

Supplier Management & SQM

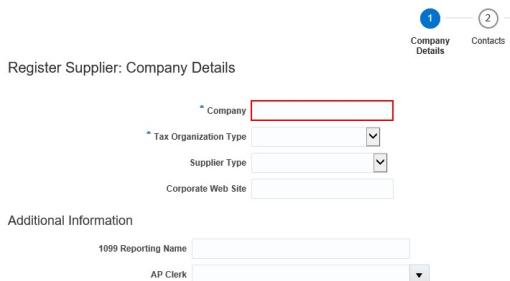
For New Suppliers _ 8.5.19

External Supplier Registration as Consultant Procedure

In this exercise, you will walk you through the process of Externally Registering as a Consultant.




The **ACCO Purchasing department** will email a registration link.

Locate the link, and open in your internet browser.

Step	Action
1.	<p>Once you have clicked the link, the "Register supplier: Company Details" screen will appear.</p> <p>This process will take you through multiple tabs to enter all required supplier information.</p> <p>To begin, Click in the Company field.</p> 

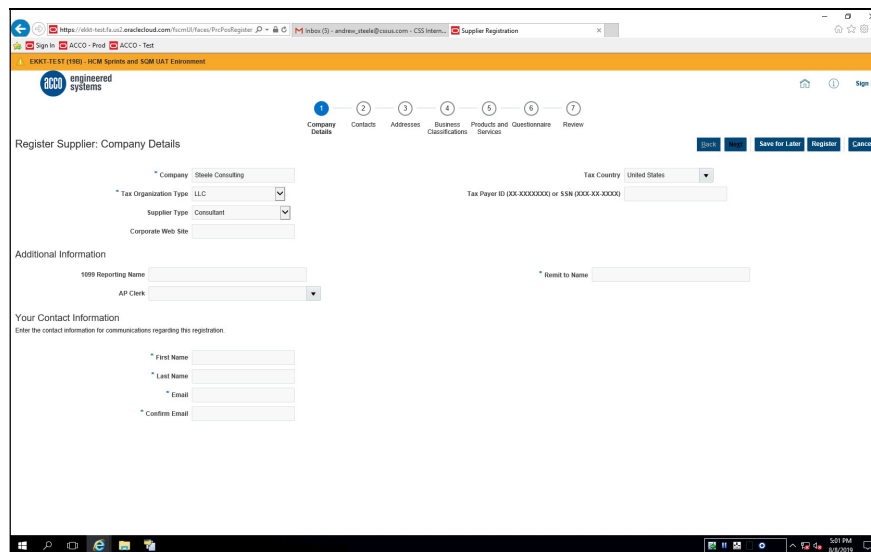
Training Guide

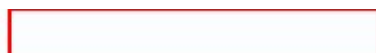
Supplier Management & SQM

Step	Action
2.	<p>Enter the desired Company/Supplier information</p> <p>Use this field to enter your full company name. Please refer to the standard naming conventions document for proper formatting (found in the Resource Center at www.accoes.com).</p> <p>(In this example, a generic company name will be entered)</p>
3.	<p>Click the Tax Organization Type list.</p> 
4.	<p>Select the desired organization type.</p> <p>Click the LLC list item.</p> 
5.	<p>Click the Supplier Type list.</p> 

Step	Action
6.	<p>Select the desired Supplier Type.</p> <p>Click Consultant.</p>

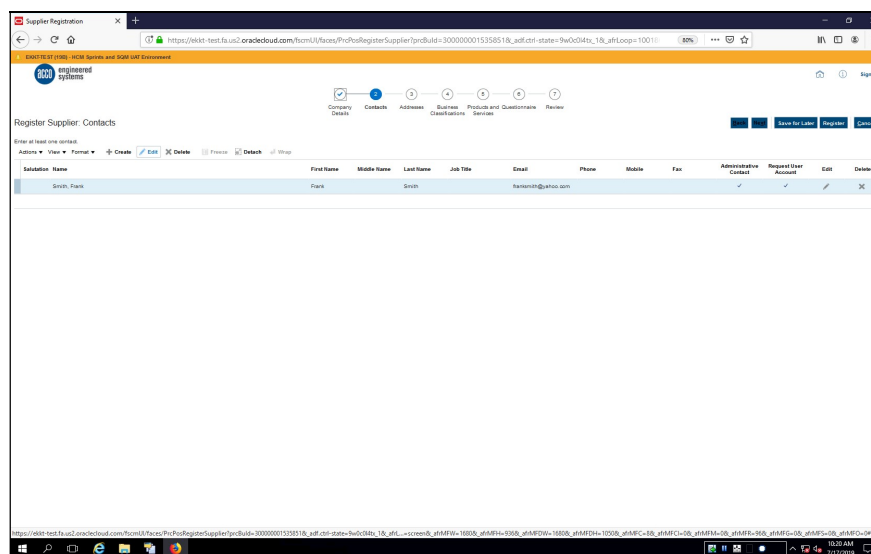
Step	Action
7.	<p>Use the Taxpayer Country field to select your taxpayer country.</p> <p>Click on the Taxpayer Country.</p> 
8.	<p>Click the United States US list item.</p> 



Step	Action
9.	<p>Use the Taxpayer ID field to list your Tax ID in one of the following formats: "XX-XXXXXXX" or "XXX-XX-XXXX"</p> <p>Click in the Taxpayer ID field.</p> <p>Tax Payer ID (XX-XXXXXXX) or SSN (XXX-XX-XXXX) </p>

Step	Action
10.	<p>Enter the correct Tax Payer ID or SSN.</p> <p>(In this example a generic SSN will be added)</p> <p>Tax Payer ID (XX-XXXXXXX) or SSN (XXX-XX-XXXX) <input type="text"/></p>
11.	<p>Under the Your Contact Information section,</p> <p>Click in the First Name field.</p> <p>Your Contact Information Enter the contact information for communications regarding this registration.</p> <p>* First Name <input type="text"/></p> <p>* Last Name <input type="text"/></p> <p>* Email <input type="text"/></p> <p>* Confirm Email <input type="text"/></p>
12.	<p>Enter your First Name.</p> <p>(In this example a generic first name will be entered)</p> <p>First Name <input type="text"/></p>
13.	<p>Click in the Last Name field.</p> <p>Last Name <input type="text"/></p>
14.	<p>Enter your Last Name.</p> <p>(In this example a generic last name will be entered)</p> <p>Last Name <input type="text"/></p>
15.	<p>Click in the Email field.</p> <p>Email <input type="text"/></p>
16.	<p>Enter your Email.</p> <p>(In this example a generic email will be entered)</p> <p>Enter the desired information into the Email field. Enter "franksmith@yahoo.com".</p> <p>Email <input type="text"/></p>
17.	<p>Click in the Confirm Email field.</p> <p>Confirm Email <input type="text"/></p>



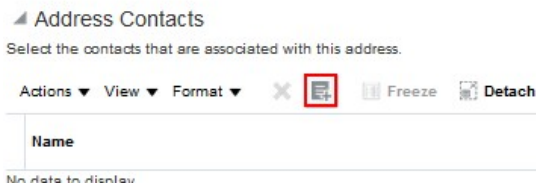
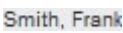
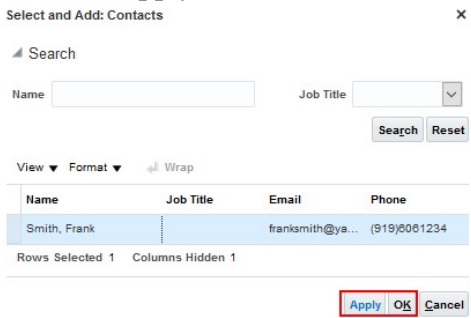

Step	Action
18.	<p>Confirm your email.</p> <p>Enter the desired information into the Confirm Email field. Enter "franksmith@yahoo.com".</p> <p>Confirm Email <input type="text"/></p>
19.	<p>Click the Next button.</p> <p>Next</p>






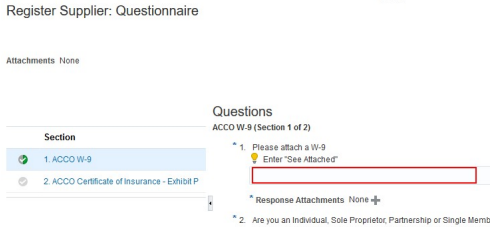
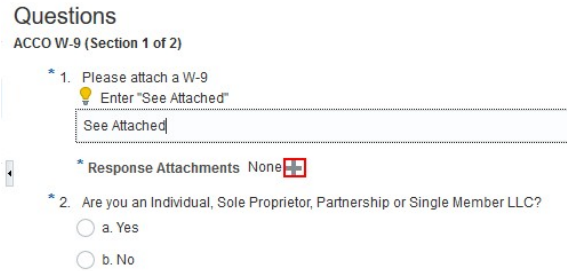


Step	Action
20.	<p>On the Register Supplier: Contacts page,</p> <p>click the Edit icon.</p> <p>Register Supplier: Contacts</p> <p>Enter at least one contact.</p> <p>Actions ▾ View ▾ Format ▾ Edit Delete Freeze Detach</p> <p>Salutation Name</p> <p>Smith, Frank</p>

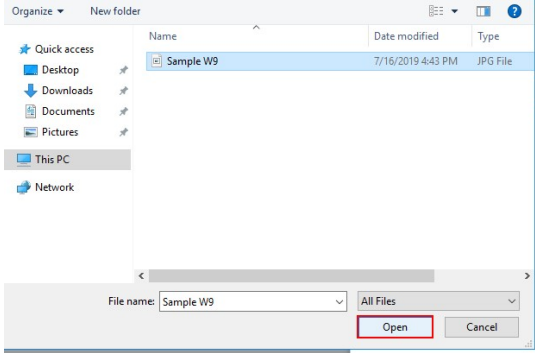


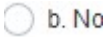
Step	Action
21.	<p>This will pull up the contact information you just entered on the previous screen.</p> <p>Here you can change or add any missing contact information.</p> <p>Click in the Phone Area Code field.</p> 
22.	Enter the desired information into the Phone Area Code field. Enter " 919 ".
23.	Click in the Phone field.
24.	<p>Enter your phone number.</p> <p>In this example we will enter a generic number.</p> <p>Enter the desired information into the Phone field. Enter "606-1234".</p>
25.	<p>Ensure the "Request User Account" box is checked.</p> <p>Then click OK.</p> 
26.	<p>Click the Next button.</p> 
27.	<p>On the Register Supplier: Addresses page,</p> <p>Click the Create (+) icon.</p> 

Step	Action															
28.	<p>For all locations, excluding Remit To location, please format your address name as follows:</p> <p>"City-Street Name" (ex. Pasadena-Walnut)</p> <p>Enter the desired information into the Address Name field. Enter "MAIN".</p> <p>Create Address</p> <div><div><div>* Address Name <input type="text"/></div><div>* Country <div></div></div><div>Address Line 1 <input type="text"/></div><div>Address Line 2 <input type="text"/></div><div>Address Line 3 <input type="text"/></div><div>City <input type="text"/></div><div>State <input type="text"/></div><div>Postal Code <input type="text"/></div></div><div><div>* Address <input type="checkbox"/> Ordering</div><div>Purpose <input type="checkbox"/> Remit to</div><div><input type="checkbox"/> RFQ or Bidding</div><div>Phone <div></div> <input type="text"/></div><div>Fax <div></div> <input type="text"/></div><div>Payment Remittance Email <input type="text"/></div></div></div> <p>Additional Information</p> <p>Address Contacts</p> <p>Select the contacts that are associated with this address.</p> <p>Actions View Format <div></div> Freeze Detach Wrap</p> <table><thead><tr><th>Name</th><th>Job Title</th><th>Email</th><th>Administrative Contact</th><th>User Account</th></tr></thead><tbody><tr><td colspan="5">No data to display.</td></tr><tr><td colspan="5">Columns Hidden: 4</td></tr></tbody></table> <div>Create Another OK Cancel</div>	Name	Job Title	Email	Administrative Contact	User Account	No data to display.					Columns Hidden: 4				
Name	Job Title	Email	Administrative Contact	User Account												
No data to display.																
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29.	<p>Click the Country list.</p> <div></div>															
30.	<p>Click the United States US list item.</p> <div>United States US</div>															
31.	<p>Click the Postal Code list.</p> <div></div>															
32.	<p>Enter the desired information into the Postal Code field. Enter "92618".</p>															
33.	<p>Notice the City, State and County automatically populate.</p> <p>Click in the Address Line 1 field.</p> <div></div>															
34.	<p>Enter your address.</p> <p>In this example we will enter a generic address.</p> <p>Enter the desired information into the Address Line 1 field. Enter "1234 Main St".</p>															



Step	Action
35.	<p>Under Address Purpose, check one or more boxes.</p> <p>Click in the Ordering field.</p> 
36.	<p>If this address is the address you wish to receive checks to, select the "Remit To" box also.</p> <p>Click in the Remit to field.</p> 
37.	<p>Click the Select and Add graphic.</p> <p>Additional Information</p> 
38.	<p>Click in the Smith, Frank field.</p> 
39.	<p>Click the Apply button then click OK.</p> 
40.	<p>Back on the Create Addresses window,</p> <p>Click the OK button.</p> 

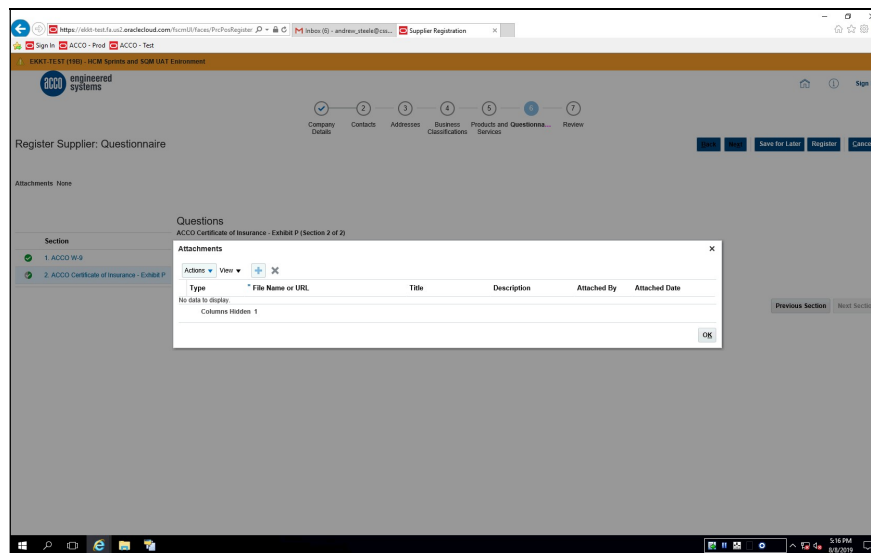
Step	Action
41.	Click the Next button. 
42.	On the Register Supplier: Business Classifications page, click the Add icon to enter a business classification. If not, simply click the box, " None of the classifications are applicable. " Register Supplier: Business Classifications 
43.	Click the Next button. 
44.	The Products and Services tab is optional. On the Register Supplier: Products and Services window, You can select and add multiple products and services. Click the Select and Add icon. Register Supplier: Products and Services 
45.	Determine and select the Category name to expand. Click the Expand link. 
46.	Click in the Box to select a field. 


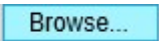
Step	Action
47.	Click the Apply menu icon. Click in the App field. 
48.	Click the OK button. 
49.	Click the Next button. 
50.	On the Register Supplier: Questionnaire screen, you will see the intial questions available for your response. Under the first question regarding your W9, Click in the Field . 
51.	Enter the desired information into the Response field. Enter " See Attached ".
52.	Click the Add (+) icon. 
53.	Click the Add graphic. 
54.	Click the Browse... button. (To search and locate the W9 form/document saved on your local computer) 

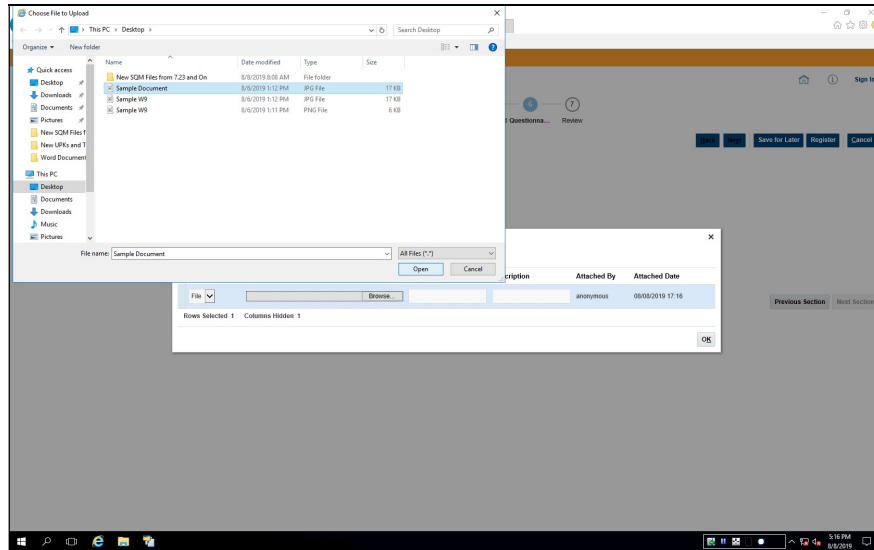
Step	Action
55.	<p>Locate the W9 file previously saved on your local machine.</p> <p>Click the Open button.</p> 
56.	<p>Click in the Description field.</p> 
57.	<p>Enter the desired information into the Description field. Enter "Sample".</p>
58.	<p>Click the OK button.</p> 
59.	<p>The second question asks if you are "an Individual, Sole Proprietor, Partnership or a Single Member LLC"?</p> <p>Make your desired selection.</p> <p>(If you select Yes a secondary question automatically expands to Enter your 1099 Name)</p> <p>Click in the b. No field.</p> 

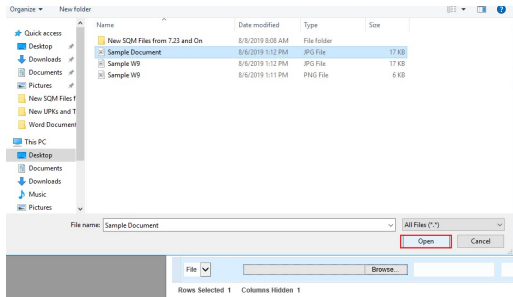
Step	Action
60.	Click the Next Section button.

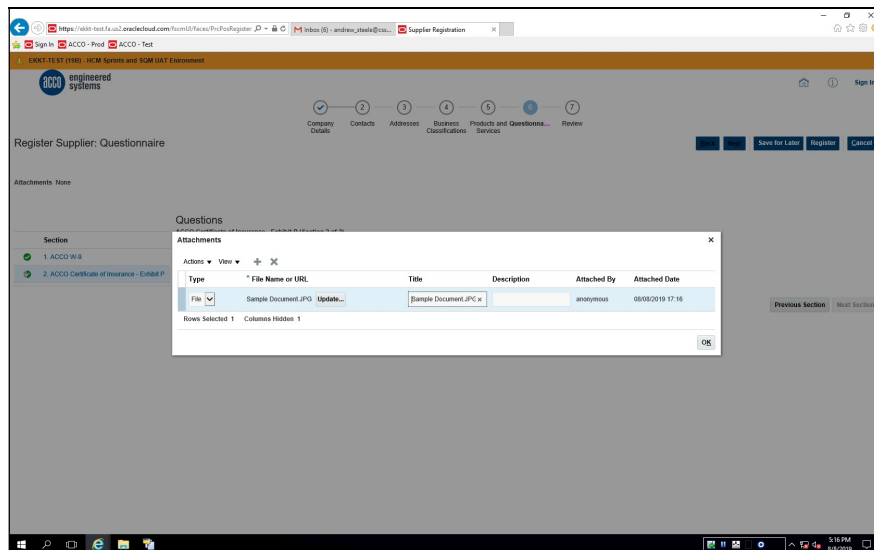
Step	Action
61.	<p>On the ACCO - Certificate of Insurance section, under question #3 regarding the attachment of your Certificate of Insurance,</p> <p>Click in the Field.</p> 
62.	Enter the desired information into the Response field. Enter " See Attached ".
63.	<p>Click the Add (+) icon.</p> 







Step	Action
64.	<p>Click the Add button.</p> 
65.	<p>Click in the *File Name or URL field.</p> <p>(To search and locate the form/document saved on your local computer)</p> 



Step	Action
66.	<p>Navigate to the desired file on your local computer.</p> <p>Click the desired file & click OK.</p> 



Step	Action
67.	Click in the Description field. 
68.	Type in the desired Description of the document to be uploaded.
69.	Click the OK button. 
70.	Since both sections of the questionnaire have been answered, Click the Next button. 
71.	Click the Register button. 
72.	You have now successfully registered as a Consultant. End of Procedure.