

# E-SUPPLIER NAVIGATION

For New Suppliers and Payment Recipients

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## First Time Supplier Set up

As a note – A W-9 is a required document attachments in the registration process. It is recommended that the document is readied prior to beginning the registration process.

### Step 1:

Click [Supplierportal.ok.gov](http://Supplierportal.ok.gov). If link does not work, please copy URL then paste in the browser address.

### Step 2:

Select the **Oklahoma Supplier Login** tab.

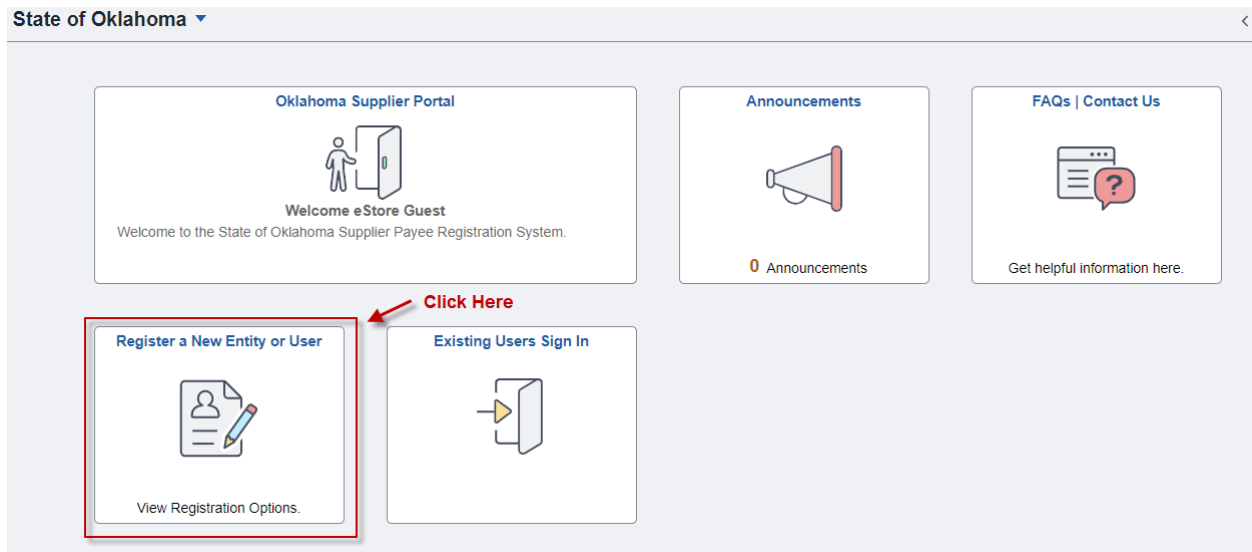


[Click here](#)

The Oklahoma Supplier Portal is the new online portal designed to assist suppliers, bidders and buyers with self registration and self management of organizational and personal

### Step 3:

Select **Register a New Entity or User** tab.



### Step 4:

Select **Register a Supplier** tab.

### Register a Supplier



Entities with no existing PeopleSoft Supplier ID may select this option to I

[More...](#)

[Register now](#)

← **Click Here**

### Register as a New Payee



Entities with no existing PeopleSoft Supplier ID may select this option to I

[More...](#)

[Register now](#)

### Request a New Bidder ID

## Step 5: Completing the Supplier Registration

There are six (6) steps that are required to complete the registration. Each step is to be completed in order. If the registration cannot be completed, you may save your progress to return later. (Please note: Registrations with error messages cannot be saved.)

*There are two documents that are required uploads. A W-9 and a copy of a current Certificate of Insurance or Letter of Exemption.*

- 1) Select the entity type. Then select **Next**.
- a) Next buttons are located at the top and bottom of each step.

The screenshot shows a multi-step registration process. At the top, a progress bar includes steps: Welcome, Identifying Information, Addresses, Contacts, Categorization, and Submit. The 'Next' button at the end of the progress bar is highlighted with a red box. Below the progress bar, the text reads 'Welcome to the State of Oklahoma Supplier Registration System.' followed by instructions for entities with no existing PeopleSoft Supplier ID. A section titled 'Select an activity below:' contains two radio button options: 'Start a new registration form' (selected) and 'Continue from where you left'. Under 'Start a new registration form', there are two sub-options: 'Business' and 'Individual' (selected). At the bottom of the form, another 'Next' button is highlighted with a red box.

- 2) There are multiple areas to complete in the Identifying Information step. This is the longest step in the process.
- a) Unique ID & Company Profile

- i) The Tax Identification Number is your Federal IRS issued number. Ex – SSN, EIN, or iTIN.

- ii) Entities that do not have an issued US Federal Tax ID are not able to register using e-Supplier at this time.

b) Government Classifications

- i) Select the magnifying glass under the Certification Source. Then select SOS or SOS-Exempt based on the company’s Oklahoma Secretary of State filing.

(1)

Certification Source	Certificate Begin Date
00000 OTC SLSTAX	OTC SALES TAX NUMBER
00000 SOS	SECRETARY OF STATE
00000 SOS-EXEMPT	EXEMPT SECRETARY OF STATE
00000 VNDRREG	REGISTERED VENDOR

(2)

- (3) The dates will automatically fill and can be disregarded.

- (4) If SOS is selected, please select SEC for the Government Classification. Then enter the filing number in the Certification Numbers.

00000 REG	REGISTERED VENDOR
00000 SEC	SEC OF STATE FILING NUMBER
00000 SMB	SMALL BUSINESS

(5)

- (6) The system will validate the filing number against the Oklahoma Sec of State’s database.  
\*Return results that are not in Good Standing will prohibit the registration from continuing.

c) Profile Questions

- i) There are multiple required questions. Please answer all questions that contain an asterisk.
- ii) LLCs will need to complete and upload the Disregarded Entity Verification form.
  - (1) A link to the form is located in the profile question.
  - (2) Form should be completed by tax personnel only.
- iii) For best results please use the hourglass when applicable.

**Profile Questions** ?

\* Are you the Authorized Account Manager who should maintain all relevant information for the entity being registered?

\* Is the registered entity a state employee employed by an Oklahoma state agency?

Please select one of the applicable responses.

\* What type of entity is the registered entity?

\* Is the registered entity a US Entity?

- (1)  
iv) To attach a document, select the add attachment and follow the screenshots below if needed.

\*

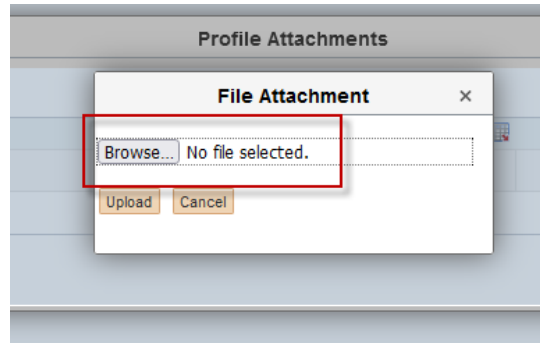
Please complete and upload one of the following current U.S. Taxpayer Verification documents, matching the registered entity's U.S. entity type. Businesses needing to register multiple entities filed under primary filing entity TIN should attach one form for each dba/tradename or disregarded entity being registered. Choose from one of the following form options:

U.S. Entities. Required for all domestic U.S. individuals and businesses. Information provided should match primary filing entity as registered with the Internal Revenue Service - IRS Form W-9(s)

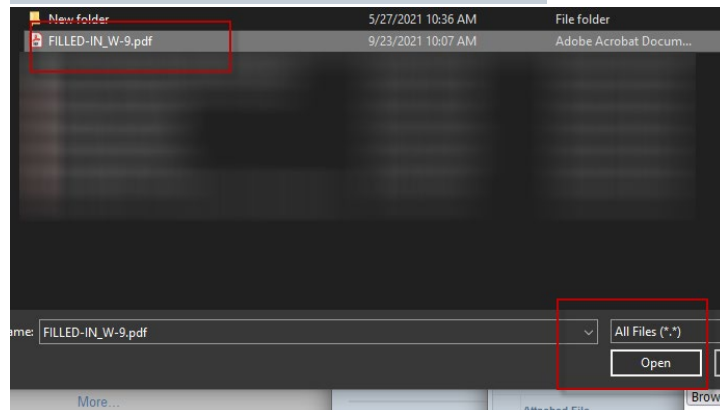
- (1) [W9 form](#)

Attached File	Attachment Description	Upload
1		<input type="button" value="Upload"/>

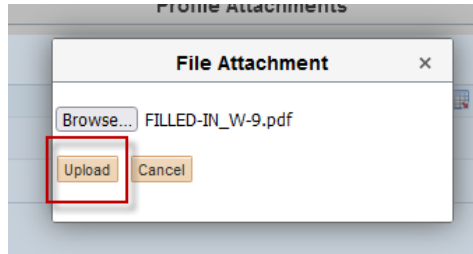
- (2)



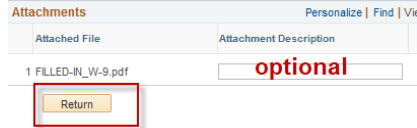
- (3)



- (4)



(5)



(6)

v) Enter text in fields like the below

\* If a different Diverse Minority Group qualification not shown is applicable, please provide additional details.

Diversified Business Certification - Small Disadvantaged Business: Are you currently certified by the United States Small Business Administration and the Oklahoma Department of Commerce as a Small Disadvantaged Business? Information related to the Oklahoma Department of Commerce Supplier Diversity Program can be found at [Diverse Business Certification Program](#) Diverse Business Certification Program

d) Addresses

i) Enter your primary address. The remit address is optional. The address will be validated by the USPS. Select **Accept address**.

**USPS Address Validation**

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**Address Validation**

Primary	Address returned by USPS:-
Address entered by you:-	
Address1 5005 N LINCOLN BLVD	Address 1 5005 N LINCOLN BLVD
Address 2	Address 2
City OKC	City OKLAHOMA CITY
State OK	State OK
County	County
Postal	Postal 73105-3324
Country USA	Country USA

Check this box to skip the USPS address and use the address you have entered.

Accept address

Edit Address

(1)

e) Contacts

i) Select Add Contact

### Contacts - Step 4 of 6

Please create the Authorized Account Manager contact. AAM will  
An email will be sent with instructions for accessing the online acc  
(\*indicates a required response)

**Company Contacts** ?

You have not added any contact information to your applicac

**Add Contact**

- (1)
- ii) Enter all required fields. The Requested User ID is your desired user ID to access e-Supplier after registration to update and maintain your information on file with the State of Oklahoma. Click **Ok** when complete. Click **Next** when done.

**Contact Information** ?

Description

\* First Name   Primary Conta

\* Last Name

Title

\* Email ID

\* Telephone  Ext

Fax Number

Contact Type

**User Profile Information** ?

\* Requested User ID  **Create a user ID to access e-Supplier after registration**

Description

Language Code

Time Zone

Currency Code

- (1)
- f) Categorization
  - i) Supplier seeking to bid on solicitations may category code(s) for registration.
    - (1) The State of Oklahoma uses the UNSPSC codes for procurement registration. To search for the code listings for the codes most applicable, please visit the UNSPSC website. <https://www.unspsc.org/>
  - ii) Click the folder icon for the Sell Categories.

**Categorization - Step 5 of 6**

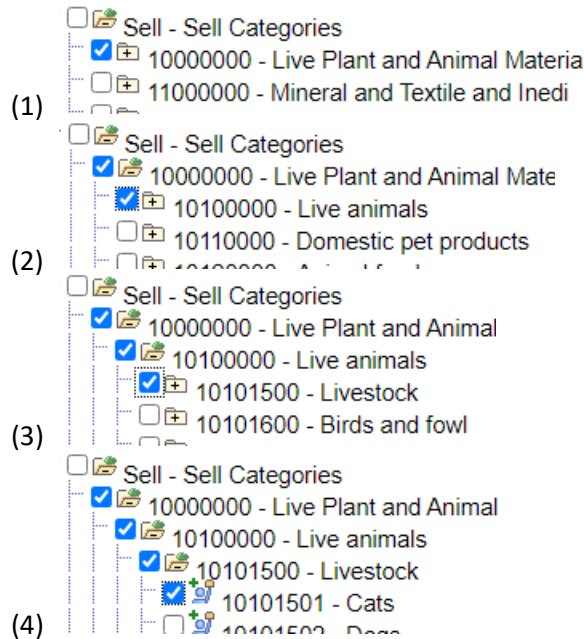
Select to add or de-select to remove categories applicable to your business

**Sourcing Procurement Categories**

- Sourcing - Sourcing Categories
- Buy Categories
- Sell Categories**

iii)

- iv) Locate the category that best describes the goods or services provided. Check the box. Then select the folder to drill down. If you are using an UNSPSC code to make your selection, drill down using two-digit increments. See the below example to drill down to 10101501 – Cats.



g) Submit

- i) As the final step, check the box to agree to the Terms of Agreement. Then select **Submit**.

**Submit** - Step 6 of 6

Select the "Review" button to review the registration information.  
 Click the "Submit" button to submit your registration after reviewing.

Email communication regarding this registration will be sent to:

SUPPLIER.REGISTRATION@OMES.OK.GOV

**Terms and Conditions** ?

Make sure you read terms of agreement fully before submitting your registration.

Select to accept the Terms of Agreement below.

[Terms of Agreement](#)

ii)

### Step 6:

Once the registration has been approved, please notify your agency contact with the supplier ID provided in the final approval email.

### Establishing the User ID and Password

Upon supplier file approval and creation, you will receive two (2) approval emails regarding the user ID created in the Contact step. The second email will contain the user ID and a temporary password.



- Return to [Supplierportal.ok.gov](http://Supplierportal.ok.gov).
- Click the Supplier Portal link.

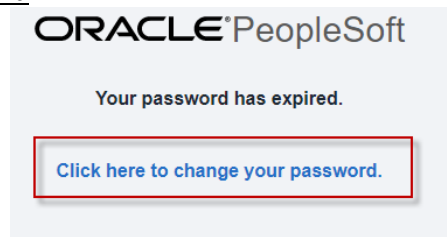


Supplier Portal is the new online portal designed to assist supplier registration and self-management of organizational and personal information as a payee if you or your organization are only receiving payments.

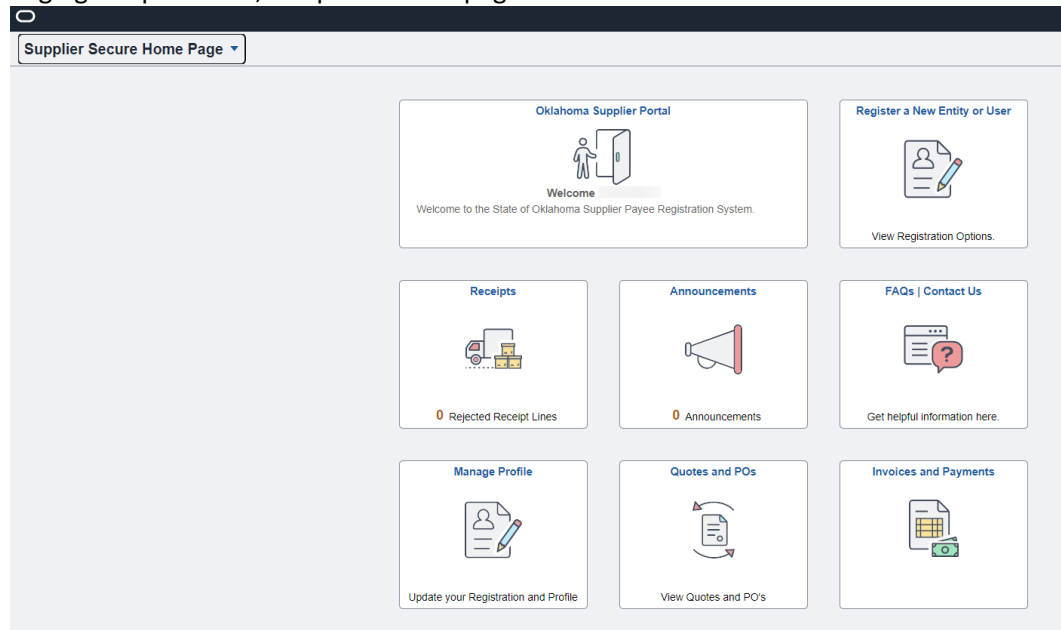
- Sign in using the Existing Users Sign In. This is where you would sign in going forward.



- Enter the user ID and temporary password.
- You will receive a message the password has expired. Select the [Click here to change your password](#).



- You will be prompted to enter the temporary password and then a new password.
- After changing the password, the portal homepage should now look like the below.



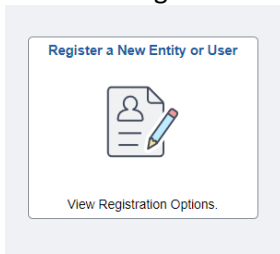
## To Access a Saved Registration

- 1) To access your draft registration please follow the steps below. The first four steps are the same as when you began the process.
  - a) This step is only for registrations that have not gone through full approval and do not have a supplier ID.
  - b) Registrations that were submitted and were Returned for More Information will use this process to access the registration.
- 2) Go to [Supplierportal.ok.gov](http://Supplierportal.ok.gov).
- 3) Click into the portal public page

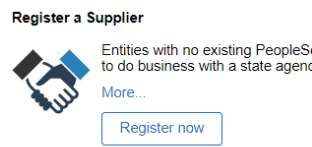


Supplier Portal is the new online portal designed to assist supplier registration and self-management of organizational and personal information. Register as a payee if you or your organization are only receiving payments.

- a)
- 4) Return to the Register a New Entity or User



- a)
- 5) Select Register Now under Register a Supplier



- a)
- 6) At the Welcome page-
  - a) under *Select an activity below* chose Continue from where you left
  - b) Enter your registration ID of 00000000XXX

Welcome - Step 1 of 6

Welcome to the State of Oklahoma Supplier Registration System.

Entities with no existing PeopleSoft Supplier ID in the state payment system will complete the below registration with the state. The individual completing registration will serve as the Authorized Account Manager, maintaining the entity information on file with the state. An email will be sent to the AAM with UserID login information and instructions for accessing the online account upon registration approval.

Entities completing registration must first have a U.S. Taxpayer Identification Number (i.e., Social Security Number). Non-US entities with no U.S. Taxpayer Identification Number should contact OMES Supplier Registration at [supplier.registration@omes.ok.gov](mailto:supplier.registration@omes.ok.gov) for assistance.

Select an activity below: ?

Start a new registration form

Continue from where you left

\* Registration ID

[Forgot your registration ID?](#)

- i)
- c) Click the arrow
- d) A new section will open requesting the FEIN
- e) Once entered, it should take you to the registration that you previously started

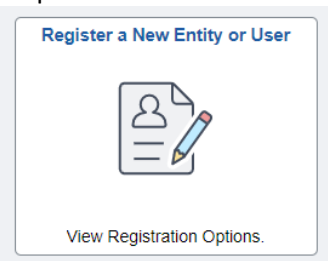
## Creating Multiple User IDs

One of the benefits to the new system is the ability to assign multiple additional user IDs to different individuals based on responsibilities. *(Please note: Banking can only be viewed and accessed with a banking user ID.)*

- Log into the registration [Supplierportal.ok.gov](http://Supplierportal.ok.gov). Sign in using the Existing Users Sign In.



- 
- Select the tile - Register a New Entity or User.
  - Once signed in, the Register a New Entity or User tile will provide new registration options. The tile now provides the option to create additional user IDs based on job responsibilities.



- 
- Select *Register Now* for the user ID you wish to create.
  - The Authorized Account Manager user ID is the only user ID that can assign additional user IDs.
    - The user ID created with the supplier file is an Authorized Account Manager user ID.
  - The Banking user ID is the only user ID that can view, add, or update banking.
    - For questions regarding the banking process, please email [eft.registration@omes.ok.gov](mailto:eft.registration@omes.ok.gov)
- The supplier ID can be found in the registration approval email.
- Enter the IRS tax ID without dashes.
- The Requested User ID must be a unique user ID.
- The Email ID should be the email of the individual being assigned the responsibilities of the user ID.
  - There are no restrictions on how many times the same email can be used.
  - The email used will receive two (2) approval emails. The second email will contain the user ID and a temporary password
- The fields for Language Code, Time Zone, and Currency Code are not applicable and can be disregarded.

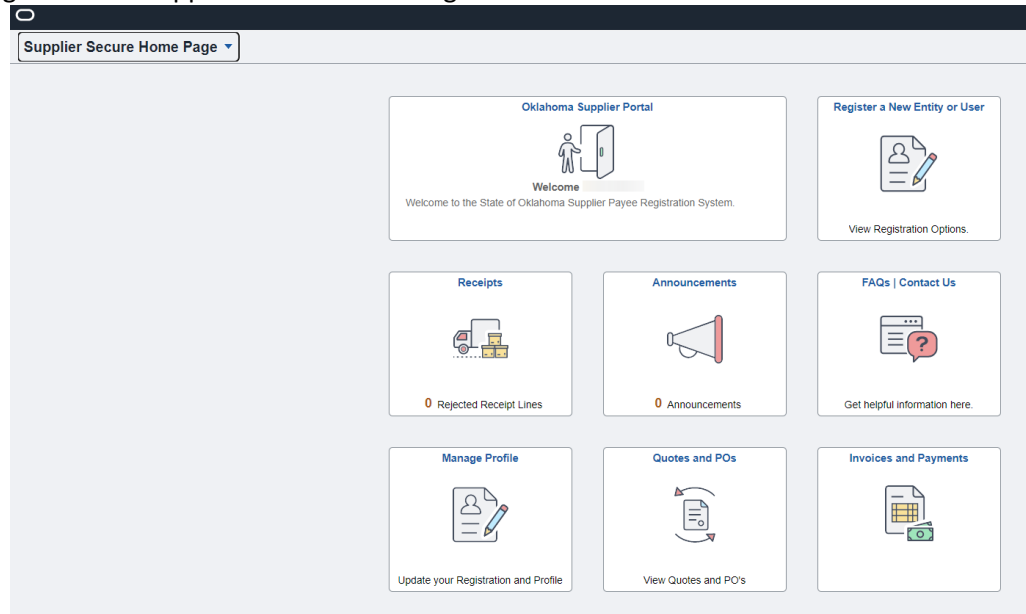
## Review and Update Supplier Information

To manage and maintain the information on file, please use Supplier Change Request. Please review the information on file on a yearly basis to ensure all information is accurate and up to date.

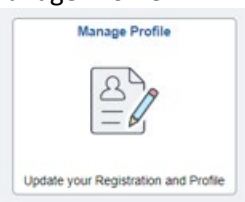
- Log into the registration [Supplierportal.ok.gov](http://Supplierportal.ok.gov). Sign in using the Existing Users Sign In.



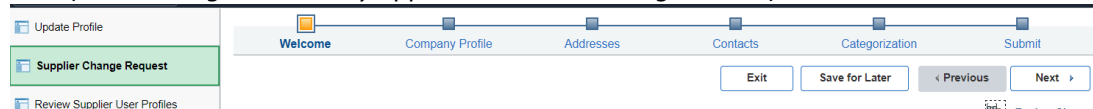
- Once Signed in the Supplier Secure Home Page will become available.



- Select Manage Profile.



- Select the Supplier Change Request tab to view, add, or update the information within the supplier file. *(The banking tab will only appear with the banking user ID.)*



## Monitor and Maintaining the Supplier Registration

At any point in time, you may return to the information provided during the supplier file creation to review or make changes. If the updates cannot be completed, you must save your progress to return later. (Please note: Registrations with error messages cannot be saved.)

### 1) Company Profile

- a) Please leave the Additional Name field as is. Disregarded Entities and DBAs should be entered in the Address Step.

### 2) Addresses

- a) The first address listing should be the 1099 or primary address.
- b) The email listed with the address is the primary email used for remittance notifications.
- c) When editing or adding addresses, the address will be validated by the USPS.
- d) If an address should be inactivated and does not have an address to replace it, please contact [supplier.registration@omes.ok.gov](mailto:supplier.registration@omes.ok.gov) to inactivate. Please include Address Inactivation and the supplier ID in the subject line.
- e) To add a Disregarded Entity (DE) or DBA –
  - i) Select Add New Address.
  - ii) In the description and on Address Line 1, enter the name of the DE or DBA.
  - iii) Enter the address on Line 2.

#### Address Information

Description	<input type="text" value="DBA NAME"/>
Country	<input type="text" value="USA"/> <input type="button" value="🔍"/> United States
Address 1	<input type="text" value="DBA NAME"/>
Address 2	<input type="text" value="1234 Main St"/>

(1)

### 3) Contacts

- a) Review contacts for accuracy.
- b) Each contact should have a type and should be attached to an address.
  - i) The Accounts Payable type will be a CC email for remittance notifications.
- c) If a contact should be inactivated and does not have a contact to replace it, please contact [supplier.registration@omes.ok.gov](mailto:supplier.registration@omes.ok.gov) to inactivate. Please include Contact Inactivation and the supplier ID in the subject line.

### 4) Categorization

- a) If the codes entered during the supplier creation are not listed, please expand the folders for the codes to appear.
- b) Codes may be added or removed as needed.

### 5) Submit

- a) As the final step, check the box to agree to the Terms of Agreement. Then select **Submit**.

For additional questions or assistance, please email [supplier.registration@omes.ok.gov](mailto:supplier.registration@omes.ok.gov).