

iSupplier User Manual

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Polk County iSupplier Registration Process

Introduction:

Welcome to the Polk County Board of County Commissioners iSupplier portal network. You now have the ability and responsibility of updating your company information: including, but not limited to address(es); contact names; phone numbers; fax numbers; email addresses; banking information; and products and services (Commodity Codes) your organization offers. This will allow Polk County to invite you to participate in their electronic bidding process.

Registration Approval Notification:

Please check your inbox for the email address that was provided during the registration process to find a notification. The subject will be: Polk County Procurement: Registration Approval.

A sample approval notification is shown below.

“Your request to register with Polk County Procurement for access to our iSupplier portal has been approved. You may now log on to our iSupplier portal with the username (PCVENDOR204@YAHOO.COM) and the temporary password: Rv6%9B. When you log on for the first time, you will be required to change your password for security purposes.

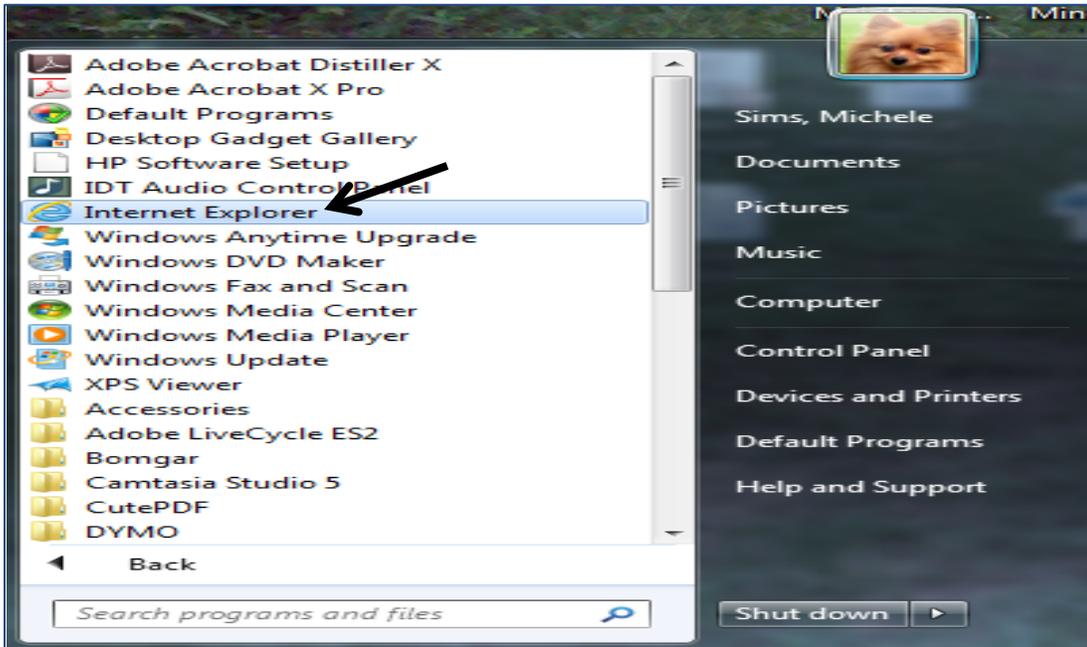
You must complete your Products and Services (Commodity Codes); these codes will be used for inviting you to participate in future solicitations. Upon approval of your required profile information you will be given full access to the iSupplier portal, which allows you to view the status of purchase orders and payments.

If you have any questions or require additional information, contact procurment@polk-county.net or 863-534-6757.

Thank you for your interest in doing business with Polk County.

Logging in to Polk County's iSupplier Portal Network:

Open Browser:



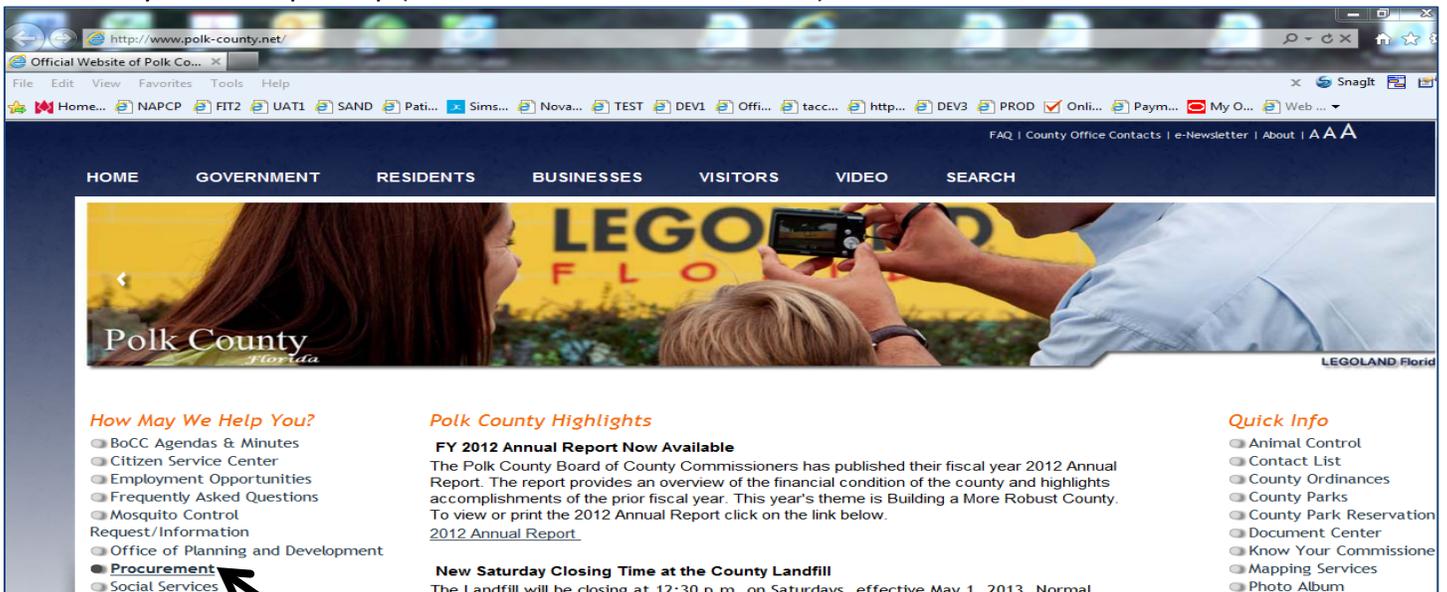
Click on Internet Explorer to open the browser.

The browser opens up:



Type URL: www.polk-county.net

Polk County website opens up (Click on the link "Procurement"):



The link opens up the procurement page:

HOME GOVERNMENT RESIDENTS BUSINESSES VISITORS VIDEO SEARCH

Polk County Florida

Historic Courthouse - Bartow

Procedure Information
All sealed bids or proposals are due at the date/time designated in the solicitation documents and must be delivered to:

Polk County BoCC
Procurement Division
330 West Church Street, Room 150
Bartow, Florida 33830
Phone: 863-534-6757
Fax: 863-534-6789

Submittals not received by the time and date certain contained within the solicitation document will not be accepted.

Procurement & Supplier Diversity Team

How to Become a Vendor
Get started by applying today!
[Learn More](#)

Woman or Minority

Click on “How to Become a Vendor” for the vendor registration page.

If you have not provided goods and/or services within the past five (5) years (2006 to current) for the Polk County Board of County Commissioners you will need to follow the instructions for New Suppliers. If you have provided goods and/or services to Polk County Board of County Commissioners within the past five years and have not already created a user logon, you will need to follow the instructions for an Existing Supplier.

Minority Vendor Registration

Polk County Florida

LEGOLAND Florida - Winter Haven

Vendor Information

- Active Contracts
- Annual Bids
- Bid Status
- CCNA
- Free Vendor Training
- Forms for County Use
- Forms for Vendor Use
- Notice of Bids
- Other Bid Opportunities
- Procurement and Bids
- Small Business Development Center
- Vendor Appointments
- Vendor Directory
- [Vendor Registration](#)
- W/MBE Program

Vendor Registration

Want to Register your company to do business with Polk County?
Vendors (Suppliers) that are interested in providing products and/or services to Polk County are required to register with us in order to hear about upcoming business opportunities. You may register by clicking on the following link: [Registration](#).

Just enter the information asked for and follow any prompting by the registration software. For your convenience, you can also read and/or print out the [Supplier User Guide](#) to assist with this registration.

Once you register with us, you will be able to update/modify your vendor information at any time so please make sure you write down your user name and password once one is established for you as you go through the registration process.

Existing Vendors/Suppliers that have not reregistered in our new data base?

Procurement implemented a new registration data base in January of 2012. If you have not reregistered you must request a user id for access to update your supplier information and receive notifications for future solicitations. Send an email to procurement@polk-county.net and include your company name, contact name, current email address and phone number. You will receive an email with instructions on how to reregister.

Once you re-register with us, you will be able to update/modify your vendor information at any time so please make sure you write down your user name and password once one is established for you as you go through the registration process.

[Registered Users Login](#)

New Suppliers

1. Select the Registration link on the Vendor Registration web page.

Vendor Registration

Want to Register your company to do business with Polk County?
 Vendors (Suppliers) that are interested in providing products and/or services to Polk County are required to register with us in order to hear about upcoming business opportunities. You may register by clicking on the following link: [Registration](#).

2. Complete the Company Details and Contact Information Section

a. Company Name

Prospective Supplier Registration
 * Indicates required field

Blank label for instruction text

Company Details

[Personalize "Company Details"](#)

✔ **TIP** Please enter information in UPPERCASE. Do NOT use punctuations (periods, commas, etc.)
 ✔ **TIP** If Company Name is more than 35 characters you must continue the name on the first address line.

* Company Name

Tax Country 
Where provided, the tax country will be used to validate the format of the Tax Registration Number and/or Taxpayer ID.

FEIN/EIN

Tax ID

SSN

At least one tax id is required to be able to complete the registration request. When using a SSN you must provide your full name in the Company Name.

- Turn on Caps Lock and enter all information in UPPERCASE
- Type in the company name as it should appear on checks or 1099 tax reporting forms (if applicable)
- Provide your FEIN/EIN or SSN, whichever is applicable (You must provide one tax id #)
 NOTE: If supplying a SSN, you must provide your full name in the Company Name
- The maximum number of characters allowed is 35. If your company name is longer than 35 characters you will need to complete the company name on the Address Line 1 on the following screen
- Do NOT use punctuations (periods, commas, etc.)
- To use the search function to find your Tax Country select the  button. Type in a portion of the Country and select . Select the  button next to the appropriate Country Name.

Search and Select: Tax Country

Search

To find your item, select a filter item in the pulldown list and enter a value in the text box.

Search By

Results

Select	Quick Select	Country Name
<input type="radio"/>		United Arab Emirates
<input type="radio"/>		United Kingdom
<input type="radio"/>		United States
<input type="radio"/>		United States Minor Outlying Islands

b. Contact Information:

Contact Information

[Personalize "Contact Information"](#)
 Blank label for instruction text

* Email

* First Name

* Last Name

* Phone Area Code

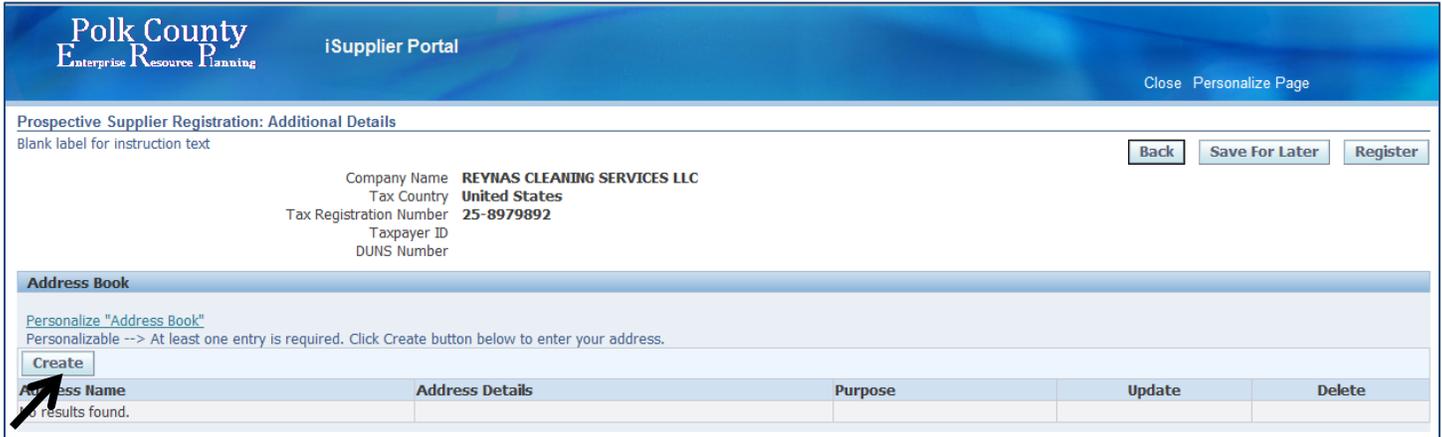
* Phone Number

Phone Extension

- The email address provided will be your User ID and the email address that notifications will be sent to for solicitations.
- The Contacts first name, last name, phone area code and phone number are required fields.
- Additional User ID's for additional company contacts may be obtained later on in the registration process.

c. Select the  button to proceed to the next page.

3. Create your Address Book by selecting the Create button.



Polk County
Enterprise Resource Planning

iSupplier Portal

Close Personalize Page

Prospective Supplier Registration: Additional Details

Blank label for instruction text

Back Save For Later Register

Company Name **REYNAS CLEANING SERVICES LLC**
 Tax Country **United States**
 Tax Registration Number **25-8979892**
 Taxpayer ID
 DUNS Number

Address Book

[Personalize "Address Book"](#)
 Personalizable --> At least one entry is required. Click Create button below to enter your address.

Create

Address Name	Address Details	Purpose	Update	Delete
No results found.				

4. Complete your company address information and select Apply. You may add as many addresses as needed.



Create Address

* Indicates required field

Cancel Apply

TIP Example Address Name: REMIT TO, HEADQUARTERS, CORPORATE, etc.

* Address Name

Country

* Address Line 1

Address Line 2

Address Line 3

Address Line 4

* City/Town/Locality

County

* State/Region

Province

* Postal Code

* Phone Area Code

* Phone Number

Fax Area Code

Fax Number

Email Address

Purchasing Address
 Payment Address
 RFQ Only Address

TIP Please enter all information in UPPERCASE. Do NOT use punctuations (periods, commas, etc.)

- Remember to turn on your Caps Lock and do NOT use any punctuation (periods, commas, etc.).
- Each address must be given an Address Name, such as REMIT TO, HEADQUARTERS, CORPORATE, or you may use the city name. Each address name must be unique, the system will not allow you to duplicate.
- If your company name is longer than 35 characters, you may continue the name in the Address Line 1 field
- Please enter suite #'s, unit #'s, apt #'s, etc. on a separate address line
- Please add the County not Country your company is located in below the City.
- Select what this Address is used for (select all applicable options):
 Purchasing Address=Purchase Orders, Solicitations
 Payment Address=Address that checks should be mailed to
 RFQ Only Address=Address is only used for solicitations

5. Select Create again to add each additional address needed.



Address Book

[Personalize "Address Book"](#)
 Personalizable --> At least one entry is required. Click Create button below to enter your address.

Create

Address Name	Address Details	Purpose	Update	Delete
REMIT TO	1129 BARTOW HWY, FL 33830 United States	RFQ Only, Payment, Purchasing		

6. To update an existing address, select the  update button on the appropriate address. Make the changes and select Apply.

Update Address
* Indicates required field

TIP Example Address Name: REMIT TO, HEADQUARTERS, CORPORATE, etc.

* Address Name: REMIT TO
Country: United States

* Address Line 1: 1129 BARTOW HWY
Address Line 2: UNIT 4
Address Line 3:
Address Line 4:
* City/Town/Locality: BARTOW
County: POLK
* State/Region: FL
Province:
* Postal Code: 33830

* Phone Area Code: 863
* Phone Number: 534-5989
Fax Area Code: 863
Fax Number: 534-5999
Email Address: JAN@REYNASCLEANING.NET

Purchasing Address
 Payment Address
 RFQ Only Address

TIP Please enter all information in UPPERCASE. Do NOT use punctuations (periods, commas, etc.)

Cancel Apply

7. To delete an existing address, select the  button.

8. Adding additional Contacts. Select Create under Contact Directory section.

Contact Directory
Personalize "Contact Directory"
Personalizable --> At least one entry is required. Click Create button below to enter your address.

Create

First Name	Last Name	Phone	Email	Requires User Account	Update	Delete
Michele	Sims	863-534-9899	michele@reynascleaning.net	<input checked="" type="checkbox"/>		

9. Complete the required information; select Create user Account for the Contact if the contact will need a User ID and password to access iSupplier/Sourcing; and select Apply.

Create Contact
* Indicates required field
Personalize Stack Layout: (MainRN)

Contact Title:
* First Name: Michele
Middle Name:
* Last Name: Sims
Job Title: Manager
Department:
* Contact Email: michele@reynascleaning.net
* Phone Area Code: 863
* Phone Number: 534-9899
Phone Extension:
Fax Area Code:
Fax Number:
 Create User Account For The Contact

Supplier User Account
Personalize "Supplier User Account"
 Create User Account For The Contact

TIP You must select "Create User Account For The Contact" for each contact needing to have a User ID to log onto iSupplier/Sourcing.

Cancel Apply

- The contact email will be the contacts User ID and cannot be a duplicate. Ensure that the spelling is correct for selecting Apply. This will also be the email address that notifications will be sent to.
- If the Contact is for informational purposes only and the contact does not need access to change company information or submit bids for solicitations do not check off the "Create User Account for the Contact".

10. To update the contact information, select the update button for the appropriate contact.

Create

First Name	Last Name	Phone	Email	Requires User Account	Update	Delete
Michele	Sims	863-534-9899	michele@reynascleaning.net	<input checked="" type="checkbox"/>		
Jan	Rodgers	863-534-8999	jan@reynascleaning.net			

11. Make the changes needed and select Apply.

Update Contact
* Indicates required field
Personalize Stack Layout: (MainRN)

Contact Title:
* First Name: Jan
Middle Name:
* Last Name: Rodgers
Job Title:
Department:
* Contact Email: jan@reynascleaning.net
* Phone Area Code: 863
* Phone Number: 534-9899
Phone Extension:
Fax Area Code:
Fax Number:
 Create User Account For The Contact

Supplier User Account
Personalize "Supplier User Account"
 Create User Account For The Contact

TIP You must select "Create User Account For The Contact" for each contact needing to have a User ID to log onto iSupplier/Sourcing.

Cancel Apply

12. Select all of the Business Classifications that apply to your company.

Business Classifications

[Personalize "Business Classifications"](#)
 Suppliers must select their Supplier Classification by selecting the "Applicable" box and selecting a Minority Type from the list. Suppliers must also select a Gender (if applicable), and a Business Type and Size. Your registration request will be rejected if required information is not provided.
 TIP Date format example: 16-Apr-2013

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Gender:					
Men Owned	<input type="checkbox"/>				
Women Owned	<input checked="" type="checkbox"/>				
Owner Ethnicity * Required	<input checked="" type="checkbox"/>	Caucasian			
Supplier Classification					
DBE	<input type="checkbox"/>				
Service Disabled Veteran	<input type="checkbox"/>				
Business Type:					
Corporation	<input type="checkbox"/>				
LLC	<input checked="" type="checkbox"/>				
LLP	<input type="checkbox"/>				
Partnership	<input type="checkbox"/>				
Sole Proprietor	<input type="checkbox"/>				
Sub-Chapter(s)	<input type="checkbox"/>				
Non-Profit	<input type="checkbox"/>				
Size:					
Small Business (Up to \$1,000,000)	<input checked="" type="checkbox"/>				
Small Medium Business (\$1,000,000 - \$5,000,000)	<input type="checkbox"/>				
Medium Business (\$5,000,000 - \$10,000,000)	<input type="checkbox"/>				
Large Business (Over \$10,000,000)	<input type="checkbox"/>				
Shelter Market Eligible? (Internal Use Only)	<input type="checkbox"/>				

- What is the Gender of the company owner? When selecting Women, the woman owner must have 51% or more ownership and manage the day to day operations.
- What is the Owner's Ethnicity? When selecting the Minority Type, the owner must have 51% or more ownership and manage the day to day operations. You must select the box in the Applicable column and select a Minority Type from the list. If you do not select both the system will not keep your selection.

Classification	Applicable	Minority Type
Gender:		
Men Owned	<input type="checkbox"/>	
Women Owned	<input checked="" type="checkbox"/>	
Owner Ethnicity * Required	<input checked="" type="checkbox"/>	Caucasian
Supplier Classification		
DBE	<input type="checkbox"/>	
Service Disabled Veteran	<input type="checkbox"/>	
Business Type:		
Corporation	<input type="checkbox"/>	
LLC	<input checked="" type="checkbox"/>	

Note: In the original image, a dropdown menu for 'Minority Type' is open, showing options: African American, Asian, Asian East Indian, Asian Pacific Islander, Caucasian (highlighted), Hispanic/Latino, Native American, Not Applicable. Arrows point to the 'Applicable' checkboxes for Owner Ethnicity and Business Type: LLC.

- Is your company classified as a DBE or Service Disabled Veteran? Select all that apply.
- What is your Business Type? Corporation, LLC, LLP, etc. Select one Business Type only.
- What is the Size of your business? Small Business, Small Medium Business, etc. Select one Size only.
- Shelter Market Eligible? This is for internal use only, do not select.
- Shelter Market Local Vendor? This is for internal use only, do not select.

13. Select the Products and Services (Commodity Codes) that your company provides. Select Create.

Products and Services (Commodity Codes)

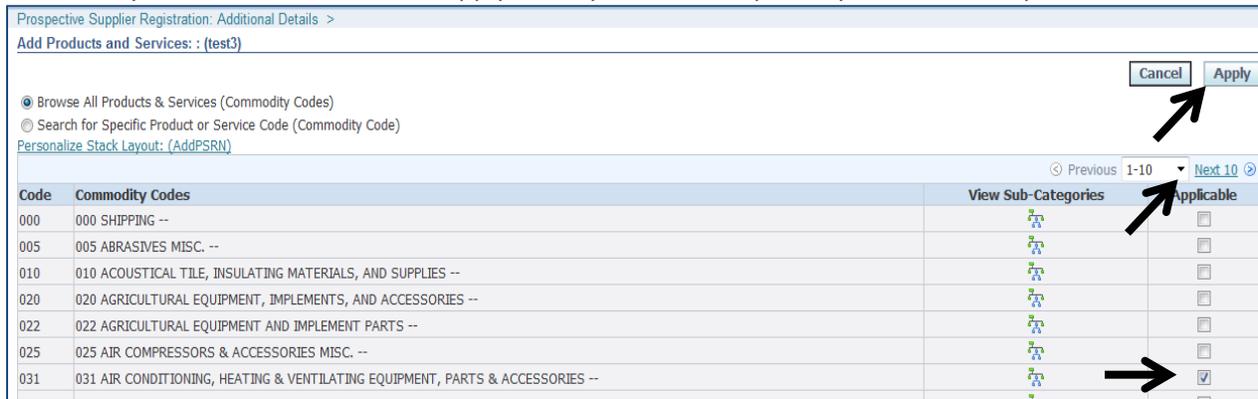
[Personalize "Products and Services \(Commodity Codes\)"](#)
 Personalizable --> At least one entry is required. Click Create button below to enter your address.

Commodity Codes	Delete
0 results found.	

Note: In the original image, an arrow points to the 'Create' button.

- Select Browse All Products & Services (Commodity Codes) to view all of the codes. Select Next 10 to continue viewing the list. Select the Applicable box next to the appropriate Commodity Codes. You may select as many

Commodity Codes as needed. Select Apply when you have completed your Commodity Code Selections.



b. Select Search for Specific Product or Service Code (Commodity Code)



- You may search by Commodity Code if you know the NIGP Commodity Code or you may search by the NIGP Commodity Code Description.
- When searching you may use the "%" sign as a wild card

c. In this example we're searching by the Code number. We know that the Code begins with 98 but aren't sure of the last three digits, so we used % as part of the search criteria. Select Go and a list of all Commodity Codes beginning with 98 is created.



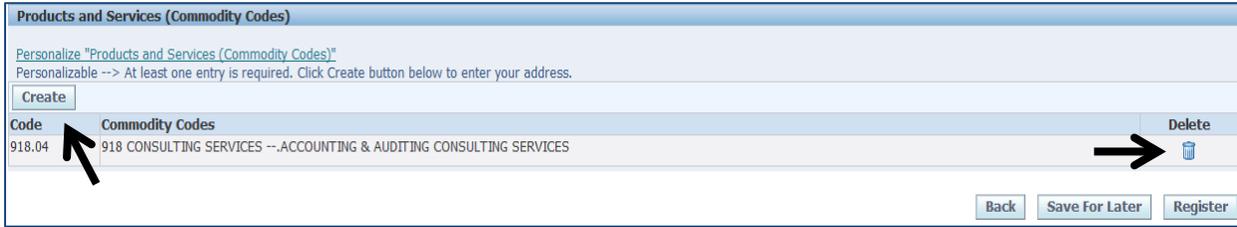
- Check all that are applicable and Apply

d. In this example we're searching by the Description of the Commodity Code. We provide Auditing services, but aren't sure of the exact description so we used %consult% as our search criteria. Select Go and a list of all Commodity Codes containing "consult" is created.



- Check all that are applicable and Apply

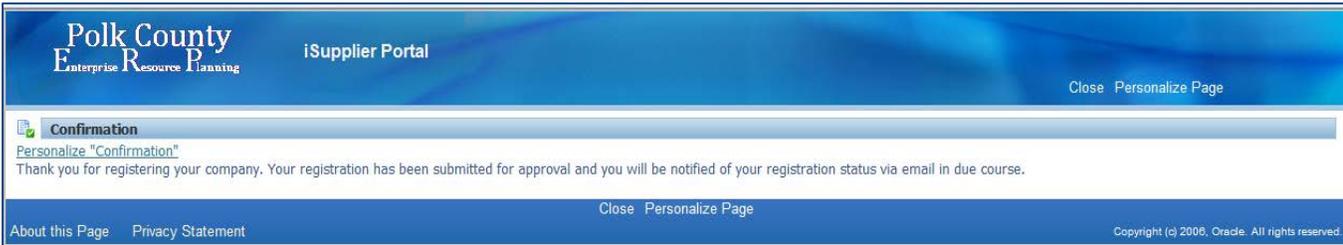
e. You may add additional codes by selecting Create or you may delete codes by selecting delete.



NOTE: All Commodity Codes beginning with “9” are for providing services, all Commodity Codes beginning with any number other than “9” are for providing goods.

14. If you have completed your registration, select the  button.

15. You will receive a Confirmation that you have completed your registration.



16. You may close your web browser now and wait for your approval notification to take further actions. The Procurement Division will review and approve your registration.

17. The approval notification will provide you with a web address (link) to the iSupplier log on screen; your User ID (email address provided at registration); and your temporary password. The User ID and password is case sensitive.

NOTE: Remember to provide your W-9 Form to the Finance Department. You may fax the completed W-9 Form to 863-534-6521 or email to procurement@polk-county.net .

Existing Suppliers

Existing suppliers are defined as those suppliers who have done business with the Polk County Board of County Commissioners and have received a payment via check in the past five (5) years (effective from October 1, 2006).

If your company is an existing supplier in our Oracle database you will need to send an email to procurement@polk-county.net to request a User ID and password to access your company information in iSupplier. You must provide the email address to be used as your User ID, First Name, Last Name, and Phone Number. You will receive an email invitation with your User ID and temporary password to access your supplier portfolio.

iSupplier Login

Introduction:

Congratulations on successfully registering your company with Polk County and welcome to our iSupplier portal network. You now have the ability and responsibility of updating your information by providing the products and services your organization offers. This will allow Polk County to invite you to participate in their electronic bidding process.

Registration Approval Notification:

Please check your inbox for the email address that was provided during the registration process to find a notification. The subject will be: Polk County Procurement: Registration Approval.

A sample approval notification is shown below.

“Your request to register with Polk County Procurement for access to our iSupplier portal has been approved. You may now log on to our iSupplier portal with the username (PCVENDOR204@YAHOO.COM) and the temporary password: Rv6%9B. When you log on for the first time, you will be required to change your password for security purposes.

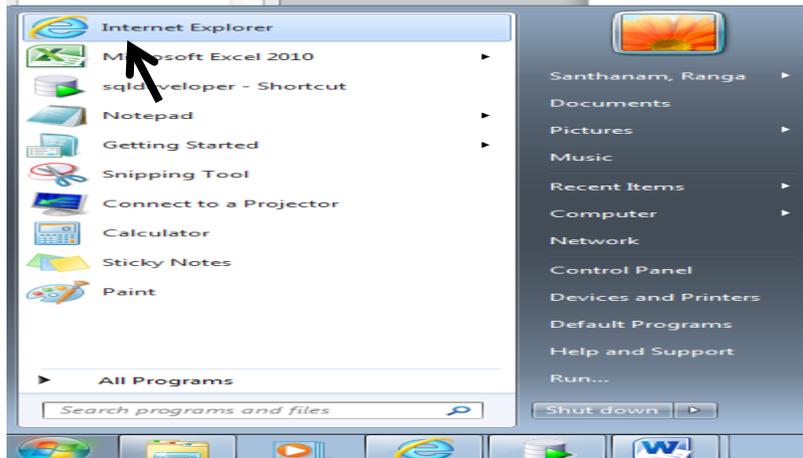
You **must** complete your Products and Services (Commodity Codes), these codes will be used for inviting you to participate in future solicitations.

If you have any questions or require additional information, contact procurment@polk-county.net or 863-534-6757.

Thank you for your interest in doing business with Polk County. “

Logging in to Polk County’s iSupplier:

1. Open Browser by selecting Internet Explorer.



2. Type URL (web address): www.polk-county.net



3. Select the link for Procurement

FAQ | County Offices | e-Newsletter | About | A A A

HOME GOVERNMENT RESIDENTS BUSINESSES VISITORS VIDEO SEARCH



Polk County Florida Airboat Rides - Lake

How May We Help You?

- ☐ Citizen Service Center
- ☐ Employment Opportunities
- ☐ Frequently Asked Questions
- ☐ BoCC Agendas & Minutes
- ☐ Office of Planning and Development
- ☐ County Utilities
- ☐ County Road Closures
- ☐ Social Services
- ☐ **Procurement**
- ☐ Waste Resource Management
- ☐ Transit Services Reservation Request
- ☐ Parenting Class Registration

What's Happening

Polk County Board of County Commissioners has launched its redesigned website! The website features a fresh feel and should be much easier to navigate. When overhauling the site, our designers kept the popular service-based design, but added new features to make it easier and more fun for visitors to access Polk County government," said Mianne Nelson, Communications Division Director. "This website will provide better access to county services for our residents, businesses and visitors."

Enhanced features of the new website include a new menu structure and a "Most Popular" feature for easier navigation, an enhanced video library with built-in viewer, an improved Google search feature that will make information easier to find, direct access to the county's Facebook and Twitter social media accounts, language translation that includes Spanish, French and several other languages, font resizing and a new Citizen Service Center that will make it easier for citizens to submit a request or suggestion. If you would like to leave feedback regarding the new website, [click here](#).

Quick Info

- ☐ County Contact List
- ☐ Where Are We Located?
- ☐ What Do We Do?
- ☐ Know Your Commissioner
- ☐ County User Fees
- ☐ Reserve a County Park
- ☐ County Mapping Services
- ☐ Animal Control
- ☐ County Document Center
- ☐ Municipal Code
- ☐ Polk County Charter
- ☐ County Photo Album

4. Select "Learn More" on How to Become a Vendor:

HOME GOVERNMENT RESIDENTS BUSINESSES VISITORS VIDEO SEARCH



Polk County Florida Historic Courthouse - Bartow

Procedure Information

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Procurement & Supplier Diversity Team






5. Select Registered Users Login to open the Login screen.

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Existing Vendors/Suppliers that have not reregistered in our new data base?

Procurement implemented a new registration data base in January of 2012. If you have not reregistered you must request a user id for access to update your supplier information and receive notifications for future solicitations. Send an email to procurement@polk-county.net and include your company name, contact name, current email address and phone number. You will receive an email with instructions on how to reregister.

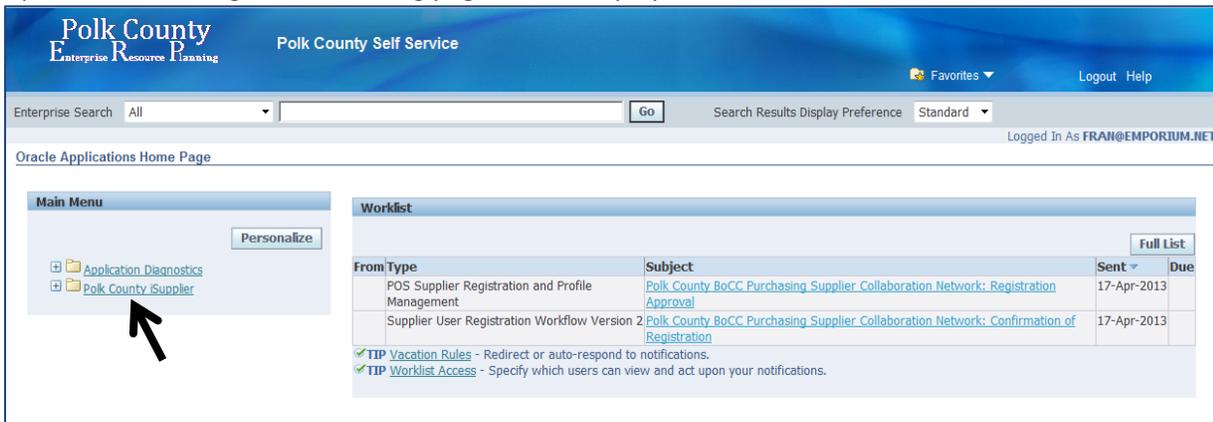
Once you re-register with us, you will be able to update/modify your vendor information at any time so please make sure you write down your user name and password once one is established for you as you go through the registration process.

[Registered Users Login](#)

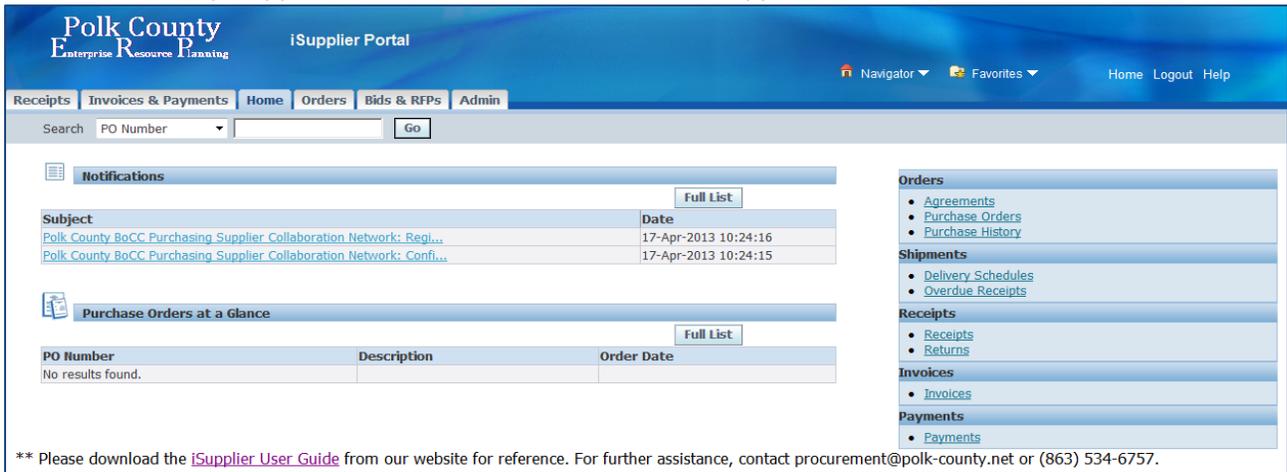
6. Type in your User Name (User ID/email address) and Password and select Login. If you are logging on for the first time you will be prompted to type in your Current (temporary) Password, create a New Password and Re-enter New Password before completing Login.



a. Upon successful Login the following page will be displayed:



b. Select Polk County iSupplier from the Main Menu to access iSupplier



Home Page

The Home Page displays your Notifications that have been sent to the email address you provided at registration. The five most recent Notifications will appear on the page, to see the full list, select the Full List button. You may open a Notification by selecting the underlined Subject.



View your companies Purchase Orders by selecting Agreements; Purchase Orders; and/or Purchase History from the menu located on the right side of the screen.



- Agreements are Contract Purchase Orders and Blanket Purchase Orders. These orders are used for reference and terms and conditions only.
- Purchase Orders are purchase orders issued for the purchase of goods and/or services.
- Purchase History is a search tool to search for a specific purchase order and review the change history of that purchase order.

View your companies Shipments by selecting Delivery Schedules; and Overdue Receipts from the menu located on the right side of the screen.



- Delivery Schedules are used to view the Need-By Dates of purchases orders issued to your company.
- Overdue Receipts are used to view if the product or service has been delivered to the County. The User Division will electronically receive a purchase order when the product and/or services have been provided and a correct invoice has been received.

View your companies Receipts by selecting Receipts; or Returns.



- Receipts provide the details of when the User Division electronically received the purchase order authorizing Accounts Payable (A/P) to pay the invoice.
- Returns provide information for products that have been returned to the supplier. This function is only used for our Fire Rescue and Utilities warehouses.

View your company's invoices by selecting Invoices.

The screenshot shows the iSupplier Portal interface. At the top, there are navigation tabs: Receipts, Invoices & Payments, Home, Orders, Bids & RFPs, and Admin. Below the tabs is a search bar with a dropdown menu set to 'PO Number' and a 'Go' button. The main content area is divided into several sections: Notifications, Purchase Orders at a Glance, and a right-hand navigation menu. The right-hand menu includes links for Orders, Shipments, Receipts, and Invoices. The 'Invoices' link is highlighted with a black arrow pointing to it.

NOTE: Currently Polk County does not utilize the electronic invoice submittal feature.

View your company's payments by selecting Payments.

The screenshot shows the iSupplier Portal interface, similar to the previous one. The right-hand navigation menu is expanded to show the 'Payments' link, which is highlighted with a black arrow pointing to it. The 'Invoices' link is also visible above it.

- Search for payment status of invoices, date check was written, check number, and check amount.

You may also access all of the above sections by selecting the appropriate tab on this screen.

The screenshot shows the top of the iSupplier Portal interface. The navigation tabs are: Receipts, Invoices & Payments, Home, Orders, Bids & RFPs, and Admin. The 'Orders' tab is highlighted with a black arrow pointing to it. Below the tabs is a search bar with a dropdown menu set to 'PO Number' and a 'Go' button.

Admin Page

The Admin page contains all of your company profile information. You may edit, add, and/or delete the information that was provided during the registration process.

General

The information contained on the General page can only be edited by Procurement. You must contact Procurement at 863-534-6757 or via email procurement@polk-county.net to request changes to be made to this information.

Company Profile

Organization

The Organization information is not required information. Any information provided may be used for reporting purposes.

Organization

SSN Chief Executive Name

Legal Structure Chief Executive Title

Principal Name

Year Established Principal Title

Incorporation Year

Control Year

Mission Statement

Total Employees

Organization Total Corporate Total

Organization Total Type Corporate Total Type

Tax and Financial Information

Taxpayer ID Analysis Year

Tax Registration Num Annual Revenue

Fiscal Year End Potential Revenue

Federal Agency For next fiscal year.

- Select the button to search for the Legal Structure. You may type in criteria and select Go to search for a specific structure; or leave the criteria blank and select Go to view the entire list.

Search and Select: Legal Structure

Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Meaning Go

Results

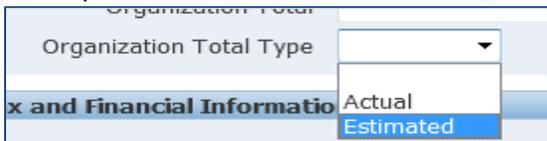
Previous 10 11-20 Next 10

Select	Quick Select	Meaning
<input type="radio"/>		Bankrupt Estate
<input type="radio"/>		Branch
<input type="radio"/>		Branch Location of Local Company
<input type="radio"/>		Business (sole-proprietorship or partnership)
<input type="radio"/>		Business Name

- ❖ The list shows ten items, to see additional items select **Next 10**
- ❖ Select the radio button next to the appropriate Meaning and then the Select button.

- ❖ Or you may select the  (Quick Select) button next to the appropriate Meaning

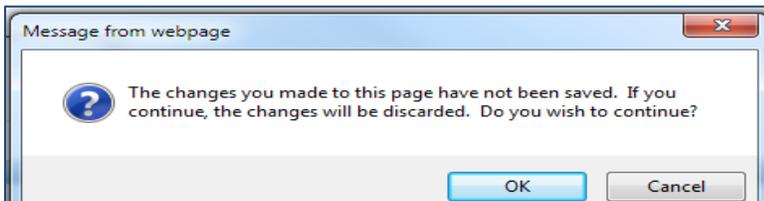
- When you see a field with a down arrow, select the arrow and choose an item from the list



- Always select Save before you leave the page or your information will not be saved.



- You will receive the following message if you did not select save. Select OK to continue without saving the information; or select Cancel and then select Save to save the information.



- A Confirmation will be displayed.



Address Book

The Address Book is where you maintain your company's addresses; only add those addresses that are necessary for doing business with Polk County.

1. Create additional address(es) by selecting Create

- Remember to turn on your Caps Lock and do NOT use any punctuation (periods, commas, etc.).
- Each address must be given an Address Name, such as REMIT TO, HEADQUARTERS, CORPORATE, or you may use the city name. Each address name must be unique, the system will not allow you to duplicate.
- If your company name is longer than 35 characters, you may continue the name in the Address Line 1 field
- Please enter suite #'s, unit #'s, apt #'s, etc. on a separate address line
- Please add the County not Country your company is located in below the City.
- Select what this Address is used for (select all applicable options):
 - Purchasing Address=Purchase Orders, Solicitations
 - Payment Address=Address that checks should be mailed to
 - RFQ Only Address=Address is only used for solicitations

2. Update an existing address by selecting the  (Update) button. Make the changes and select Apply

Update Address
* Indicates required field

TIP Example Address Name: REMIT TO, HEADQUARTERS, CORPORATE, etc.

* Address Name: REMIT TO
 Country: United States

* Address Line 1: 1129 BARTOW HWY
 Address Line 2: UNIT 4
 Address Line 3:
 Address Line 4:
 * City/Town/Locality: BARTOW
 County: POLK
 * State/Region: FL
 Province:
 * Postal Code: 33830

* Phone Area Code: 863
 * Phone Number: 534-5989
 Fax Area Code: 863
 Fax Number: 534-5999
 Email Address: JAN@REYNASCLEANING.NET

Purchasing Address
 Payment Address
 RFQ Only Address

Cancel **Apply** 

TIP Please enter all information in UPPERCASE. Do NOT use punctuations (periods, commas, etc.)

3. To delete an existing address, select the  button.

Contact Directory

The Contact Directory is a list of contacts for your company. You may add new contacts; update existing contacts; or delete existing contacts.

Profile Management

- General
- Company Profile
 - Organization
 - Address Book
 - Contact Directory**
 - Business Classifications
 - Product & Services
 - Banking Details
 - Surveys

Contact Directory : Active Contacts

Create 

First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update
Donna	McCarty	863-324-3882	donna@censtate.com	Current	✓			
DONNA	MCCARTY	863 324-3882	DONNA@CENSTATE.COM	Current				
SCOTT	SHORT	863 324-3882	BSSHORT@CENSTATE.COM	Current				
Michele	Sims		michelesims@censtate.com	Change Pending	✓			

TIP Only those contacts showing a check mark in the User Account column have access to iSupplier and Sourcing. To create a new registered user email your company name; first and last name; phone #; and email address to procurement@polk-county.net

Contact Directory : Inactive Contacts

1. To Create a new Contact Select the Create button, complete the contacts information and select Save.

Admin: Profile Management: Contact Directory >

Create Contact

* Indicates required field

Contact Title:

* First Name: John
 Middle Name:
 * Last Name: Smith
 Job Title:
 Department:

* Contact Email: john@censtate.com
 Phone Area Code: 863
 Phone Number: 324-6598
 Phone Extension:
 Fax Area Code:
 Fax Number:

Cancel **Save** 

- A Confirmation will be displayed that the contact was added. Notice the contact now appears in the list with a status of pending. The Procurement office must approve all changes to the supplier records.

Confirmation
 John Smith has been added to your Contact Directory.

Contact Directory : Active Contacts

Create

First Name	Last Name	Phone Number	Email	Status
Donna	McCarty	863-324-3882	donna@censtate.com	Current
DONNA	MCCARTY	863 324-3882	DONNA@CENSTATE.COM	Current
SCOTT	SHORT	863 324-3882	BSSHORT@CENSTATE.COM	Current
Michele	Sims		michelesims@censtate.com	Change Pending
John	Smith	863 324-6598	john@censtate.com	Pending

2. Update an existing Contact by selecting the  button next to the appropriate name. Make the necessary changes and select Save.

Update Contact
* Indicates required field

Contact Title	<input type="text"/>	Contact Email	michelesims@censtate.com
* First Name	Michele	Phone Area Code	863
Middle Name		Phone Number	324-8979
* Last Name	Sims	Phone Extension	
Job Title	Office Manager	Fax Area Code	863
Department		Fax Number	324-8955

- The Status has now been changed to "Change Pending". Upon approval of the changes from Procurement the status will change to "Current".

Michele	Sims		michelesims@censtate.com	Change Pending
---------	------	--	--------------------------	----------------

3. To associate a contact with an address or location, select the  button under Addresses for the appropriate contact.

Address Associations for Contact
The addresses associated with the contact can be maintained in this page.

Address Name	Address Details	Remove
WINTER HAVEN	PO DRAWER 552, WINTER HAVEN, FL, FL, US	

✓ TIP Select Add Another Row to associate a contact to an address.
✓ TIP To remove a site associated with a contact, select the Remove icon next to the appropriate address.

- Select Add Another Row

Address Associations for Contact
The addresses associated with the contact can be maintained in this page.

Address Name	Address Details
<input type="text"/>	

- Select the magnifying glass to search the list of addresses available

Search and Select:

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By:

Results

Address Name	Address Details
<input type="text"/>	<input type="text"/>

- Select search criteria from list: Address Name or Address Details; enter information and select Go. Or you may leave blank and select Go to bring up everything.

Search and Select:

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By:

Results

Select	Quick Select	Address Name	Address Details
<input type="radio"/>		BARTOW	1295 CHURCH, BARTOW, FL, FL, US
<input type="radio"/>		WINTER HAVEN	PO DRAWER 552, WINTER HAVEN, FL, FL, US

- Select the radio button next to the appropriate Address Name and the button. Or select the  button next to the appropriate Address Name

Address Associations for Contact
The addresses associated with the contact can be maintained in this page.

Address Name	Address Details	Remove
BARTOW	1295 CHURCH, BARTOW, FL, FL, US	
WINTER HAVEN	PO DRAWER 552, WINTER HAVEN, FL, FL, US	

- Delete any addresses that are not associated to the contact by selecting the  button next to the appropriate Address Name.
- Select OK to continue with the action
- Select Save, to save your changes

Address Associations for Contact

The addresses associated with the contact can be maintained in this page. Cancel Save

Address Name	Address Details	Remove
BARTOW	1295 CHURCH, BARTOW, FL, FL, US	

Add Another Row

4. To remove a contact from the list select the (Remove) button next to the appropriate contact.
- A Confirmation is displayed and the contact has now been moved from the Active Contacts list to the Inactive Contacts list.

Contact Directory : Active Contacts

Create

First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update
Donna	McCarty	863-324-3882	donna@censtate.com	Current	✓			
SCOTT	SHORT	863 324-3882	BSSHORT@CENSTATE.COM	Current				
Michele	Sims		michelesims@censtate.com	Change Pending	✓			
John	Smith	863 324-6598	john@censtate.com	Pending				

TIP Only those contacts showing a check mark in the User Account column have access to iSupplier and Sourcing. To create a new registered user email your company name; first and last name; phone #; and email address to procurement@polk-county.net

Contact Directory : Inactive Contacts

First Name	Last Name	Phone Number	Email	Status	User Account
DONNA	MCCARTY	863 324-3882	DONNA@CENSTATE.COM	Pending	

Business Classifications

Select all of the Business Classifications that apply to your company and select the box next to I certify that I have reviewed the classification below and they are current and accurate. Select Save after completing all of the information.

Business Classifications Cancel Save

Certification

Personalize "Certification"

I certify that I have reviewed the classification below and they are current and accurate.

Last Certified: _____ By: _____

TIP Date format example: 18-Apr-2013

TIP Identify all Business Classifications that apply to your company.

TIP When completing Minority Owned, you must check the box and select the appropriate minority type.

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Gender:					
Men Owned	<input checked="" type="checkbox"/>				
Women Owned	<input type="checkbox"/>				
Owner Ethnicity * Required	<input checked="" type="checkbox"/>	Caucasian			
Supplier Classification					
DBE	<input type="checkbox"/>				
Service Disabled Veteran	<input type="checkbox"/>				
Business Type:					
Corporation	<input checked="" type="checkbox"/>				
LLC	<input type="checkbox"/>				
LLP	<input type="checkbox"/>				
Partnership	<input type="checkbox"/>				
Sole Proprietor	<input type="checkbox"/>				
Sub-Chapter(s)	<input type="checkbox"/>				
Non-Profit	<input type="checkbox"/>				
Size:					
Small Business (Up to \$1,000,000)	<input type="checkbox"/>				
Small Medium Business (\$1,000,000 - \$5,000,000)	<input type="checkbox"/>				
Medium Business (\$5,000,000 - \$10,000,000)	<input checked="" type="checkbox"/>				
Large Business (Over \$10,000,000)	<input type="checkbox"/>				

- What is the Gender of the company owner? When selecting Women, the woman owner must have 51% or more ownership and manage the day to day operations.
- What is the Owner's Ethnicity? When selecting the Minority Type, the owner must have 51% or more ownership and manage the day to day operations. You must select the box in the Applicable column and select a Minority Type from the list. If you do not select both the system will not keep your selection.
- Certificates may be emailed to procurement@polk-county.net to be added/attached to your company profile

Classification	Applicable	Minority Type
Gender:		
Men Owned	<input type="checkbox"/>	
Women Owned	<input checked="" type="checkbox"/>	
Owner Ethnicity * Required	<input checked="" type="checkbox"/>	Caucasian
Supplier Classification		
DBE	<input type="checkbox"/>	
Service Disabled Veteran	<input type="checkbox"/>	
Business Type:		
Corporation	<input type="checkbox"/>	
LLC	<input checked="" type="checkbox"/>	

- Is your company classified as a DBE or Service Disabled Veteran? Select all that apply.
- What is your Business Type? Corporation, LLC, LLP, etc. Select one Business Type only.
- What is the Size of your business? Small Business, Small Medium Business, etc. Select one Size only.
- Shelter Market Eligible? This is for internal use only, do not select.
- Shelter Market Local Vendor? This is for internal use only, do not select.

Products & Services (Commodity Codes)

Remove or Add Products & Services (Commodity Codes) that you provide. You will be notified of solicitations advertised for the Commodity Codes you have selected. You **do not** have to receive an invitation in order to participate in a solicitation.

1. Select the box next to the Codes to be removed and select the **Remove** button.

Select Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/>	913.45 913 CONSTRUCTION SERVICES, HEAVY, INCL. MAINTENANCE AND REPAIR SERVICES --.CONSTRUCTION SEWER AND STORM DRAIN	08-Apr-2009	Approved	
<input checked="" type="checkbox"/>	913.47 913 CONSTRUCTION SERVICES, HEAVY, INCL. MAINTENANCE AND REPAIR SERVICES --.CONSTRUCTION, SIDEWALK AND DRIVEWAY INCLUDES PEDESTRIAN AND HANDICAP RAMPS	08-Apr-2009	Approved	
<input checked="" type="checkbox"/>	913.60 913 CONSTRUCTION SERVICES, HEAVY, INCL. MAINTENANCE AND REPAIR SERVICES --.WATER MAIN & SERVICE LINE CONSTRUCTION	08-Apr-2009	Approved	

A Confirmation will display. Select Return to Products and Services to return to the previous page.

Confirmation

Personalize "Confirmation"

The following Product and Service categories have been removed from your profile.

- 913 CONSTRUCTION SERVICES, HEAVY, INCL. MAINTENANCE AND REPAIR SERVICES --.CONSTRUCTION, SIDEWALK AND DRIVEWAY
- 913 CONSTRUCTION SERVICES, HEAVY, INCL. MAINTENANCE AND REPAIR SERVICES --.WATER MAIN & SERVICE LINE CONSTRUCTION

[Return to Products and Services](#)

2. Select the **Add** button to add additional Commodity Codes.
 - a. Select Browse All Products & Services (Commodity Codes) to view all of the codes. Select Next 10 to continue viewing the list. Select the Applicable box next to the appropriate Commodity Codes. You may select as many Commodity Codes as needed. Select Apply when you have completed your Commodity Code Selections.

Code	Commodity Codes	View Sub-Categories	Applicable
000	000 SHIPPING --		<input type="checkbox"/>
005	005 ABRASIVES MISC. --		<input type="checkbox"/>
010	010 ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES --		<input type="checkbox"/>
020	020 AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES --		<input type="checkbox"/>
022	022 AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS --		<input type="checkbox"/>
025	025 AIR COMPRESSORS & ACCESSORIES MISC. --		<input type="checkbox"/>
031	031 AIR CONDITIONING, HEATING & VENTILATING EQUIPMENT, PARTS & ACCESSORIES --		<input checked="" type="checkbox"/>

b. Select Search for Specific Product or Service Code (Commodity Code)

Prospective Supplier Registration: Additional Details >
Add Products and Services: : (test3)

Browse All Products & Services (Commodity Code)
 Search for Specific Product or Service Code (Commodity Code)

Search

Please enter your search criteria and select the "Go" button to see the results. Note that the search is not case sensitive.

Code
Description

Code	Description	Applicable
No search conducted.		

TIP Use "%" as a wildcard when searching. For example for supply related commodity codes type "%supply%".

- You may search by Commodity Code if you know the NIGP Commodity Code or you may search by the NIGP Commodity Code Description.
- When searching you may use the "%" sign as a wild card

c. In this example we're searching by the Code number. We know that the Code begins with 98 but aren't sure of the last three digits, so we used % as part of the search criteria. Select Go and a list of all Commodity Codes beginning with 98 is created.

Prospective Supplier Registration: Additional Details >
Add Products and Services: : (test3)

Browse All Products & Services (Commodity Code)
 Search for Specific Product or Service Code (Commodity Code)

Search

Please enter your search criteria and select the "Go" button to see the results. Note that the search is not case sensitive.

Code
Description

Code	Description	Applicable
981	981 RENTAL OR LEASE SERVICES OF GENERAL EQUIPMENT HVAC, ATHLETIC, FIRE AND POLICE PROTECTION, ETC. --	<input type="checkbox"/>
981.00	981 RENTAL OR LEASE SERVICES OF GENERAL EQUIPMENT HVAC, ATHLETIC, FIRE AND POLICE PROTECTION, ETC. --Default	<input type="checkbox"/>
983	983 RENTAL OR LEASE SERVICES OF CLOTHING, JANITORIAL, LAUNDRY, LAWN, PAINTING, SPRAYING, LABORATORY, AND TEXTILE EQUIPMENT --	<input type="checkbox"/>
983.00	983 RENTAL OR LEASE SERVICES OF CLOTHING, JANITORIAL, LAUNDRY, LAWN, PAINTING, SPRAYING, LABORATORY, AND TEXTILE EQUIPMENT --Default	<input type="checkbox"/>
983.06	983 RENTAL OR LEASE SERVICES OF CLOTHING, JANITORIAL, LAUNDRY, LAWN, PAINTING, SPRAYING, LABORATORY, AND TEXTILE EQUIPMENT -- Uniform Rental or Lease	<input type="checkbox"/>

- Select all that are applicable and Apply

d. In this example we're searching by the Description of the Commodity Code. We provide Auditing services, but aren't sure of the exact description so we used %consult% as our search criteria. Select Go and a list of all Commodity Codes containing "consult" is created.

Prospective Supplier Registration: Additional Details >
Add Products and Services: : (test3)

Browse All Products & Services (Commodity Code)
 Search for Specific Product or Service Code (Commodity Code)

Search

Please enter your search criteria and select the "Go" button to see the results. Note that the search is not case sensitive.

Code
Description

Code	Description	Applicable
918	918 CONSULTING SERVICES --	<input type="checkbox"/>
918.04	918 CONSULTING SERVICES --ACCOUNTING & AUDITING CONSULTING SERVICES	<input type="checkbox"/>
918.26	918 CONSULTING SERVICES --COMMUNICATIONS: PUBLIC RELATIONS CONSULTING	<input type="checkbox"/>
918.28	918 CONSULTING SERVICES --COMPUTER HARDWARE CONSULTING	<input type="checkbox"/>
918.30	918 CONSULTING SERVICES --COMPUTER NETWORK CONSULTING	<input type="checkbox"/>
918.36	918 CONSULTING SERVICES --COMPUTER SOFTWARE CONSULTING	<input type="checkbox"/>

- Select all that are applicable and Apply

e. You may add additional codes by selecting Create or you may delete codes by selecting delete.

Products and Services (Commodity Codes)

[Personalize "Products and Services \(Commodity Codes\)"](#)
Personalizable --> At least one entry is required. Click Create button below to enter your address.

Code	Commodity Codes	Delete
918.04	918 CONSULTING SERVICES --ACCOUNTING & AUDITING CONSULTING SERVICES	<input type="button" value="Delete"/>

NOTE: All Commodity Codes beginning with "9" are for providing services; all Commodity Codes beginning with any number other than "9" are for providing goods.

Banking Details

Polk County does not currently make ACH payments. We are in the process of implementing this service. Those suppliers interested in receiving ACH payments in the future will need to provide their ACH bank account information including a routing number. Polk County will notify all suppliers when the ACH payment process is put in place.

Banking Details

View: General Accounts

TIP Polk County currently does not make ACH payments, we are in the process of implementing this service. You will be notified prior to receiving ACH payments.

TIP If you are interested in receiving ACH Payments in the future, please provide your ACH bank account information including routing number. Please contact your bank, to ensure you have correct information.

TIP Date format example: 18-Apr-2013

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.											

1. Select the button to create an account.
 - a. Select the Country where the bank is located by selecting the down arrow and More

Create Bank Account

* Indicates required field

* Country: d for foreign payments
must include bank and branch information.

Type in the name of the Country and select Go to search for a specific Country or leave the criteria blank and select Go to view the list of Countries available.

Search and Select: Country

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Name

Results

Select	Quick Select	Name	Code
<input type="radio"/>		Afghanistan	AF
<input type="radio"/>		Aland Islands	AX
<input type="radio"/>		Albania	AL

- Select the radio button for the appropriate Country and Select; or
 - Select the Quick Select button next to the appropriate Country
- b. Unselect "Account is used for foreign payments, if applicable"

Admin: Profile Management: Banking Details >

Create Bank Account

* Indicates required field

* Country: Account is used for foreign payments
Account definition must include bank and branch information.

2. Complete the Bank and Branch information

Bank	Branch
<p>Personalize "Bank"</p> <p><input checked="" type="radio"/> New Bank</p> <p><input type="radio"/> Existing Bank</p> <p>Bank Name: <input type="text"/></p> <p>Bank Number: <input type="text"/></p> <p><input type="button" value="Show Bank Details"/></p>	<p>Personalize "Branch"</p> <p><input checked="" type="radio"/> New Branch</p> <p><input type="radio"/> Existing Branch</p> <p>Branch Name: <input type="text"/></p> <p>Branch Number: <input type="text"/></p> <p>BIC: <input type="text"/></p> <p>Branch Type: ABA <input type="button" value="Show Branch Details"/></p>

- a. Select New Bank or Existing Bank

New Bank

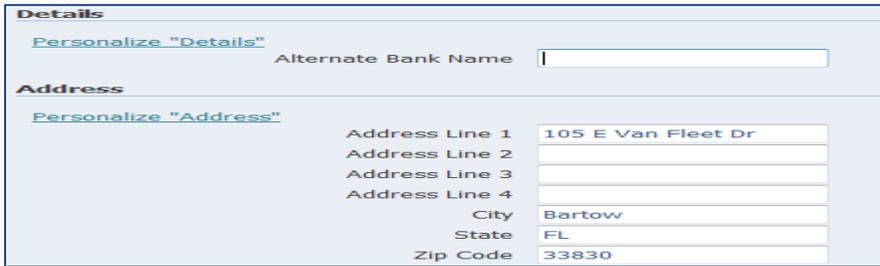
Existing Bank

- b. Type in the Bank Name and Bank Number

Bank Name:

Bank Number:

- c. Select to expand the Bank Details



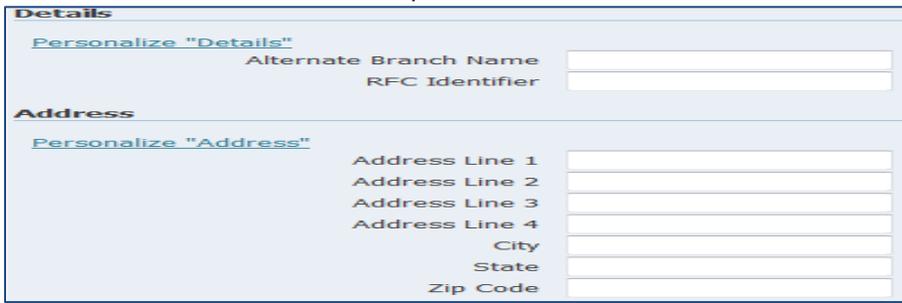
- d. Select New Branch or Existing Branch



- e. Complete the Branch information



- f. Select to expand the Branch Details



3. Complete your Bank Account information



- Select Show Account Details for additional information



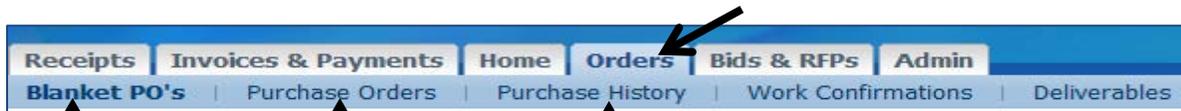
4. Add Comments, if applicable



5. Select the button to save your information.

Orders Page

Select the Orders tab and then select the appropriate button to view Blanket PO's; Purchase Orders; and Purchase History.



- Blanket PO's=Blanket purchase orders are created as a result of an electronic solicitation and are issued to the awarded vendors with their bid prices.
- Purchase Orders=Standard purchase orders are created and issued to vendors after a requisition is created and approved by a User Division.
- Purchase History=
- Work Confirmations=this feature is not utilized by Polk County.
- Deliverables=this feature is not utilized by Polk County.

Blanket PO's

You may do a Simple Search by entering the Blanket PO number; Effective-From Date; and/or Effective-To Date and select Go to search for a specific Blanket PO. Or you may leave the search criteria blank and select Go to bring up a list of all of your company's Blanket PO's

PO Number	Revision	Description	Buyer	Order Date	Amount Agreed	Amount Released	Effective-From Date	Effective-To Date	Status	Attachments	Upload Status
No search conducted.											

Purchase Orders

- You may scroll through the list of PO Numbers or;

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	21301491	0	Board of County Commissioners Division	Standard PO	Bid 12-013, Rental of portable facilities	28-Mar-2013 14:39:56	Sims, Michele A	USD	117.11	Open		
<input type="radio"/>	21301422	1	Board of County Commissioners Division	Standard PO	Contract 13-003 Hodge Street	25-Mar-2013 09:21:20	Kennedy, Kari Lyn	USD	2,000,000.00	Open		
<input type="radio"/>	21301441	0	Board of County Commissioners Division	Standard PO	Test PDF PO print	01-Feb-2013 17:17:35	Sims, Michele A	USD	242,272.23	Open		
<input type="radio"/>	21101912	3	Board of County Commissioners Division	Standard PO	Contract #11-030 New Mann Rd. WPF & Palmore Well Interconnect (BVP 10-116)	28-Jan-2013 15:18:59	Kennedy, Kari Lyn	USD	2,531,024.09	Closed		

- If there are more than 25 PO's the Next 25 will be underlined. Select Next to see the next 25 PO's.

- Select the radio button next to the appropriate po and select View Change History

Select	PO Number	Rev	Operating Unit	Document Type	Description
	21301491	0	Board of County Commissioners Division	Standard PO	Bid 12-013, Rental of portable facilities

- Or; Select the PO Number 21301491 to view the PO.

Receipts | Invoices & Payments | Home | Orders | Bids & RFPs | Admin

Blanket PO's | **Purchase Orders** | Purchase History | Work Confirmations | Deliverables

Orders: Purchase Orders >

Standard Purchase Order: 21301491, 0 (Total USD 117.11)

Currency=USD

Actions: View Change History [Go] Export

Personalize "View Order Detail Container"

Order Information

General	Terms and Conditions	Summary
Total: 117.11 Supplier: CENSTATE CONTRACTORS INC Supplier Site: WINTER HAVEN Address: PO DRAWER 552 WINTER HAVEN, FL 33882 Buyer: Sims, Michele A Order Date: 28-Mar-2013 14:39:56 Description: Bid 12-013, Rental of portable facilities Status: Open Note to Supplier Operating Unit: Board of County Commissioners Division Sourcing Document Supplier Order Number Attachments: None	Payment Terms: IMMEDIATE Carrier: Best Way Freight Terms: Destination Shipping Control Ship-To Address Address: 330 W Church St 5th Floor Bartow, FL 33830 Bill-To Address Address: 330 West Church Street Room 150 Bartow, FL 33830	Total: 117.11 Received: 0.00 Invoiced: 0.00 Payment Status: Not Paid

PO Details

Personalize "PO Details"

Show All Details | Hide All Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
Show 1	Goods			UAT Training Doc: Entered by RS; Expense Account	EACH	1	117.11	117.11	Open		

- Summary in top right corner shows:
 Total=total of PO
 Received=amount User Division has authorized payment for
 Invoiced=amount paid
 Payment Status=status of the check
- Select button to see the Shipment details for each PO line

Shipment	Ship-To Location	Qty	Amount	Ordered	Received	Invoiced	Ordered	Received	Invoiced	Promised Date	Need-By Date	Payment Status	Status	Supplier Line	Split	Reason	Attachments
1	Information Technology	1	117.11							31-Mar-2013 17:00:00	31-Mar-2013 17:00:00	Open					

- Select an option from the Actions list and Go to view Change History; PDF of PO; Receipts; Invoices; Payments; and Shipments.

Delivery Schedules | **Receipts** | Returns | Overdue Receipts

Orders: Purchase Orders >

Standard Purchase Order: 21301491, 0 (Total USD 117.11)

Currency=USD

Actions: View Receipts [Go] View Change History View PDF View Receipts View Invoices View Payments View Shipments

Personalize "View Order Detail Container"

Order Information

General	Terms and Conditions	Summary
Total: 117.11 Supplier: CENSTATE CONTRACTORS INC Supplier Site: WINTER HAVEN Address: PO DRAWER 552 WINTER HAVEN, FL 33882 Buyer: Sims, Michele A Order Date: 28-Mar-2013 14:39:56 Description: Bid 12-013, Rental of portable facilities Status: Open Note to Supplier Operating Unit: Board of County Commissioners Division Sourcing Document Supplier Order Number Attachments: None	Payment Terms: IMMEDIATE Carrier: Best Way Freight Terms: Destination Shipping Control Ship-To Address Address: 330 W Church St 5th Floor Bartow, FL 33830 Bill-To Address Address: 330 West Church Street Room 150 Bartow, FL 33830	Total: 117.11 Received: 0.00 Invoiced: 0.00 Payment Status: Not Paid

Select Return to View Order Details from any of these screens to return to the previous screen.

Receipts for Standard Purchase Order: 21301491

Export

Receipt	PO Number	Line	Shipment	Description	UOM	Ordered	Returned	Net Received	Defects	Location	Receipt Date	Promised Date	Need-By Date	Performance
No results found.														

[Return to View Order Details](#) [Export]

b. Search for a particular PO by using the Advanced Search button

The screenshot shows the 'Purchase Orders' page with a navigation bar at the top containing 'Blanket PO's', 'Purchase Orders', 'Purchase History', 'Work Confirmations', and 'Deliverables'. Below the navigation bar is a search area with a 'Views' section. In the 'Views' section, there is a dropdown menu set to 'All Purchase Orders' and a 'Go' button. To the right of the 'Go' button is an 'Advanced Search' button.

- Select **Show table data when all conditions are met** or **Show table data when any condition is met.**
- Fill in your search criteria and select Go

The screenshot shows the 'Advanced Search' dialog box. It has a title bar 'Advanced Search' and a 'Views' button on the right. The main area contains the text 'Specify parameters and values to filter the data that is displayed in your results set.' Below this are two radio buttons: 'Show table data when all conditions are met.' (which is selected) and 'Show table data when any condition is met.' There are four search criteria: 'PO Number' (value: 21100834), 'Document Type', 'Order Date', and 'Buyer'. Each criterion has a dropdown menu and a text input field. At the bottom are 'Go', 'Clear', 'Add Another', and 'Add' buttons, along with an 'Acknowledgement Status' dropdown.

- In the following example we used PO Number 21100834 as our search criteria

PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Acknowledge Status	By	Attachments
21100834	2	Board of County Commissioners Division	Standard PO	Contract #10-098 Holly Hill WPF & Reclaim/Repump Facility (BVP 10-077)	29-Oct-2012 09:34:30	Cusano, Carolyn Joyce	USD	4,635,875.48	Closed		

Purchase History

- a. You may select Go to pull up a list of all PO's issued to your company; perform a Simple Search; or perform an Advanced Search

The screenshot shows the 'Purchase Order Revision History' page. It has a navigation bar with 'Blanket PO's', 'Purchase Orders', 'Purchase History', 'Work Confirmations', and 'Deliverables'. Below the navigation bar is a 'Simple Search' form with fields for 'PO Number', 'Release Number', 'Revision', 'Document Type', 'Creation Date', and 'Revised Date'. There are 'Go' and 'Clear' buttons. To the right of the 'Go' button is an 'Export' button with an arrow pointing to it. Below the 'Go' button is an 'Advanced Search' button.

- To Export the list, select Export
- A dialogue box will pop up: select Open, Save, or Cancel

The screenshot shows a dialog box with the text 'Do you want to open or save export.csv from r12access.polk-county.net?'. There are three buttons: 'Open', 'Save', and 'Cancel'.

- The list will open in an Excel spreadsheet:

	A	B	C	D	E	F	G	H
1	PO Number	Rev	Description	Buyer	Creation Date	Revised Date	Total	Ship-To Location
2	21301491	0	Bid 12-013, Rental of portable facilities	Sims, Michele A	3/28/2013 14:25		117.11	Procurement Division
3	21301441	0	Test PDF PO print	Sims, Michele A	2/1/2013 17:16		242,272.23	Natural Resources
4	21301405	0	Contract 13-003 Hodge Street Water Productio	Kennedy, Kari Lyn	1/28/2013 15:08			Utilities Jim Keene Blvd
5	21301232	0	Bid 13-055, Twin Oaks Mobile Home Park Dra	Combee, Mary W	1/8/2013 17:15		242,272.23	Natural Resources
6	21101738	0	BVP 10-116, New Mann Road WPF & Palmore	Cusano, Carolyn Joyce	3/2/2011 14:58			Utilities Jim Keene Blvd
7	21101635	0	Contract #10-98 New Holly Hill WPF/Reclaim	S Cusano, Carolyn Joyce	2/16/2011 13:50		4,543.40	Utilities Jim Keene Blvd
8	21100817	0	Contract #10-098, New Holly Hill WPF & Reclai	Cusano, Carolyn Joyce	12/2/2010 9:20			Utilities Jim Keene Blvd

- b. You may select Compare to Original PO; Compare to Previous PO; or Show all PO Changes to view the PO change history. Only those PO's with a Rev number greater than 0 will show results.

PO Number	Rev	Description	Buyer	Creation Date	Revised Date	Total	Ship-To Location	Compare to Original PO	Compare to Previous PO	Show all PO Changes
20600023	0	Contract 06-87, Dinner Lake Water Production Facility Impr. (PO78002)	Sims, Michele A	21-Sep-2006 16:22:09		364,999.00	Utilities Jim Keene Blvd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21301422	1	Contract 13-003 Hodge Street	Kennedy, Kari Lyn	29-Jan-2013 09:42:35	25-Mar-2013 09:05:26	2,000,000.00	Utilities Jim Keene Blvd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21101917	3	Contract #11-030 New Mann Rd. WPF & Palmore Well Interconnect (BVP 10-116)	Kennedy, Kari Lyn	22-Mar-2011 13:23:54	28-Jan-2013 15:18:58	2,531,024.09	Utilities Jim Keene Blvd	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

❖ In this example we chose to Show all PO Changes for PO 21101917 with 3 revisions:

Blanket PO's | Purchase Orders | **Purchase History** | Work Confirmations | Deliverables

Orders: Purchase History >

PO Comparison Result

Personalize Stack Layout: (ViewCompareStackRN)

PO Number	21101917	Ship-To Location	Utilities Jim Keene Blvd	Bill-To Location	Utilities Jim Keene Blvd
Revision	3	Ship Via	Best Way	Payment Terms	IMMEDIATE
Type	Standard PO	FOB		Freight	
Currency	USD	Total	2,531,024.09	Buyer	Kennedy, Kari Lyn

Show All PO Changes

Personalize "Compare to Original PO"

Comparisons are sorted by Revision, Line and Shipment.

Revision	Line	Item/Job	Shipment	Price Differential	Enabled Organization	Field Altered	Changed From	Changed To
3						Cancelled		
3	1					Cancelled		
3	1		1			Cancelled		
2						Buyer	Cusano, Carolyn Joyce	Kennedy, Kari Lyn
1						Amount	2862250	2572782.36
1	1					Quantity	2862250	2572782.36
1	1		1			Quantity	2862250	2572782.36

- Revision 1: the quantity decreased from 2862250 to 2572782.36
- Revision 2: the buyer was changed from Carolyn Cusano to Kari Kennedy
- Revision 3: the PO was cancelled

You may also Select Export to view the results in an Excel spreadsheet

	A	B	C	D	E	F	G	H	I
1	PO Number	Revision	Type	Currency	Ship-To Location	Ship Via	FOB	Total	Bill-To Location
2	21101917	3	Standard F	USD	Utilities Jim Keene Blvd	Best Way		2,531,024.09	Utilities Jim Keene Blvd
3									
4									
5	Revision	Line	Item/Job	Shipment	Price Differential	Enabled Organization	Field Altered	Changed From	Changed To
6		3					Cancelled		
7		3	1				Cancelled		
8		3	1	1			Cancelled		
9		2					Buyer	Cusano, Carolyn Joyce	Kennedy, Kari Lyn
10		1					Amount	2862250	2572782.36
11		1	1				Quantity	2862250	2572782.36
12		1	1	1			Quantity	2862250	2572782.36

Receipts Page

Select the Receipts tab and then select the appropriate button to view Delivery Schedules, Receipts, Returns and Overdue Receipts.



- Delivery Schedules Provide the Promised Date and Need-By Date
- Receipts=User Division electronic acknowledgement for receipt of goods and/or services and approval of payment for goods and/or services
- Returns=the return of goods purchased for Utilities and Fire Rescue inventory items only
- Overdue Receipts=PO's that have not been electronically received prior to the Due Date

Delivery Schedule

You may select Go to view a list of all open PO's for your company; Perform a Simple Search for a specific PO; or perform an Advanced Search.

Organization	PO Number	Supplier Item	Item Description	UOM	Quantity Ordered	Quantity Received	Ship-To Location	Carrier	Item Number	Supplier Config ID	Supplier	Supplier Location	Promised Date	Need-By Date
Board of County Commissioners Division	21301491		UAT Training Doc: Entered by RS; Expense Account	EACH	1	0	Information Technology	Best Way			CENSTATE CONTRACTORS INC	WRITE HAVEN	31-Mar-2013 17:00:00	31-Mar-2013 17:00:00
Board of County Commissioners Division	21301422		Contract 13-003, Hodge Street Water Production Facility construction contract	DOLLARS	2000000	0	Utilities Administration	Best Way			CENSTATE CONTRACTORS INC	WRITE HAVEN	31-Jan-2013 17:00:00	31-Jan-2013 17:00:00

- Follow the same instructions shown on page 23 for an Advanced Search
- Export the information into an Excel spreadsheet by selecting the Export button

	A	B	C	D	E	F	G	H	I
1	Organization	PO Number	Item Description	UOM	Quantity Ordered	Quantity Received	Ship-To Location	Promised Date	Need-By Date
2	Board of Cou	21301491	UAT Training Doc: Entered by RS; Expense A	EACH	1	0	Information Technology	3/31/2013 17:00	3/31/2013 17:00
3	Board of Cou	21301422	Contract 13-003, Hodge Street Water Product	DOLLARS	2000000	0	Utilities Administration	1/31/2013 17:00	1/31/2013 17:00
4	Board of Cou	21301441	Bid 13-055 Twin Oaks Mobile Home Park Dra	DOLLARS	105272.23	0	Natural Resources	1/18/2013 17:00	1/18/2013 17:00
5	Board of Cou	21301441	Bid 13-055 Twin Oaks Mobile Home Park Dra	DOLLARS	137000	0	Natural Resources	1/18/2013 17:00	1/18/2013 17:00

Receipts

You may select Go to view a list of all receipts for your company; perform a Simple Search for a specific receipt; or perform an Advanced Search.

Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/ Airbill	Freight Carrier	Bill of Lading	PO Number	Invoice	Attachments
9902	26-Mar-2007 11:55:13	Polk County Master Inventory Organization								20700805		
98655	23-Oct-2012 10:54:25	Polk County Master Inventory Organization								21101917		
9798	22-Mar-2007 11:06:07	Polk County Master Inventory Organization								20600740		

- Follow the same instructions shown on page 23 for an Advanced Search

- Export the information into an Excel spreadsheet by selecting the Export button

	A	B	C	D	E	F	G	H	I	J	K
1	Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/Airbill	Freight Carrier	Bill of Lading	PO Number
2	9902	3/26/2007 11:55	Polk County Master Inventory Organization								20700805
3	98655	10/23/2012 10:54	Polk County Master Inventory Organization								21101917
4	9798	3/22/2007 11:06	Polk County Master Inventory Organization								20600740
5	94917	8/3/2012 16:31	Polk County Master Inventory Organization								21101917
6	93136	6/21/2012 12:03	Polk County Master Inventory Organization								21100834
7	91820	5/18/2012 11:19	Polk County Master Inventory Organization								21101917
8	90753	4/25/2012 11:56	Polk County Master Inventory Organization								21101917
9	88939	3/9/2012 13:47	Polk County Master Inventory Organization								21101917

- Select a Receipt from the list to view the details

Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/Airbill	Freight Carrier	Bill of Lading	PO Number	Invoice	Attachments
9902	26-Mar-2007 11:55:13	Polk County Master Inventory Organization								20700805		
98655	23-Oct-2012 10:54:25	Polk County Master Inventory Organization								21101917		

Receipt: 98655 Export

Creation Date: 23-Oct-2012 10:54:25
 Organization: Polk County Master Inventory Organization
 Supplier: WINTER HAVEN
 Supplier Site: WINTER HAVEN
 Shipment Number:
 Shipment Date:
 Packing Slip:
 Containers:
 Waybill/Airbill:
 Freight Carrier:
 Bill of Lading:
 Attachments: None

Receipt Transactions

Receipt Date	Promised Date	Need-By Date	Performance	PO Number	Line	Shipment	Item/Job Description	UOM	Ordered	Returned	Net Received	Defects	Location	Attachments	LPI/Lot/Serial	Invoice
23-Oct-2012 10:53:50	22-Mar-2011 12:00:00	22-Mar-2011 12:00:00	Late	21101917	1	1	BVP 10-116 Construction of New Mann Rd WPF and Palmore Well Interconnect	DOLLARS	2572782.36		252571.42		Utilities Administration			

[Return to Receipts: Receipts](#) Export

Returns

You may select Go to view a list of all returns for your company; perform a Simple Search for a specific receipt; or perform an Advanced Search.

Receipts | Invoices & Payments | Home | Orders | Bids & RFPs | Admin

Delivery Schedules | Receipts | Returns | Overdue Receipts

Returns Summary Export

Simple Search

Note that the search is case insensitive Advanced Search

Organization:

PO Number:

Receipt Number:

Shipment Number:

RMA Number:

Item:

Supplier Item:

Item Description:

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Supplier Item	Item Description	Quantity UOM	Quantity Received	Quantity Returned	Return Date	Supplier Reason	Supplier Config ID
No search conducted.													

TIP Returns only apply to goods purchased for Utilities and Fire Rescue inventory items.

- Returns only apply to goods purchased for Utilities and Fire Rescue inventory items.