E-SUPPLIER NAVIGATION

For New Payees and Suppliers

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First-Time Supplier Setup

A W-9 is a required document attachment in the registration process. It is recommended that the document is readied prior to beginning the registration process.

Step 1: Supplier portal

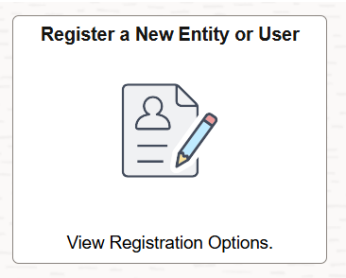
Go to supplierportal.ok.gov. You can also copy and paste this URL into your web browser address bar.

Step 2: Supplier portal login

Select **Oklahoma Supplier Portal Login**.

Step 3: Register a new entity or user

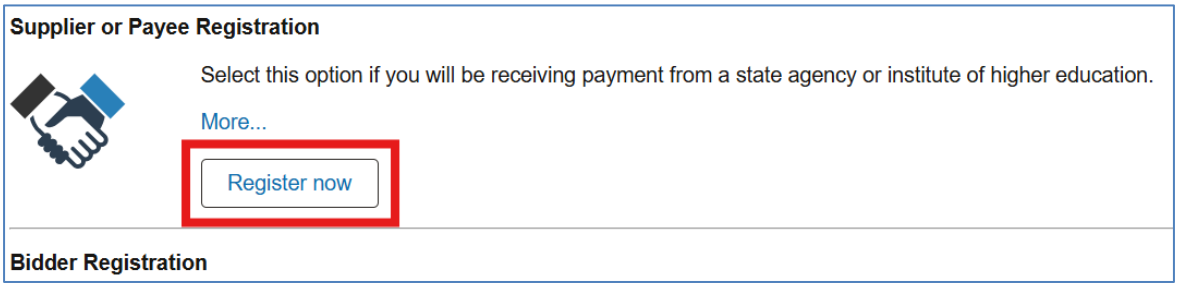
Select **Register a New Entity or User**.



Step 4: Register a supplier

Under Supplier or Payee Registration, select **Register now**.

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

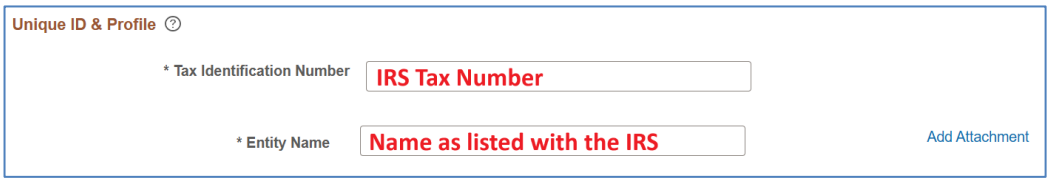


Step 5: Completing the supplier registration

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

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

1) Welcome.
   a) Select the entity type. Then select **Next**.
   b) Next buttons are located at the top and bottom of each step.
2) Identifying Information.
   a) Unique ID & Company Profile.
      i) In the **Tax Identification Number** field, enter your IRS-issued federal taxpayer identification number (i.e., SSN, FEIN or ITIN). Do not include any dashes in the number.



      ii) Entities that do not have an issued US Federal Tax ID are not able to register using e-Supplier at this time.

b) Profile Questions.

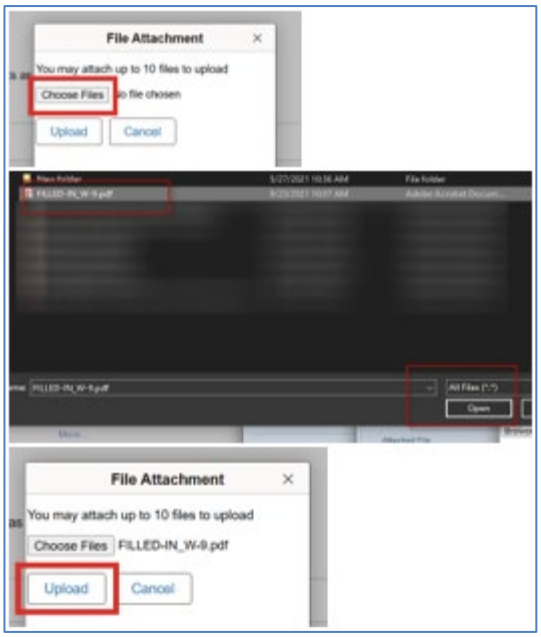
i) You are required to answer all questions that contain an asterisk.

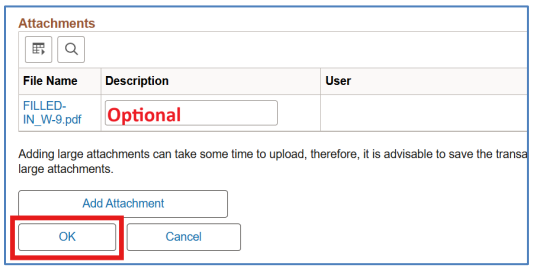
(1) Use the provided link to upload the required W-9. International entities may upload a W-8 BEN-E or W-8 BEN.

(2) All documents must be completed, signed and dated. Incomplete forms may be returned for correction.

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

iii) To attach a document, select **Add Attachment then Add Attachment again in the window that pops up** and follow the screenshots below.

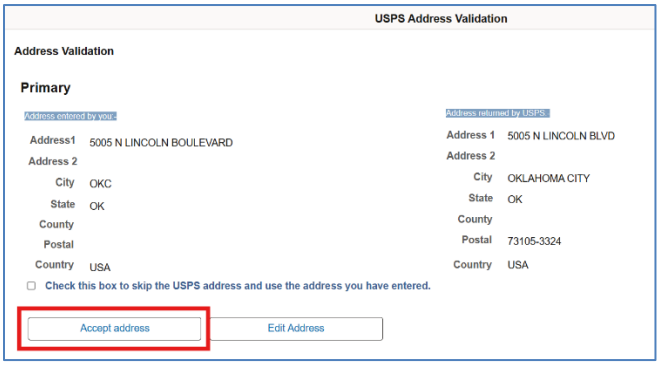




iv) Enter text in the provided fields.

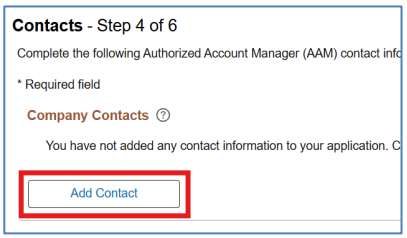
3) Addresses.

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

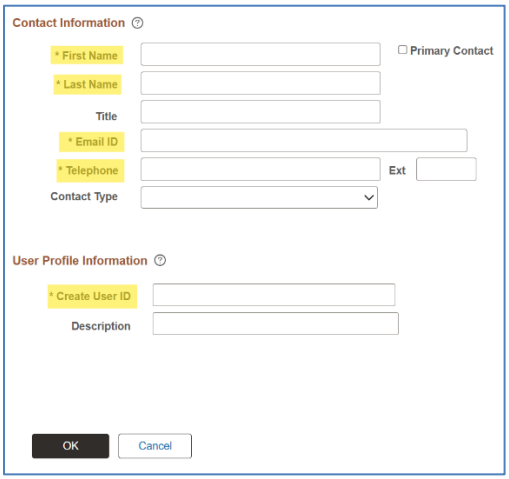


4) Contacts.

a) Select **Add Contact**.



b) Enter all required fields. The user ID that you enter in the Create User ID field will have access to e-Supplier (after your registration is approved) to update and maintain your information on file with the State of Oklahoma. Select **O**K when complete, then select **Next.**



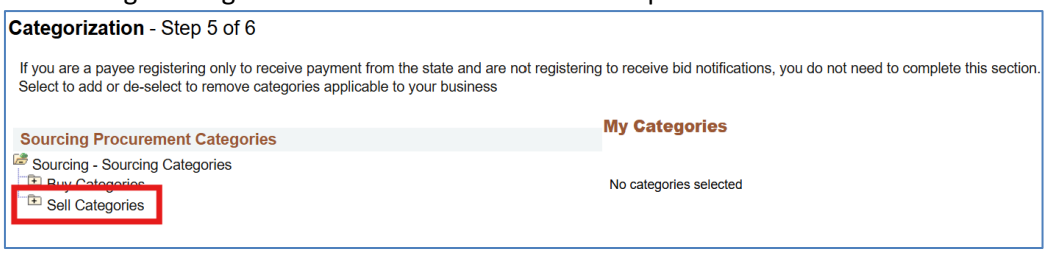
5) Categorization.

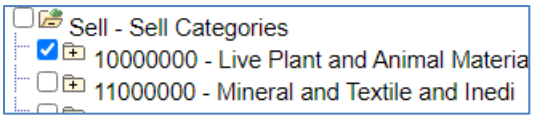
a) All suppliers who plan to participate in solicitations and bids must pick at least one category code for registration. The category code(s) that you select will determine the bid notifications that you receive. If you do not need to receive bid notifications, you can skip this step.

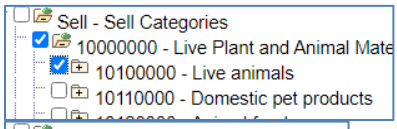
b) State of Oklahoma uses the UNSPSC codes for procurement registration. To search for the code listings for the codes most applicable, visit the https://www.ungm.org/Public/UNSPSC.To view and

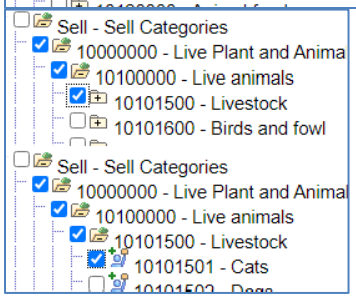
select category codes, select the **Sell Categories** folder icon for the Sell Categories.

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



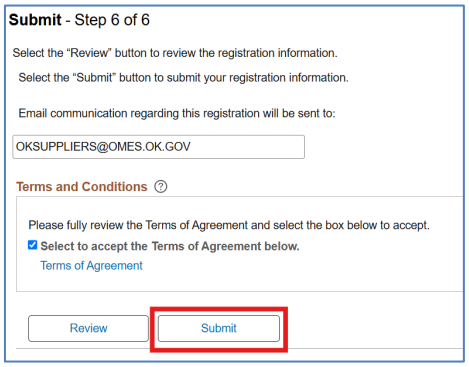






6) Submit.

a) As the final step, **confirm your email address is correct, check the box to agree to the Terms of Agreement** and select **Submit**.



Step 6: Registration approval

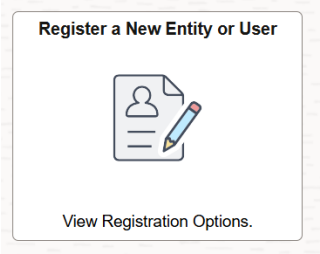
Once the registration has been approved, notify your agency contact with the supplier ID provided in the final approval email.

Establishing the User ID and Password

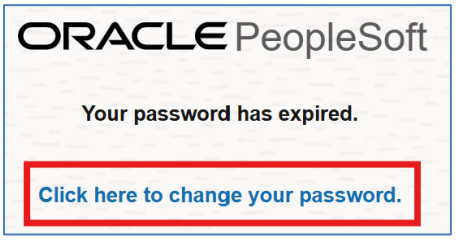
Upon supplier file approval and creation, you will receive two approval emails regarding the user ID created in the Contact step. The second email will contain the user ID and a temporary password.

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

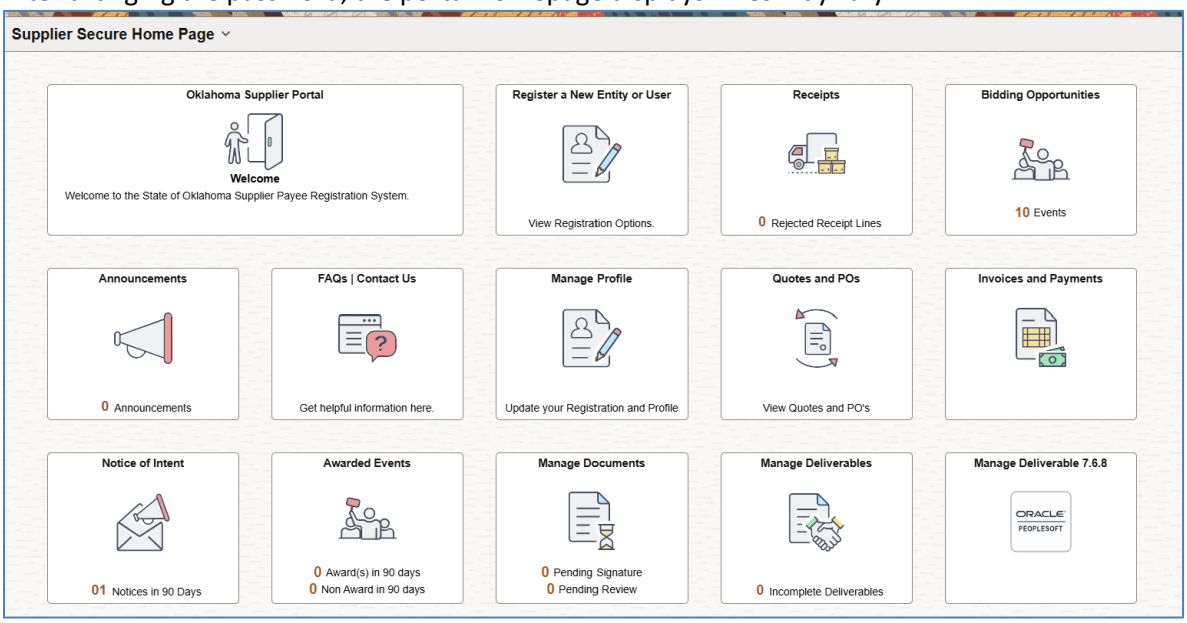
- Sign in using the **Existing Users Sign In**. This is where you will sign in going forward.



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



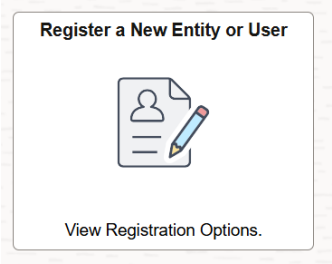
- You will be prompted to enter the temporary password, followed by a new password.
- After changing the password, the portal homepage displays. Tiles may vary.



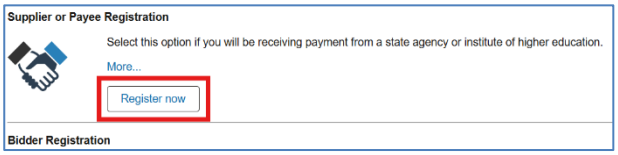
Access a Saved Registration

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

4) Return to **Register a New Entity or User**.

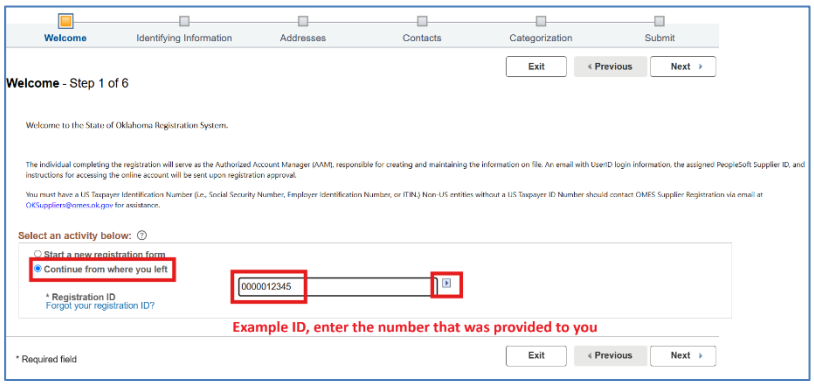


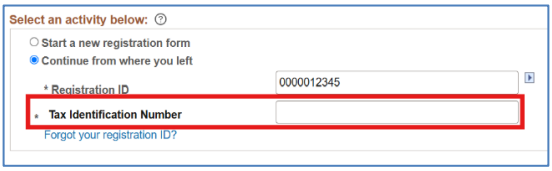
5) Under Supplier or Payee Registration, select **Register Now**.



6) Welcome page.
   a) Under **Select an activity below,** choose **Continue from where you left**.
   b) Enter your registration ID that was provided when you saved your draft, it will be in the format of00000XXXXX and select the arrow to the right.

   c) A new section will open requesting the TIN or employer identification.





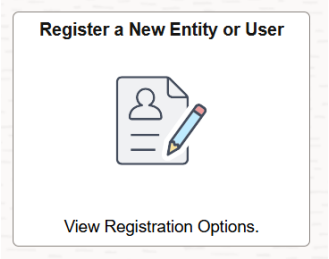
   d) Once entered click Next and it should take you to the registration that you previously started.

Creating Multiple User IDs

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

- Select the **Oklahoma Supplier Portal Login** button at supplierportal.ok.gov, and sign in using **Existing Users Sign In**.

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



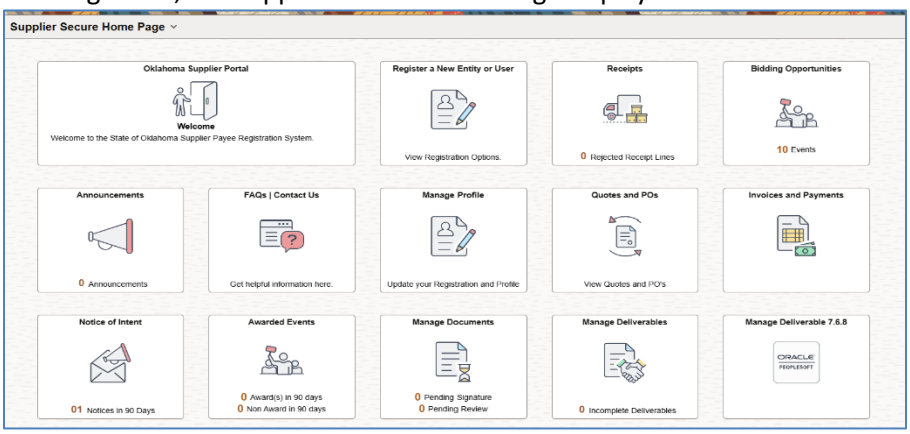
- Select **Register Now** for the user ID you wish to create.
  - The Authorized Account Manager user ID is the only user ID that can assign additional user IDs.
    - The user ID created with the supplier file is an Authorized Account Manager user ID.
  - The Banking user ID is the only user ID that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

Review and Update Supplier Information

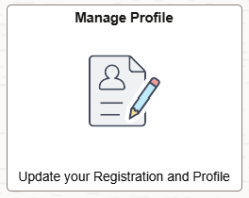
To manage and maintain the information on file, use **Supplier Change Request**. Please review the information on file on a yearly basis to ensure all information is accurate and up to date.

- Select the **Oklahoma Supplier Portal Login** button at supplierportal.ok.gov; sign in using the **Existing Users Sign In**.

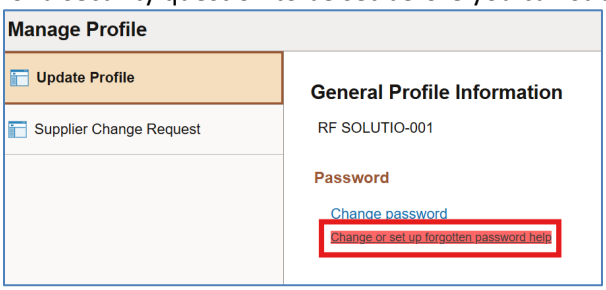
- Once signed in, the Supplier Secure Home Page displays.

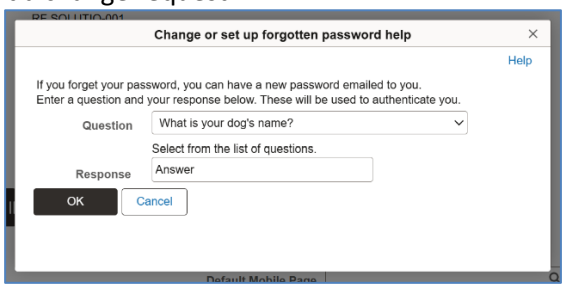


- Select **Manage Profile**.

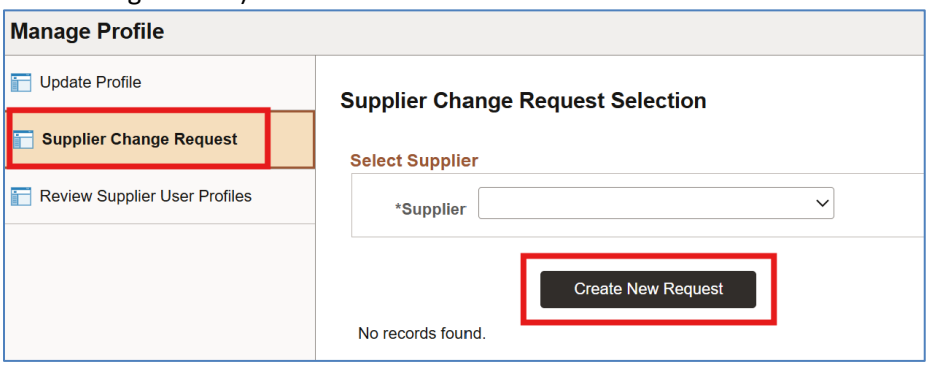


- If you have not already set your security question, select **Change or set up forgotten password help**. In the pop up that appears, select your question and enter your answer then select OK. It is required for a security question to be set before you can submit a change request.





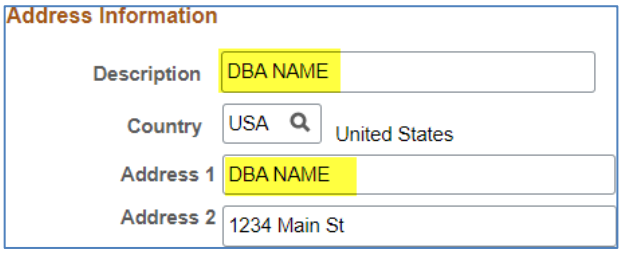
- Select **Supplier Change Request** in the top left corner and then **Create New Request** to view, add or update the information within the supplier file. (The banking tab will only appear with the banking user ID.)



Monitor and Maintaining the Supplier Registration

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

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



3) Contacts.
   a) Review contacts for accuracy.
   b) Each contact should have a type, a phone number, and should be attached to an address.
   c) The Accounts Payable type will receive remittance notifications for EFT payments made to the address that is selected in their contact information.
   d) If a contact should be inactivated and does not have a contact to replace it, put INACTIVATE in the contact description.

4) Categorization.
   a) If the codes entered during the supplier creation are not listed, please expand the folders for the codes to appear.
   b) You may add or remove codes as needed.
5) Submit.
   a) As the final step, check the box to agree to the **Terms of Agreement**. Then select **Submit**.

For additional questions or assistance, please email OKSuppliers@omes.ok.gov.