Supplier Management & SQM

For New Suppliers _ 8.5.19

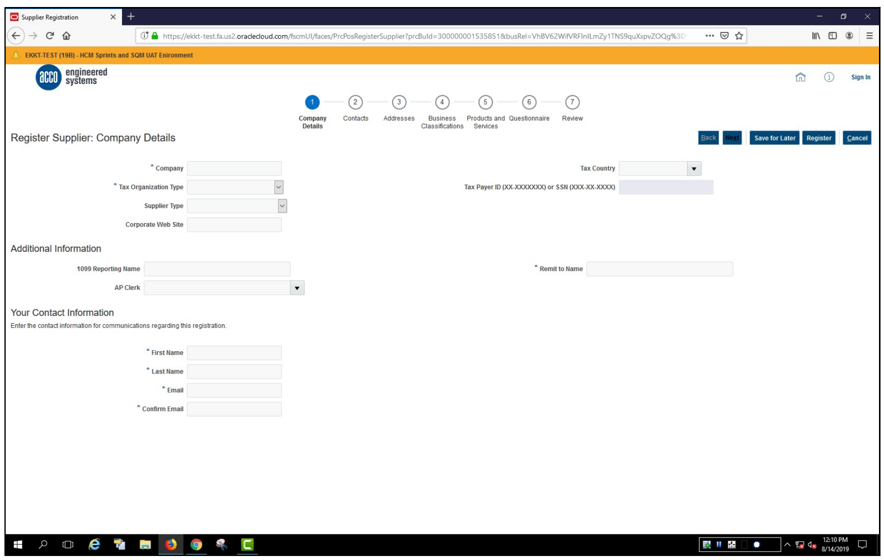
External Supplier Registration as a Subcontractor

Procedure

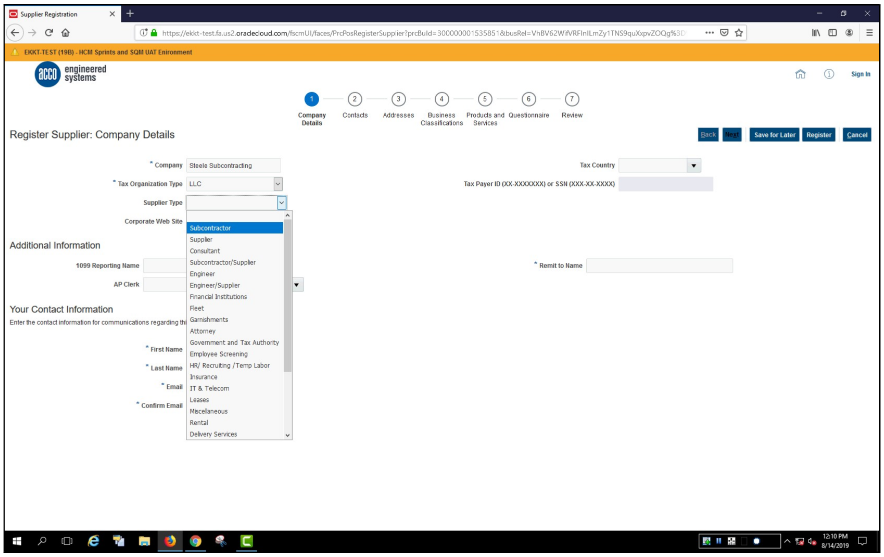
In this exercise, you will walk you through the process of Externally Registering as a Subcontractor.

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

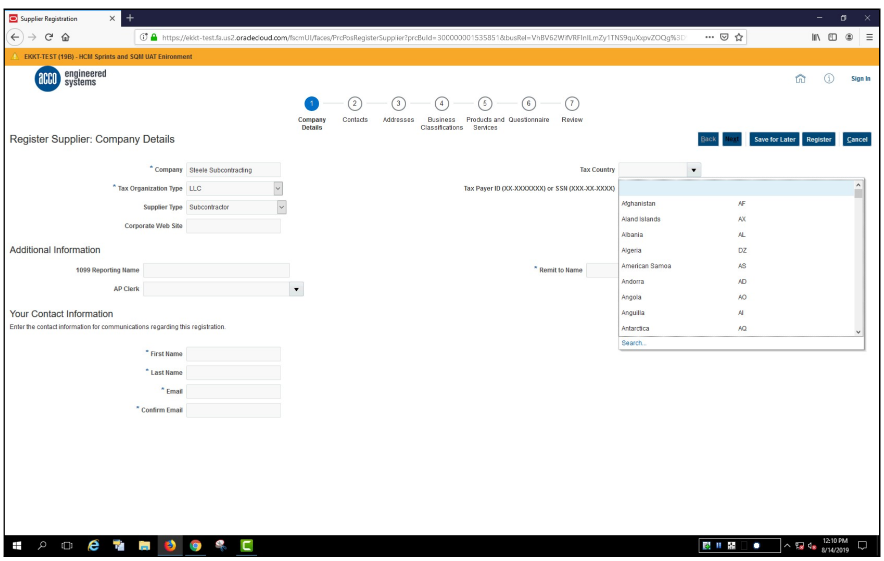
Locate the link, and open in your internet browser.

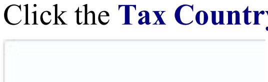


Step	Action
1.	Click in the **Company** field.
2.	Enter the desired information into the **Company** field. Enter "**Steele Subcontracting**".
3.	Click the **Tax Organization Type** list. 
4.	Click the **Supplier Type** list. 



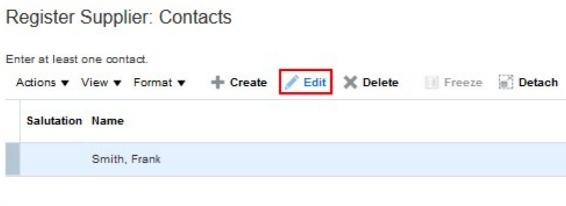
Step	Action
5.	Select **Subcontractor** 



Step	Action
6.	Click the **Tax Country** list. 
7.	Enter the desired information into the **Tax Country** field. Enter "**united**".

Step	Action
8.	Click the **United States US** list item. United States US
9.	Click in the **Tax Payer ID (XX-XXXXXXX) or SSN (XXX-XX-XXXX)** field.
10.	Enter the desired information into the **Tax Payer ID (XX-XXXXXXX) or SSN (XXX-XX-XXXX)** field. Enter "**000-00-8218**".
11.	Click in the **First Name** field.
12.	Enter the desired information into the **First Name** field. Enter "**Frank**".
13.	Click in the **Last Name** field.
14.	Enter the desired information into the **Last Name** field. Enter "**Smith**".
15.	Click in the **Email** field.
16.	Enter the desired information into the **Email** field. Enter "**franksmith@yahoo.com**".
17.	Click in the **Confirm Email** field.
18.	Enter the desired information into the **Confirm Email** field. Enter "**franksmith@yahoo.com**".
19.	Click in the **Remit to Name** field.
20.	Enter the desired information into the **Remit to Name** field. Enter "**Steele subcontracting**".
21.	Click the **Next** button. Next

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>22.</td><td>On the Register Supplier: Contacts page,

click the Edit icon.

</td></tr>
<tr><td>23.</td><td>This will pull up the contact information you just entered on the previous screen.

Here you can change or add any missing contact information.

Click in the Phone Area Code field.

</td></tr>
<tr><td>24.</td><td>Enter the desired information into the Phone Area Code field. Enter "919".</td></tr>
<tr><td>25.</td><td>Click in the Phone field.
</td></tr>
<tr><td>26.</td><td>Enter your phone number.

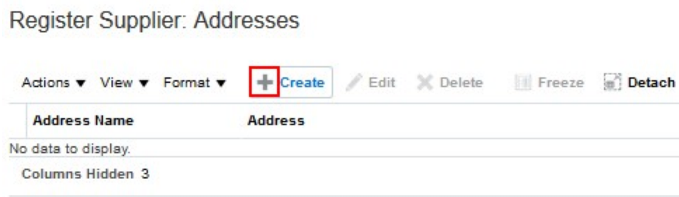
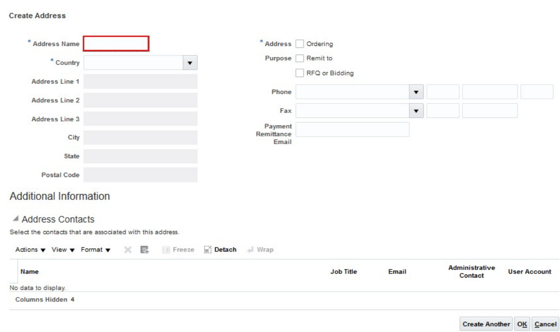
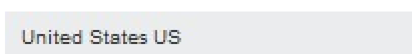
In this example we will enter a generic number.

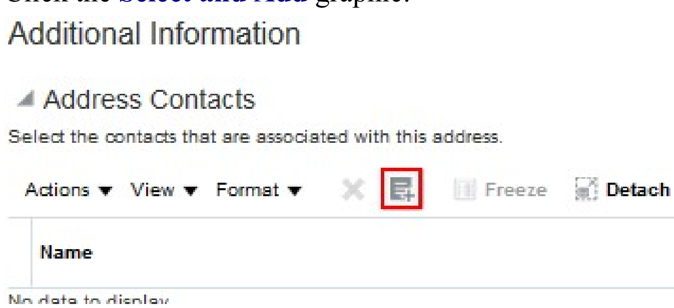
Enter the desired information into the Phone field. Enter "606-1234".</td></tr>
<tr><td>27.</td><td>Ensure the "Request User Account" box is checked.

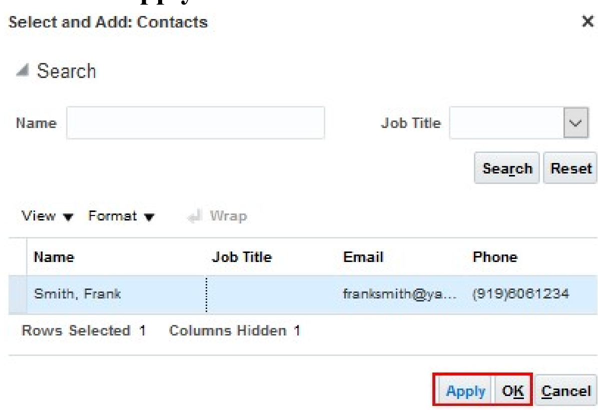
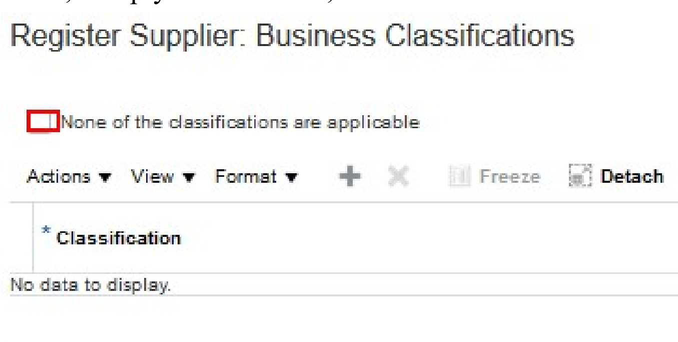
Then click OK.

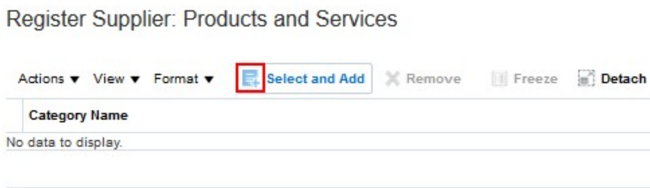
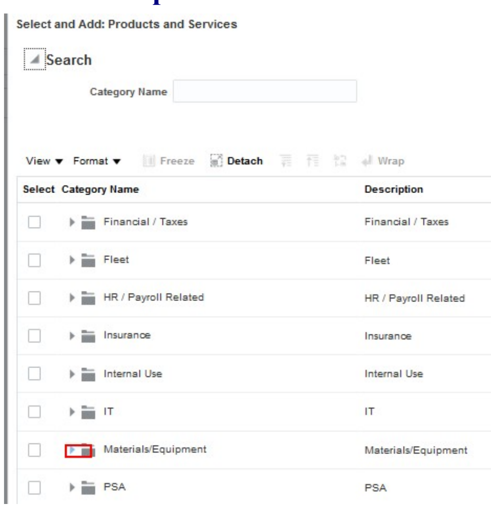
</td></tr>
<tr><td>28.</td><td>Click the Next button.

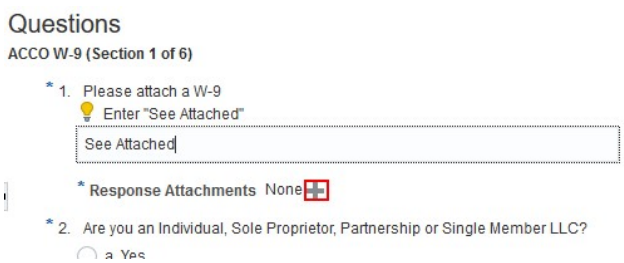
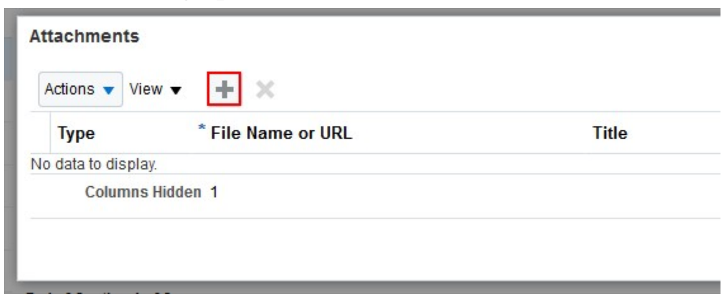
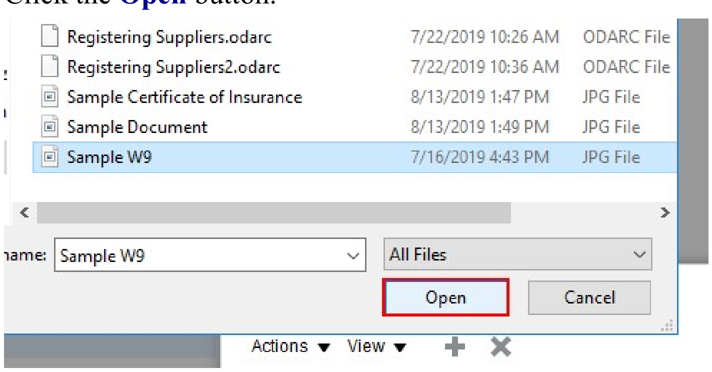
</td></tr>
</table>

Step	Action
29.	On the **Register Supplier: Addresses** page, Click the **Create (+)** icon. 
30.	For all locations, excluding Remit To location, please format your address name as follows: "**City-Street Name**" (ex. Pasadena-Walnut) Enter the desired information into the **Address Name** field. Enter "**MAIN**". 
31.	Click the **Country** list.
32.	Click the **United States US** list item. 
33.	Click the **Postal Code** list. 
34.	Enter the desired information into the **Postal Code** field. Enter "**92618**".
35.	Notice the City, State and County automatically populate. Click in the **Address Line 1** field. 

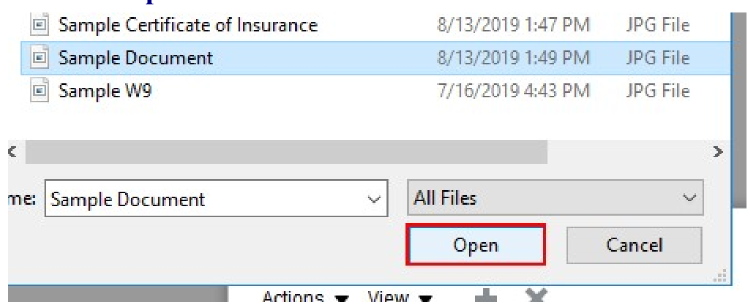
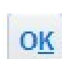
Step	Action
36.	Enter your address. In this example we will enter a generic address. Enter the desired information into the **Address Line 1** field. Enter "**1234 Main St**".
37.	Under Address Purpose, check one or more boxes. Click in the **Ordering** field. 
38.	If this address is the address you wish to receive checks to, select the "Remit To" box also. Click in the **Remit to** field.
39.	Click the **Select and Add** graphic. 
40.	Click in the **Smith, Frank** field. 

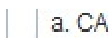
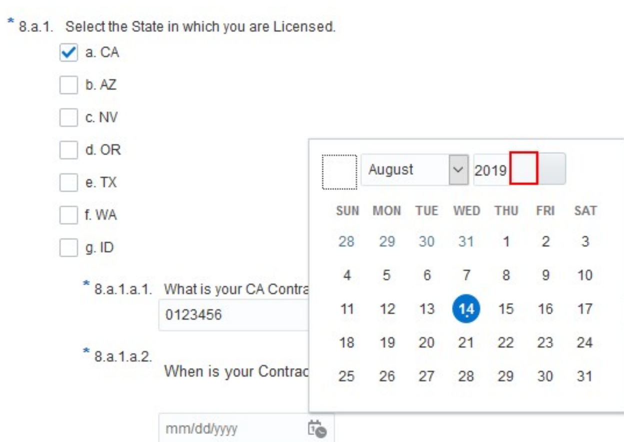
Step	Action
41.	Click the **Apply** button then click **OK**. 
42.	Back on the **Create Addreses** window, Click the **OK** button. 
43.	Click the **Next** button. 
44.	On the **Register Supplier: Business Classifications** page, click the **Add** icon to enter a busines classifcation. If not, simiply click the box, "**None of the classifications are applicable**." 
45.	Click the **Next** button. 

Step	Action
46.	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. 
47.	Determine and select the Category name to expand. Click the **Expand** link. 
48.	Click in the **Box** to select a field. 
49.	Click the **Apply** menu icon. Click in the **App** field. 
50.	Click the **OK** button. 
51.	Click the **Next** button. 

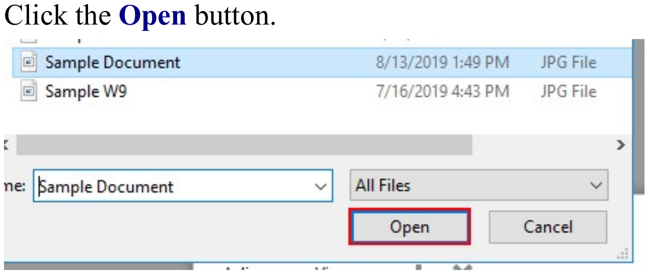
Step	Action
52.	On the **Register Supplier: Questionnaire** screen, you will see the intial questions available for your response. Under the first question regarding your W9, Click in the **Field.**
53.	Enter the desired information into the **Response** field. Enter "**See Attached**".
54.	Click the **Add (+)** icon. 
55.	Click the **Add** graphic. 
56.	Click the **Browse…** button. 
57.	Locate the W9 file previously saved on your local machine. Click the **Open** button. 
58.	Click in the **Description** field. 

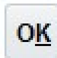
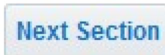
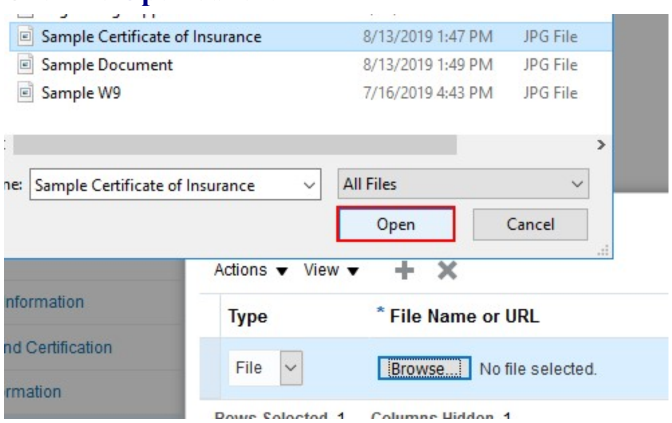
Step	Action
59.	Enter the desired information into the **Description** field. Enter "**W9**".
60.	Click the **OK** button. OK
61.	The second question asks if you are "**an Individual, Sole Propietor, Partnership or a Single Member LLC**"? Make your desired selection. (If you select Yes a secondary question automatically expands to **Enter your 1099 Name)** Click in the **b. No** field. b. No
62.	Click the **Next Section** button. Next Section
63.	For question #3 on the next section, Click in the **Response** field.
64.	Enter your previous year's Income/Revenue. (In this example a generic amount will be used) Enter the desired information into the **Response** field. Enter "**100000**".
65.	For question #4, Click in the **Response** field.
66.	Enter your Payment/Performance Surety Provider. (In this example a generic name will be used) Enter the desired information into the **Response** field. Enter "**Example Surety Provider**".
67.	For question #5, Click in the **Response** field.
68.	Enter "**See Attached**"

Step	Action
69.	Click the **Manage Attachments** graphic. 
70.	Click the **Add** graphic. 
71.	Click the **Browse...** button. 
72.	Select the previously saved document, then Click the **Open** button. 
73.	Click in the **Description** field.
74.	Enter the desired information into the **Description** field. Enter "**Surety Bond rate**".
75.	Click the **OK** button. 
76.	For question #6, select if your company is owned in whole or part by another company. (In this example, we will select "**No**") Click in the **b. No** field. 
77.	For question #7, select the number of employees in your organization. Click in the **a. Less than 100** field. 
78.	Click the **Next Section** button. 

Step	Action
79.	For question #8 on the next section, select if you have a **Contractor's License Number**. Click in the **a. Yes** field. 
80.	Select the State in which you are licensed. Click in the **a. CA** field. 
81.	Click in the **Response** field.
82.	Enter your Contractor's License Number. (In this example we will enter a generic number) Enter the desired information into the **Response** field. Enter "**0123456**".
83.	Select the date of expiry for your Contractor's License. Click the **Select Date** link. 
84.	Go to the following year, 2020. Click the **increment** button. 
85.	Click in the **14** field. 

Step	Action
86.	For question #9, select if you have a **Public Works Certification**. Click in the **a. Yes** field. a. Yes
87.	Select which States in which you are Certified. Click in the **a. CA** field. a. CA
88.	Enter the Public Works Registration Number. Click in the **Response** field.
89.	In this example we will enter a generic number. Enter the desired information into the **Response** field. Enter "**012345**".
90.	Select the date of expiry. Click the **Select Date** link.
91.	Click the **increment** button.
92.	Click in the **14** field. 14
93.	For question #10, select the unions your company is affiliated with. Click in the **b. CARPENTERS (Southwest Regional Council of Carpenters)** field. b. CARPENTERS (Southwest Regional Council of Carpenters)
94.	Click in the **Response** field.
95.	Enter the union numbers of the unions you selected. In this example we will enter a generic number. Enter the desired information into the **Response** field. Enter "**012345**".
96.	Click the **Next Section** button. Next Section

Step	Action
97.	For question #11 on the next section, Click in the **Response** field.
98.	Enter your EMR. In this example we will use 1. Enter the desired information into the **Response** field. Enter "**1**".
99.	For question #12, select if there have been any fatalities. Click in the **a. No** field. a. No
100.	For question #13, select if you posses a IIPP. Click in the **a. Yes** field. a. Yes
101.	Click in the **Response** field.
102.	Enter the desired information into the **Response** field. Enter "**See Attached**".
103.	Click the **Manage Attachments** graphic.
104.	Click the **Add** graphic.
105.	Click the **Browse…** button. Browse...
106.	Click the **Open** button. 
107.	Click in the **Description** field.
108.	Enter the desired information into the **Description** field. Enter "**IIPP**".

Step	Action
109.	Click the **OK** button. 
110.	Click the **Next Section** button. 
111.	For question #14 on the next section, Click in the **Response** field.
112.	Enter the desired information into the **Response** field. Enter "**See attached**".
113.	Click the **Manage Attachments** graphic. 
114.	Click the **Add** graphic. 
115.	Click the **Browse…** button. 
116.	Select the previously saved Certificate of Insurance then, Click the **Open** button. 
117.	Click in the **Description** field.
118.	Enter the desired information into the **Description** field. Enter "**Cert of Insurance**".
119.	Click the **OK** button. 

Step	Action
120.	Click the **Next Section** button. Next Section
121.	For question #15, Click in the **Response** field.
122.	Enter the desired information into the **Response** field. Enter "**See Attached**".
123.	Click the **Manage Attachments** graphic.
124.	Click the **Add** graphic.
125.	Click the **Browse…** button. Browse...
126.	Select the previously saved OSHA 300 document then, Click the **Open** button. Open
127.	Click in the **Description** field.
128.	Enter the desired information into the **Description** field. Enter "**OSHA 300**".
129.	Click the **OK** button. OK
130.	Once all sections of the questionnaire have been completed, Click in the **Register** field. Register
131.	You have now completed the exercise. **End of Procedure.**