

# VENDOR REGISTRATION PROCESS GUIDE

## NTTA Marketplace

It's important to us that you have access to procurement opportunities at NTTA. This guide provides information regarding the steps to register in NTTA Marketplace, as well as how to utilize the account once it's in place.

Only by registering at [NTTAMarketplace.org](http://NTTAMarketplace.org) will you be able to respond to NTTA solicitations.

NTTA Procurement Department  
[bidpurchasing@ntta.org](mailto:bidpurchasing@ntta.org)

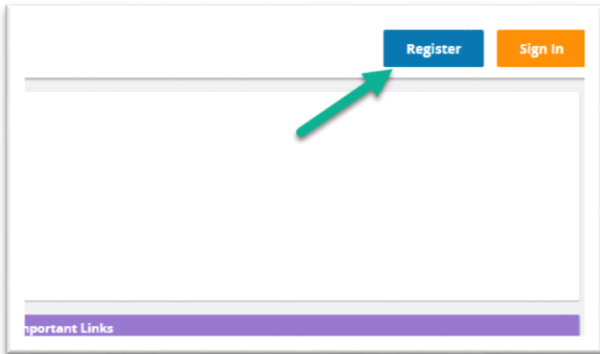
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# 1 REGISTRATION PROCESS

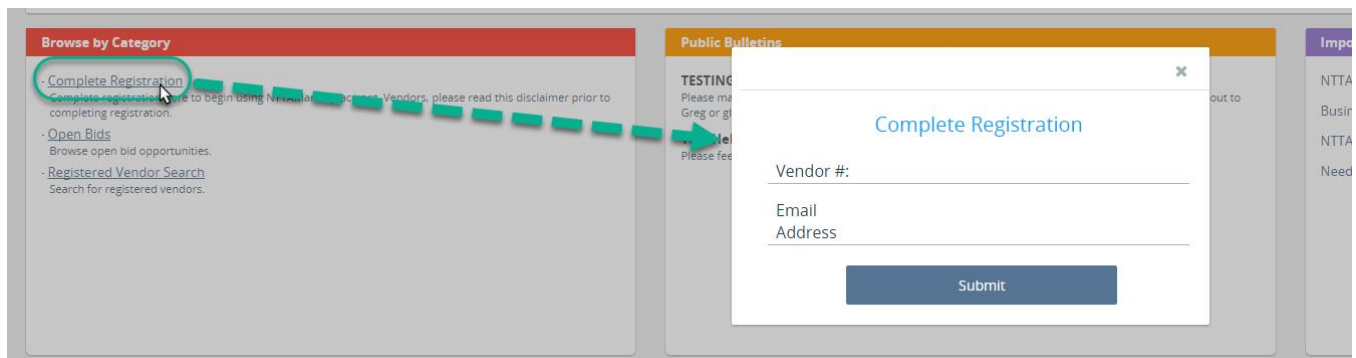
Being a registered vendor allows suppliers to compete for opportunities to provide goods and services for NTTA (the "Agency"). Registration enables a company to receive communications regarding procurement solicitations, as well as utilization of the other features found in Marketplace.

To begin registration, click the "Register" button, above the Important Links section, on the Login page.



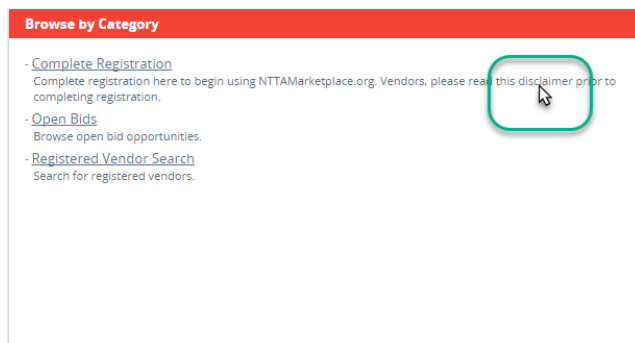
A valid Tax Identification or Social Security Number will be necessary to begin the Vendor Registration process.

If the registration process is not completed after initiation, the session can be resumed from the last saved point by clicking "Complete Registration" in the Browse by Category section.



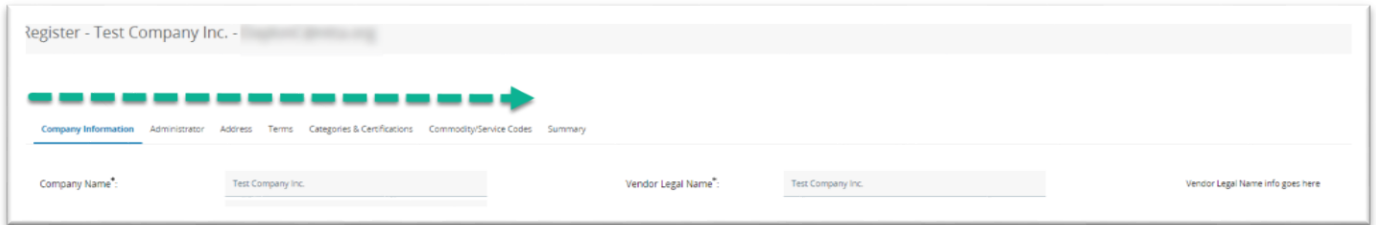
A Pre-Registration email will be sent to the email address provided upon the initiation of registration. The email will include the Vendor #, which will begin with a "V" and contain 9 characters.

Please take a moment to read the Vendor Disclaimer found by clicking the word "disclaimer" in the Complete Registration message.



## 1.1 COMPLETION OF REGISTRATION

Follow the Vendor Registration tabs from left to right to complete the process



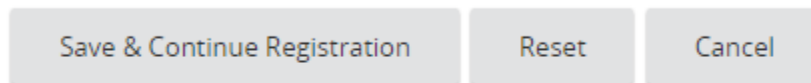
The screenshot shows a registration page for 'Test Company Inc.' with a progress bar at the top. Below the progress bar are navigation tabs: 'Company Information', 'Administrator', 'Address', 'Terms', 'Categories & Certifications', 'Commodity/Service Codes', and 'Summary'. The 'Company Information' tab is active. Below the tabs are input fields for 'Company Name\*' (Test Company Inc.), 'Vendor Legal Name\*' (Test Company Inc.), and a placeholder for 'Vendor Legal Name Info goes here'.

All mandatory fields are indicated with an asterisk



This close-up view of the registration form highlights mandatory fields with green dashed arrows and asterisks. The fields are: 'Company Name\*' (containing 'Test Company Inc.'), 'Mailing Address Line 1\*', 'Country\*' (a dropdown menu currently showing 'US - United States of America'), 'City\*', and 'ZIP\*'. Other fields like 'Business Description', 'Address Line 2', 'Address Line 3', and 'Address Line 4' are not highlighted as mandatory.

Click "Save & Continue Registration" at the bottom of the registration pages to establish save points through the process.



Three buttons are shown: 'Save & Continue Registration', 'Reset', and 'Cancel'.

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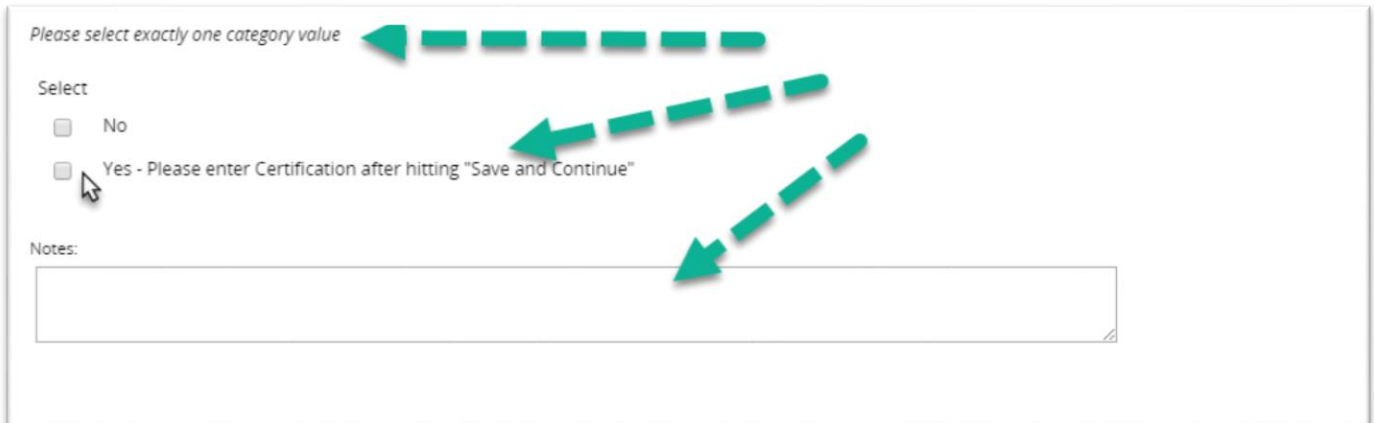
## 1.2 CATEGORIES & CERTIFICATIONS

Vendor Categories & Certifications entries allow Vendors to provide information regarding their specific certifications, and the details of their organization.

Each category requires a value entry, however, please reach out to NTTA if you do not see an accurate category value for you organization.

## 1.2.1 Category Values & Process

Categories are listed on a continuous page. Below are some key structural components:

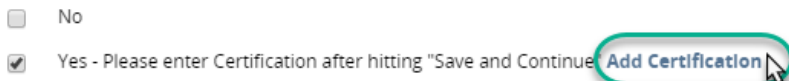


The screenshot shows a form with the following elements: a heading "Please select exactly one category value" with a dashed green arrow pointing to it; a "Select" section with two radio button options: "No" and "Yes - Please enter Certification after hitting 'Save and Continue'", with a dashed green arrow pointing to the "Yes" option; and a "Notes:" label above a large text input field, with a dashed green arrow pointing to the input field.

Single select categories, are indicated with "...select exactly one...." Categories that allow multiple values will have "... select at least one...."

Yes - Please enter Certification after hitting "Save & Add Certification" - This indicates that if an organization has obtained this certification, a place to enter the Certification ID, and details will appear after clicking Save & Add Certification at the bottom of the page.

Select



The snippet shows the "Select" section with the "Yes" radio button selected. To the right of the "Yes" option is a button labeled "Add Certification" with a mouse cursor over it.

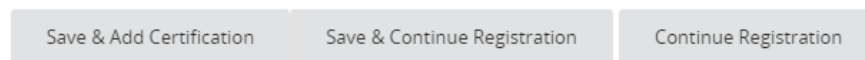
The Notes field is available to supply any additional information pertaining to a respective category.

Each button at the bottom of the page has different results:

Save & Add Certification - Allows entry of Certification details by saving entries and remaining on the Category & Certification page.

Save & Continue Registration - Saves the entries and proceed to next stage of registration.

Continue Registration - Proceeds to the next stage of registration without saving any category values.



Three buttons are shown in a row: "Save & Add Certification", "Save & Continue Registration", and "Continue Registration".

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## 2 MAINTAINING A VENDOR PROFILE -

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Once registered in NTTA Marketplace, a Vendor, through the Seller Administrator role, can log in and update many of the components of their Vendor profile including:

- General Information, such as email address and emergency Vendor information
- Addresses
- Terms, Categories & related Certifications
- Commodity Codes

The purpose of Vendor profile maintenance is to ensure that NTTA has the most current information for the Vendor. The maintenance of the profile also ensures that the appropriate users have access to respond to Solicitations.

### 2.1 NOTIFICATION

The Vendor will receive an email from the system notifying the new Seller Administrator (the Vendor's account "owner") that registration is complete/active. The email is sent to the email address on the General Organization Information tab.

Contact Name	Phone Number	Email Address

Vendor #: V00000115  
Company Name:  
Email Address:

Thank you,  
NTTA Procurement Department

Use this link to log on to NTTAMarketplace.org: <https://nttamarketplace.org>

Once registration is completed the Seller Administrator will receive the below Vendor Registration email containing their account details.

Dear Testing Carter,

Thank you for registering with NTTAMarketplace.org. Your account has been activated. Below you will find your NTTAMarketplace.org login ID and password.

Login ID: test1233  
Password: Password12!  
Vendor #: V00000116 - Test Company Inc.

Please log in to the NTTAMarketplace.org application. If you have any questions concerning your account, please contact us at [bidpurchasing@ntta.org](mailto:bidpurchasing@ntta.org).

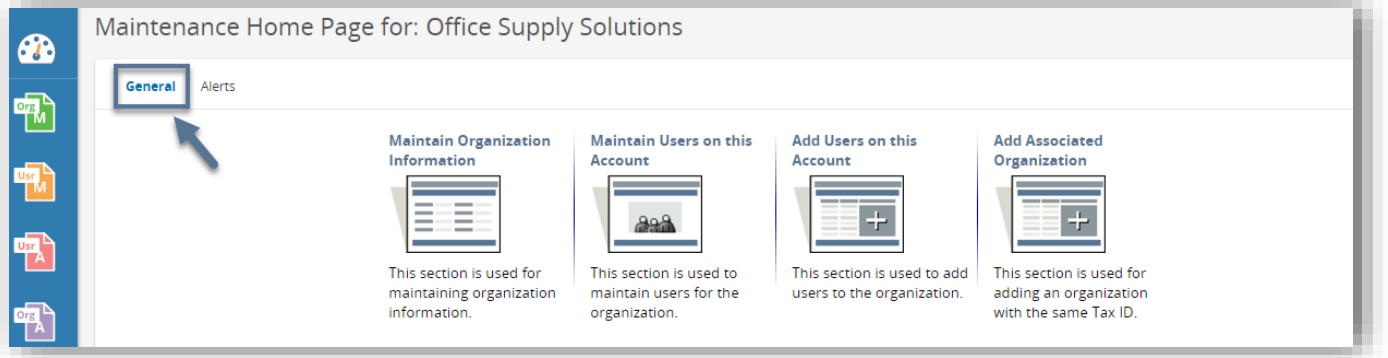
Thank you,  
NTTA Procurement Department

Use this link to log on to NTTAMarketplace.org: <https://nttamarketplace.org>

## 2.2 HOMEPAGE

The purpose of the Seller Administrator Maintenance Homepage is to provide a dashboard for the Seller Administrator in Marketplace, to access sections of the profile, such as users and general organization information.

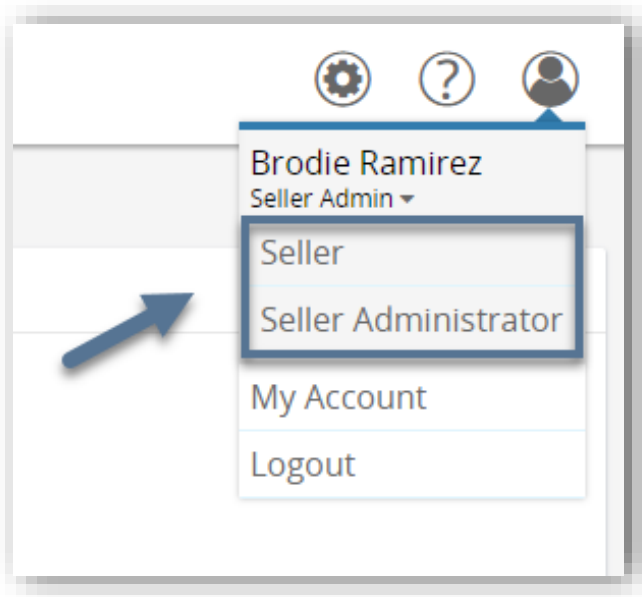
Once logged in, the Seller Administrator will land on the General tab of the Maintenance Home Page. If the user's Homepage does not look like the one shown below, the user is probably in the Seller role (which is also created for the first user on the Vendor's account). To change roles, follow the steps shown below the screenshot.



**Step 1: Click the User Account Icon in the upper right of the Homepage**

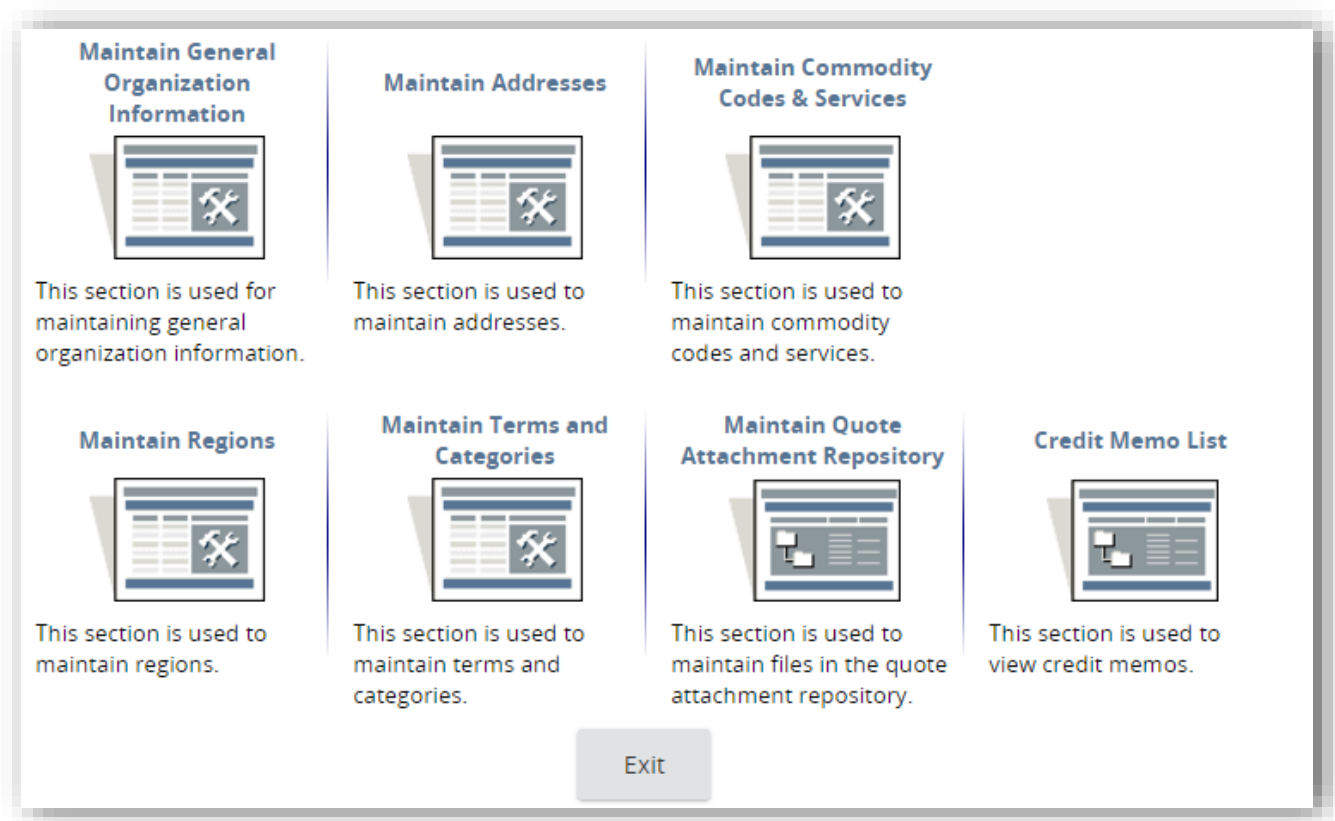
**Step 2: Click the down arrow under the user name**

**Step 3: Scroll down and select Seller Administrator**



## 2.3 MAINTAINING ORGANIZATION INFORMATION

The purpose of this section is to allow Seller Administrators to update data regarding the Vendor organization such as Addresses, Commodity Codes, and Categories.



### 2.3.1 Maintaining General Organization Information

The purpose of this section is to allow Seller Administrators to update general information regarding the Vendor organization such as the incorporation details, business description, email address, preferred delivery method, primary contact information and emergency supplier status.

Note: The Vendor email address shown on this portion of the Vendor profile is used to notify the Vendor of opportunities (Bids and other solicitations). Some Vendors develop an email re-direct/distribution protocol to distribute such notifications to their salesforce.

**Step 1: From the General tab, click Maintain Organization Information**

**Step 2: Click Maintain General Organization Information**

**Step 3: Update required and optional fields as needed**

The Seller Administrator can upload or delete Attachments on this screen as well as add Forms, if enabled for the Vendor.

**Step 4: Click Save and Exit**



## Maintain General Organization Information

Vendor ID: **V00000013**

**Company Name\***: Office Supply Solutions **Vendor Legal Name\***: Office Supply Solutions

DBA for Vendor:

**Tax ID #\***: ..... **Show** **Country Code for Tax ID\***: US - United States of America

Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)?

EIN  SSN

Incorporation Details: State: \_\_\_\_\_ Year of Incorporation: 0

Business Description: \_\_\_\_\_

Preferred Delivery Method: Email

Vendor Email: tisensee@periscopeholdings.com

Vendor Fax: \_\_\_\_\_

Emergency Supplier:

Yes  No

Emergency Phone\*: \_\_\_\_\_ Ext.: \_\_\_\_\_

Emergency Contact Name\*: \_\_\_\_\_

Emergency Email\*: \_\_\_\_\_

Emergency Info Comment: \_\_\_\_\_

User Last Updated: Administrator System  
Date Last Updated: 04/25/2017 01:17:15 PM

If Seller Administrator selects Yes for Emergency Supplier, the fields marked with an asterisk are required.

### Attachments

Download	File	Description	Size	Uploaded By	Uploaded Date
	NIGP Code Search.docx		2,069,934 bytes	John Smith	05/01/2017 07:14:53 PM

File:  No file chosen

Description: \_\_\_\_\_

### Forms

Click **Add Form** to add form attachments.

No Form Attachments

The Seller Administrator can click Save & Continue to save the changes and to remain on the page. To undo the changes click Reset or click Cancel & Exit to exit the page without saving the changes.

## 2.3.2 Maintaining Addresses

The purpose of this section is to allow the Seller Administrator to maintain all of the addresses associated with the Vendor's account. It is important for the Seller Administrator to keep these addresses up to date. Types of addresses may include General Mailing Address, Bid Mailing Address and Purchase Order Mailing Address.

The address that appears for the General Mailing Address is the address that the Vendor entered when first registering. This email address is used for notifications of bidding and other solicitation opportunities. However, if the Vendor establishes a default Bid Mailing Address, the Buyer may select this address for the Bid, and the bid notification will be sent to the email address associated with that Bid Mailing Address.

Address Type	Field Description	Field Implication	Common Usage
Bid Mailing Address	Physical and email address for Bid notifications	Solicitation opportunities sent to default Bid Mailing email address	Group or shared email frequently used
PO Mailing Address	Physical and email address for PO notifications	PO notifications sent to default PO Mailing email address	Group or shared email frequently used
Remit Address	Physical and email address for payments (some may be EFT-enabled)	Payments sent to Remit Address or via EFT	Group or shared email frequently used

### 2.3.2.1 Add New Address

**Step 1: Click Maintain Addresses**

**Step 2: Click Add Another Address**

Maintain Addresses for: Office Supply Solutions

Name	Address Type	Address Information	Status	Default for Type
General	General Mailing Address	Brodie Ramirez 123 23rd Street Boston, MA 45643 US Email: tisensee@periscopeholdings.com Phone: (555)888-4444	Active	Yes

**Step 3: Complete Required and Optional Fields as preferred**

**Step 4: Click Save & Exit**

The Address Types allowed are maintained by the Agency. The Vendor can click Reset to erase entered data or click Cancel & Exit to exit the screen without saving.

**Address Book - Office Supply Solutions**

**Enter a New Address**

Address Type: Bid Mailing Address ▾

Name this Address\*:

Contact Name\*:

Address Line 1\*:

Address Line 2:

Address Line 3:

Address Line 4:

Country\*: US - United States of America ▾

City\*:

State/Province\*:

ZIP\*:

County:

Phone\*:

Ext:

Toll Free:

Mobile:

Fax:

Email\*:

Id: 0

Alternate Id:

Status: Active ▾

Web Address:

Default address for this address type

(Begin with http:// or https://)

Save & Exit   Reset   Cancel & Exit

### 2.3.2.2 Update an Existing Address

Step 1: Click Maintain Addresses

Step 2: Click the Address Name

Name ↕	Address Type	Address Information	Status	Default for Type
<b>General</b>	General Mailing Address	Brodie Ramirez 123 23rd Street Boston, MA 45643 US Email: tisensee@periscopeholdings.com Phone: (555)888-4444	Active	Yes

**Step 3: Update Required and Optional Fields as needed**

The Seller Administrator can update the Status of the Address to Inactive so that the address will not display on the Agency side.

**Step 4: Click Save & Exit**

The Seller Administrator can click Reset to undo the updated data or click Cancel & Exit to exit the page without saving the changes.


The screenshot shows a form with several input fields: Toll Free, Mobile, Fax, Email\*, Id (with value 0), Alternate Id, and Web Address. The Status dropdown menu is open, showing options: Active (selected), Deleted, Inactive, and Pending. A checkbox is checked below the Status field. At the bottom, there are three buttons: Save & Exit (highlighted), Reset, and Cancel & Exit.

**2.3.2.3 Add EFT Information to a Remit Address**

Seller Administrators may add EFT information to a Remit Address to receive electronic payments for Invoices (if enabled by the Agency). This information is encrypted in the database after it is saved. The Seller Administrator may add EFT to an existing Remit address (see section above) or add a new Remit address and add EFT information to it.

**Step 1: Click Add Another Address**

<b>General</b>	General Mailing Address	Brodie Ramirez 123 23rd Street Boston, MA 45643 US Email: tisensee@periscopeholdings.com Phone: (555)888-4444	Active	Yes
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**Step 2: Select Remit Address as the Address Type**

**Step 3: Complete Required Fields**

**Step 4: Select EFT Enabled**

**Step 5: Complete Required Fields under EFT Enabled**

**Step 6: Click Save & Exit**

The Seller Administrator can click Reset to undo the entered information or click Cancel & Exit to exit the page without saving.

**Enter a New Address**

Address Type: Remit Address

Name this Address\*:

Contact Name\*:

Address Line 1\*:

Address Line 2:

Address Line 3:

Address Line 4:

Country\*: US - United States of America

City\*:  State/Province\*:

ZIP\*:  County:

Phone\*:  Ext:


Toll Free:  Mobile:

Fax:  Email\*:

Id:  Alternate Id:

Status: Active Web Address:

Default address for this address type (Begin with http:// or https://)

EFT Enabled? 

Description\*:

Country\*: ▼


Branch Name\*:

Account Type\*: ▼

Routing Number\*:

Account Number\*:  Show

IAT Flag:  ⓘ



Fields with asterisks are required

## 2.3.3 Maintaining Commodity Codes & Services

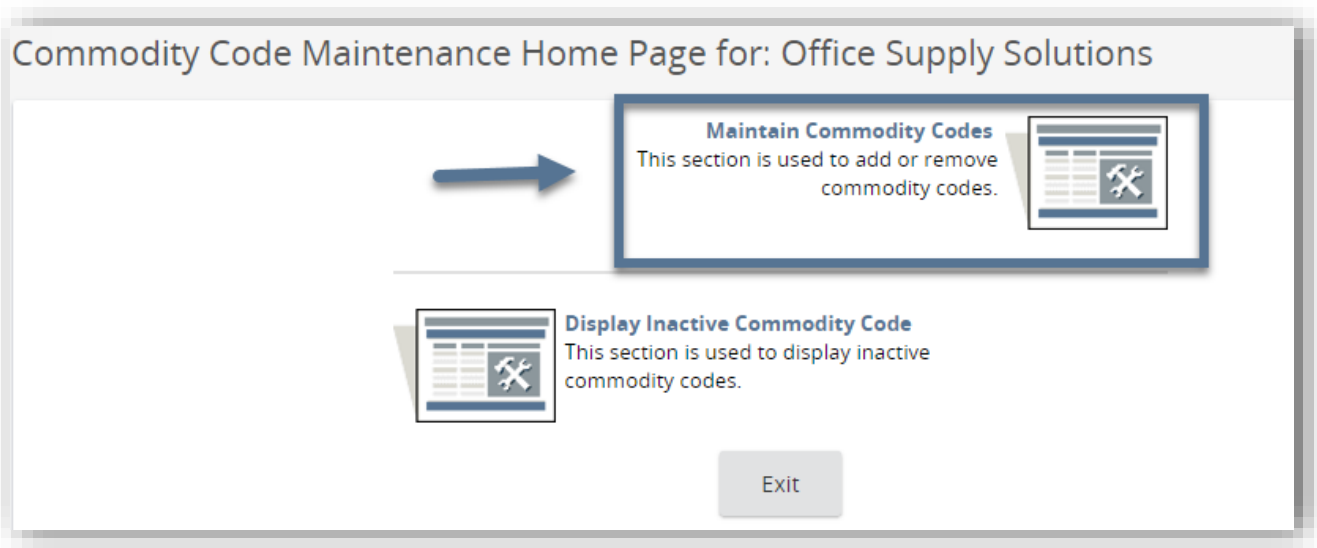
The purpose of this section is to allow the Seller Administrator to update the NIGP codes, which determine which Bid opportunities the Vendor is notified of via email from the system. The Seller Administrator must keep this up to date as the Agency can add all Vendors listed under a certain NIGP code for a Solicitation. Depending on the Seller Administrator's familiarity with the NIGP code structure, the user may choose from one of three ways to add NIGP codes.

### 2.3.3.1 Add Additional Codes Using Dropdown

If the Seller Administrator is familiar with the NIGP code, the system allows the user to find and select specific codes to add.

**Step 1: Click Maintain Commodity Codes & Services**

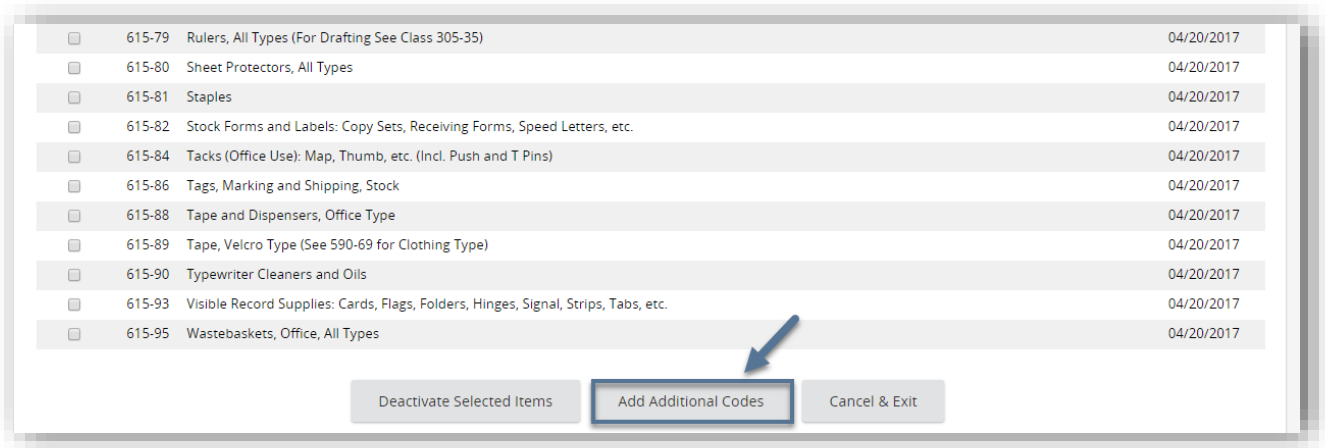
**Step 2: Click Maintain Commodity Codes**



**Step 3: Click Add Additional Codes**

The codes that appear on this page are the NIGP codes that the Vendor listed when first registering in the system.

<input type="checkbox"/>	615-79	Rulers, All Types (For Drafting See Class 305-35)	04/20/2017
<input type="checkbox"/>	615-80	Sheet Protectors, All Types	04/20/2017
<input type="checkbox"/>	615-81	Staples	04/20/2017
<input type="checkbox"/>	615-82	Stock Forms and Labels: Copy Sets, Receiving Forms, Speed Letters, etc.	04/20/2017
<input type="checkbox"/>	615-84	Tacks (Office Use): Map, Thumb, etc. (Incl. Push and T Pins)	04/20/2017
<input type="checkbox"/>	615-86	Tags, Marking and Shipping, Stock	04/20/2017
<input type="checkbox"/>	615-88	Tape and Dispensers, Office Type	04/20/2017
<input type="checkbox"/>	615-89	Tape, Velcro Type (See 590-69 for Clothing Type)	04/20/2017
<input type="checkbox"/>	615-90	Typewriter Cleaners and Oils	04/20/2017
<input type="checkbox"/>	615-93	Visible Record Supplies: Cards, Flags, Folders, Hinges, Signal, Strips, Tabs, etc.	04/20/2017
<input type="checkbox"/>	615-95	Wastebaskets, Office, All Types	04/20/2017



#### Step 4: Select NIGP Class from Dropdown Menu

First the Seller Administrator selects the 3-digit NIGP class code, which populates the second dropdown with 2-digit NIGP class item codes.

#### Step 5: Select Class Items by Clicking Appropriate Checkboxes

The checkbox next to "Code" allows the Seller Administrator to select all class items with a single click.

A good practice for many Vendors is to select all class items within a class. This practice allows the Vendor to maximize notifications of future solicitation opportunities.

#### Step 6: Click Save

**Search**

**NIGP Class** 005 - ABRASIVES

**NIGP Class Item**

**NIGP Keyword**

**Search using** ALL of the criteria

**Search**

**NIGP Code Browse** Show Categories

Select the category that best describes the product and service you offer. Click on the question mark for more information.

<input checked="" type="checkbox"/>	Code	Description
<input checked="" type="checkbox"/>	005-05	Abrasive Equipment and Tools
<input checked="" type="checkbox"/>	005-14	Abrasives, Coated: Cloth, Fiber, Sandpaper, etc.
<input checked="" type="checkbox"/>	005-21	Abrasives, Sandblasting, Metal
<input checked="" type="checkbox"/>	005-28	Abrasives, Sandblasting (Other than Metal)
<input checked="" type="checkbox"/>	005-42	Abrasives, Solid: Wheels, Stones, etc.
<input checked="" type="checkbox"/>	005-56	Abrasives, Tumbling (Wheel)
<input checked="" type="checkbox"/>	005-63	Grinding and Polishing Compounds: Carborundum, Diamond, etc. (For Valve Grinding Compounds See Class 075)
<input checked="" type="checkbox"/>	005-70	Pumice Stone
<input checked="" type="checkbox"/>	005-75	Recycled Abrasives Products and Supplies
<input checked="" type="checkbox"/>	005-84	Steel Wool, Aluminum Wool, Copper Wool, and Lead Wool

**Save** **Save and Add More**

To add more commodity codes, click Save and Add More. If the Save and Add More option is clicked, the Seller Administrator will be returned to the main commodity code search screen.

### 2.3.3.2 Add Additional Codes Using NIGP Code Browse by Category

If the Seller Administrator is less familiar with the NIGP code, another option is the NIGP Code Browse.

**Step 1: Click Maintain Commodity Codes & Services**

**Step 2: Click Maintain Commodity Codes**



## Commodity Code Maintenance Home Page for: Office Supply Solutions

**Maintain Commodity Codes**  
This section is used to add or remove commodity codes.

**Display Inactive Commodity Code**  
This section is used to display inactive commodity codes.

Exit

### Step 3: Click Add Additional Codes

The codes that appear on this page are the NIGP codes that the Vendor listed when first registering in the system.

<input type="checkbox"/>	615-79 Rulers, All Types (For Drafting See Class 305-35)	04/20/2017
<input type="checkbox"/>	615-80 Sheet Protectors, All Types	04/20/2017
<input type="checkbox"/>	615-81 Staples	04/20/2017
<input type="checkbox"/>	615-82 Stock Forms and Labels: Copy Sets, Receiving Forms, Speed Letters, etc.	04/20/2017
<input type="checkbox"/>	615-84 Tacks (Office Use): Map, Thumb, etc. (Incl. Push and T Pins)	04/20/2017
<input type="checkbox"/>	615-86 Tags, Marking and Shipping, Stock	04/20/2017
<input type="checkbox"/>	615-88 Tape and Dispensers, Office Type	04/20/2017
<input type="checkbox"/>	615-89 Tape, Velcro Type (See 590-69 for Clothing Type)	04/20/2017
<input type="checkbox"/>	615-90 Typewriter Cleaners and Oils	04/20/2017
<input type="checkbox"/>	615-93 Visible Record Supplies: Cards, Flags, Folders, Hinges, Signal, Strips, Tabs, etc.	04/20/2017
<input type="checkbox"/>	615-95 Wastebaskets, Office, All Types	04/20/2017

Deactivate Selected Items   Add Additional Codes   Cancel & Exit

### Step 4: Scroll Down to NIGP Code Browse

### Step 5: Review Categories and Click the Category Number

The categories are based on the descriptions of goods and services. Once the category number is clicked, all the NIGP classes under the category display.

## Commodity Code and Service Codes - Office Supply Solutions

### Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

### NIGP Code Browse

**i** Select the category that best describes the product and service you offer. Click on the question mark for more information.

- 01 Administrative, Financial, and Management Services
- 02 Agricultural Equipment and Related Products and Services
- 03 Arts, Crafts, Entertainment, Theatre
- 04 Automotive Products, Vehicles, and Services
- 05 Building Equipment, Supplies, and Services
- 06 Clothing, Textiles, Laundry Equipment, and Supplies
- 07 Communication Equipment and Services
- 08 Computers, Software, Supplies, and Services
- 09 Food, Equipment, and Related Services
- 10 Furnishings and Related Services
- 11 Furniture and Related Services

## Step 6: Click the NIGP Class Number (3 digits)

## Commodity Code and Service Codes - Office Supply Solutions

### Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

### NIGP Code Browse

**i** Select the category that best describes the product and service you offer. Click on the question mark for more information.

- 01 Administrative, Financial, and Management Services
- 946 FINANCIAL SERVICES
- 952 HUMAN SERVICES
- 953 INSURANCE AND INSURANCE SERVICES, (ALL TYPES)
- 958 MANAGEMENT SERVICES
- 998 SALE OF SURPLUS AND OBSOLETE ITEMS

### Step 7: Select Class Items by Clicking Appropriate Checkboxes

### Step 8: Click Save or Save and Add More

**Commodity Code and Service Codes - Office Supply Solutions**

**Search**

NIGP Class

NIGP Class Item

NIGP Keyword

Search using ALL of the criteria

**NIGP Code Browse**

**i** Select the category that best describes the product and service you offer. Click on the question mark for more information.

<input type="checkbox"/>	Code	Description
<input type="checkbox"/>	01	Administrative, Financial, and Management Services
<input type="checkbox"/>	946	FINANCIAL SERVICES
<input checked="" type="checkbox"/>	946-10	Accounting and Billing Services (Including Payroll Services, 3rd Party Reimbursement for Medicare, Medicaid, Private Insurance, etc)
<input checked="" type="checkbox"/>	946-11	Accounting Services (Not Otherwise Classified)
<input type="checkbox"/>	946-12	Actuarial Services and Retirement Planning
<input type="checkbox"/>	946-14	Appraisal Services, Antique

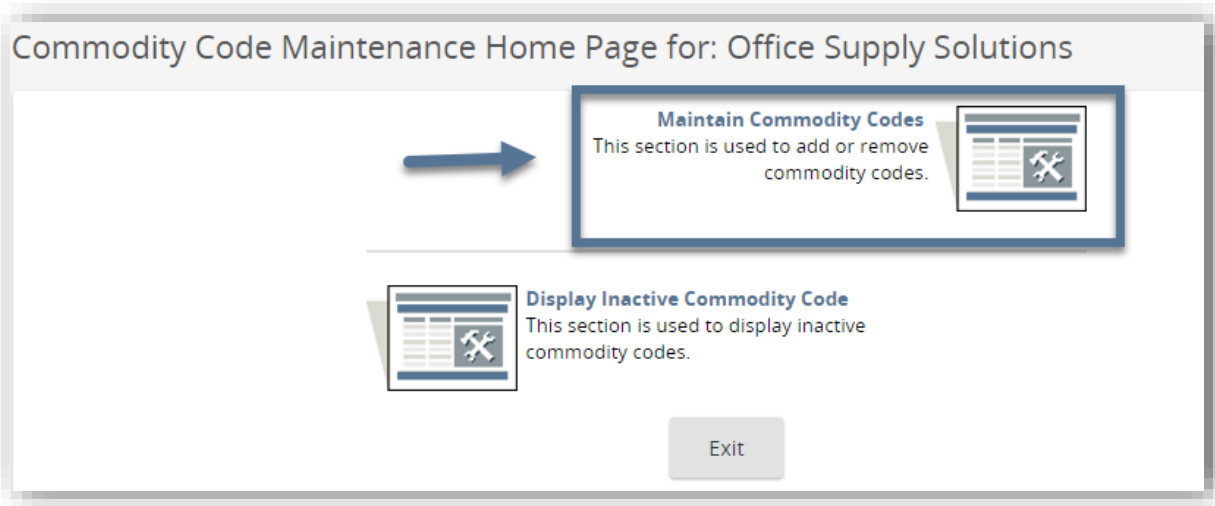
#### 2.3.3.3 Add Additional Codes Using Keyword Search

The final option to add commodity codes to the Vendor profile is the NIGP Keyword Search. While this method may be effective when searching for discrete terms (e.g. bandage), the search function may return a large number of NIGP class items. The Seller Administrator should use this search function in combination with the NIGP Code Browse function to find appropriate class items in an efficient manner.

#### Step 1: Click Maintain Commodity Codes & Services

## Step 2: Click Maintain Commodity Codes

Commodity Code Maintenance Home Page for: Office Supply Solutions



**Maintain Commodity Codes**  
This section is used to add or remove commodity codes.

**Display Inactive Commodity Code**  
This section is used to display inactive commodity codes.

Exit

## Step 3: Click Add Additional Codes

The codes that appear on this page are the NIGP codes that the Vendor listed when first registering in the system.

<input type="checkbox"/>	615-79 Rulers, All Types (For Drafting See Class 305-35)	04/20/2017
<input type="checkbox"/>	615-80 Sheet Protectors, All Types	04/20/2017
<input type="checkbox"/>	615-81 Staples	04/20/2017
<input type="checkbox"/>	615-82 Stock Forms and Labels: Copy Sets, Receiving Forms, Speed Letters, etc.	04/20/2017
<input type="checkbox"/>	615-84 Tacks (Office Use): Map, Thumb, etc. (Incl. Push and T Pins)	04/20/2017
<input type="checkbox"/>	615-86 Tags, Marking and Shipping, Stock	04/20/2017
<input type="checkbox"/>	615-88 Tape and Dispensers, Office Type	04/20/2017
<input type="checkbox"/>	615-89 Tape, Velcro Type (See 590-69 for Clothing Type)	04/20/2017
<input type="checkbox"/>	615-90 Typewriter Cleaners and Oils	04/20/2017
<input type="checkbox"/>	615-93 Visible Record Supplies: Cards, Flags, Folders, Hinges, Signal, Strips, Tabs, etc.	04/20/2017
<input type="checkbox"/>	615-95 Wastebaskets, Office, All Types	04/20/2017

Deactivate Selected Items   **Add Additional Codes**   Cancel & Exit

## Step 4: Enter Keyword(s)

Step 5: Click Search

**Commodity Code and Service Codes - Office Supply Solutions**

**Search**

NIGP Class

NIGP Class Item

**NIGP Keyword**

Search using


Step 6: Select Class Items by Clicking Appropriate Checkboxes

Step 7: Click Save or Save and Add More

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1 2 3 4 5 6 7 8 9 10 ▶▶

<input type="checkbox"/>	Code	Description
<input checked="" type="checkbox"/>	005-14	Abrasives, Coated: Cloth, Fiber, Sandpaper, etc.
<input checked="" type="checkbox"/>	010-45	Exterior Insulation and Finish Systems
<input checked="" type="checkbox"/>	010-76	Paper Type Insulation Material (Cellulose, etc.)
<input type="checkbox"/>	015-06	Addressing Machine Supplies, Metal and Plastic Plate Type
<input type="checkbox"/>	015-10	Addressing Machine Supplies, Paper Plate Type
<input type="checkbox"/>	015-15	Chemicals and Supplies, Dry (For Bond Paper Type Copying Machines)
<input type="checkbox"/>	015-16	Chemicals and Supplies, Wet (For Bond Paper Type Copying Machines)
<input type="checkbox"/>	015-20	Chemicals and Supplies (For Spirit Type Duplicating Machines)
<input type="checkbox"/>	015-25	Chemicals, Inks, and Supplies (For Mimeograph Machines)
<input type="checkbox"/>	015-77	Recycled Copying and Duplicating Supplies
<input type="checkbox"/>	037-56	Paper, Crepe
<input type="checkbox"/>	050-40	Drawing and Painting Supplies: Brushes, Canvas, Chalk, Colors (Acrylic, Oil, Water, etc.), Crayons, Palettes, Paper and Pads, Staples, etc.
<input type="checkbox"/>	050-59	Paper, Art, Various Types
<input type="checkbox"/>	085-85	Soil Erosion Sheetting Material (To Include Silt Fencing): Asphalt, Biodegradable Paper, Burlap, Excelsior, Jute, Straw, etc.
<input type="checkbox"/>	125-70	Paper, Reproduction Proofing
<input type="checkbox"/>	125-72	Paper Treatment Chemicals (Deacidifiers)
<input type="checkbox"/>	150-06	Builder's Paper, Kraft Types (Not Felt and Tar Paper)
<input type="checkbox"/>	165-30	Dispensers: Aluminum Foil, Plastic Wrap, Food Service Gloves, etc.
<input type="checkbox"/>	175-33	Filter Paper and Membranes
<input type="checkbox"/>	175-62	Papers, Laboratory

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1 2 3 4 5 6 7 8 9 10 ▶▶




### 2.3.3.4 Deactivate Codes

**Step 1: Click Maintain Commodity Codes & Services**


**Step 2: Click Maintain Commodity Codes**


Commodity Code Maintenance Home Page for: Office Supply Solutions



**Maintain Commodity Codes**

This section is used to add or remove commodity codes.





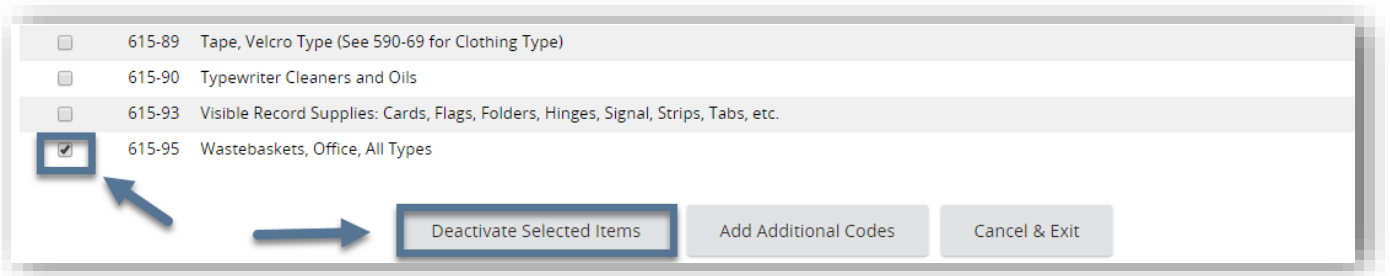
**Display Inactive Commodity Code**

This section is used to display inactive commodity codes.

### Step 3: Select the Code(s) to Deactivate

### Step 4: Click Deactivate Selected Items

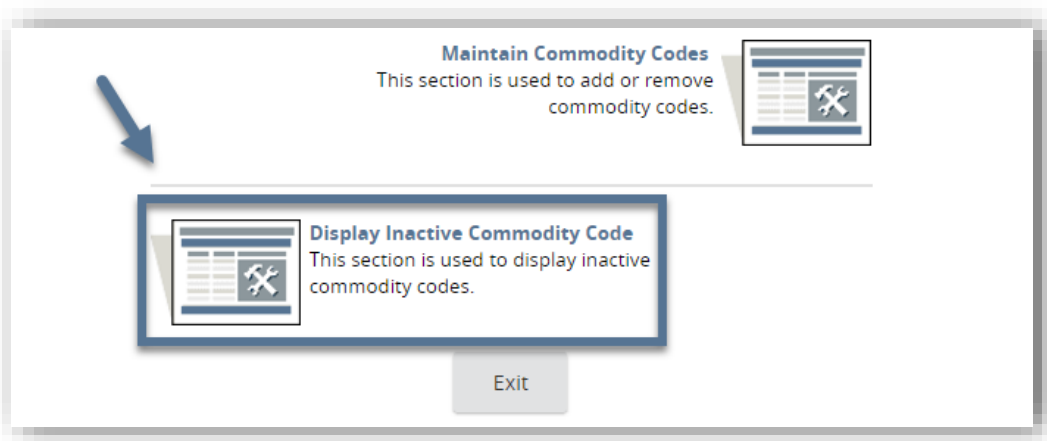
The Seller Administrator can click Deactivate Selected Items to deactivate the selected codes. Or simply click Cancel & Exit to exit the page without deactivating the selected codes.



### 2.3.3.5 Reactivate Inactive Codes

#### Step 1: Click Maintain Commodity Codes & Services

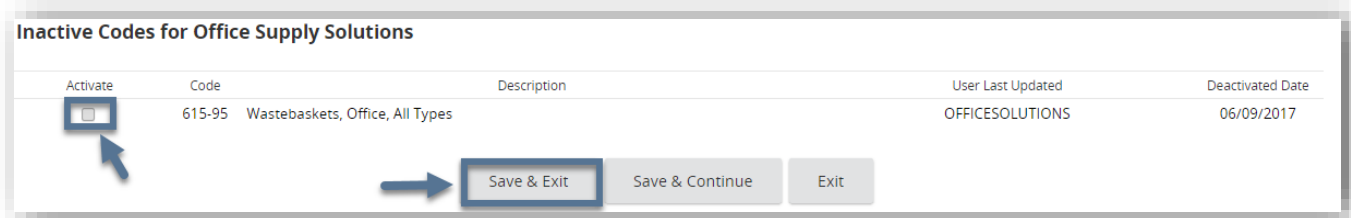
#### Step 2: Click Display Inactive Commodity Codes



#### Step 3: Select the Code(s) to Activate

#### Step 4: Click Save & Exit

The Seller Administrator can click Save & Continue to save the changes and to remain on the page. The Seller Administrator can click Exit to exit without saving the change.



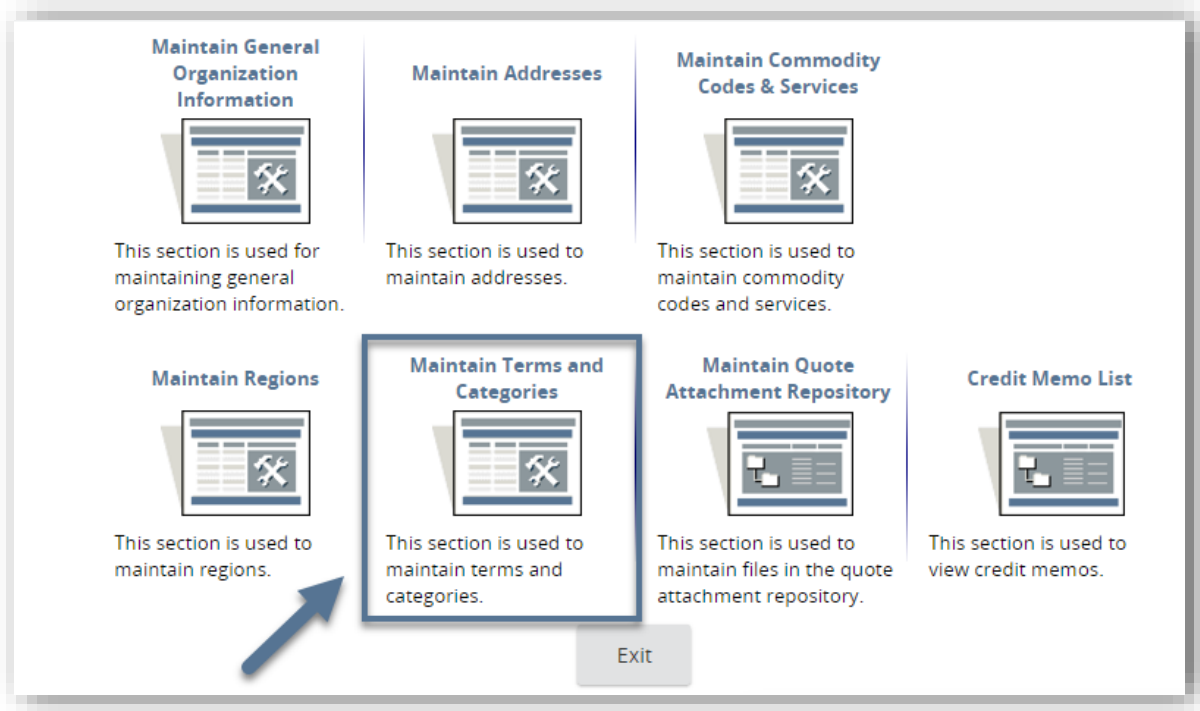
## 2.3.4 Maintaining Regions

This section is no longer used.

## 2.3.5 Maintaining Terms and Categories

The purpose of this section is to allow the Seller Administrator to update demographic information (Vendor Categories), related certifications and terms.

### Step 1: Click Maintain Terms and Categories



### Step 2: Complete Required and Optional fields as needed

The Terms and the Categories are configured by the Agency.

### Step 3: Click Save & Continue

When the Seller Administrator clicks Save & Continue, any Vendor Categories that have underlying Certifications associated with them will display an Add Certification link. This link may be clicked to add certification information associated with that Vendor Category.



**Category: Small Business Enterprise**

Please select at most one category value

Select

Yes Add Certification

Notes:

**Category: Business Type**

Please select at most one category value

Select

Corporation

Individually Owned

Limited Liability Corporation

Partnership

Notes:

Save & Exit Save & Continue Reset Cancel & Exit

**Step 4: Click Add Certification, as applicable.**

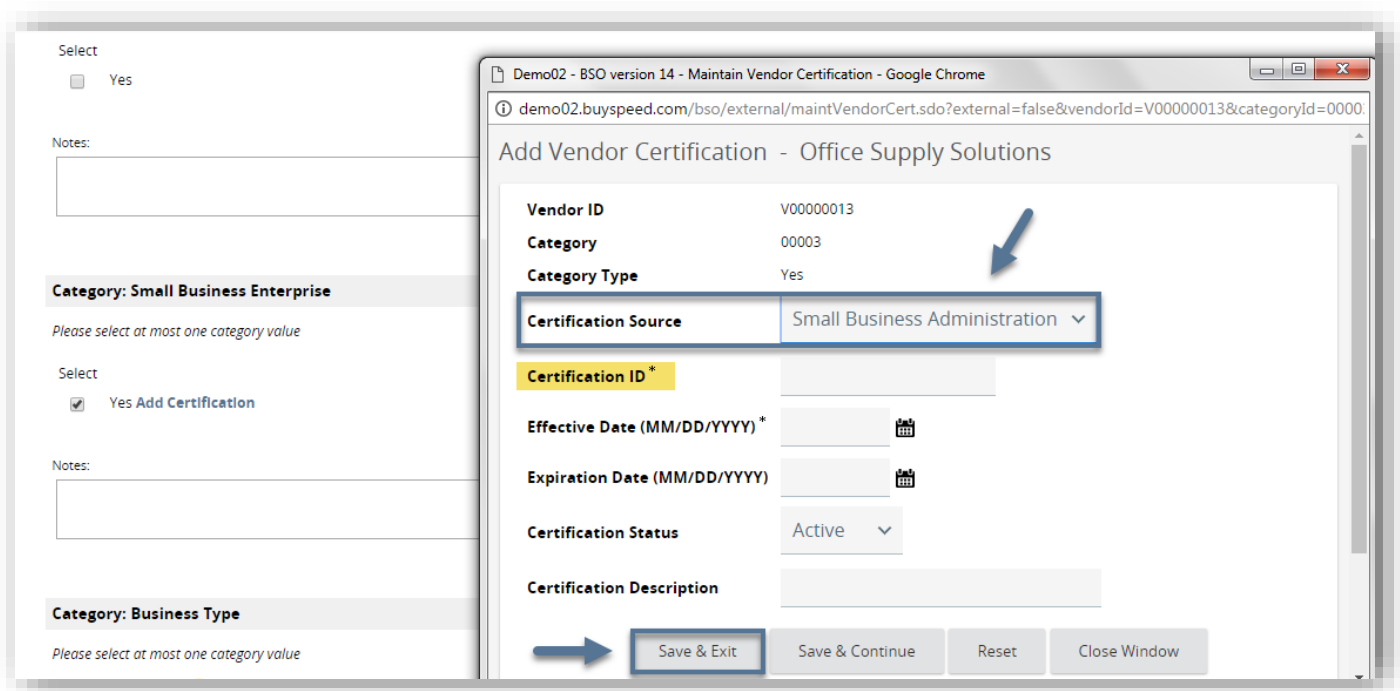
A new window opens for data entry.

**Step 5: Enter Certification data, as appropriate.**

The Seller Administrator should input all the appropriate data associated with a certification including the selection of the certification source from the dropdown menu.

**Step 6: Click Save & Exit**

The Seller Administrator may click Save & Continue to continue updating the certification information. Save & Exit will return to the Terms, Categories, and Certifications page.



### Step 7: Click Save & Exit (on the main Terms, Categories, and Certifications page)

The Seller Administrator can click Reset to undo the entered data or click Cancel & Exit to exit from the page without saving.

## 2.3.6 Maintaining Quote Attachment Repository

This section is no longer used.

## 2.4 ADDING & MAINTAINING USERS ON VENDOR ACCOUNT

The purpose of this section is to allow the Seller Administrator to update existing users on the Vendor's account. The Seller Administrator can add users from Add Users on this Account.


## 2.4.1 Update Existing Users

### Step 1: Click Maintain Users on this Account

Maintenance Home Page for: Office Supply Solutions


General Alerts

**Maintain Organization Information**




This section is used for maintaining organization information.

**Maintain Users on this Account**




This section is used to maintain users for the organization.

**Add Users on this Account**



This section is used to add users to the organization.

**Add Associated Organization**



This section is used for adding an organization with the same Tax ID.

### Step 2: Click Login ID

Login ID	First Name	Last Name	Status	Role(s)
OFFICESOLUTIONS	Brodie	Ramirez	Active	Seller Seller Administrator

Add User Exit

### Step 3: Update Required and Optional Fields as needed

The initial registrant in the system must have the Seller Administrator role. This cannot be changed.

User Maintenance: Brodie Ramirez - Office Supply Solutions

Salutation: [v]

First Name\*: Brodie Last Name\*: Ramirez

Job Title\*: President Department:

Phone\*: 555 777 9999 - Email\*: brodie.ramirez@officesolutions.com

Login ID: OFFICESOLUTIONS Status: Active

New Password\*: ..... Confirm Password\*: .....

Login Question\*: What is your favorite food? Login Answer\*: pie

**Roles**

Seller  Can Create Blanket Change Orders

Seller Administrator  Can Upload Contract

Save & Exit Save & Continue Reset Cancel & Exit

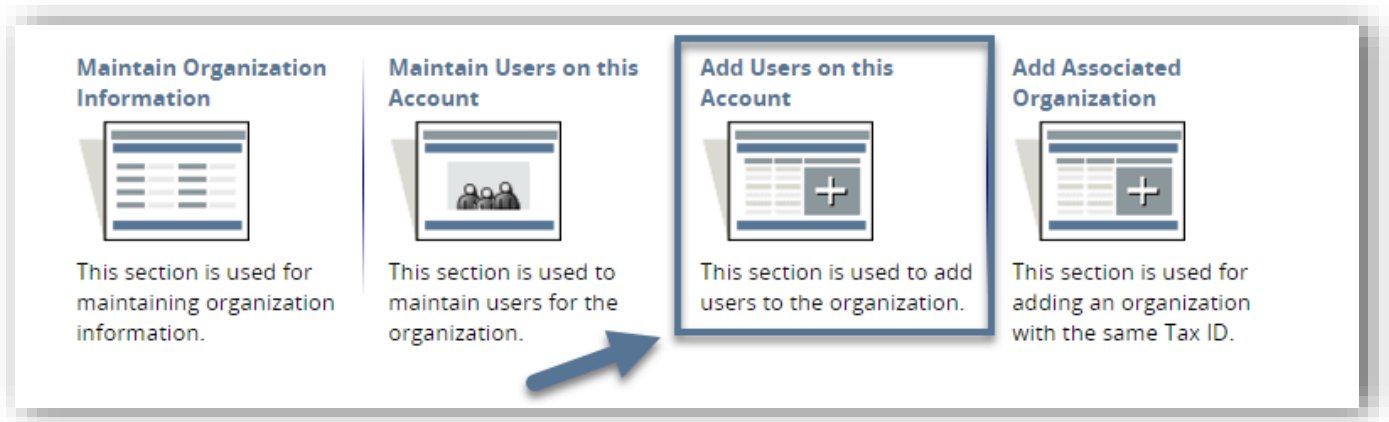
#### Step 4: Click Save & Exit

The Seller Administrator can click Save & Continue to save the changes on the page and remain on the page. Click Reset to undo the changes or click Cancel & Exit to exit out of the page without saving the changes.

## 2.4.2 Add New Users

The purpose of this section is to allow the Seller Administrator to create additional users on the Vendor account. The Seller Administrator can also create users from Maintain Users on this Account.

#### Step 1: Click Add Users on this Account



#### Step 2: Complete Required and Optional Fields per preference

The Seller Administrator must complete the fields marked with an asterisk.

#### Step 3: Click Save & Exit

The Seller Administrator can click Reset to erase the entered data or click Cancel & Exit to exit the page without saving.

The two roles and role privileges are described in the table below.

User Role/Privilege	Description	Recommended Usage
Seller	User may view and acknowledge Bid opportunities including Bid Amendments; may submit responses to Bids (Quotes); may acknowledge POs and PO Change Orders; may create/submit Invoices	Appropriate role for members of the Vendor's salesforce and/or Accounts Receivable staff (if using Invoice features)
Seller Administrator	User has full access to administrative functions of Vendor account; may update General Information, Addresses, Vendor Categories/Certifications and Commodity/Service codes; may add and inactivate users on account; may view Credit Memo list; may add a DBA Vendor	Should be limited to authorized personnel to improve control of information

User Role/Privilege	Description	Recommended Usage
Can Create Blanket Change Orders (if enabled by Agency)	Seller ONLY feature: may initiate a Change Order to a Master Blanket PO (that will require approval by the contract "owner" of the Agency)	Varies depending on internal responsibilities
Can Upload Contract (if enabled by Agency)	Seller ONLY feature: may upload items to a contract (Master Blanket PO)	Varies depending on internal responsibilities

## 2.5 ADDING AN ASSOCIATED ORGANIZATION

The purpose of this section is to allow the Seller Administrator to initiate the registration for an associated organization in the system under the Vendor's Tax ID. This is often used by Vendors to register a DBA, "Doing Business As" entity.

### Step 1: Click Add Associated Organization



### Step 2: Complete required and optional fields as appropriate

On the Send Mail screen the Seller Administrator must complete the fields marked with an asterisk. Send Mail is used to request that the associated organization registers in <system name>.

### Step 3: Click Send

The user can click Cancel & Exit to exit out of the page without sending the email.

### Send Mail

**i** Use the email form below to request that the associated organizations register in BSO. The link provided below must be used in order to register with the same tax ID.

**To\*:**


**CC:**

Send confirmation email to brodie.ramirez@officesupply.com

**From:** brodie.ramirez@officesupply.com

**Subject\*:** Office Supply Solutions requests you register with the Central Procurement Agency's eProcurement system.

**Text:**



#### Step 4: Click OK

An email confirmation displays.

Subject: Office Supply Solutions requests you register with the Central Procurement Agency's eProcurement system.

#### Email Recipients

Delivery Date: 06/12/2017 09:39:05 AM

#### Additional Email Notifications

Email Address
angeladavid@supplydepot.com

