



# SUPPLIER REGISTRATION MANUAL

## Supplier Portal Module

### Abstract

Step by step process for new vendors to follow when registering as a supplier for Polk County

Brush, Ken  
kenbrush@polk-county.net

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# Supplier Registration

Please fill in all the information in each required field starting with your Company's Name.

The company name should be entered as it appears on your W-9, legal entity name.

1 2 3 4 5 6 7  
Company Details Contacts Addresses Business Products and Questionnaire Review  
Classifications Services

Register Supplier: Company Details ?

Back Next Save for Later Register Cancel

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

\* Company

\* Tax Organization Type

Supplier Type

Corporate Web Site

Attachments None

D-U-N-S Number

Tax Country

Taxpayer ID

Tax Registration Number

Note to Approver

Your Contact Information

Enter the contact information for communications regarding this registration.

\* First Name

\* Last Name

\* Email

\* Confirm Email

Select your company's "Tax Organization Type".

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

\* Tax Organization Type

Supplier Type

Corporate Web Site

Attachments

Corporation

Foreign Corporation

Foreign Government Agency

Foreign Individual

Foreign Partnership

Government Agency

Individual

Partnership

Your Contact Information

Enter the contact information for communications regarding this registration.

\* First Name

\* Last Name

\* Email

\* Confirm Email

## Select your "Supplier Type"

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

\* Tax Organization Type

**Supplier Type**

Corporate Web Site

Attachments

Your Contact Information

Enter the contact information for communications regarding this registration.

\* First Name

\* Last Name

\* Email

\* Confirm Email

Choose Not To Disclose

## Enter your "Corporate Web Site", optional.

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

\* Tax Organization Type

Supplier Type

Corporate Web Site

Attachments

## Enter your "Contact Information"

**\*\*Please note that the email address entered will be the primary username for the account. We recommend using a general email address for the company (E.g.: [info@abc.com](mailto:info@abc.com), [sales@abc.com](mailto:sales@abc.com), etc.)**

Your Contact Information

Enter the contact information for communications regarding this registration.

\* First Name

\* Last Name

\* Email

\* Confirm Email

Select the appropriate Tax Country. (Tip: when you start typing the country, a list will form. You may select from the automatically generated list.)

D-U-N-S Number

**Tax Country**

Taxpayer ID

Tax Registration Number

Note to Approver

[More...](#)

The Taxpayer ID # is mandatory. Enter your D-U-N-S #, optional.

D-U-N-S Number

Tax Country

**Taxpayer ID**

Tax Registration Number

Note to Approver

**Note:** If the Taxpayer ID # entered is applicable to more than one company, enter a note in the “Note to Approver” referencing the additional company name and identify which company is the parent company.

Click Next to continue to the next section

1 Company Details | 2 Contacts | 3 Addresses | 4 Business Classifications | 5 Products and Services | 6 Questionnaire | 7 Review

## Contacts Screen

In this section you will be able to review and edit your information by clicking “Edit”. You may also add additional users by clicking “Create”

Register Supplier: Contacts

Enter at least one contact.

Actions View Format Create Edit Delete Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	Request User Account	Edit	Delete
Brush, Ken		a1supplier@test.com	✓	✓	✎	✕

Columns Hidden 7

On the “Edit Contact” screen you may change the assigned role and add or change additional information.

Edit Contact: Ken Brush

Salutation

\* First Name Ken

Middle Name

\* Last Name Brush

Job Title

Administrative contact

Request user account

Roles

Role	Description
PolkSupplier Customer Service Representati...	Manages inbound purchase orders and communicates shipment activities for the supplier company . Primary tasks include...
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking in...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requ...

OK Cancel

When creating a new contact, you may assign if they will be an “Administrative Contact” of any changes to the account. You will also have the option to “Request User Account”. This will create a log in account with their email address. They will be sent an email to create a password.

Create Contact

Salutation

\* First Name

Middle Name

\* Last Name

Job Title  Indicate this contact is an administrative contact who will be notified of the registration review outcome

Administrative contact

Phone

Mobile

Fax

\* Email

▲ User Account

Request user account

Once you complete contact information click “Ok”. “Next” to move to the next section “Addresses”.

Roles

Actions View Format   Freeze Detach Wrap

Role	Description
Polk Supplier Customer Service Representa...	Manages inbound purchase orders and communicates shipment activities for the supplier company . Primary tasks include...
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking in...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requ...

Click “Next” to move to the next section “Addresses”.

	Administrative Contact	Request User Account	Edit	Delete
m	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

# Address Screen

In this section you must create a minimum of one (1) address for your company. Click “Create”

Complete the information required below. Select your city from the drop-down menu options. The State and County will auto-populate.

Select the purpose of the site. Please select all that will apply for the location. Enter a minimum of one contact name.

- Ordering-address for purchase orders
- Remit to- address for payments to be sent




- RFQ or Bidding-address to receive bid notices

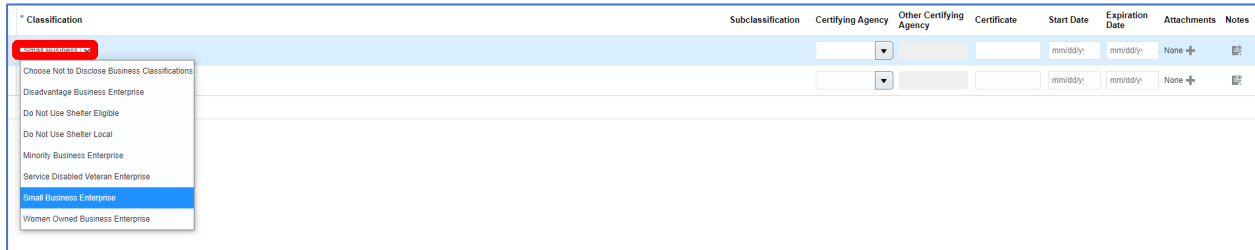
**NOTE: the contact entered will be the email that receives purchase orders. To add a Contact for the Address, click the .**

**You will be prompted to select one or more of the previously created Contact(s). After selecting Contact(s) click “OK”.**

**Click “Ok” if there are no additional addresses or “Create Another” to add another address. After all addresses have been created, click “Next” to complete the “Business Classifications”**

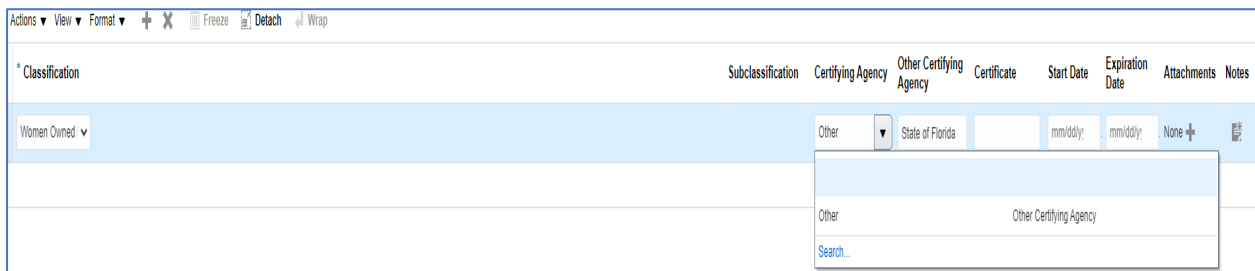
## Business Classification Screen

Under Business Classification page you will need to enter your companies' information. Start by clicking on the  (“add row”) button and select all that apply. If none apply, or you prefer not to select an item, you may select “Choose Not to Disclose Business Classification”.




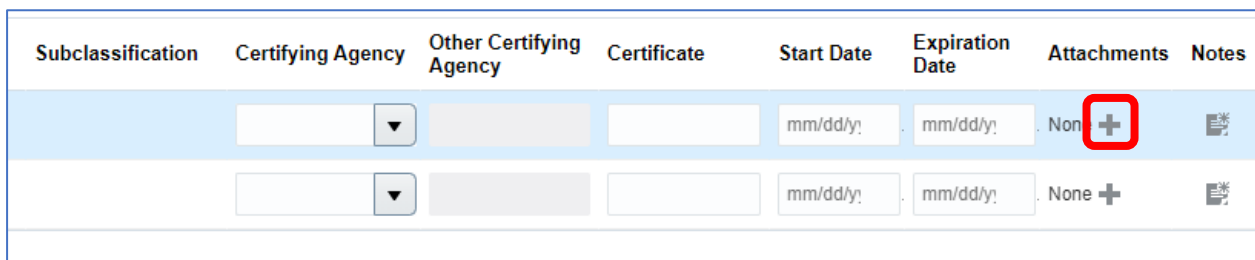
* Classification	Subclassification	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes
Choose Not to Disclose Business Classifications					mm/dd/yy	mm/dd/yy	None +	
Disadvantage Business Enterprise					mm/dd/yy	mm/dd/yy	None +	


If you select a Business Classification, the “Certifying Agency” must also be selected by clicking on the drop down, select other, and enter the Agency’s name.



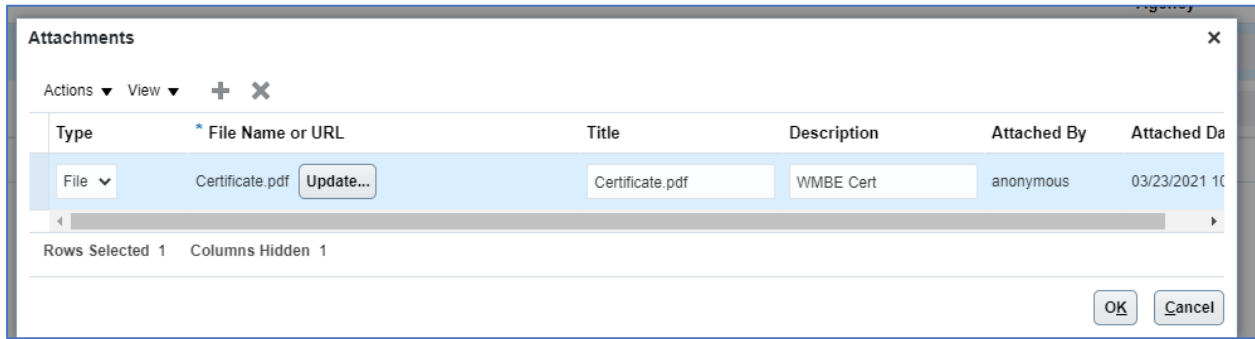
* Classification	Subclassification	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes
Women Owned		Other	State of Florida		mm/dd/yy	mm/dd/yy	None +	
		Other	Other Certifying Agency					

Next you will need to attach a copy of your certificate by clicking the  under “Attachments”

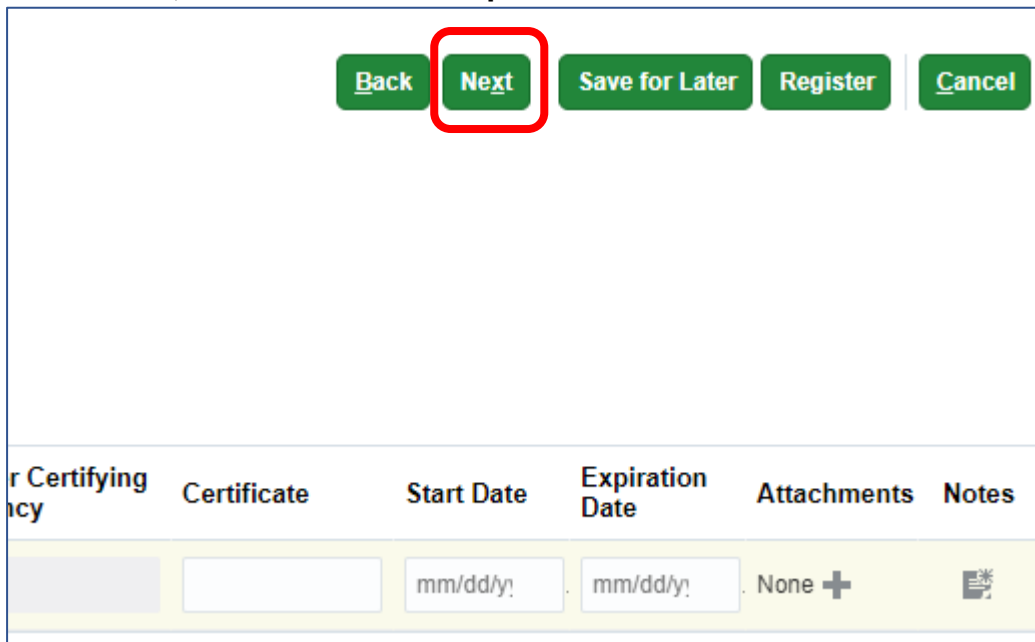


Subclassification	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes
				mm/dd/yy	mm/dd/yy	None 	
				mm/dd/yy	mm/dd/yy	None +	

Click “Choose File” to select your certificate file to attach and click “Ok”.



After selecting all applicable all classifications and uploading copies of the certificates, click “Next” to complete “Products and Services”.







## Products and Services Screen

Here you will need to select as many commodity codes as possible that will fall under the services you provide. Start by clicking  **Select and Add**

**\*NOTE:** notifications for solicitations are sent out based on commodity codes. Please select all that apply to the goods and/or services your company provides.

### Register Supplier: Products and Services

- Click "Select and Add" to add NIGP Codes
- The supplier must select at least one commodity code from this list
- Vendors should only choose the codes, for the goods and Services, that they provide
- To Access all available Commodity Codes, please [click here](#)

Actions ▼ View ▼ Format ▼  **Select and Add** ✕ Remove  Freeze  Detach  Wrap






Commodity Code

You may either search by Commodity Code number, Description, or by selecting the “Expand” button and scrolling through all of the Commodity Codes.

#### Select and Add: Products and Services

Search

Commodity Code  Description

View ▼ Format ▼  Freeze  Detach    Wrap

Select	Commodity Code	Description
<input type="checkbox"/>	NIGP Category	NIGP Category

Columns Hidden

**NOTE:** All commodity codes beginning with the # 9 are services, all others are for providing the described goods.

Click on the box to the left of all applicable commodity codes.

Select	Category Name	Description
<input type="checkbox"/>	NIGP Category	NIGP Category
<input type="checkbox"/>	000.00	SHIPPING CHARGES
<input type="checkbox"/>	005.00	ABRASIVES MISC.
<input type="checkbox"/>	010.00	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIE
<input type="checkbox"/>	020.00	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIE
<input type="checkbox"/>	022.00	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
<input type="checkbox"/>	025.00	AIR COMPRESSORS & ACCESSORIES MISC.
<input type="checkbox"/>	031.00	AIR CONDITIONING, HEATING & VENTILATING EQUIPMENT,
<input type="checkbox"/>	035.00	AIRCRAFT & AIRPORT EQUIPMENT, PARTS & SUPPLIES
<input type="checkbox"/>	037.00	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS

To search the commodity codes:

Select	Category Name	Description
<input type="checkbox"/>	485.00	JANITORIAL SUPPLIES, GENERAL LINE
<input type="checkbox"/>	910.39	JANITORIAL/CUSTODIAL SERVICES
<input type="checkbox"/>	911.39	JANITORIAL/CUSTODIAL SERVICES

1. Scroll through the commodity codes and check all that apply; or
2. Enter the commodity code number and click on the “Search” button; or
3. Enter a keyword and click on the “Search” button. In the example above, we searched “janitorial”.

After selecting all commodity codes that apply, click “Next” to complete the “Questionnaire”.

## Questionnaire

Here you will choose the Ethnicity, Gender, and Size of your company.

Register Supplier: Questionnaire

Attachments None

**Section**

1. New Supplier Registration

**Questions**  
New Supplier Registration (Section 1 of 1)

\* 1. Choose your Business Size

a. Choose Not to Disclose Size

b. Large Business (Over \$10,000,000)

c. Medium Business (\$5,000,000 - \$10,000,000)

d. Small Business (Up to \$1,000,000)

e. Small Medium Business (\$1,000,000 - \$5,000,000)

2. Ownership by Gender

a. Choose not to disclose gender

b. Men Owned

c. Women Owned

3. Choose Ethnicity

a. African American

b. Asian

c. Asian East Indian

d. Asian Pacific Islander

e. Caucasian


f. Choose not to disclose

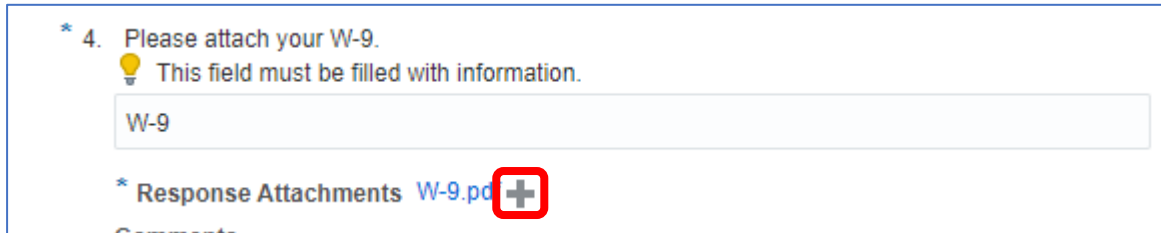
g. Hispanic/Latino

h. Native American

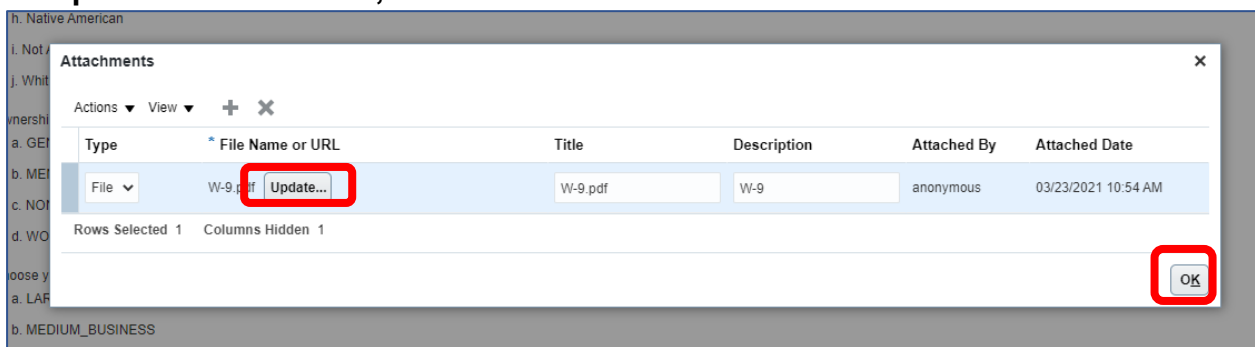
i. Not Applicable

- **Business Size:** select the appropriate business size or select “Choose not to disclose” by click on the radial button to the left of your choice.
- **Ownership by Gender:** select the gender of the owner of the company or select “Choose not to disclose” if you choose not to or if it is not applicable.
- **Choose Ethnicity:** select the ethnicity of the owner of the company or select “Choose not to disclose”. “Not Applicable” only applies to those companies that are Publicly Traded, Employee Owned, and Non-profit.

Uploading a copy of your companies W-9 is required. Click on the  next to “Response Attachments” to attach your W-9. Acknowledge by typing “W-9” in box 4 as shown below.

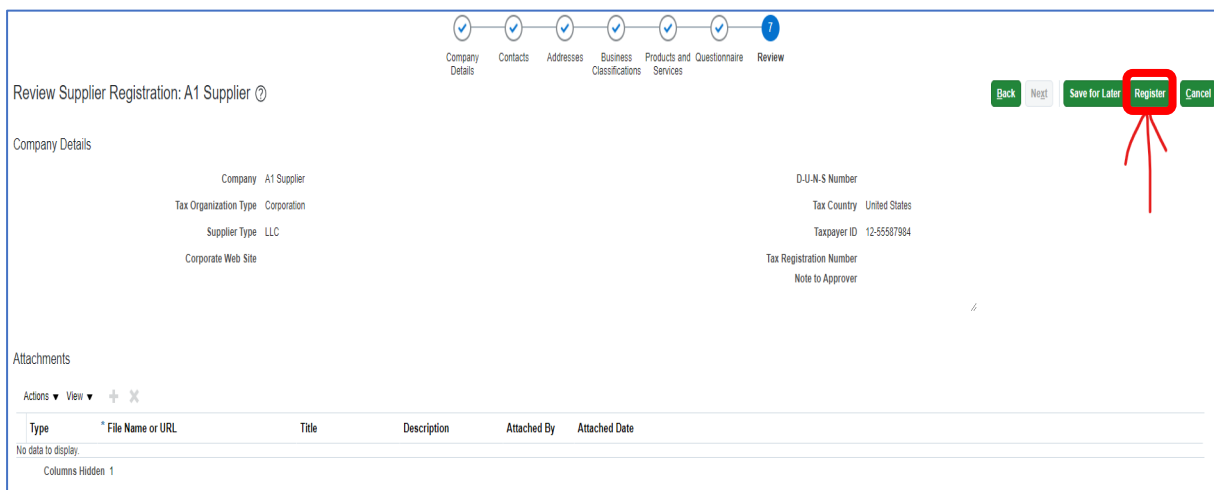


To upload the document, select the file and click “Ok”



Click “Next” to review all the information you have input.

After verifying all information has been entered, click “Register” in the top right corner.



**Congratulations, you have successfully completed your registration!**

## What Next?

Procurement staff will review your registration and confirm that the company does not already exist in our database within 1- 2 business days. Upon approval an email confirmation will be sent to the contact and email address that was used to register the company. The email will be sent from POLK ONE and will provide a link to set your password that expires in 72 hours.

If the password is not set within 72 hours, you will follow the forgot password process to reset your password.

If your company already exists, or the FEIN/TIN number entered already exist, a representative from Procurement will contact you.

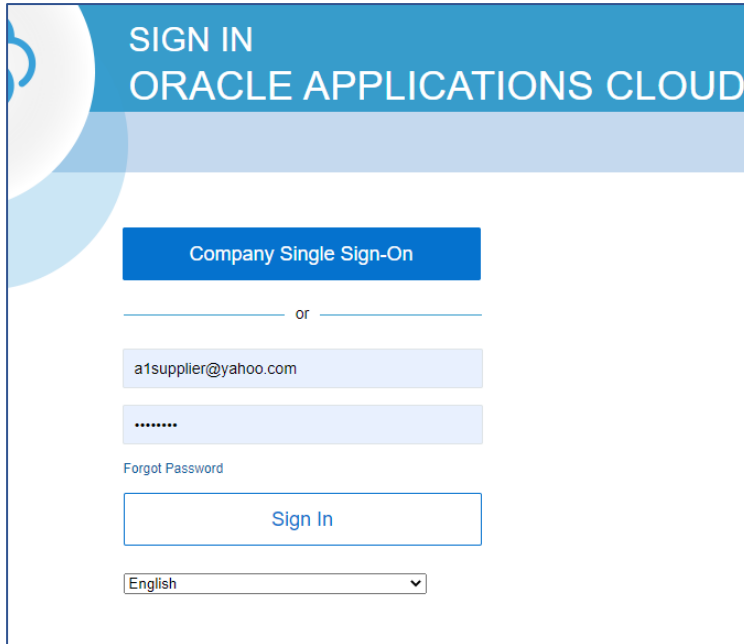
Remember to review and update your company information when there are changes in contacts, addresses and commodity codes. Failing to do so could cause you to miss out on an upcoming solicitation, or a purchase order requesting goods and/or services.

It is solely the responsibility of all vendors to maintain their company information in our database



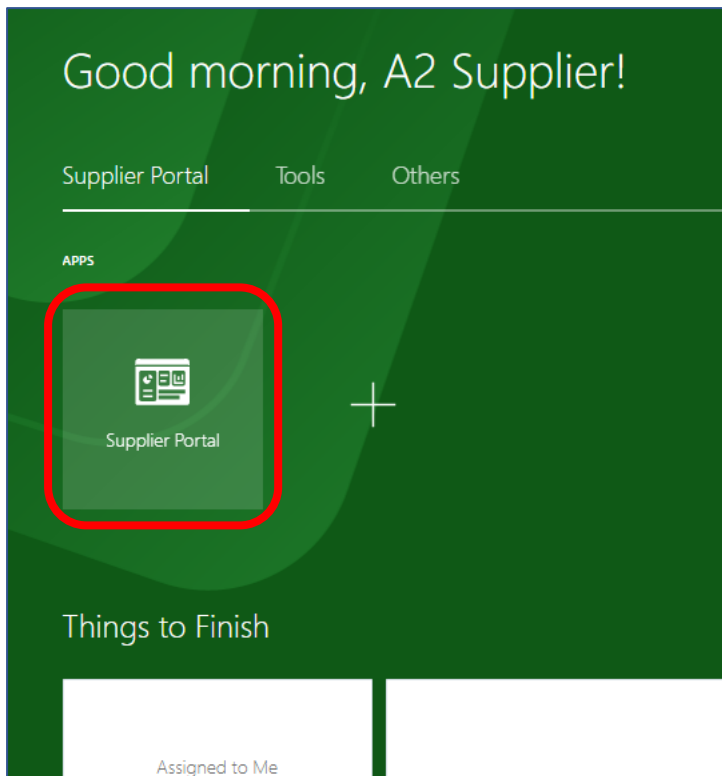
## Navigating the Supplier Portal

Login by entering your Email address and Password. If you have forgotten your Password, please follow the promotes under “Forgot Password”



The screenshot shows the Oracle Applications Cloud sign-in interface. At the top, it says "SIGN IN ORACLE APPLICATIONS CLOUD". Below this is a blue button labeled "Company Single Sign-On". Underneath, there is a horizontal line with "or" in the center. Below that are two input fields: the first contains the email address "a1supplier@yahoo.com" and the second contains a masked password "\*\*\*\*\*". To the left of the password field is a link for "Forgot Password". Below the input fields is a "Sign In" button. At the bottom, there is a language dropdown menu currently set to "English".

Once you have logged in, click on “Supplier Portal” to manage all of your Purchase Orders.



**From the “Supplier Portal Dashboard”, you will be able to review Purchase Orders, Manager Agreements, View Invoices, View Payments, View Active Solicitations and Manage your Responses, and Manage your Profile.**

The screenshot shows the Supplier Portal dashboard. At the top, there is a search bar with a dropdown menu set to 'Orders' and an 'Order Number' input field. Below the search bar is a 'Tasks' sidebar with a scrollable list of links: 'Manage Orders', 'Manage Schedules', 'Manage Agreements', 'View Invoices', 'View Payments', 'View Active Solicitations', 'Manage Responses', and 'Manage Profile'. The main content area features three widgets: 'Requiring Attention' with a lightning bolt icon and 'No data available' text; 'Recent Activity' showing 'Orders opened' with a count of 1; and 'Transaction Reports' showing 'PO Purchase Amount' of 1000 USD. A 'Supplier News' section is visible at the bottom.

**To view recent POs, click on “Manager Orders” under the “Task” menu.**

This is a close-up view of the 'Tasks' sidebar from the dashboard. The 'Tasks' header is at the top. Under the 'Orders' section, the 'Manage Orders' link is highlighted with a red rectangular box. Other links in the sidebar include 'Manage Schedules', 'Manage Agreements', 'View Invoices', 'View Payments', 'View Active Solicitations', 'Manage Responses', and 'Manage Profile'.

On the “Manager Order” screen, you can search for all the Purchase Orders that have been issued to you Company. (Hint: you can do an empty search by leaving all fields empty and clicking “Search”. This will bring up all POs for your Company.”

Manage Orders Done

Headers Schedules

Search

Sold to Legal Entity

Bill to BU

Supplier Site

Advanced Manage Watchlist Saved Search All Orders

Order

Status

Include Closed Documents No

**Search** Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
No search conducted.									
Columns Hidden 25									

Your search results will display.

Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
21-100101	6/1/21		Remit to	Brush, Kenneth	1,000.00	USD	Open		6/1/21

Columns Hidden 25

View the PO and all the details of it by clicking on the “Order Number”.

Search Results

Actions View Format Freeze

Order	Order Date	Description
<b>21-100101</b>	6/1/21	

Columns Hidden 25

On the right-hand side of the screen, you will see the “Order Life Cycle” graph. This will keep track of the progress of your PO. Click View Details to track Invoices and Receipts.



When an item is received by the County the Order Life Cycle will update.

