# **E-SUPPLIER NAVIGATION**

For New Payees and Suppliers

# Table of Contents

First Time Supplier Set up	1
Step 1: Supplier portal	1
Step 2: Supplier portal login	2
Step 3: Register a new entity or user	2
Step 4: Register a supplier	2
Step 5: Completing the Supplier Registration	3
Step 6: Registration approval	7
Establishing the user ID and password	7
Access a Saved Registration	8
Create Multiple User IDs	. 10
Review and Update Supplier Information	.11
Monitor and maintain the supplier registration	. 12

# First-Time Supplier Setup

A W-9 and a current Certificate of Insurance or Letter of Exemption are required document attachments in the registration process. It is recommended that the documents are readied prior to beginning the registration process.

## Step 1: Supplier portal

Go to <u>supplierportal.ok.gov</u>. You can also copy and paste this URL into your web browser address bar.

#### Step 2: Supplier portal login

Select Oklahoma Supplier Portal Login.

Oklahoma Supplier Portal Login

The Oklahoma Supplier Portal is the ne

### Step 3: Register a new entity or user Select **Register a New Entity or User**.

Register a New Entity or User
View Registration Options.

## Step 4: Register a supplier

Under Register a Supplier, select Register now.

**Note:** The Bidder Registration can be used for those who wish to view solicitations and bids but do not want to complete the requirements to receive a supplier ID at this time. A supplier ID is required for contract award.

	Select this option if you will be receiving payment from a state agency or institute of higher education.
	More
	Register now
Bidder Registra	tion



Entities with no existing PeopleSoft Supplier ID, may select this simplified registration option to be adde

## Step 5: Completing the supplier registration

There are six sections or "train stops" that are required to complete the registration. Complete each step in order. If the registration cannot be completed, you may save your progress to return later. (Registrations with error messages cannot be saved.)

A current, **signed and dated** copy of your W-9 is required to upload.

- 1) Welcome.
  - a) Select the entity type. Then select Next.
  - b) Next buttons are located at the top and bottom of each step.

Welcome	Identifying Information	Addresses	Contacts	Categorization	Submit			
elcome - Step	1 of 6			Exit I 📢 P	Previous Next 🕨			
Welcome to the	e State of Oklahoma Supplie	er Registration Syste	em.					
Entities with no existing PeopleSoft Supplier ID in the state payment system will complete the below registration needed to register for payments from Oklahoma state agencies. The Individual completing registration will serve as the Authorized Account Manager (AAM), responsible for creating and maintaining the entity information on file with the state. An email will be sent to the AAM with UserID login information, the assigned PeopleSoft Supplier ID and instructions for accessing the online account upon recientrion account.								
Entities comple Identification N Registration via	eting registration must first h umber, or ITIN). Non-US ent a email at <u>supplier.registrati</u>	nave a U.S. Taxpayer itties with no U.S. Ta <u>on@omes.ok.gov</u> fo	r Identification Numbe xpayer Identification N r assistance.	er (i.e., Social Security Nur Number should contact Ol	mber, Employer MES Supplier			
elect an activity	below: 👔							
• Start a new re	gistration form							
Rusines	ntity do you represent?							
<ul> <li>Individu</li> </ul>	Jal							
O Continue from	where you left							
Required field				Exit   K P	Previous Next 🕨			

- 2) Identifying Information.
  - a) Unique ID & Company Profile.
    - i) In the **Tax Identification Number** field, enter your IRS-issued federal taxpayer identification number (i.e., SSN, EIN or iTIN).

* Tax Identification Number	IRS Tax Number	
* Entity Name	Name as listed with the IRS	Add Attachment
http://URL	Open URL	

- ii) Entities that do not have an issued US Federal Tax ID are not able to register using e-Supplier at this time.
- b) Profile Questions.
  - i) You are required to answer all questions that contain an asterisk.
    - (1) Use the provided links to upload the required W-9. International entities may upload a W-8 BEN-E or W-8 BEN.
    - (2) All documents must be completed, signed and dated. Incomplete forms may be returned for correction.

ii) For best results, use the magnifying glass when applicable.

۹

iii) To attach a document, select Add Attachment and follow the screenshots below.

Add Attachment		Ø	
3			
ttachments	P	ersonalize   F	ind   View All   🖉   🔣
Attached File	Attachment Descript	ion	Upload
1			Upload
Return			
Profile	Attachments		
File	Attachment	×	
			F
Browse No file se	lected.		
Upload Cancel			
- New folder	5/27/202	1 10:36 AM	File folder
FILLED-IN_W-9.pdf	9/23/202	1 10:07 AM	Adobe Acrobat Docum
me: FILLED-IN W-9.pdf			~ All Files (*.*)
			Open
More			Attached File
Frome A	litacriments		
File At	tachment	×	
Browse FILLED-IN_V	V-9.pdf		
Upload Cancel			
Attachments	Person	alize   Find   Vi	a a a a a a a a a a a a a a a a a a a
Attachments Attached File	Person Attachment Description	alize   Find   Vi	
Attachments Attached File 1 FLLED-IN_W-9.pdf	Person Attachment Description <b>optiona</b>	alize   Find   Vi	4
Attachments Attached File 1 FLLED-N_W-9.pdf Return	Person Attachment Description <b>optiona</b>	alize   Find   Vi	

iv) Enter text in the provided fields.

7

1.

#### 3) Addresses.

a) Enter your primary address. The remit address is optional. The address will be validated by the USPS. Select **Accept address**. **DO NOT ENTER THE COUNTY.** 

				USPS Address Valida	tion
	Address Valid	ation			
	Primary Address ente	red by you:-		Address retu	Irned by USPS:-
	Address1 Address2 City State County Postal	5005 N LINCOLN BLVD OKC OK		Address 1 Address 2 City State County Postal	5005 N LINCOLN BLVD OKLAHOMA CITY OK 73105-3324
	Country	115.4		Country	USA
4)	Contacts. a) Select Ad	id Contact.	Edit Address		
	Contacts Please creat An email wi (*indicates a Compan You have Add	Step 4 of 6     te the Authorized Aca     Il be sent with instruct     required response)     y Contacts     e not added any con     Contact	count Manager contact. AAM tions for accessing the online fact information to your applic	will aco catic	

b) Enter all required fields. The Requested User ID is your desired user ID to access e-Supplier after registration to update and maintain your information on file with the State of Oklahoma. Select
 OK when complete, then select Next.

Contact Information	(@)	
Description		
* First Name		Primary Conta
* Last Name		
Title		
* Email ID		
* Telephone		Ext
Fax Number		
Contact Type	~ v	
User Profile Informa	Create a user ID to ac	cess e-
* Requested User ID	Supplier after regist	ration
Description		
Language Code	English v	
Time Zone	•	
Currency Code	e US Dollar v	

- 5) Categorization.
  - a) All suppliers who plan to participate in solicitations and bids must pick at least one category code for registration.
    - i) State of Oklahoma uses the UNSPSC codes for procurement registration. To search for the code listings for the codes most applicable, visit the <u>UNSPSC website</u>.
  - b) To view and select category codes, select the Sell Categories folder icon for the Sell Categories.



c) Locate the category that best describes the goods or services provided and check the box. Then select the folder to drill down. If you are using an UNSPSC code to make your selection, drill down using two-digit increments. See the below example to drill down to 10101501 – Cats.





- 6) Submit.
  - a) As the final step, check the box to agree to the Terms of Agreement and select Submit. Submit - Step 6 of 6

Select the "Review" button to review the registration information. Click the "Submit" button to submit your registration after reviewin Email communication regarding this registration will be sent to: SUPPLIER.REGISTRATION@OMES.OK.GOV Terms and Conditions (2) Make sure you read terms of agreement fully before submitting yo Select to accept the Terms of Agreement below.

Submit

#### Step 6: Registration approval

Terms of Agreement

Review

Once the registration has been approved, notify your agency contact with the supplier ID provided in the final approval email.

#### Establishing the User ID and Password

Upon supplier file approval and creation, you will receive two approval emails regarding the user ID created in the Contact step. The second email will contain the user ID and a temporary password.

• Return to supplierportal.ok.gov, and select the Oklahoma Portal Login button.



The Oklahoma Supplier Portal is the ne

• Sign in using the Existing Users Sign In. This is where you will sign in going forward.



- Enter the user ID and temporary password.
- You will receive a message that your password has expired. Select **Click here to change your** password.



- You will be prompted to enter the temporary password, followed by a new password.
- After changing the password, the portal homepage displays. Tiles may vary.

Okiahoma Suna	lier Portal	Repieter a New Entity or Line
Citationa supp	2)	require a new criticy or use
ê.		R
W L		$\equiv l_1$
Welcome to the State of Oklahoma Supplie	r Payee Registration System.	
		View Registration Options.
Receipts	Announcements	FAQs   Contact Us
-		<b>—</b>
	5	
0 Rejected Receipt Lines	0 Announcements	Get helpful information here.
Museu Burlin	0.000	ferral and December 1
Manage Profile	Quotes and POS	involces and Payments
R		
$\equiv l$	=0	

# Access a Saved Registration

- 1) To access your draft registration, follow these steps. The first four steps are the same as when you began the process.
  - a) This step is for registrations that have not gone through full approval and do not have a supplier ID.
  - b) Registrations that were submitted and returned for more information need to access the registration.
- 2) Go to <u>supplierportal.ok.gov</u>.
- 3) Select Oklahoma Supplier Portal Login.

Oklahoma Supplier Portal Login

The Oklahoma Supplier Portal is the ne

4) Return to Register a New Entity or User.



5) Under Supplier or Payee Registration, select **Register Now**.



- 6) Welcome page.
  - a) Under Select an activity below, chose Continue from where you left.
  - b) Enter your registration ID of 000000XXXX and select the caret.

Welcome	Identifying Information	Addresses	Contacts				
Icome - Step 1 of 6							
Welcome to the State	of Oklahoma Supplier Re	gistration System.					
Entities with no exists Oklahoma state ageno maintaining the entity ID and instructions for	Entities with no existing PeopleSoft Supplier ID in the state payment system will complete the below regists Oklahoma state agencies. The individual completing registration will serve as the Authorized Account Mani maintaining the entity information on file with the state. An email will be sent to the AAM with UserID logi ID and instructions for accessing the online account unon resistration approval.						
Entities completing registration must first have a U.S. Taxpayer Identification Number (i.e., Social Security ITIN), Non-US entities with no U.S. Taxpayer Identification Number should contact OMES Supplier Regist supplier registration@omes.ok.gov for assistance.							
elect an activity be	ow: 🕐						
Start a new registre Continue from whe Registration ID Forgot your registra	ation form ere you left tion ID?	000000002					

- c) Click the arrow to the right.
- d) A new section will open requesting the TIN or employer identification.
- e) Once entered, it should take you to the registration that you previously started.

# Creating Multiple User IDs

One of the benefits to the new system is the ability to assign multiple additional user IDs to different individuals based on responsibilities. **Note**: Banking can only be viewed and accessed with a banking user ID.

• Select the Oklahoma Supplier Portal Login button at <u>supplierportal.ok.gov</u>, and sign in using **Existing Users Sign In**.



- Select **Register a New Entity or User**.
  - Once signed in, the Register a New Entity or User tile will provide new registration options. The tile now provides the option to create additional user IDs based on job responsibilities.



- Select **Register Now** for the user ID you wish to create.
  - The Authorized Account Manager user ID is the only user ID that can assign additional user IDs.
    - The user ID created with the supplier file is an Authorized Account Manager user ID.
  - The Banking user ID is the only user ID that can view, add, or update banking.
    - For questions regarding the banking process, email <u>eft.registration@omes.ok.gov</u>.
- The supplier ID can be found in the registration approval email.
- Enter the IRS tax ID without dashes.
- The Requested User ID must be a unique user ID.
- The Email ID should be the email of the individual being assigned the responsibilities of the user ID.
  - $\circ$   $\;$  There are no restrictions on how many times the same email can be used.
  - You will receive two approval emails. The second email will contain the user ID and a temporary password
- The Language Code, Time Zone, and Currency Code fields are not applicable and can be disregarded.

# Review and Update Supplier Information

To manage and maintain the information on file, use **Supplier Change Request**. Please review the information on file on a yearly basis to ensure all information is accurate and up to date.

• Select the Oklahoma Supplier Portal Login button at <u>supplierportal.ok.gov</u>; sign in using the Existing Users Sign In.



• Once signed in, the Supplier Secure Home Page displays.

0			
Supplier Secure Home Page 🔻			
	Oklahoma Sup	plier Portal	Register a New Entity or User
	Welcome Welcome to the State of Oklahoma Suppli	2	
			View Registration Options.
	Receipts	Announcements	FAQs   Contact Us
		est.	
	0 Rejected Receipt Lines	0 Announcements	Get helpful information here.
	Manage Profile	Quotes and POs	Invoices and Payments
	Update your Registration and Profile	View Quotes and PO's	

• Select Manage Profile.



• Select **Supplier Change Request** to view, add or update the information within the supplier file. (The banking tab will only appear with the banking user ID.)

T Update Profile	N/eleanne	Company Profile	Addresses	Contacta	Catagorization	Submit
E Supplier Change Request	weicome	Company Prolite	Addresses	Contacts	Categorization	Submit
Review Supplier User Profiles				Exit	Save for Later	Gell

## Monitor and Maintaining the Supplier Registration

At any point in time, you may return to the information provided during the supplier file creation to review or make changes. If the updates cannot be completed, you must save your progress to return later. (Registrations with error messages cannot be saved.)

- 1) Company Profile.
  - a) Leave the Additional Name field as is. Disregarded Entities and DBAs should be entered in the Addresses step.
- 2) Addresses.
  - a) The first address listing should be the 1099 or primary address.
  - b) The email listed with the address is the primary email for remittance notifications.
  - c) When editing or adding addresses, the address will be validated by the USPS.
  - d) If an address should be inactivated and does not have an address to replace it, email supplier.registration@omes.ok.gov to inactivate. Include Address Inactivation and the supplier ID in the subject line.
  - e) Add a Disregarded Entity (DE) or DBA.
    - i) Select Add New Address.
    - ii) Under Address Information in the Description and Address 1 fields, enter the DE or DBA name.
    - iii) Enter the address in the Address 2 field.

#### Address Information

Description	DBA NAME	
Country	USA <b>Q</b> United States	
Address 1	DBA NAME	
Address 2	1234 Main St	

#### 3) Contacts.

- a) Review contacts for accuracy.
- b) Each contact should have a type and should be attached to an address.
  - i) The Accounts Payable type will be a CC email for remittance notifications.
- c) If a contact should be inactivated and does not have a contact to replace it, email <u>supplier.registration@omes.ok.gov</u> to inactivate. Include Contact Inactivation and the supplier ID in the subject line.
- 4) Categorization.
  - a) If the codes entered during the supplier creation are not listed, please expand the folders for the codes to appear.
  - b) Codes may be added or removed as needed.
- 5) Submit.
  - a) As the final step, check the box to agree to the **Terms of Agreement**. Then select **Submit**.

For additional questions or assistance, please email <u>supplier.registration@omes.ok.gov</u>.