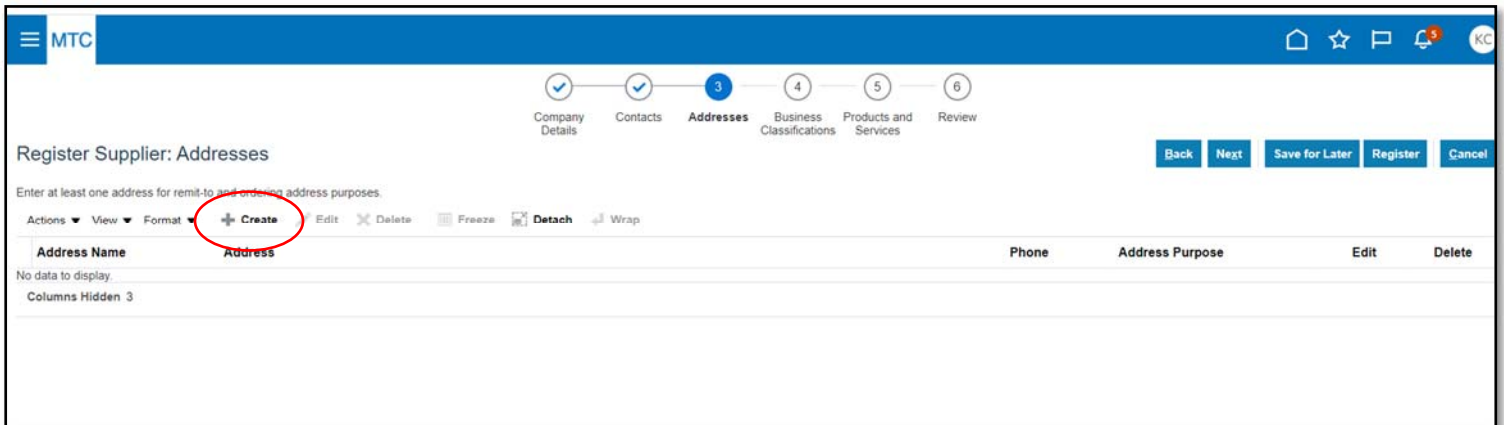


5. User can select the (+) icon to *Create User Account* for multiple users in the organization
 - a. Select *User Account* role
 - b. You can *Create Another* user account or select *OK*.
 - c. Select *Next* button.

Below is an example of what your contacts screen will look like. In this example we have added multiple contacts that perform various roles for the company. They have all been added as Administrative Contact and will also be set up with their own user account in the Oracle system.



6. User will *Create Address* for applicable company locations
 - a. Fill in all applicable fields. Should be entered as city-state-first part of street address (i.e. Boise-ID-1234 Main ST).
 - i. Zip code must be 10 digits including dash.
 - b. Select whether address is *Ordering, Remit to* or *RFQ or Bidding*.
 - i. *For non-remit to address select Ordering and RFQ or Bidding*
 - c. User can *Create Another* address if needed.
 - d. Select *Address Contacts* dropdown and choose *Select and Add*. To associate the contact(s) to the address above, go to the far left of the Name until you see the arrow and select the applicable row(s). This will highlight the row(s). Select *Apply* and *OK*.



Register Supplier: Add

Enter at least one address for remit-4

Actions View Format

Address Name
No data to display.
Columns Hidden 3

Create Address

* Address Name

* Country

Address Line 1

Address Line 2

Address Line 1

City

State

Postal Code

* Address Purpose Ordering
 Remit to
 RFQ or Bidding

Phone

Fax

Email

Address Contacts
Select the contacts that are associated with this address.

Actions View Format X Freeze Detach Wrap

| Name | Job Title | Email | Administrative Contact | User Account |
|---------------------|-----------|-------|------------------------|--------------|
| No data to display. | | | | |
| Columns Hidden 4 | | | | |

Create Another OK Cancel

Register Supplier: Add

Enter at least one address for remit-4

Actions View Format

Address Name
No data to display.
Columns Hidden 3

Create Address

* Address Name

* Country

Address Line 1

Address Line 2

Address Line 1

City

State

Postal Code

* Address Purpose Ordering
 Remit to
 RFQ or Bidding

Phone

Fax

Email

Address Contacts
Select the contacts that are associated with this address.

Actions View Format X Freeze Detach Wrap

| Name | Job Title | Email | Phone |
|--------------|----------------|----------------|-------------------|
| JOHNSON, BOB | OWNER | BJOHNSON@B... | |
| JONES, BETH | BOOKKEEPER | BETH@BOBSE... | +1 (801) 693-5656 |
| NELSON, MARK | SALES MANAG... | MARK@BOBS... | +1 (801) 693-5555 |
| SMITH, JILL | CUSTOMER SE... | JILL@BOBSEL... | +1 (801) 693-5454 |

Rows Selected 1 Columns Hidden 1

Apply OK Cancel

Example of associating Mark and Bob with Main Address:

Create Address

* Address Name: COLUMBUS-IN-111

* Country: United States

Address Line 1: 111 HWY 31

Address Line 2:

Address Line 1:

City: Columbus

State: IN

Postal Code: 47201

* Address Purpose: Ordering
 Remit to
 RFQ or Bidding

Phone: 1 812 876-4390

Fax: 1 812 876-2568

Email:

Address Contacts

Select the contacts that are associated with this address.

Actions: View, Format, Freeze, Detach, Wrap

| Name | Job Title | Email | Administrative Contact | User Account |
|--------------|----------------|---------------|-------------------------------------|-------------------------------------|
| NELSON, MARK | SALES MANAG... | MARK@BOBS... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| JOHNSON, BOB | OWNER | BJOHNSON@B... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Columns Hidden 4

Buttons: Create Another, OK, Cancel

Example of associating Beth and Jill with different remit to address:

Create Address

* Address Name: INDIANAPOLIS

* Country: United States

Address Line 1: PO BOX 187

Address Line 2:

Address Line 1:

City: Indianapolis

State: IN

Postal Code: 46113

* Address Purpose: Ordering

Select and Add: Contacts

Search

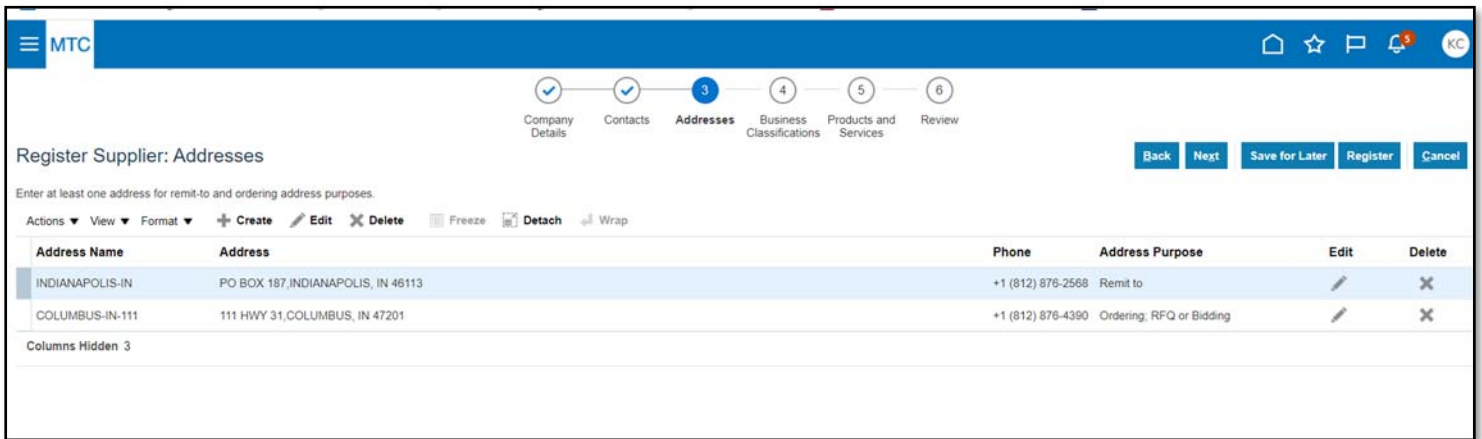
Name: Job Title: Search Reset

| Name | Job Title | Email | Phone |
|--------------|----------------|----------------|-------------------|
| JOHNSON, BOB | OWNER | BJOHNSON@B... | |
| JONES, BETH | BOOKKEEPER | BETH@BOBSE... | +1 (801) 693-5656 |
| NELSON, MARK | SALES MANAG... | MARK@BOBS... | +1 (801) 693-5555 |
| SMITH, JILL | CUSTOMER SE... | JILL@BOBSEL... | +1 (801) 693-5454 |

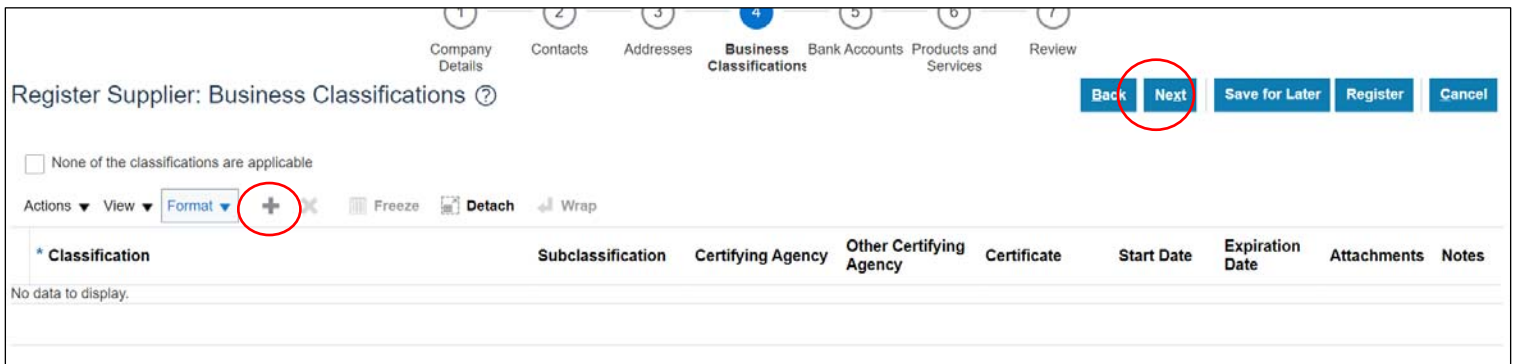
Rows Selected 2 Columns Hidden 1

Buttons: Apply, OK, Cancel

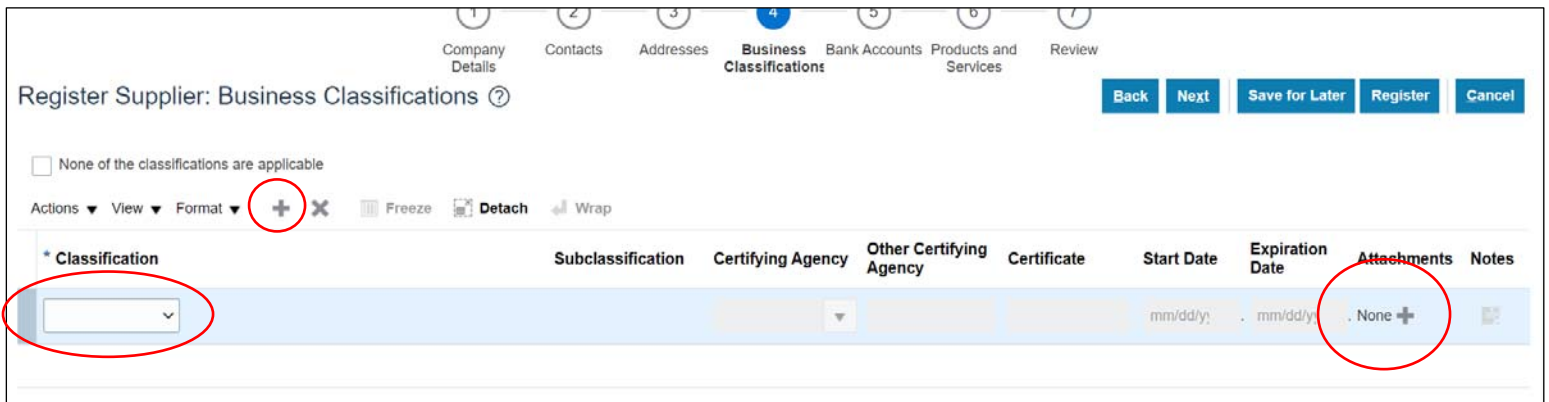
Select Apply and Ok. Then it will take you back to the recap screen of your addresses.



7. Select *Next* to go to *Business Classifications* tab
 - a. Select *(+) icon*.



8. Using the Dropdown Arrow, select the Applicable Small *Business Classifications* Certifications listed on the Self-Certification form
 - a. For each small business classification, each category must be separately added by selecting the *(+) icon*.
 - b. If HUBZone classification if applicable it must be verified on the www.sam.gov website. Complete the *Start Date* and *Expiration Date* fields listed on the [sam.gov](http://www.sam.gov) printout. Attach the printout of the HUBZone certification by selecting the *(+) icon* in the Attachment section.



9. Review all inputted information and select *Register* and *Ok*

Review Supplier Registration: BOB'S ELECTRICAL PARTS

Company Details

Company: BOB'S ELECTRICAL PARTS
Tax Organization Type: Limited Liability Company
Supplier Type: Supplier
Corporate Web Site: WWW.BOBSELECTRICAL.COM

D-U-N-S Number: 987854321
Tax Country: United States
Taxpayer ID: 35-5863663
Tax Registration Number

Confirmation

Your registration request was submitted. You will receive an email after your registration request is reviewed.

OK

Attachments

Actions

Type

File

Contacts

View Format Freeze Detach Wrap

| Name | Job Title | Email | Administrative Contact | Request User Account | Details |
|-------------|------------------|---------------------|------------------------|----------------------|---------|
| JONES, BETH | BOOKKEEPER | BETH@BOBELECTRIC... | ✓ | ✓ | |
| SMITH, JILL | CUSTOMER SERVICE | JILL@BOBELECTRICA | ✓ | ✓ | |