

## Supplier Management & SQM

### Registering Suppliers

#### External Supplier Registration as a Supplier




##### Procedure

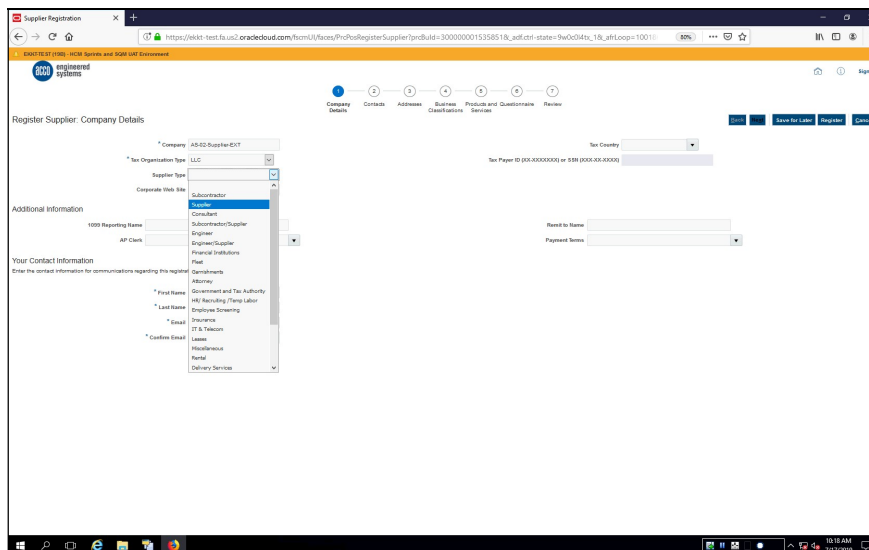
In this exercise, you will walk you through the process of Externally Registering as a Supplier.

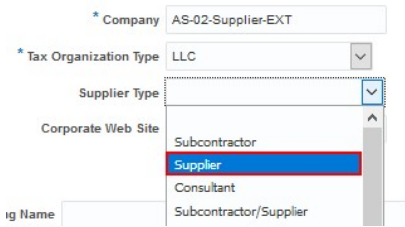
The **ACCO Purchasing department** will email a registration link.

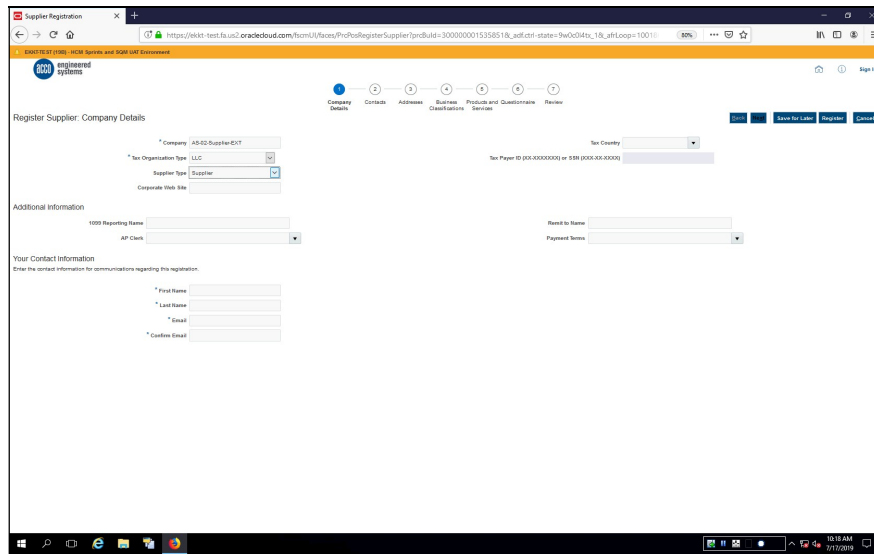
Locate the link, and open in your internet browser.

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

Step	Action
2.	<p>Enter the desired <b>Company/Supplier</b> 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 <a href="http://www.accoes.com">www.accoes.com</a>).</p> <p>(In this example, a generic company name will be entered)</p>
3.	<p>Click the <b>Tax Organization Type</b> list.</p> 
4.	<p>Select the desired <b>organization type</b>.</p> <p>Click the <b>LLC</b> list item.</p> 
5.	<p>Click the <b>Supplier Type</b> list.</p> 


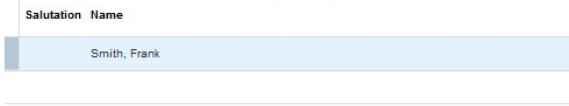






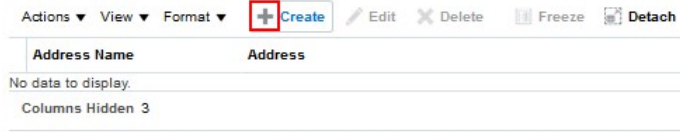
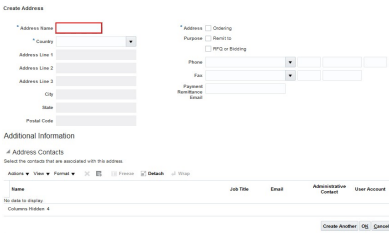

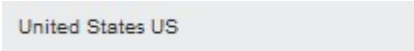

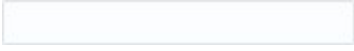
Step	Action
6.	<p>Select the desired <b>Supplier Type</b>.</p> 


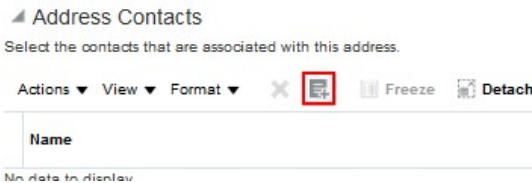
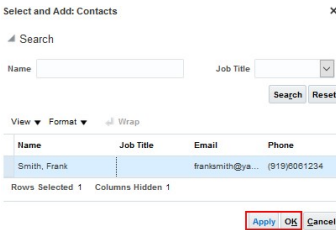



Step	Action
7.	<p>Use the <b>Taxpayer Country</b> field to select your taxpayer country.</p> <p>Click on the <b>Taxpayer Country</b>.</p> 
8.	<p>Enter the desired Tax Country.</p> <p>Begin to type in "United" and selections will populate.</p>
9.	<p>Click the <b>United States US</b> list item.</p> 

Step	Action
10.	<p>Use the <b>Taxpayer ID</b> field to list your Tax ID in one of the following formats: "XX-XXXXXXX" or "XXX-XX-XXXX"</p> <p>Click in the <b>Taxpayer ID</b> field to make any necessary edits.</p> <p>Tax Payer ID (XX-XXXXXXX) or SSN (XXX-XX-XXXX) <input type="text"/></p>
11.	Enter the correct <b>Tax Payer ID</b> or SSN.
12.	<p>Under the <b>Your Contact Information</b> section,</p> <p>Click in the <b>First Name</b> 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>
13.	<p>Enter your First Name.</p> <p>(In this example a generic first name will be entered)</p> <p>Enter the desired information into the <b>First Name</b> field. Enter "<b>Frank</b>".</p>
14.	<p>Click in the <b>Last Name</b> field.</p> <p><input type="text"/></p>
15.	<p>Enter your Last Name.</p> <p>(In this example a generic last name will be entered)</p> <p>Enter the desired information into the <b>Last Name</b> field. Enter "<b>Smith</b>".</p>
16.	<p>Click in the <b>Email</b> field.</p> <p><input type="text"/></p>
17.	<p>Enter your Email.</p> <p>(In this example a generic email will be entered)</p> <p>Enter the desired information into the <b>Email</b> field. Enter "<b>franksmith@yahoo.com</b>".</p>
18.	<p>Click in the <b>Confirm Email</b> field.</p> <p><input type="text"/></p>




Step	Action
19.	<p>Confirm your email.</p> <p>Enter the desired information into the <b>Confirm Email</b> field. Enter "<b>franksmith@yahoo.com</b>".</p>
20.	<p>Click the <b>Next</b> button.</p> 
21.	<p>On the <b>Register Supplier: Contacts</b> page,</p> <p>click the <b>Edit</b> icon.</p> <p>Register Supplier: Contacts</p> <p>Enter at least one contact.</p> <p>Actions ▾ View ▾ Format ▾ + Create <b>Edit</b> ✕ Delete Freeze Detach</p> 
22.	<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 <b>Phone Area Code</b> field.</p> 
23.	<p>Enter the desired information into the <b>Phone Area Code</b> field. Enter "<b>919</b>".</p>
24.	<p>Click in the <b>Phone</b> field.</p> 
25.	<p>Enter your phone number.</p> <p>In this example we will enter a generic number.</p> <p>Enter the desired information into the <b>Phone</b> field. Enter "<b>606-1234</b>".</p>
26.	<p>Ensure the "<b>Request User Account</b>" box is checked.</p> <p>Then click <b>OK</b>.</p> 

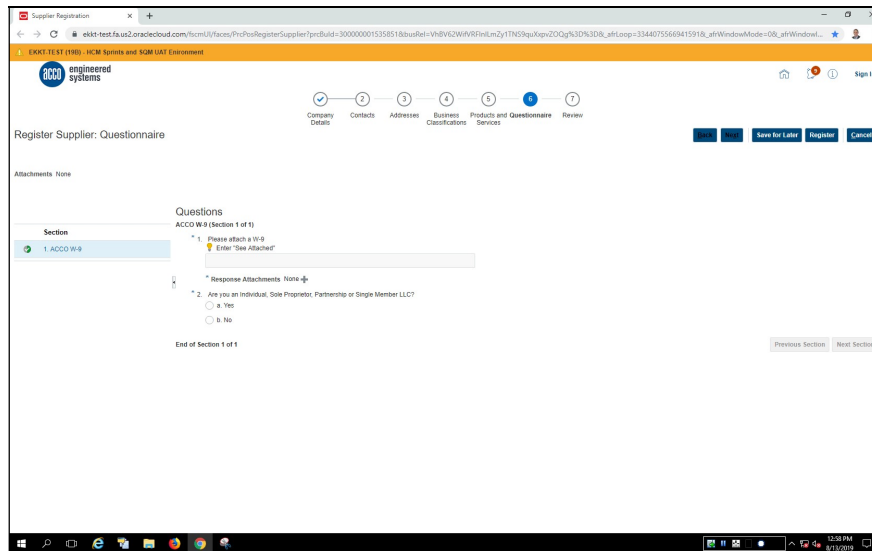
Step	Action
27.	<p>Click the <b>Next</b> button.</p> 
28.	<p>On the <b>Register Supplier: Addresses</b> page,</p> <p>Click the <b>Create (+)</b> icon.</p> <p>Register Supplier: Addresses</p> 
29.	<p>For all locations, excluding Remit To location, please format your address name as follows:</p> <p><b>"City-Street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


Step	Action
35.	<p>Enter your address.</p> <p>In this example we will enter a generic address.</p> <p>Enter the desired information into the <b>Address Line 1</b> field. Enter "<b>1234 Main St</b>".</p>
36.	<p>Under Address Purpose, check one or more boxes.</p> <p>Click in the <b>Ordering</b> field.</p> 
37.	<p>If this address is the address you wish to receive checks to, select the "Remit To" box also.</p> <p>Click in the <b>Remit to</b> field.</p> <p>   </p>
38.	<p>Click the <b>Select and Add</b> graphic.</p> <p>Additional Information</p> 
39.	<p>Click in the <b>Smith, Frank</b> field.</p> <p>Smith, Frank</p>
40.	<p>Click the <b>Apply</b> button then click <b>OK</b>.</p> 
41.	<p>Back on the <b>Create Addresses</b> window,</p> <p>Click the <b>OK</b> button.</p> 

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

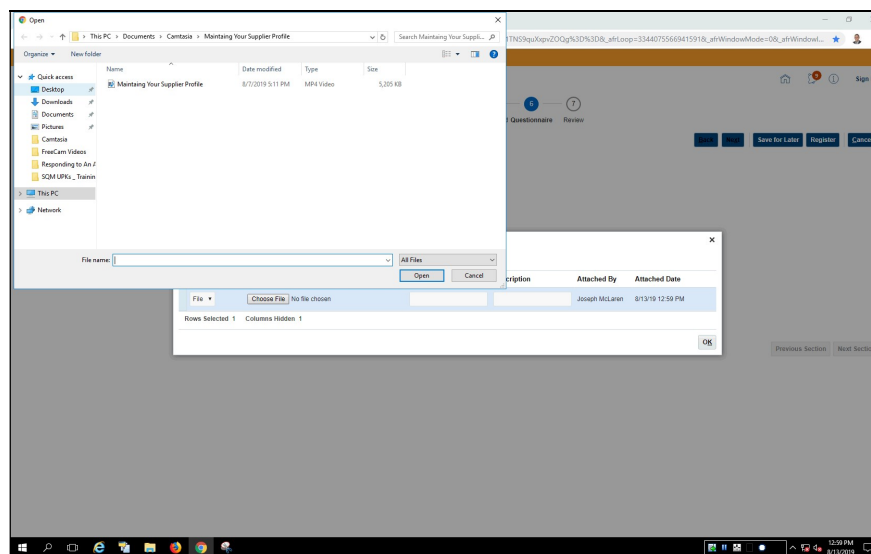


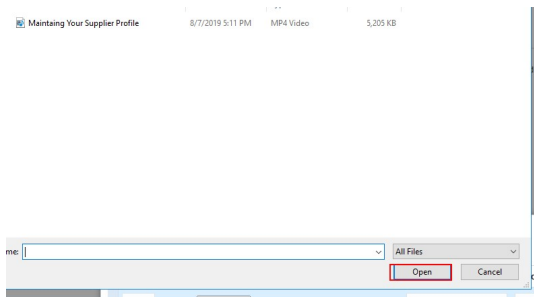
Step	Action
48.	Click the <b>Apply</b> menu icon. Click in the <b>App</b> field. 
49.	Click the <b>OK</b> button. 
50.	Click the <b>Next</b> button. 

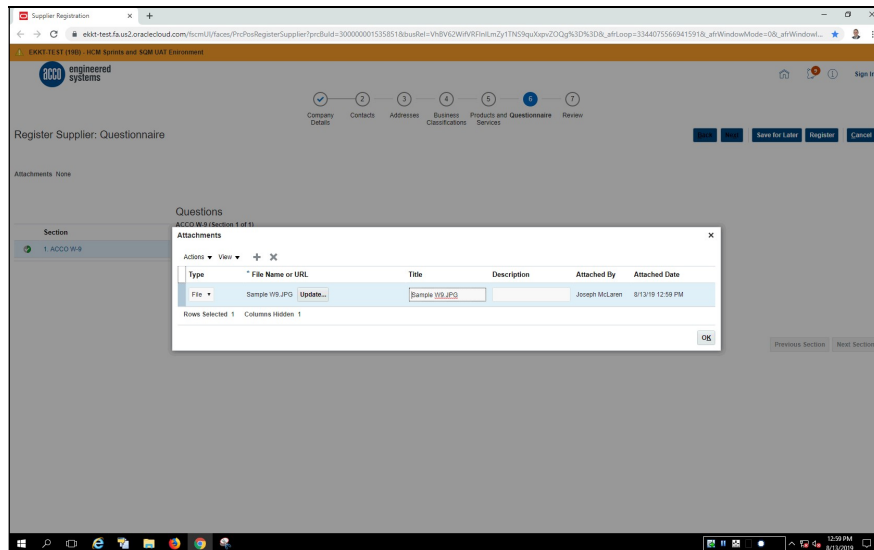




Step	Action
51.	On the <b>Register Supplier: Questionnaire</b> screen, you will see the initial questions available for your response.  Click in the <b>Field</b> under Question 1.  Questions ACCO W-9 (Section 1 of 1) * 1. Please attach a W-9 Enter "See Attached"  * Response Attachments None * 2. Are you an Individual, Sole Proprietor, Partnership or Single Member LLC? <input type="radio"/> a. Yes <input type="radio"/> b. No
52.	Enter " <b>See Attached</b> "


Step	Action
53.	<p>Click the <b>Add "+"</b> button.</p> <p>Questions</p> <p>ACCO W-9 (Section 1 of 1)</p> <p>1. Please attach a W-9</p> <p>Enter "See Attached"</p> <p>See Attached</p> <p>* Response Attachments None <b>+</b></p>
54.	<p>On the attachments window, Click the <b>Add "+"</b> button.</p> <p>Attachments</p> <p>Actions View <b>+</b> <b>x</b></p> <p>Type * File name or URL Title</p> <p>No data to display.</p> <p>Columns Hidden 1</p>
55.	<p>To search and locate the W9 form/document saved on your local computer,</p> <p>Click the <b>Choose File</b> or <b>Browse</b> icon.</p> <p>Choose File No file chosen</p>




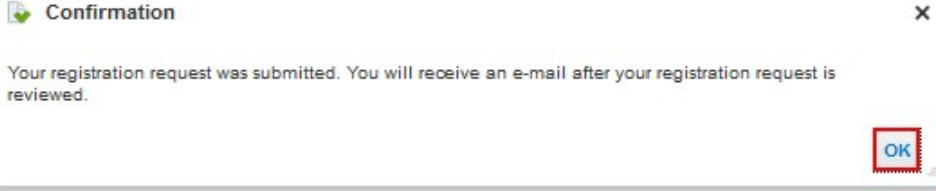
Step	Action
56.	<p>Locate the W9 file previously saved on your local machine.</p> <p>Click <b>Open</b>.</p> 



Step	Action
57.	<p>Click in the <b>"Description"</b> field and enter <b>"W9"</b>.</p> 
58.	<p>Click <b>OK</b>.</p> 

Step	Action
59.	<p>The second question asks if you are <b>"an Individual, Sole Proprietor, Partnership or a Single Member LLC"</b>?</p> <p>Make your desired selection.</p> <p>(If you select "Yes" a secondary question automatically expands to <b>Enter your 1099 Name</b>)</p> <p>Questions</p> <p>— ACCO W-9 (Section 1 of 1)</p> <p>1. Please attach a W-9 Enter "See Attached"</p> <p>See Attached</p> <p>* Response Attachments Sample W9.JPG</p> <p>2. Are you an Individual, Sole Proprietor, Partnership or Single Member LLC?</p> <p><input type="radio"/> a. Yes</p> <p><input checked="" type="radio"/> b. No</p> <p>End of Section 1 of 1</p>
60.	<p>Click the <b>Next</b> button.</p> <p></p>

Step	Action
61.	<p>Before registering the supplier, review all information entered.</p> <p>Scroll down to review entire registration info.</p>

Step	Action
62.	<p>Click the <b>Register</b> button.</p> 
63.	<p>Click the <b>OK</b> button.</p> 
64.	<p>You have completed the exercise. <b>End of Procedure.</b></p>