Supplier Registration

Step	Action
1.	**<u>TIPS FOR SUPPLIER NAMES:</u>** 1. Omit the word "THE" when it is the first word 2. Omit all punctuation, including: -Slashes and dashes (use a blank space) -Periods and commas (omit without leaving a space) -Replace "&" with "AND" 3. No abbreviations except the following mandatory abbreviations: -- The standards of AT&T, MCI and SBC -- CORP -- CO -- INC -- LLC -- LLP -- LP -- PC -- ASSOC -- ENT -- LTD 4. Acronyms are mandatory as the first word of associations' names when the association name is more than 30 characters long. An acronym alone is unacceptable. Ex: NAIC NATIONAL ASSOC OF INSURANCE COMMISSIONERS
2.	Enter your business's name into the **Company Name/Supplier Name** field. Use the Tab key to move to the next field.
3.	Enter the letters "Uni" into the **Tax Country** field and hit the TAB key. The search screen will open. Select United States. **Note:** Do <u>NOT</u> abbreviate the country here. For example, enter United States, not USA.
4.	The *Search and Select* screen will open. Click **Quick Select** on the appropriate line. 
5.	You are now back in the *City of Tampa and Hillsborough County Common Prospective Supplier Registration* window. Enter your company's tax identification into the **EIN/FEIN** field (include the dash). **Note:** If you do not have a EIN/FEIN Number, you may enter your Social Security Number. If using your SSN Number, enter it in the SSN field below the EIN field and leave the EIN/FEIN field **<u>BLANK</u>**.

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6.	Now you will enter contact information. This is basic contact information (for you) captured during this part of the registration process. Information entered here will create the first contact in your company's Contact Directory (which will be shown on the next screen). Additional information for this contact can be added at a later time during the registration. **All required information is denoted by an asterisk (*).**
7.	Enter your email address into the **Email** field.
8.	Enter your first name into the **First Name** field.
9.	Enter your last name into the **Last Name** field.
10.	Enter your area code into the **Phone Area Code** field.
11.	Enter your phone number into the **Phone Number** field (include dash).
12.	When all fields are completed, click **Next**. 
13.	The *Prospective Supplier Registration: Additional Details* window opens. On this page, you will create an Address for your company profile, add Contacts and Products and Services. You may also communicate with the approver by entering any questions you may have for the approver into the **Note to Approver** field. **Note:** This is not a required field, so you may leave it blank.
14.	In the Address Book section, click **Create**. 

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15.	When entering an address, use the following rules: 1. Use all capital letters throughout the address 2. Use 2-letter state abbreviations 3. Only enter US states in the state field 4. Nine characters (XXXXX-XXXX) are preferred for postal code but five characters are acceptable 5. Punctuation should be kept to a minimum within the street address portion of the site record and should only be used when it can reduce the length of the address and/or is necessary to conform to US Postal Service guidelines. ST=STREET RR=RURAL ROUTE CIR=CIRCLE BLVD=BOULEVARD LN=LANE RD=ROAD RTE=ROUTE CT=COURT AVE=AVENUE PKWY=PARKWAY HWY=HYWAY DR=DRIVE N=NORTH S=SOUTH E=EAST W=WEST NE=NORTHEAST NW=NORTHWEST SE=SOUTHEAST SW=SOUTHWEST APT=APARTMENT RM=ROOM STE=SUITE FL=FLOOR DEPT=DEPARTMENT BCH=BEACH DIV=DIVISION & = AND ATTN=ATTENTION PO=POST OFFICE
16.	The *Create Address* window opens. **Any required information is denoted by an asterisk(*). All other fields are optional.** Give your company address a name such as Headquarters, Payment, Remit To, etc. in the **Address Name** field.
17.	Enter your company's address into the **Address Line 1** field. **Important! A PO Box cannot be used for a regular Purchase Order address. A PO Box can only be used for Remit To addresses.**
18.	Enter your company's city/town into the **City/Town/Locality** field.
19.	Enter your company's State into the **State/Region** field.
20.	Enter your company's zip code into the **Postal Code** field.
21.	The Phone Number, Fax Number and Email Address in this section are optional. They are not intended to be the contact's phone number, but the main number for your business. For example, this would be a reception desk phone & fax number or a general company email address.
22.	Enter the area code into the **Phone Area Code** field.
23.	Enter the phone number into the **Phone Number** field (include dash).

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24.	When all fields are completed, click **Apply**. 
25.	You are now back in the *Prospective Supplier Registration: Additional Details* window. Create additional addresses as needed for your company. Each one should be named according to its function (i.e., Headquarters, Remit to, Payment, etc.) If additional addresses are not necessary, please continue to the **Contact Directory** section.
26.	In the Contact Directory section, click **Create** to add contacts for your company. 
27.	The *Create Contact* window opens. **Any required information is denoted by an asterisk(*). All other fields are optional.** Enter the contact's first name into the **First Name** field.
28.	Enter the contact's last name into the **Last Name** field.
29.	Enter the area code into the **Phone Area Code** field.
30.	Enter the phone number into the **Phone Number** field (include dash).
31.	If you want this user to have an iSupplier logon, and be able to submit bids on behalf of your company, click the **Create User Account For The Contact** option. Otherwise, click Apply. 
32.	Note that once the "**Create User Account**" option is checked, the Contact Email is now a required field. Enter the contact's email into the **Contact Email** field.
33.	When all fields are completed, click **Apply**. 
34.	You are now back in the *Prospective Supplier Registration: Additional Details* window. You may update your contact details by clicking the **Update** (pencil icon) next to the entry being edited. Once you have finished adding your contacts, you will select the Products and Services (NIGP codes) that your company offers. **TIP:** You may use the iSupplier Category Codes link on the Procurement Services web page to review the list of NIGP commodity codes and determine in advance which products and services to add. Locate your products on the list and write down their corresponding 5 digit numbers. You can search *Products and Services* using the number as criteria.

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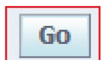
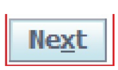
35.	Under the **Products and Services** Section, click **Create**. 
36.	Select the **Search for Specific (NIGP) Code and Product** option. 
37.	Enter the NIGP Class code into the **Code** field and click **Go**.
38.	If you do not know the NIGP Class code, enter a search term into the **Description** field.
39.	Click **Go**. 
40.	The system will return a list matching the criteria you entered. Check all applicable codes for your company. On this screen, you see multiple options were selected for Fuel. **Notice that the "top level" option (405) for Fuel is NOT chosen.** **CAUTION: Selecting a product or service indicates that it is supplied by your company. Through this selection, you are choosing to receive procurement opportunities from the County when the County is seeking those products or services. If you select the "main" item (in this case 405) then ALL items related to it will be chosen, and you will receive requests for each one.** **If your company does not supply every subproduct listed, then do NOT select the main product; instead go through the list and select each subproduct that your company provides.** 
41.	When all options are selected, click **Apply**. 
42.	You are returned to the *Prospective Supplier Registration: Additional Details* window. You will see your selections listed in the Products and Services Sections. You may add more by clicking **Create**; or delete items by clicking the **trash can** icon next to the entry. Click **Next** to move to the *City of Tampa Certifications* window. 
43.	This screen is OPTIONAL, and only applies to the City of Tampa. If you have no selections, or do not wish to be certified as a Women/Minority owned business, click **Next**; otherwise, make the appropriate selections. **Note:** You may update this page at any time once your registration is approved.
44.	Click **Next** to move to the *Attachments* page. 

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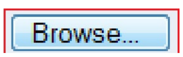
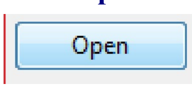
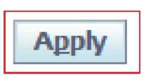
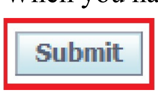
45.	You may choose to submit a Substitute W-9 (http://www.hillsboroughcounty.org/DocumentCenter/Home/View/290) at this point in the process. If you do not have one, a blank form is available on the Procurement web page (under Forms). **Caution: This W-9 will become part of the Public Record. If you are using a Social Security Number instead of an EIN/FEIN number, DO NOT ATTACH THE W-9 HERE. Instead, fax it to the following number:** **813-272-5544** **Attention: ERP Suppliers** To attach your substitute W-9 (or any other required document), click **Add Attachment...**. 
46.	Optional: Enter a document title into the **Title** field. For example, enter a valid value e.g. "**W-9**".
47.	Optional: Enter a description into the **Description** field. For example, enter a valid value e.g. "**SUBSTITUTE W-9**".
48.	Click **Browse...** to search for the document on your computer. 
49.	Select the document being added. Click **Open**. 
50.	To add more documents, click **Add Another**. When all documents are added, click **Apply**. 
51.	The system will provide confirmation that the documents are attached. At this point, you are ready to submit your registration. Prior to submitting, you may click **Back** to go back through the screens and review your entries. If you want to **update** an entry, click the Pencil icon to the right of the entry. If you want to **delete** an entry, click the trash can icon to the right of the entry.
52.	When you have reviewed your data, click **Submit**. 

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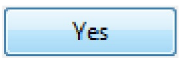
53.	A Confirmation screen opens verifying that your registration has been submitted for approval. You will also receive an email indicating your registration is received and is being reviewed. To view the status of your request, click the link contained in the confirmation email. Save the email for your records. Click **Close**. 
54.	Click **Yes** if you receive a prompt to close the page. 
55.	**End of Procedure.**