



SUPPLIER REGISTRATION MANUAL

Supplier Portal Module

Abstract

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

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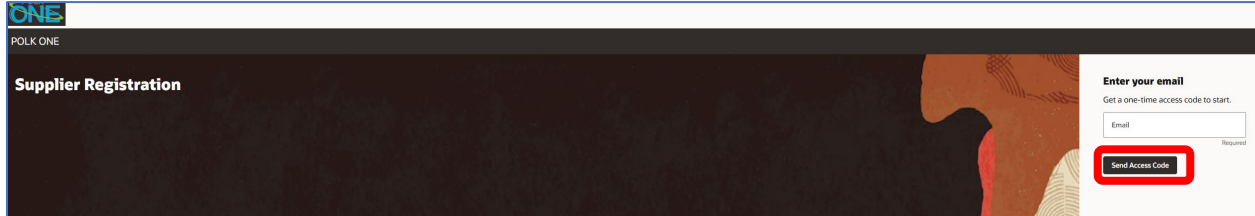
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Supplier Registration

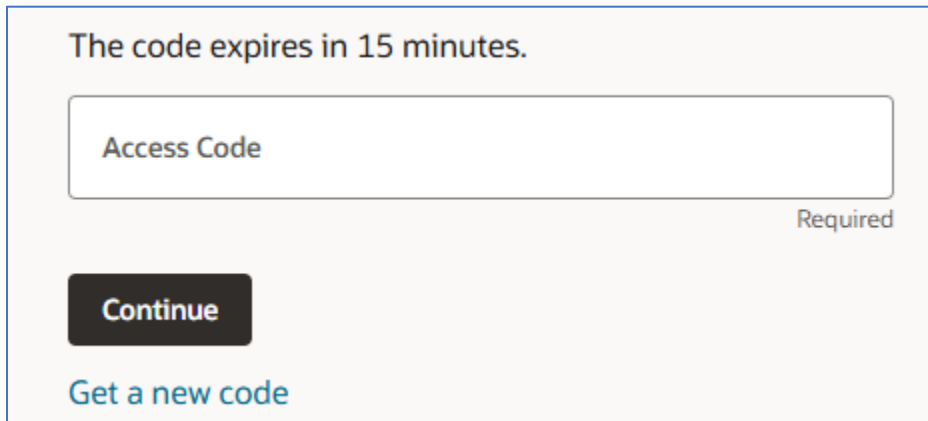
Enter your email address to start the registration and click “Send Access Code”.



The screenshot shows the 'Supplier Registration' page. At the top left, there is a logo for 'ONE POLK ONE'. The main heading is 'Supplier Registration'. On the right side, there is a section titled 'Enter your email' with the instruction 'Get a one-time access code to start.' Below this is an 'Email' input field with a 'Required' label. A red box highlights the 'Send Access Code' button.

****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, sales@abc.com, etc.)**

Once you receive the access code in your email, enter the code and click on “Continue”



The screenshot shows a screen for entering an access code. At the top, it says 'The code expires in 15 minutes.' Below this is a large text input field labeled 'Access Code' with a 'Required' label to its right. At the bottom left, there is a black 'Continue' button. At the bottom right, there is a blue link that says 'Get a new code'.

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.

Supplier Registration
Company Details

- Do NOT use punctuation (periods, commas, etc.)
- If Company Name is more than 55 Characters, you must continue the name on the first address line.
- The email address entered will also be your User ID/Username
- Email address should be a general corporate email (Not a personnel email)
- Supplier Training Video

Company: ABC Company | Website: | Country: United States

Taxpayer ID: | Tax Registration Number: | D-U-N-S Number: |

Organization Type: Corporation | Supplier Type: |

Note to Approver: |

Attach tax, insurance, and other relevant documents

Drag and Drop
Select or drop files here.

URL: | Add URL: |

No items to display.

Cancel Save Continue

1 | 6

Company Details
Contacts
Addresses
Business Classifications
Products and Services
Questionnaire

Enter your "Website", optional.

Company: ABC Company | Website: | Country: United States

Taxpayer ID: | Tax Registration Number: | D-U-N-S Number: |

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

Company ABC Company	Website	Country United States
Taxpayer ID	Tax Registration Number	D-U-N-S Number

Enter your “Taxpayer ID” information. Please use what is applicable to your business. Note: The Taxpayer ID # is mandatory. Enter your D-U-N-S #, optional.

Company ABC Company	Website	Country United States
Taxpayer ID	Tax Registration Number	D-U-N-S Number

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.

Organization Type Corporation	Supplier Type
Note to Approver	

Select your company's "Tax Organization Type".

The screenshot shows a form with several input fields. The 'Organization Type' dropdown menu is open, displaying a list of options: Corporation, Foreign Corporation, Foreign Government Agency, Foreign Individual, Foreign Partnership, Government Agency, Individual, and Partnership. The 'Corporation' option is highlighted in blue. A red rectangle highlights the dropdown menu and its selected value.

Company ABC Company	Website	Country United States
Taxpayer ID	Tax Registration Number	D-U-N-S Number
Organization Type Corporation	Supplier Type	

Select your "Supplier Type"

The screenshot shows a form with several input fields. The 'Supplier Type' dropdown menu is open, displaying a list of options: Corporation, Employee Owned, LLC, LLP, Partnership, Publicly Traded, Sole Proprietor, and Sub Chapter(s). The 'Corporation' option is highlighted in blue. A red rectangle highlights the dropdown menu and its selected value.

Company ABC Company	Website	Country United States
Taxpayer ID	Tax Registration Number	D-U-N-S Number
Organization Type Corporation	Supplier Type	

Click Next to continue to the next section

POLK ONE

Supplier Registration

Company Details

- Do NOT use punctuations (periods, commas, etc.)
- If Company Name is more than 35 Characters, you must continue the name on the first address line.
- The email address entered will also be your User ID/Username
- Email address should be a general corporate email (Not a personnel email)
- [Supplier Training Video](#)

Company ABC Company	Website	Country United States
Taxpayer ID	Tax Registration Number	D-U-N-S Number
Organization Type Corporation	Supplier Type	

Note to Approver

Attach tax, insurance, and other relevant documents

Drag and Drop
Select or drop files here.

URL

No items to display.

1 | 6

- Company Details
- Contacts
- Addresses
- Business Classifications
- Products and Services
- Questionnaire

Cancel

Contacts Screen

Fill in your contact information. Your email address will automatically be filled in the email address you provided earlier.

Supplier Registration

Contacts

- Enter at least one contact
- The email address entered will also be your User ID/Username

Contact 1
Enter contact details. Registration communications will be sent to this contact.

First Name Ken	Last Name Brush	Email testco@gmail.com
Job Title	Country US	Mobile +1
Country US	Phone +1	Ext
Country US	Fax +1	

Is this an administrative contact? Yes No
Administrative contact will receive general communications from us.

Does this contact need a user account? Yes No
User accounts will provide online access to supplier transactions and self-service tasks.

What user roles does this contact need?
Assign at least 1 user role to specify the responsibilities of the contact.

- Supplier Self Service Administrator**
Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
- Supplier Sales Representative**
Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to agreements in addition to adding catalog line items with customer specific pricing and terms. Updates contract deliverables that are assigned to the supplier party and updates progress on contract deliverables for which the supplier is responsible.
- Supplier Inventory Manager**
Individual in a supplier organization responsible for managing inventory process control from beginning to end. Monitors available supplies, materials and products to ensure that customers, employees and production have access to the materials they need.

Last updated 5 minutes ago Cancel Save **Continue**

Scroll down to verify the roles and access this user will have. The default roles will already be marked.

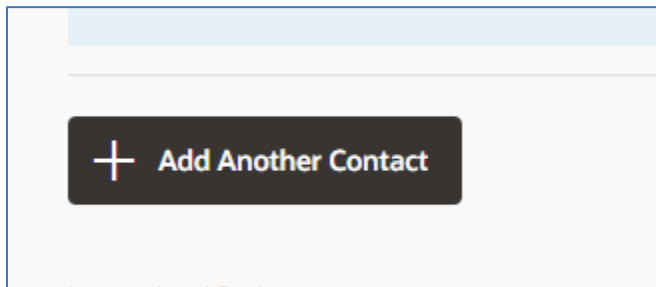
Is this an administrative contact? Yes No
Administrative contact will receive general communications from us.

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- Supplier Inventory Manager**
Individual in a supplier organization responsible for managing inventory process control from beginning to end. Monitors available supplies, materials and products to ensure that customers, employees and production have access to the materials they need.
- Supplier Customer Service Representative**
Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include tracking, acknowledging or requesting changes to new orders. Communicates order schedules that are ready to be shipped by submitting advance shipment notices, and monitors the receipt activities performed by the buying organization.
- Supplier Bidder**
Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requests for information and reverse auctions.
- Supplier Accounts Receivable Specialist**
Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
- Polk Supplier Customer Service Representative**
Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include tracking, acknowledging or requesting changes to new orders. Communicates order schedules that are ready to be shipped by submitting advance shipment notices, and monitors the receipt activities performed by the buying organization.

You can add additional contacts by scrolling to the bottom and clicking “Add Another Contact”.



You can edit the contact’s information by clicking “Edit” (pencil icon) on the right-hand side of the contact’s information.

A screenshot of a web form for editing contact information. The form is titled "Contact 1" and includes the following fields and options:

- First Name: Ken
- Last Name: Brush
- Email: testco@gmail.com
- Job Title: (empty)
- Mobile: (empty)
- Phone: (empty)
- Fax: (empty)
- Is this an administrative contact? Yes No
- Does this contact need a user account? Yes No
- What user roles does this contact need? (At least 1 user role to specify the responsibilities of the contact.)

The roles listed are: Supplier Self Service Administrator, Supplier Bidder, Supplier Accounts Receivable Specialist, and Polk Supplier Customer Service Representative. A red box highlights a pencil icon and a trash icon in the top right corner of the form.

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

When creating a new contact, the contact may be assigned as an “Administrative Contact” for any changes to the account. You will also have the option to “Request User Account”. This will create a log in account for the contact using their email address. The contact will be sent an email to create a password.

<p>Is this an administrative contact? Administrative contact will receive general communications from us.</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>
<p>Does this contact need a user account? User accounts will provide online access to supplier transactions and self-service tasks.</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>

Once the contact information has been entered, click “Continue” on the bottom right to move to the next section “Addresses”.

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

Address Screen

In this section you must create a minimum of one (1) address for your company. Complete the information required below.

Addresses
Enter at least one address.

- There must be at least one address for "Receive Purchase Orders", "Receive Payments", and "Bid on RFQs"
- You can enter more than one address

Address 1 ✕

Address Name Required **What's this address used for?** Select at least 1 purpose.
 Receive Purchase Orders Receive Payments Bid on RFQs

Country/Region

Address Line 1 Address Line 2 City

State Postal Code Postal Code Extension

County

Email Country Phone Ext

Country Fax

Which contacts are associated to this address?

Ken Brush testco@gmail.com

[+ Add Another Address](#)

Last updated 18 minutes ago Cancel Save [Continue](#)

Enter the Address Name (e.g. Headquarters, Main Office, etc.) and select the "Purpose" of the site. Please select all that will apply for the location.

Address 1

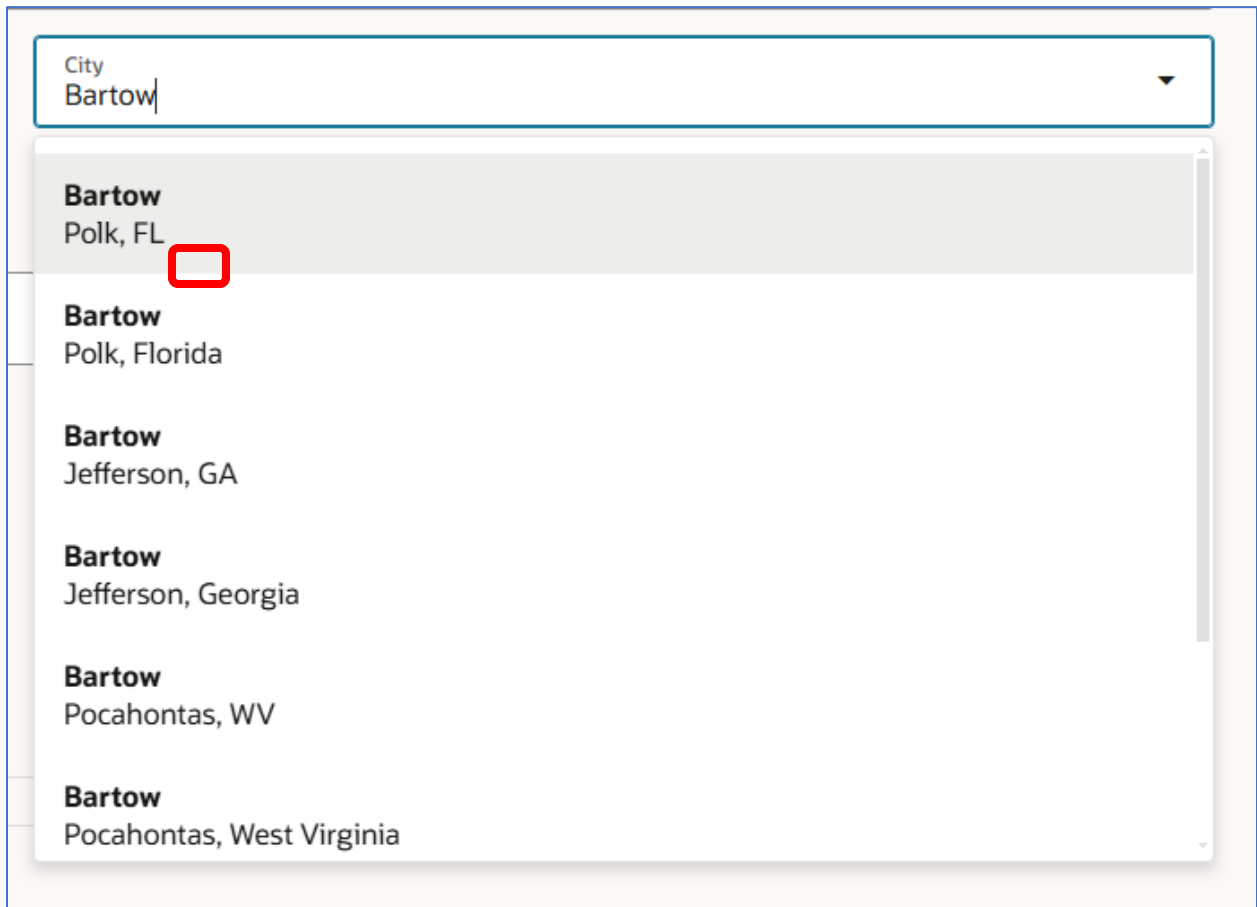
Address Name

What's this address used for? Select at least 1 purpose.
 Receive Purchase Orders Receive Payments Bid on RFQs

- Ordering- address for purchase orders
- Remit to- address for payments to be sent
- RFQ or Bidding- address to receive bid notices

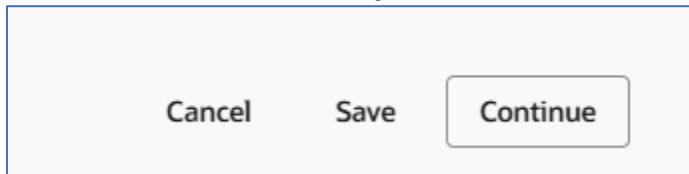
NOTE: There needs to be at least one address for each address purpose. It is recommended that you select all three Purposes for your primary address.

Once you start typing the name of the City a menu will appear to select from and the State and County will auto-populate.



A screenshot of a web form showing a dropdown menu for city selection. The input field at the top contains the text "City Bartow" with a downward arrow on the right. Below the input field, a list of suggestions is displayed. The first suggestion is "Bartow Polk, FL", which is highlighted with a light gray background and has a red square box drawn around it. The other suggestions are "Bartow Polk, Florida", "Bartow Jefferson, GA", "Bartow Jefferson, Georgia", "Bartow Pocahontas, WV", and "Bartow Pocahontas, West Virginia".

Click "Continue" to complete the "Business Classifications"



A screenshot of a button bar containing three buttons: "Cancel", "Save", and "Continue". The "Continue" button is highlighted with a light gray background and a thin border.

Business Classification Screen

Under Business Classification page you will need to enter your company's classification information. Start by clicking on the drop-down arrow and select all that are applicable to your company. If none apply, or you prefer not to select an item, you may select "Choose Not to Disclose Business Classification".

Supplier Registration

Business Classifications

Enter at least one business classification or select none applicable.

- This is a mandatory field
- If nothing is applicable, select "Choose not to Disclose"
- Do not choose Shelter (Internal Use Only)
- If you choose Certifying Agency as Other, you must enter the "Other Certifying Agency" name

Select a classification or confirm that none are applicable.

Classification

- Disadvantage Business Enterprise
- Minority Business Enterprise
- Service Disabled Veteran Enterprise
- Small Business Enterprise
- Women Owned Business Enterprise
- Choose Not to Disclose Business Classifications

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.

Business classification 1

Classification
Minority Business Enterprise

Subclassification

Certifying Agency
Other

Other Certifying Agency Required

Certificate Number

Other

Certificate End Date

Notes

Next you will need to attach a copy of your certificate by dragging and dropping in the attachment section.

Business classification 1

Classification
Minority Business Enterprise

Certifying Agency
Other

Other Certifying Agency Required

Certificate Start Date

Certificate End Date

Notes

Attach current certificates and supporting documents

Drag and Drop
Select or drop files here.

URL

Add URL

After selecting all applicable all classifications and uploading copies of the certificates, click “Continue” 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 commodities/services your company provides.

***NOTE:** notifications for solicitations are sent out based on commodity codes.

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

Products and Services
Enter at least one products and services category.

- Click “>” to view All NIGP Codes
- The supplier must select at least one commodity code from this list
- Vendors should only choose the codes, for the Goods and/or Services, that they provide

Search by category or description

Category	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

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. When you select a commodity code it will be added to the company profile. You can search again to add to the list.

Category	Description
<input type="checkbox"/> ▾ <input type="checkbox"/> NIGP Category	NIGP Category
<input type="checkbox"/> <input type="checkbox"/> 000.00	SHIPPING CHARGES
<input type="checkbox"/> <input type="checkbox"/> 005.00	ABRASIVES MISC.
<input type="checkbox"/> <input type="checkbox"/> 010.00	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIE
<input checked="" type="checkbox"/> <input type="checkbox"/> 020.00	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIE
<input type="checkbox"/> <input type="checkbox"/> 022.00	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
<input type="checkbox"/> <input type="checkbox"/> 025.00	AIR COMPRESSORS & ACCESSORIES MISC.
<input type="checkbox"/> <input type="checkbox"/> 031.00	AIR CONDITIONING, HEATING & VENTILATING EQUIPMENT,
<input checked="" type="checkbox"/> <input type="checkbox"/> 035.00	AIRCRAFT & AIRPORT EQUIPMENT, PARTS & SUPPLIES
<input type="checkbox"/> <input type="checkbox"/> 037.00	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS
<input type="checkbox"/> <input type="checkbox"/> 037.78	SOUVENIRS: PROMOTIONAL, ADVERTISING, ETC.
<input type="checkbox"/> <input type="checkbox"/> 045.00	APPLIANCES & EQUIPMENT, HOUSEHOLD TYPE MISC.
<input type="checkbox"/> <input type="checkbox"/> 050.00	ART EQUIPMENT & SUPPLIES
<input type="checkbox"/> <input type="checkbox"/> 052.00	ART OBJECTS MISC.
<input type="checkbox"/> <input type="checkbox"/> 055.00	AUTOMOTIVE ACCESSORIES FOR AUTOMOBILES, BUSES, TRA
<input type="checkbox"/> <input type="checkbox"/> 060.00	AUTOMOTIVE & TRAILER EQUIPMENT & PARTS

After selecting all commodity codes that apply, click “Continue” 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 “Add Attachments” and drag and drop to attach your W-9. Acknowledge by typing “W-9” in box 4 as shown below.

4. Please attach your W-9.

💡 This field must be filled with information.

Required

Required

After verifying all information has been entered, click “Submit” in the bottom 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.

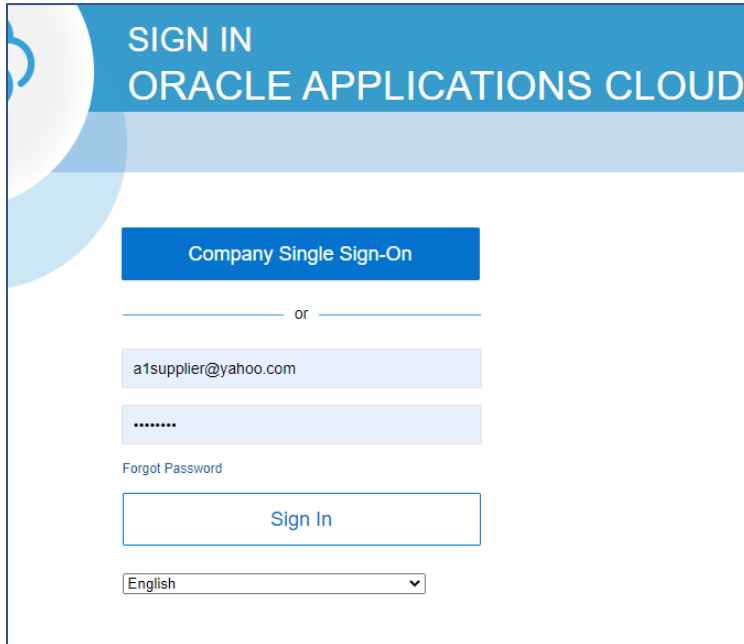
If your company already exists, or the FEIN/TIN number entered already exist, a representative from Procurement will contact you.

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

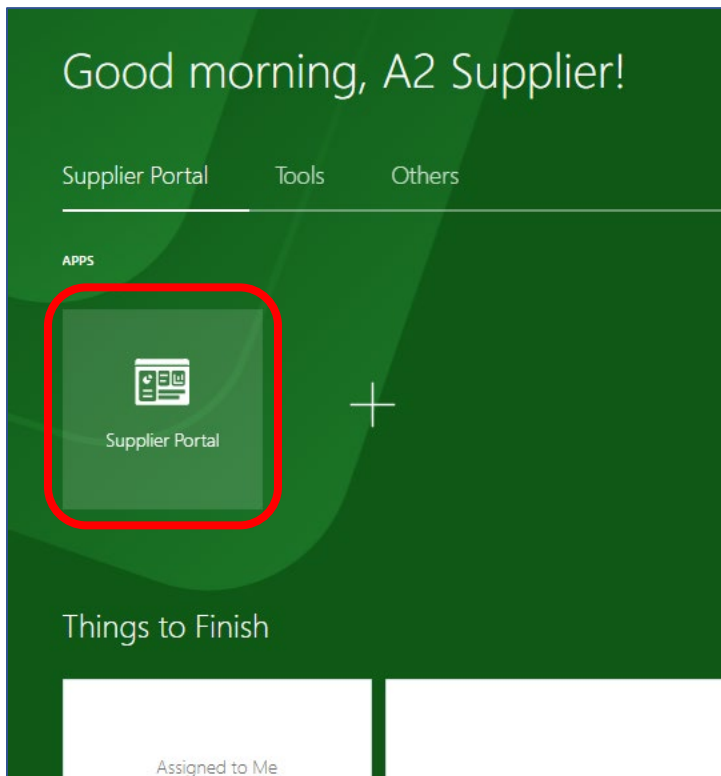
Navigating the Supplier Portal

Login by entering your Email address and Password. If you have forgotten your Password, please follow the prompts 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 is a horizontal line with "or" in the center. There are two input fields: the first contains the email address "a1supplier@yahoo.com" and the second contains a masked password "*****". Below the password field is a link for "Forgot Password". A "Sign In" button is positioned below the input fields. 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 menu with the following categories and links:

- Orders
 - Manage Orders
 - Manage Schedules
- Agreements
 - Manage Agreements
- Invoices and Payments
 - View Invoices
 - View Payments
- Solicitations
 - View Active Solicitations
 - Manage Responses
- Company Profile
 - Manage Profile

The main content area contains three widgets:

- Requiring Attention:** A large empty box with a lightning bolt icon and the text 'No data available'.
- Recent Activity:** A box titled 'Recent Activity' with a sub-header 'Last 30 Days'. It shows a table with one row: 'Orders opened' with a value of '1'.
- Transaction Reports:** A box titled 'Transaction Reports' with a sub-header 'Last 30 Days'. It shows a table with one row: 'PO Purchase Amount' with a value of '1000' and a unit of 'USD'.

At the bottom of the dashboard, there is a 'Supplier News' section.

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

This is a close-up view of the 'Tasks' sidebar menu. The 'Manage Orders' link is highlighted with a red rectangular box. The menu structure is as follows:

- Tasks**
- Orders**
 - Manage Orders
 - Manage Schedules
- Agreements**
 - Manage Agreements
- Invoices and Payments**
 - View Invoices
 - View Payments
- Solicitations**
 - View Active Solicitations
 - Manage Responses
- Company Profile**
 - 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.”

The screenshot shows the 'Manage Orders' interface. At the top right, there is a 'Done' button. Below it, there are tabs for 'Headers' and 'Schedules'. A search section is visible with filters for 'Sold to Legal Entity', 'Bill to BU', and 'Supplier Site'. On the right side of the search section, there are buttons for 'Advanced', 'Manage Watchlist', and a 'Saved Search' dropdown. Below these are fields for 'Order' and 'Status', and a dropdown for 'Include Closed Documents' set to 'No'. A red box highlights the 'Search' button, along with 'Reset' and 'Save...' buttons.

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
21-100101	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.

