E-SUPPLIER NAVIGATION

For New Payees and Suppliers

Table of Contents

First-Time Supplier Setup

A W-9 and a current Certificate of Insurance or Letter of Exemption are required document attachments in the registration process. It is recommended that the documents are readied prior to beginning the registration process.

Step 1: Supplier portal

Go to supplierportal.ok.gov. You can also copy and paste this URL into your web browser address bar.
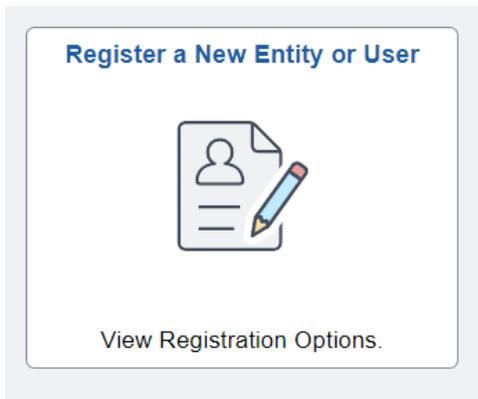
Step 2: Supplier portal login

Select **Oklahoma Supplier Portal Login**.

Oklahoma Supplier Portal Login

The Oklahoma Supplier Portal is the ne

Step 3: Register a new entity or user

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

Register a New Entity or User

View Registration Options.

Step 4: Register a supplier

Under Register a Supplier, select **Register now**.

Note: The Bidder Registration can be used for those who wish to view solicitations and bids but do not want to complete the requirements to receive a supplier ID at this time. A supplier ID is required for contract award.

Supplier or Payee Registration

Select this option if you will be receiving payment from a state agency or institute of higher education.

More...

Register now

Bidder Registration

Entities with no existing PeopleSoft Supplier ID, may select this simplified registration option to be adde

Step 5: Completing the supplier registration

There are six sections or "train stops" that are required to complete the registration. Complete each step in order. If the registration cannot be completed, you may save your progress to return later. (Registrations with error messages cannot be saved.)

A current, **signed and dated** copy of your W-9 is required to upload.

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

2) Identifying Information.
    a) Unique ID & Company Profile.
        i) In the **Tax Identification Number** field, enter your IRS-issued federal taxpayer identification number (i.e., 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) Profile Questions.
        i) You are required to answer all questions that contain an asterisk.
            (1) Use the provided links to upload the required W-9. International entities may upload a W-8 BEN-E or W-8 BEN.
            (2) All documents must be completed, signed and dated. Incomplete forms may be returned for correction.

ii) For best results, use the magnifying glass when applicable.

iii) To attach a document, select **Add Attachment** and follow the screenshots below.
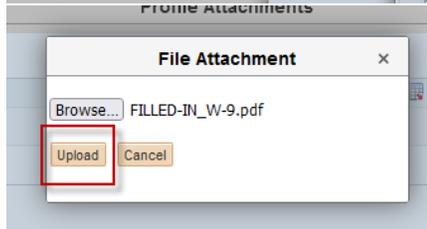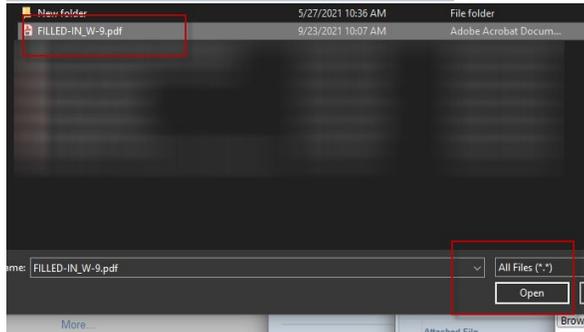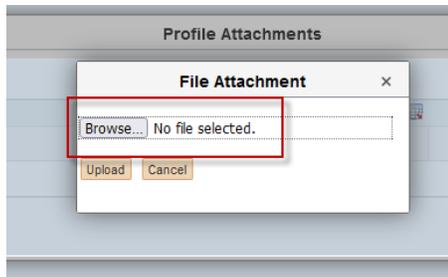
iv) Enter text in the provided fields.

3) Addresses.
   a) Enter your primary address. The remit address is optional. The address will be validated by the USPS. Select **Accept address**. **DO NOT ENTER THE COUNTY.**

4) Contacts.
   a) Select **Add Contact**.

   b) 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. Select **O**K when complete, then select **Next.**

Contact Information ⓘ

Description	
* First Name	☐ Primary Conta
* Last Name	
Title	
* Email ID	
* Telephone	Ext
Fax Number	
Contact Type	⌄

User Profile Information ⓘ

Create a user ID to access e-Supplier after registration

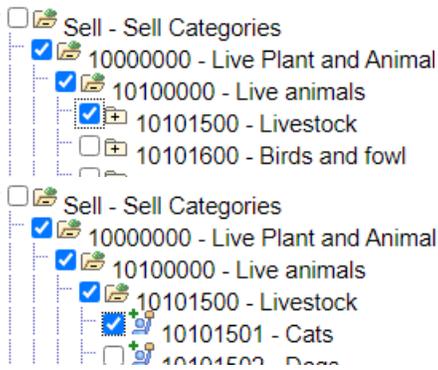|	
* Requested User ID	
Description	
Language Code	English ⌄
Time Zone	⌄
Currency Code	US Dollar ⌄

5) Categorization.
   a) All suppliers who plan to participate in solicitations and bids must pick at least one category code for registration.
      i) State of Oklahoma uses the UNSPSC codes for procurement registration. To search for the code listings for the codes most applicable, visit the UNSPSC website.
   b) To view and select category codes, select the **Sell Categories** 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
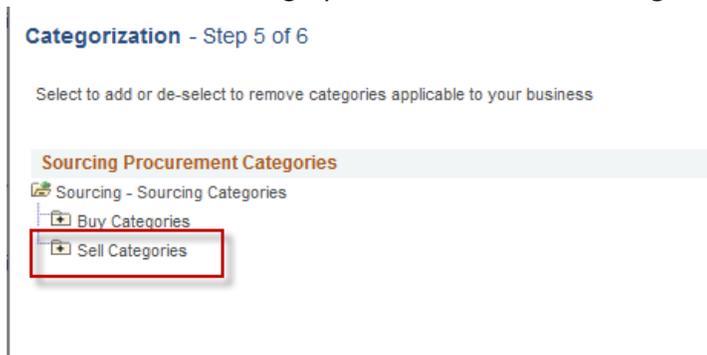
   c) Locate the category that best describes the goods or services provided and check the box. Then select the folder to drill down. If you are using an UNSPSC code to make your selection, drill down using two-digit increments. See the below example to drill down to 10101501 – Cats.

☐📂 Sell - Sell Categories
　☑⊞ 10000000 - Live Plant and Animal Materia
　☐⊞ 11000000 - Mineral and Textile and Inedi
　☐

☐📂 Sell - Sell Categories
　☑📂 10000000 - Live Plant and Animal Mate
　　☑⊞ 10100000 - Live animals
　　☐⊞ 10110000 - Domestic pet products
　　☐⊞

6) Submit.

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

Step 6: Registration approval

Once the registration has been approved, 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 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, and select the **Oklahoma Portal Login** button.
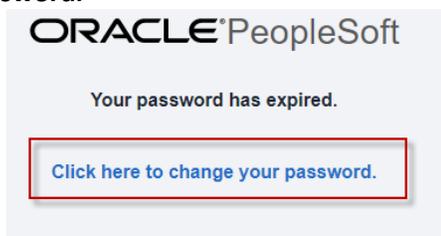
- Sign in using the **Existing Users Sign In**. This is where you will sign in going forward.

- Enter the user ID and temporary password.
- You will receive a message that your password has expired. Select **Click here to change your password.**

- You will be prompted to enter the temporary password, followed by a new password.
- After changing the password, the portal homepage displays. Tiles may vary.

-
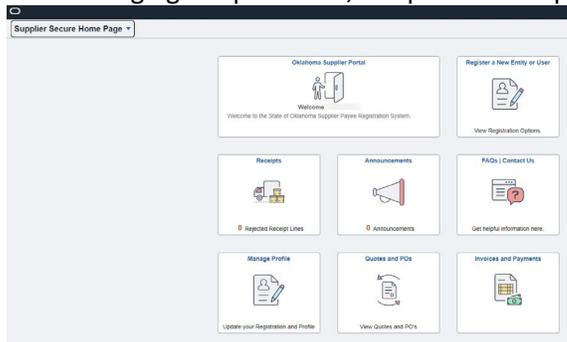
Access a Saved Registration

1) To access your draft registration, follow these steps. The first four steps are the same as when you began the process.
   a) This step is for registrations that have not gone through full approval and do not have a supplier ID.
   b) Registrations that were submitted and returned for more information need to access the registration.
2) Go to supplierportal.ok.gov.
3) Select **Oklahoma Supplier Portal Login**.

The Oklahoma Supplier Portal is the ne

4) Return to **Register a New Entity or User**.
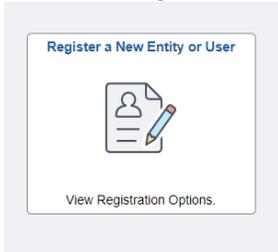
5) Under Supplier or Payee Registration, select **Register Now**.

6) Welcome page.
   a) Under **Select an activity below,** chose **Continue from where you left**.
   b) Enter your registration ID of 000000XXXX and select the **caret**.
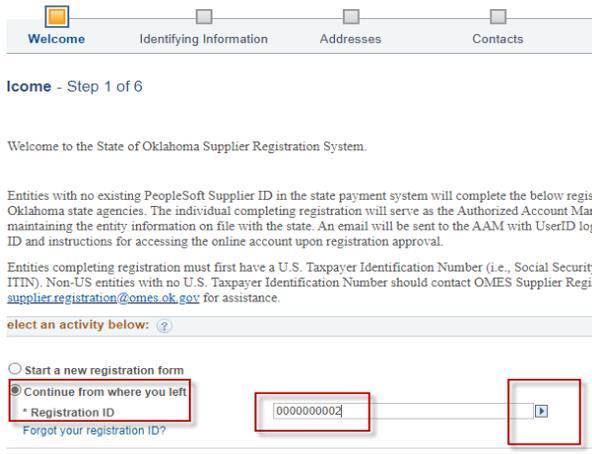
   c) Click the arrow to the right.
   d) A new section will open requesting the TIN or employer identification.
   e) Once entered, it should take you to the registration that you previously started.

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. **Note**: Banking can only be viewed and accessed with a banking user ID.

- Select the **Oklahoma Supplier Portal Login** button at supplierportal.ok.gov, and sign in using **Existing Users Sign In**.
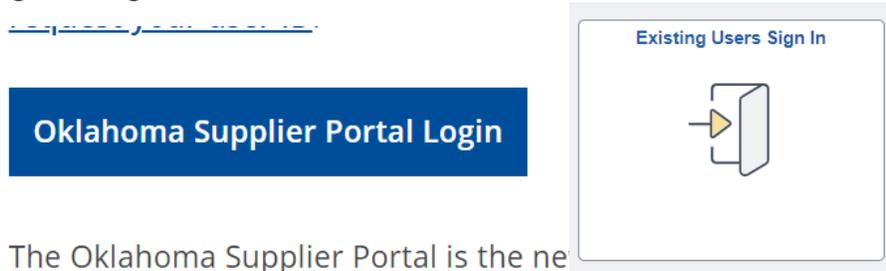
- Select **Register a New Entity or User**.
  - Once signed in, the Register a New Entity or User tile will provide new registration options. The tile now provides the option to create additional user IDs based on job responsibilities.
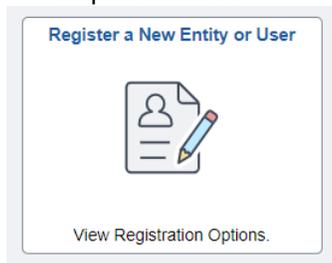
- Select **Register Now** for the user ID you wish to create.
  - The Authorized Account Manager user ID is the only user ID that can assign additional user IDs.
    - The user ID created with the supplier file is an Authorized Account Manager user ID.
  - The Banking user ID is the only user ID that can view, add, or update banking.
    - For questions regarding the banking process, email 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.
  - You will receive two approval emails. The second email will contain the user ID and a temporary password
- The Language Code, Time Zone, and Currency Code fields are not applicable and can be disregarded.

Review and Update Supplier Information

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

- Select the **Oklahoma Supplier Portal Login** button at supplierportal.ok.gov; sign in using the **Existing Users Sign In**.

- Once signed in, the Supplier Secure Home Page displays.
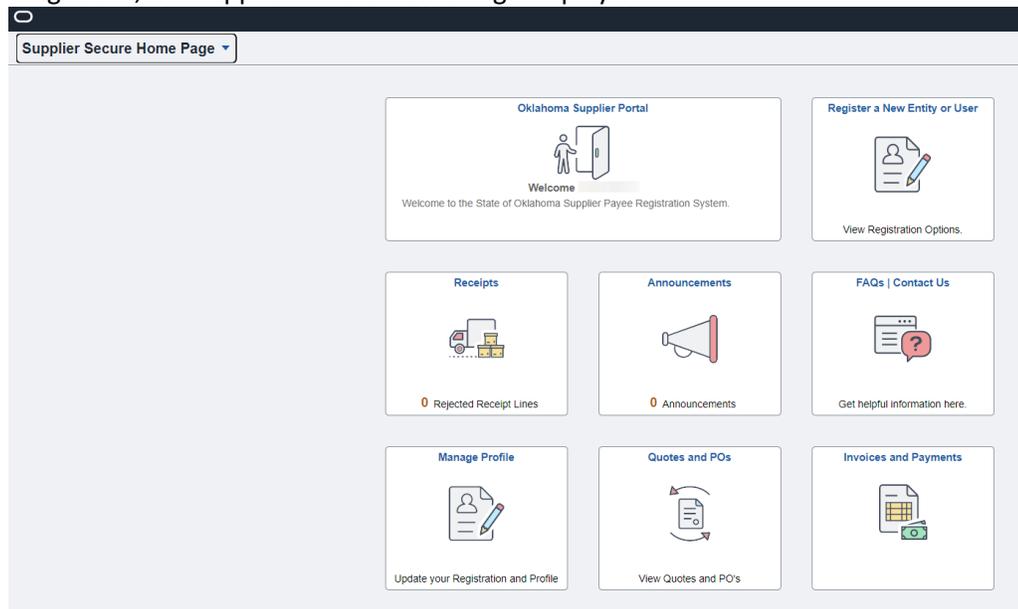
- Select **Manage Profile**.

- Select **Supplier Change Request** 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. (Registrations with error messages cannot be saved.)

1) Company Profile.
   a) Leave the Additional Name field as is. Disregarded Entities and DBAs should be entered in the Addresses 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 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, email supplier.registration@omes.ok.gov to inactivate. Include Address Inactivation and the supplier ID in the subject line.
   e) Add a Disregarded Entity (DE) or DBA.
      i) Select **Add New Address**.
      ii) Under Address Information in the Description and Address 1 fields, enter the DE or DBA name.
      iii) Enter the **address** in the Address 2 field.

Address Information

Description	DBA NAME
Country	USA United States
Address 1	DBA NAME
Address 2	1234 Main St

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, email supplier.registration@omes.ok.gov to inactivate. 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.