E-SUPPLIER NAVIGATION

For New Procurement Suppliers

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First Time Supplier Set up

As a note – A W-9 and a current Certificate of Insurance or Letter of Exemption are required document attachments in the registration process. It is recommended that the documents are readied prior to beginning the registration process.

Step 1:

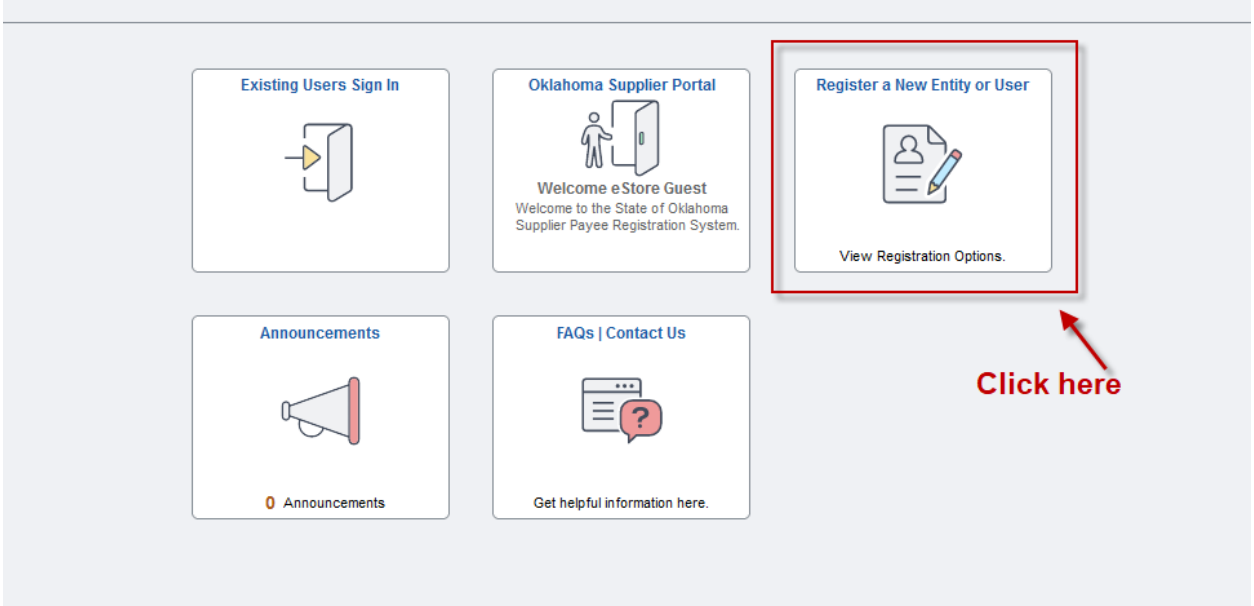
Click Supplierportal.ok.gov. If link does not work, please copy URL then paste in the browser address.

Step 2:

Select the **Oklahoma Supplier Login** tab.

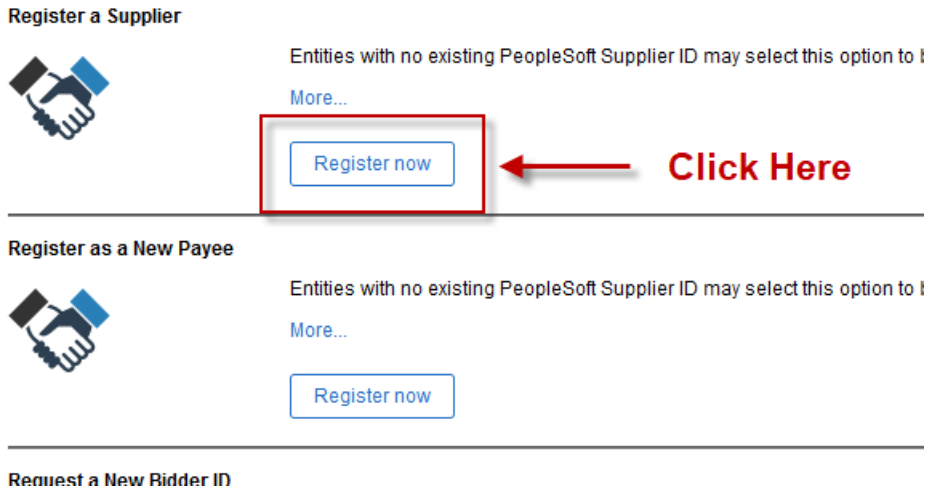
Step 3:

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



Step 4:

Select **Register a Supplier** tab.

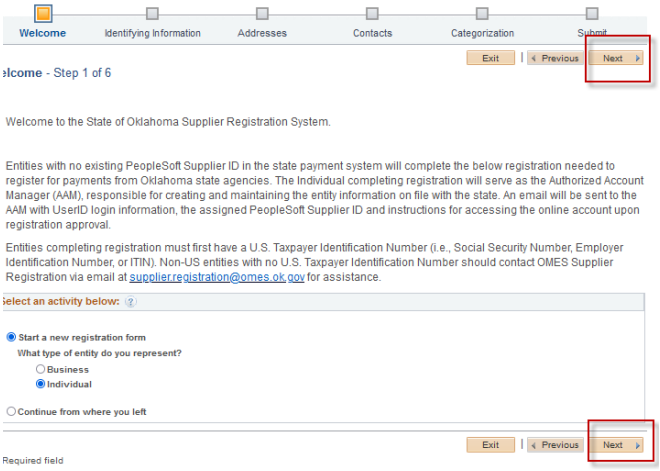


Step 5: Completing the Supplier Registration

There are six (6) steps that are required to complete the registration. Each step is to be completed in order. If the registration cannot be completed, you may save your progress to return later. (Please note: Registrations with error messages cannot be saved.)

There are two documents that are required uploads. A W-9 and a copy of a current Certificate of Insurance or Letter of Exemption.

1) Select the entity type. Then select **Next**.
   a) Next buttons are located at the top and bottom of each step.



2) There are multiple areas to complete in the Identifying Information step. This is the longest step in the process.
   a) Unique ID & Company Profile

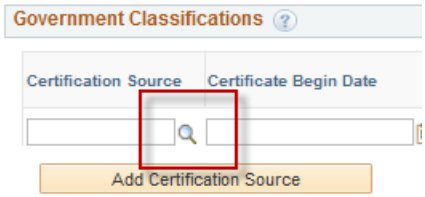
i) The Tax Identification Number is your Federal IRS issued number. Ex – SSN, EIN, or iTIN.

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

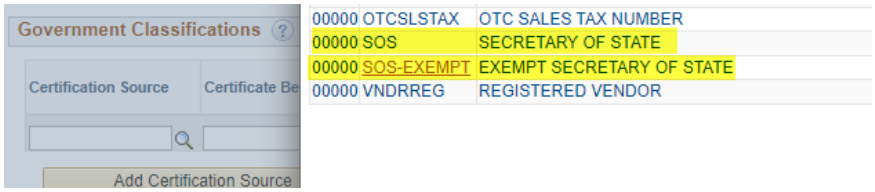
b) Government Classifications

i) Select the magnifying glass under the Certification Source. Then select <u>SOS</u> or <u>SOS-Exempt</u> based on the company's Oklahoma Secretary of State filing.

(1)



(2)



(3) The dates will automatically fill and can be disregarded.

(4) If SOS is selected, please select SEC for the Government Classification. Then enter the filing number in the Certification Numbers.

(5)

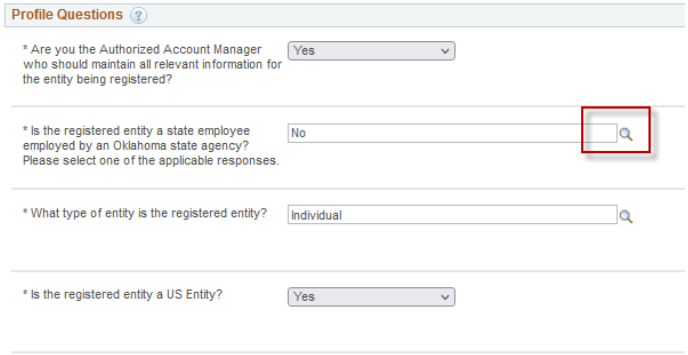
(6) The system will validate the filing number against the Oklahoma Sec of State's database. *Return results that are not in Good Standing will prohibit the registration from continuing.

c) Profile Questions

i) There are multiple required questions. Please answer all questions that contain an asterisk.

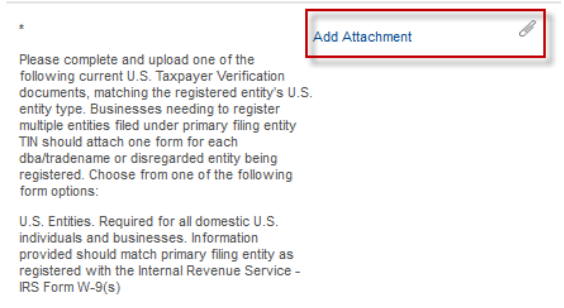
ii) For best results please use the hourglass when applicable.

(1)



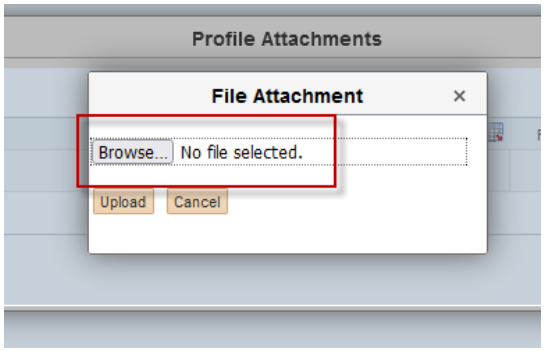
iii) To attach a document, select the add attachment and follow the screenshots below if needed.

(1)

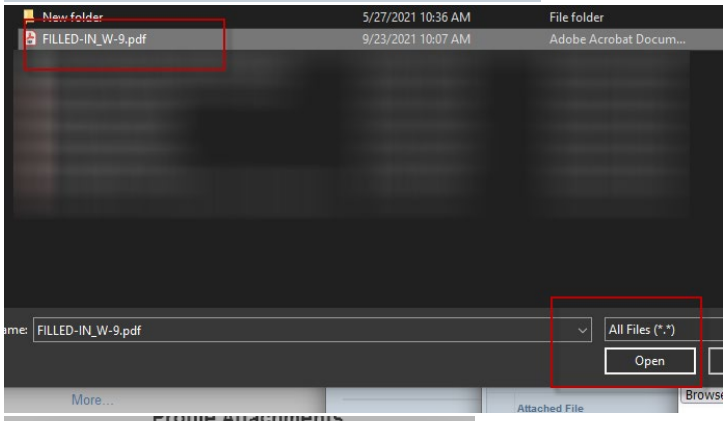


(2)

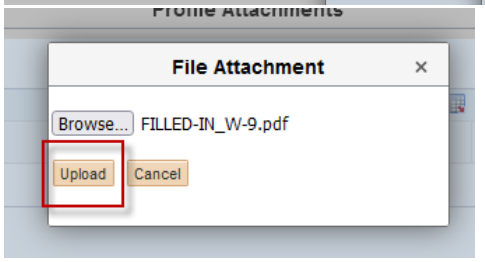
(3)

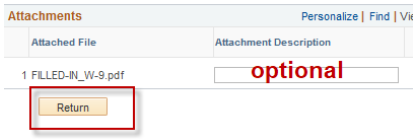


(4)



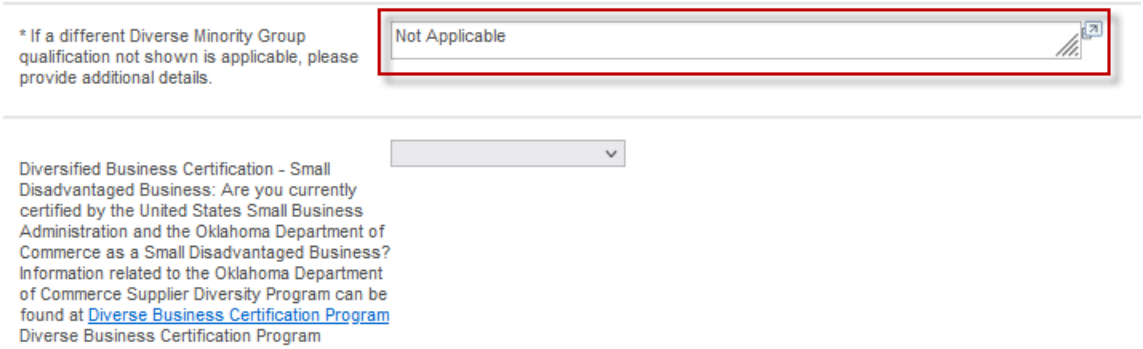
(5)





(6)

iv) Enter text in fields like the below



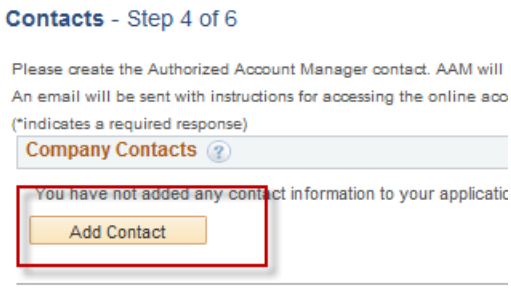
d) Addresses

i) Enter your primary address. The remit address is optional. The address will be validated by the USPS. Select **Accept address**.

(1)

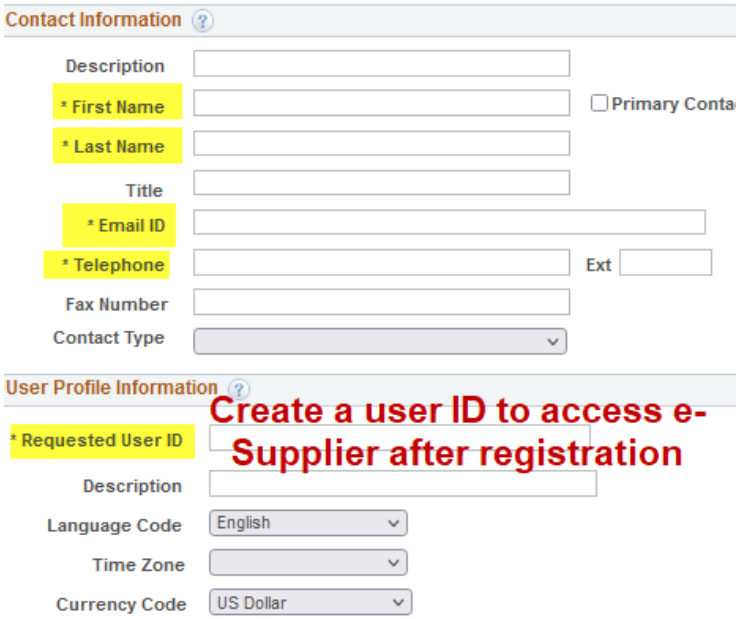
e) Contacts

i) Select Add Contact



(1)

ii) Enter all required fields. The Requested User ID is your desired user ID to access e-Supplier after registration to update and maintain your information on file with the State of Oklahoma. Click **Ok** when complete. Click **Next** when done.



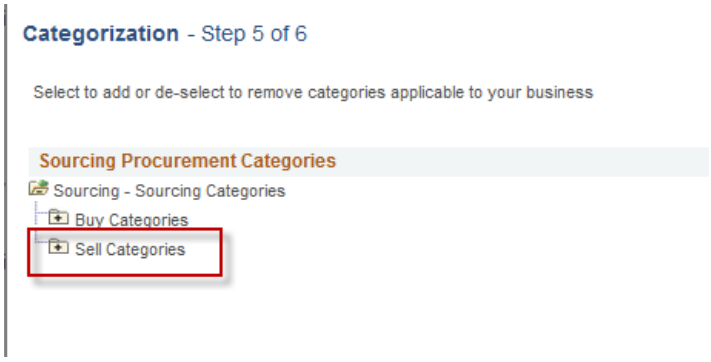
(1)

f) Categorization

i) All suppliers must pick at least one category code for registration.

(1) The State of Oklahoma uses the UNSPSC codes for procurement registration. To search for the code listings for the codes most applicable, please visit the UNSPSC website. https://www.unspsc.org/

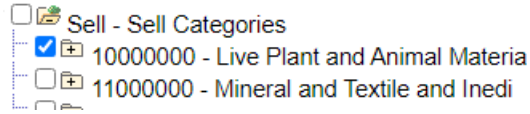
ii) Click the folder icon for the Sell Categories.



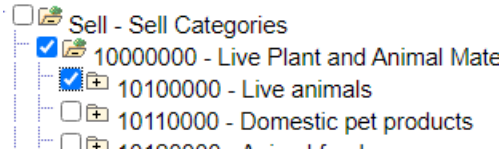
iii)

iv) Locate the category that best describes the goods or services provided. 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.

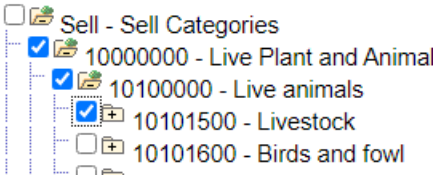
(1)



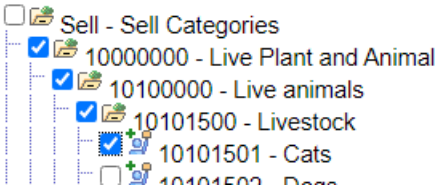
(2)



(3)

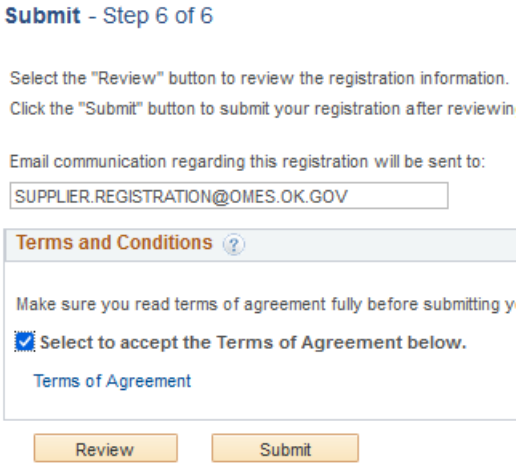


(4)



g) Submit

i) As the final step, check the box to agree to the Terms of Agreement. Then select **Submit**.



ii)

Step 6:

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

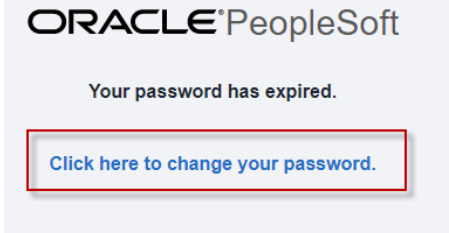
Establishing the User ID and Password

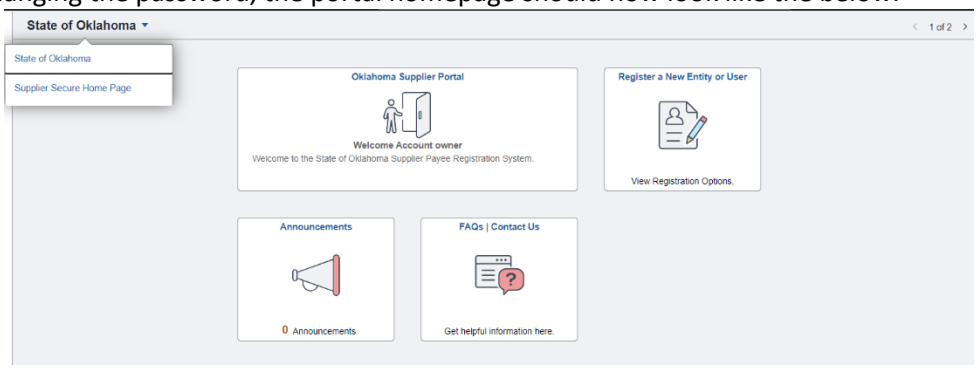
Upon supplier file approval and creation, you will receive two (2) approval emails regarding the user ID created in the Contact step. The second email will contain the user ID and a temporary password.

- Return to Supplierportal.ok.gov.
- Click the Supplier Portal link.
  -

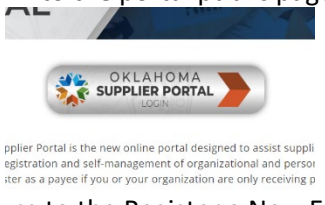
- Sign in using the Existing Users Sign In. This is where you would sign in going forward.

-

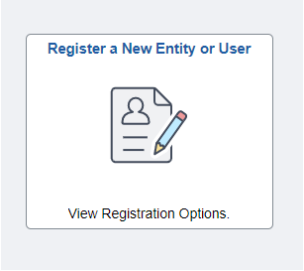
- Enter the user ID and temporary password.
- You will receive a message the password has expired. Select the Click here to change your password.
  - 

- You will be prompted to enter the temporary password and then a new password.
- After changing the password, the portal homepage should now look like the below.
  - 

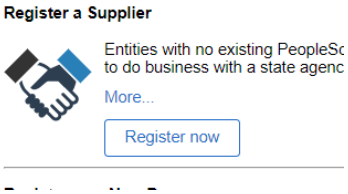
To Access a Saved Registration

1) To access your draft registration please follow the steps below. The first four steps are the same as when you began the process.
   a) This step is only for registrations that have not gone through full approval and do not have a supplier ID.
   b) Registrations that were submitted and were Returned for More Information will use this process to access the registration.
2) Go to Supplierportal.ok.gov.
3) Click into the portal public page
   a) 

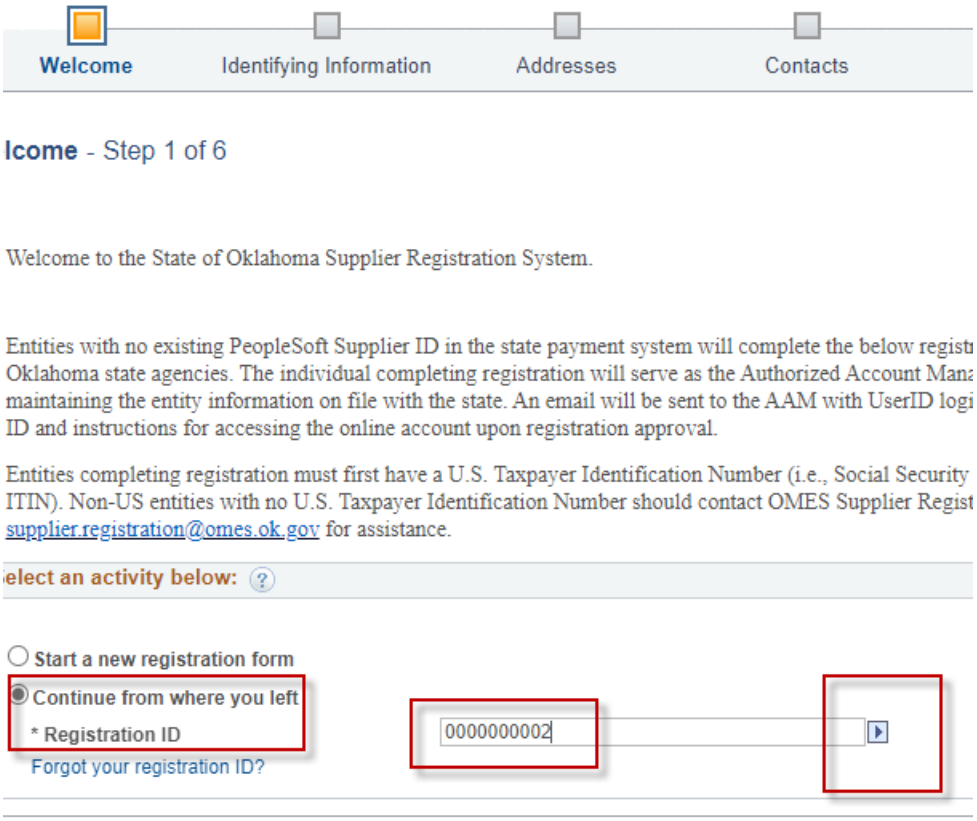
4) Return to the Register a New Entity or User

a) 

5) Select Register Now under Register a Supplier

a) 

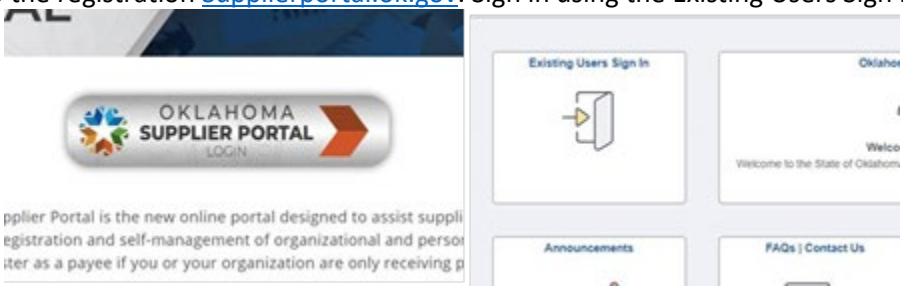
6) At the Welcome page-
   a) under *Select an activity below* chose Continue from where you left
   b) Enter your registration ID of 0000000XXX
   c) Click the arrow
   d) A new section will open requesting the FEIN
   e) Once entered, it should take you to the registration that you previously started

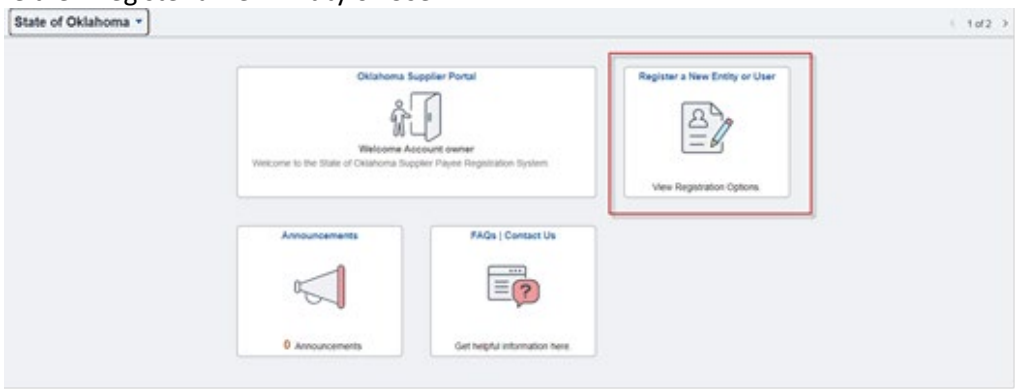


f)

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. (*Please note: Banking can only be viewed and accessed with a banking user ID.*)

- Log into the registration Supplierportal.ok.gov. Sign in using the Existing Users Sign In.
    - 

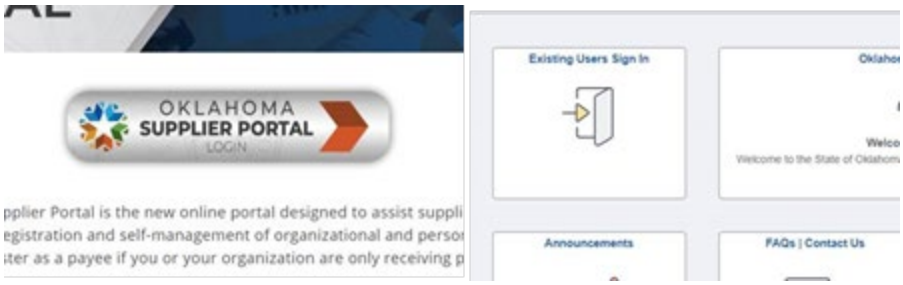
- Select the tile - Register a New Entity or User.
    - 

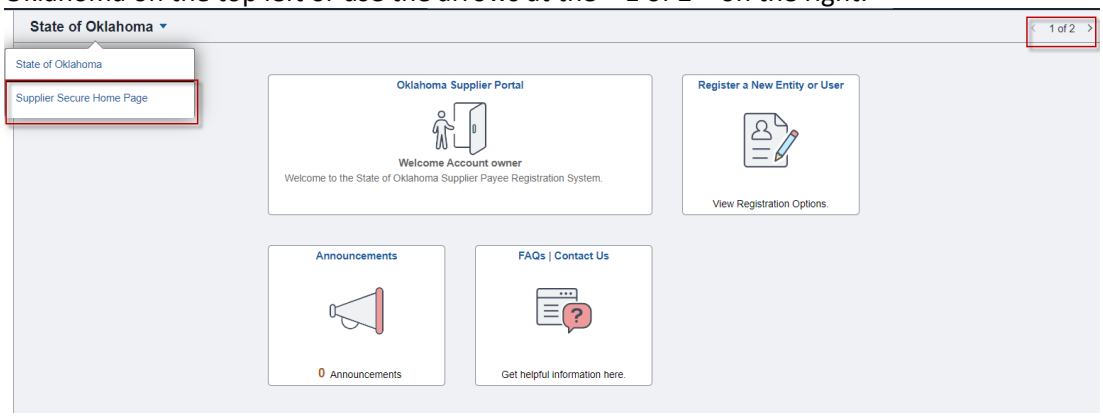
- Select *Register Now* for the user ID you wish to create.
    - The Authorized Account Manager user ID is the only user ID that can assign additional user IDs.
        - The user ID created with the supplier file is an Authorized Account Manager user ID.
    - The Banking user ID can add or update banking.
        - For questions regarding the banking process, please email eft.registration@omes.ok.gov
- The Requested User ID must be a unique user ID.
- The Email ID should be the email the user ID and temporary password will be sent to.
    - There are no restrictions on how many times the same email can be used.

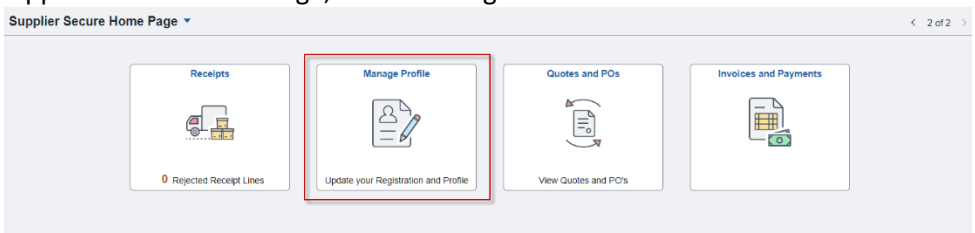
Review and Update Supplier Information

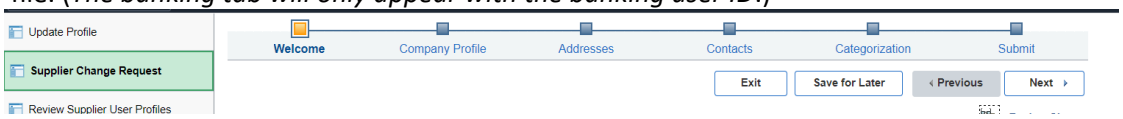
To manage and maintain the information on file, please use Supplier Change Request. Please review the information on file on a yearly basis to ensure all information is accurate and up to date.

- Log into the registration Supplierportal.ok.gov. Sign in using the Existing Users Sign In.

- 

- Once Signed in the Supplier Secure Home Page will become available.
  - To navigate to the second page, use the drop down now available at the State of Oklahoma on the top left or use the arrows at the < 1 of 2 > on the right.
  - 

- On the Supplier Secure Home Page, select Manage Profile.
  - 

- Select the Supplier Change Request tab 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. (Please note: Registrations with error messages cannot be saved.)

1) Company Profile

a) Please leave the <u>Additional Name</u> field as is. Disregarded Entities and DBAs should be entered in the Address 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 used 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, please contact supplier.registration@omes.ok.gov to inactivate. Please include Address Inactivation and the supplier ID in the subject line.
e) To add a Disregarded Entity (DE) or DBA –
   i) Select Add New Address.
   ii) In the description and on Address Line 1, enter the name of the DE or DBA.
   iii) Enter the address on Line 2.

3) Contacts

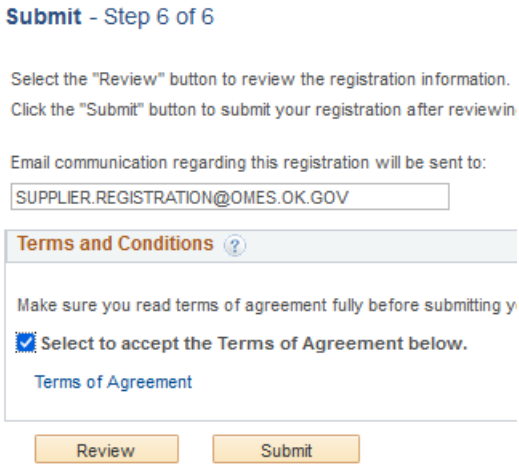
a) Review contacts for accuracy.
b) Each contact should have a type and should be attached to an address.
   i) The Accounts Payable type will be a CC email for remittance notifications.
c) If a contact should be inactivated and does not have a contact to replace it, please contact supplier.registration@omes.ok.gov to inactivate. Please include Contact Inactivation and the supplier ID in the subject line.

4) Categorization

a) If the codes entered during the supplier creation are not listed, please expand the folders for the codes to appear.
b) Codes may be added or removed as needed.

5) Submit

a) As the final step, check the box to agree to the Terms of Agreement. Then select **Submit**.



b)

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