

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.

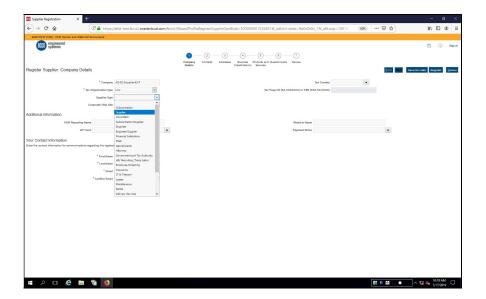
Locate the link, and open in your internet browser.

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Step	Action	
1.	Once you have clicked the link, the "Register supplier: Company Details" screen should appear.	
	This process will take you through multiple tabs to enter all required supplier information.	
	To begin, Click in the Company field.	
	Register Supplier: Company Details	
	* Company * Tax Organization Type Supplier Type Corporate Web Site	



Step	Action	
2.	Enter the desired Company/Supplier information	
	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).	
	(In this example, a generic company name will be entered)	
3.	Click the Tax Organization Type list.	
4.	Select the desired organization type.Click the LLC list item.	
	* Company AS-02-Supplier-EXT * Tax Organization Type Corporation Corporate Web Site LLC LP Individual	
5.	Click the Supplier Type list.	





Step	Action
6.	Select the desired Supplier Type.
	* Company AS-02-Supplier-EXT
	* Tax Organization Type LLC
	Supplier Type
	Corporate Web Site Subcontractor
	Suppler
	Consultant
	Ig Name Subcontractor/Supplier

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* Tax Organization Type			
Supplier Type			
Corporate Web Site			
Additional Information			
1099 Reporting Name	Remit to Manne		
AP Clerk	Payment Tomo	•	
Your Contact Information			
Enter the contact information for communications regarding this registrat	Son.		
* First Name			
* Last Name			
"Email			
* Confirm Email			
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Step	Action
7.	Use the Taxpayer Country field to select your taxpayer country.
	Click on the Taxpayer Country.
	Tax Country
	Tax Payer ID (XX-XXXXXX) or SSN (XXX-XX-XXXX)
8.	Enter the desired Tax Country.
	Begin to type in "United" and selections will populate.
9.	Click the United States US list item.
	United States US



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



Step	Action
19.	Confirm your email.
	Enter the desired information into the Confirm Email field. Enter " franksmith@yahoo.com ".
20.	Click the Next button.
	Back Next Save for Later Register
21.	On the Register Supplier: Contacts page,
	click the Edit icon. Register Supplier: Contacts Enter at least one contact. Actions • View • Format • + Create C Edit * Delete III Freeze III Detach Salutation Name Smith, Frank
22.	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. Edit Contact Frank Smith * Phone *
	A User Account
	✓ Requet user account
23.	Enter the desired information into the Phone Area Code field. Enter "919".
24.	Click in the Phone field.
25.	Enter your phone number.
	In this example we will enter a generic number. Enter the desired information into the Phone field. Enter " 606-1234 ".
26.	Ensure the " Request User Account " box is checked.
20.	Then click OK.



Step	Action
27.	Click the Next button.
	Back Next
28.	On the Register Supplier: Addresses page,
	Click the Create (+) icon.
	Register Supplier: Addresses
	Actions View View Format View Edit Zelete Freeze Detach
	Address Name Address No data to display.
	Columns Hidden 3
29.	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".
	Adalar fan Vander (K. E.) Theorem (Balak at Name Inser Name Annual Control Control Contern Name 4 Contern Name 4 Contern Name 4
30.	Click the Country list.
31.	Click the United States US list item.
	United States US
32.	Click the Postal Code list.
33.	Enter the desired information into the Postal Code field. Enter "92618".
34.	Notice the City, State and County automatically populate.
	Click in the Address Line 1 field.



Step	Action
35.	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".
36.	Under Address Purpose, check one or more boxes.
	Click in the Ordering field.
	* Address Ordering
	Purpose Remit to
	Phone 1
	Payment Remittance Email
37.	If this address is the address you wish to receive checks to, select the "Remit To" box also.
	Click in the Remit to field.
38.	Click the Select and Add graphic.
	Additional Information
	Address Contacts Select the contacts that are associated with this address.
	Actions v View v Format v x F reeze Detach
	Name
20	
39.	Click in the Smith, Frank field.
40	Smith, Frank
40.	Click the Apply button then click OK.
	Search Name Job Title V
	Seach Reset
	Name Job Title Email Phone Smith, Frank franismith@ya (919)0061234 Rows Selected 1 Columns Hidden 1
	Apply OK Cancel
41.	Back on the Create Addreses window,
	Click the OK button.
	0 <u>K</u>



Step	Action
42.	Click the Next button.
	Me <u>x</u> t
43.	On the Register Supplier: Business Classifications page, click the Add icon to enter a busines classification.
	If not, simiply click the box, "None of the classifications are applicable." Register Supplier: Business Classifications
	None of the classifications are applicable
	Actions 🔻 View 🔻 Format 💌 🕂 👫 Freeze 🔐 Detach
	* Classification
	No data to display.
	Click the Next button
44.	Click the Next button.
	Ne <u>x</u> t
45.	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
	Actions View View View Format View Remove
	Category Name
	No data to display.
46.	Determine and select the Category name to expand.
	Click the Expand link.
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47.	Click in the Box to select a field.
4/.	Click in the Box to select a field.



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

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Step	Action
51.	On the Register Supplier: Questionnaire screen, you will see the initial questions available for your response.
	Click in the Field under Question 1.
	Questions Acco W-9 (Section 1 of 1)
	* 1. Please attach a W-9
	* Response Attachments None
	🔿 b. No
52.	Enter "See Attached"



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

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Step	Action
56.	Locate the W9 file previously saved on your local machine.
	Click Open .
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Step	Action
57.	Click in the "Description" field and enter "W9".
58.	Click OK.
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Step	Action
59.	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)
	Questions – ACCO W-9 (Section 1 of 1)
	* 1. Please attach a W-9
	See Attached Response Attachments Sample W9.JPG 2. Are you an Individual, Sole Proprietor, Partnership or Single Member LLC? a. Yes
	End of Section 1 of 1
60.	Click the Next button.
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Supplier Type Supplier										
Corporate Web Site										
Additional Information										
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Step	Action
61.	Before registering the supplier, review all information entered.
	Scroll down to review entire registration info.



Step	Action	
62.	Click the Register button.	
	Back Next Save for Later Register Cancel	
63.	Click the OK button.	
	Confirmation X	
	Your registration request was submitted. You will receive an e-mail after your registration request is reviewed.	
	ок	
64.	You have completed the exercise.	
	End of Procedure.	