

WebProcure™

Instructions for Editing & Managing Your Vendor Profile

(Updated June 15, 2018)




WebProcure™ powered by  PERFECT COMMERCE

Table of Contents

- Log In to P.O.R.T./WebProcure 4
 - WebProcure Usage Terms and Conditions 5
 - Vendor Profile Verification..... 6
 - What’s New..... 8
- Vendor Home Page 9
 - Online Help 9
 - Message Board..... 10
 - Documents 10
 - Responding to a Solicitation 13
 - Toolbar..... 13
- Edit Profile/My Account..... 14
 - Online Help 15
 - Edit Main Organization Info 15
 - Main Information 16
 - Bid Notification 19
 - Permissions..... 20
 - Edit Contacts 20
 - Edit Demographic Information 22
 - Edit Categories 22
 - Edit Properties..... 24
 - Organization Attachments 24
 - Enhanced Profile Information 25
 - Add New User 25

Permissions..... 28

Edit Existing User 30

Account Management 31

Add New Buyer 31

Anne Arundel County.....33

Additional Required Attributes33

Terms of Payment 34

Affiliation with County Employee(s).....35

Professional Licensure35

Minority Business Enterprise MBE37

Maryland SDAT Number 38

Account Codes 38

Additional Terms 38

Attachments 39

Manipulating a Document 40

Service Level..... 42

Payment Routing 42

Log In to P.O.R.T./WebProcure

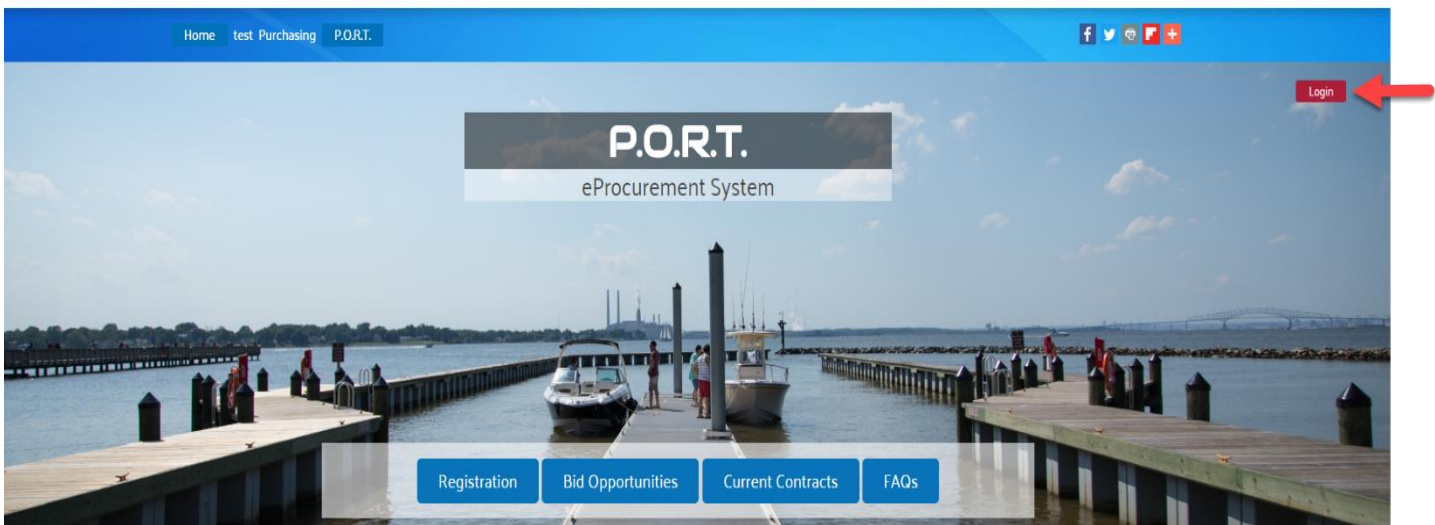
Upon the successful completion of your registration, you may click on the **Take me to WebProcure Now** link on the Registration Confirmation screen or select the link that is included in your confirmation email. Either path will take you to the following WebProcure log in screen:

Enter the **Username** and **Password** that you created during registration and click the **Log In** button.



The screenshot shows a login form titled "Login to P.O.R.T." on a light blue background. It features two input fields: "Enter Username" with a text box containing "Username" and "Enter Password" with a text box containing "Password". Below the fields is a blue "Login" button and a blue link for "Forgot password?". At the bottom right, it says "Powered by Perfect Commerce".

You can also enter the WebProcure system through the P.O.R.T. website at <https://www.aacounty.org/PORT> and click on the **Login** button.



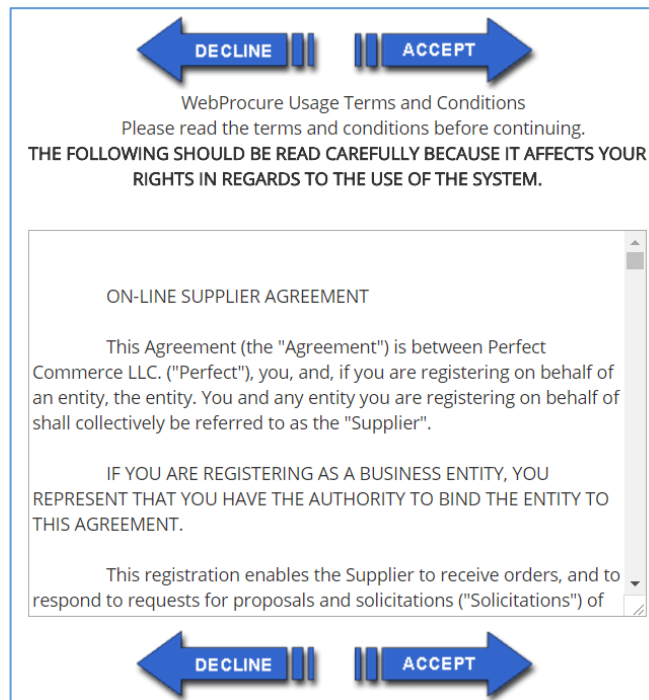
Accessing the WebProcure system through the P.O.R.T. website will open the following login screen:

Enter your user credentials and click **Login**.



WebProcure Usage Terms and Conditions

Anne Arundel County, Maryland has contracted with Perfect Commerce to utilize the WebProcure system for P.O.R.T. Upon your initial log in, you will be presented with WebProcure's terms and conditions. Use the vertical scroll bar to view the terms and conditions in their entirety. Once reviewed, click **Accept** to continue into the application.



DECLINE ACCEPT

WebProcure Usage Terms and Conditions
Please read the terms and conditions before continuing.
THE FOLLOWING SHOULD BE READ CAREFULLY BECAUSE IT AFFECTS YOUR RIGHTS IN REGARDS TO THE USE OF THE SYSTEM.

ON-LINE SUPPLIER AGREEMENT

This Agreement (the "Agreement") is between Perfect Commerce LLC. ("Perfect"), you, and, if you are registering on behalf of an entity, the entity. You and any entity you are registering on behalf of shall collectively be referred to as the "Supplier".

IF YOU ARE REGISTERING AS A BUSINESS ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND THE ENTITY TO THIS AGREEMENT.

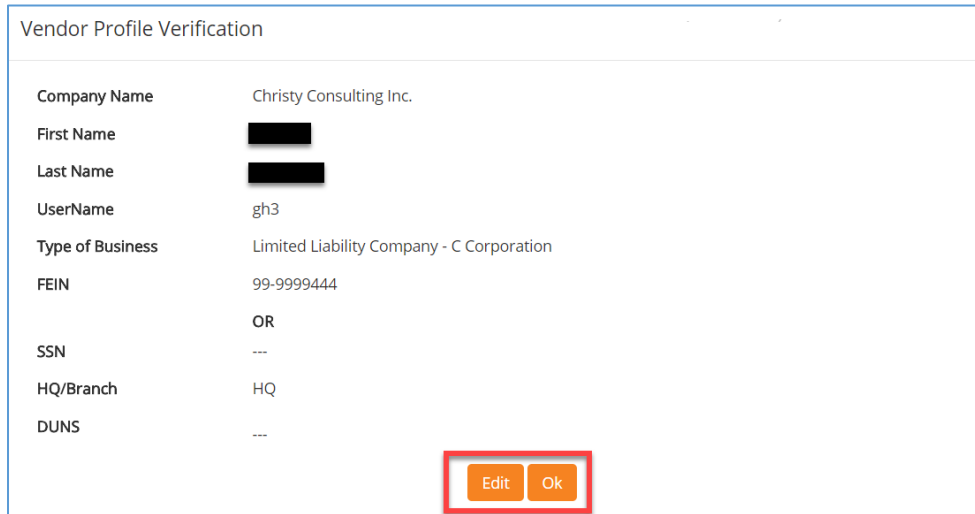
This registration enables the Supplier to receive orders, and to respond to requests for proposals and solicitations ("Solicitations") of

DECLINE ACCEPT

If you choose to **Decline** these usage terms and conditions, you will not be able to successfully log in to the WebProcure application, submit bid responses electronically, or be able to use other system features.

Vendor Profile Verification

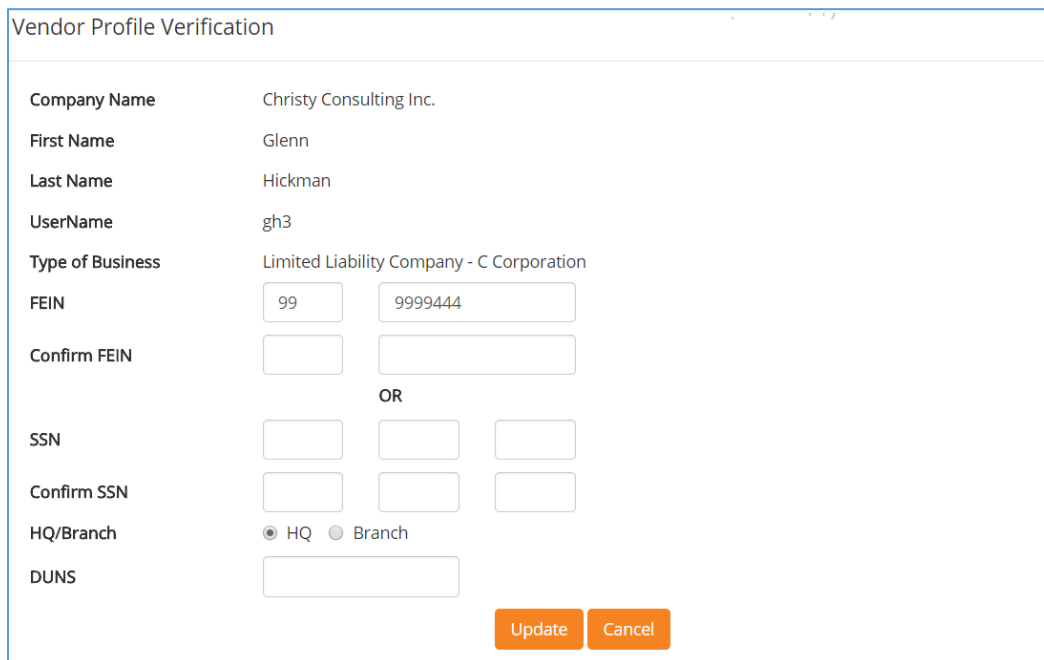
Once accepted the system presents a **Vendor Profile Verification** screen the first time you login. If the information is correct, click on the **Ok** button and proceed to your **P.O.R.T. Home Page**.



Vendor Profile Verification

Company Name	Christy Consulting Inc.
First Name	██████
Last Name	██████
UserName	gh3
Type of Business	Limited Liability Company - C Corporation
FEIN	99-9999444
	OR
SSN	---
HQ/Branch	HQ
DUNS	---

If the information is incorrect, click on the **Edit** button.



Vendor Profile Verification

Company Name	Christy Consulting Inc.
First Name	Glenn
Last Name	Hickman
UserName	gh3
Type of Business	Limited Liability Company - C Corporation
FEIN	<input type="text" value="99"/> <input type="text" value="9999444"/>
Confirm FEIN	<input type="text"/> <input type="text"/>
	OR
SSN	<input type="text"/> <input type="text"/> <input type="text"/>
Confirm SSN	<input type="text"/> <input type="text"/> <input type="text"/>
HQ/Branch	<input checked="" type="radio"/> HQ <input type="radio"/> Branch
DUNS	<input type="text"/>

This will allow you to update the following information:

- **Federal Employer Identification Number*** -- **OR** – **Social Security Number*** – During your initial registration, either a Federal Employer Identification Number (FEIN) or a Social Security Number (SSN), must be entered to identify your organization in **P.O.R.T.**

- **Confirm Federal Employer Identification Number*** – **OR** – **Confirm Social Security Number***
– Re-enter either the Federal Employer Identification Number (FEIN) or a Social Security Number (SSN) to ensure that it was entered correctly.

- **Please specify whether you are registering as a HQ or a Branch.**

Choose the appropriate designation for your organization:

- **HQ (Parent/Holding Company)** – This is the default designation and applies to your organization if it is the parent or headquarters location of your organization. Also, if you are an individual/sole proprietor, be sure this option is selected.
 - **Branch** – If your organization is a child company or branch location of another entity, select this option. You will be required to enter your DUNS number or a nine-digit unique identifier in the DUNS field.
- **DUNS (Unique Branch Identifier)** – The **DUNS** number is used to differentiate between entities that share a common taxpayer identification number. This may be a D-U-N-S number, issued by Dunn & Bradstreet, which provides unique identifiers of single business entities, while linking corporate family structures together. It may also be a store location number, etc. This field is required if you are registering as a branch location. This field must contain 9 digits. It cannot contain letters or symbols.

Click on the **Update** button to save your changes or click on Cancel to return to the **Vendor Profile Verification** screen.

What's New

Upon logging into the **P.O.R.T./WebProcure** system, you are presented with a 'What's New?' page showing all the changes and improvements in the most current release of **WebProcure**.

NOTE: **WebProcure** is a SaaS product used by multiple organizations. It runs off a common code base that can be configured differently for each implementation. Therefore some of the release notes show will not be applicable to Anne Arundel County's **P.O.R.T.** system.

What's New

10.4 Release - VENDOR PORTAL

UNIT OF MEASURE DESCRIPTION ADDED

Prior to this release, in a number of areas in the application, the **Unit of Measure** was displayed in ISO code format only. For example, **EA**, **PKG**, and **BX**. This worked well enough when basic units of measure were referenced, however, as there are more than one hundred possible **Units of Measure** and those measurement codes may not be readily known; it made sense to add in the description next to the code. For example, **Eight pack (P8)**, **Running or Operating Hour (RH)**, and **Assembly (AY)**. The following areas of the application have been updated to display **UOM** description and the code in parentheses.

- Buyer Side - Supplier Print Purchase Order
- Buyer Dispatch to Vendor - HTML Attachment
- Vendor Portal - Purchase Order Summary

INDICATION WHEN QUOTE IS LOCKED BY ANOTHER USER

If you select a solicitation response to submit or edit, and another user in your same organization selects the same response on the same solicitation at the same time, a new lock message will display providing two courses of action. The message advises you that another user in your organization is responding to the solicitation and would you like to create a separate response for an alternate submission. You may choose **Yes** to create a separate and distinct response. Alternately, you may choose **Close** to acknowledge the message and return to the solicitation listing. The latter path allows you to return to the solicitation response and submit or edit at a later time, if needed.

EXPORT & IMPORT LINE ITEM RESPONSES

In the 10.4 release, we are vastly improving the way you respond to solicitations that contain line items, especially those solicitations where the line item count exceeds 20. You will now be able to download the solicitation line items, provide your bid response directly into the template, and upload the completed file into the **WebProcure** application. Data validation will be performed and once the upload is successful, the responses will be reflected in the application. You will review and

Show on login

« Previous Feature Next Feature » **Got It!**

Once you have read the release notes, click on the **Got It!** Button to proceed to your **Vendor Home Page**.

<< **Previous Feature** and **Next Feature** >> allow you to move through the notes for other releases.

The **Show on login** checkbox allows you to “turn off” these release note messages by unchecking the box. It is strongly recommended that you do **not** uncheck this box. Once you uncheck it you will no longer be able to see any release notes (past, present, or future).

Vendor Home Page

The screenshot shows the Vendor Home Page with the Perfect Commerce logo and user name 'Glenn Hickman'. The navigation menu includes Solicitations, Contracts, Order, Invoice, and Catalogs. The Message Board section contains a 'Reminders' box with the following items:

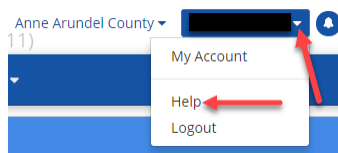
- Please make sure your profile is up to date.
- Add more buyers
- Add more regions for wider geographical business offerings
- Please fill in any additional required information for your selected buyers.

The Documents section contains a table with the following data:

Organization	Solicitations		Order	Contracts	Invoice
	Formal	Informal			
Anne Arundel County	0	1	0	0	0

The **Vendor Home Page** has a number of sections.

Online Help



Access online help by clicking on the name drop-down in the upper right-hand corner of the page and selecting Help. Documentation and videos on a variety of subjects are available.

The screenshot shows the 'Tutorials' page with a sidebar containing a list of help topics. The main content area includes the following text:

Below is a list of available topics with associated video demonstrations.

NOTE: This list is being updated continually; please check back often for more video simulations.

Simply click the desired topic to launch the video.

Depending on your system and network speed, some of the longer videos may take a minute or two to completely load.

- [Approval Related Tutorials](#)
- [Contract Related Tutorials](#)
- [Order Related Tutorials](#) (including Receiving)
- [Report Related Tutorials](#)
- [Request Related Tutorials](#)
- [Solicitation Related Tutorials](#)
 - [Evaluate and Award Tutorials](#)
- [Supplier Management Related Tutorials](#)

Message Board

- **Message Board** section includes news about the product, reminders, and alerts.

Message Board

Reminders

- Please make sure your profile is up to date.
- Add more buyers
- Add more regions for wider geographical business offerings
- Please fill in any additional required information for your selected buyers.

NOTE: Many of the choices show will not be applicable to Anne Arundel County’s **P.O.R.T.** system.

Documents

- **Documents** section identifies the number of **Formal** and **Informal Solicitations** available for review and response.

Organization	Solicitations		Order	Contracts	Invoice
	Formal	Informal			
Anne Arundel County	1	1	0	0	

NOTE: Orders, Contracts, and Invoices are not applicable to Anne Arundel County vendors at this time.

If the number of **Formal** or **Informal** solicitations is greater than one, click on the number to view the **Current Solicitations** page.

Organization	Solicitations	
	Formal	Informal
Anne Arundel County	1	1

The **Current Solicitations** page is divided into two sections: Filter and Results.

Filter

Current Solicitations

Filter by Agency

-- All --

Filter By Title

Filter By Opp. No

Start Date From (MM/DD/YYYY)

Select Date

Start Date to (MM/DD/YYYY)

Select Date

End Date From (MM/DD/YYYY)

Select Date

End Date To (MM/DD/YYYY)

Select Date

[Submit](#) [Reset](#)

The Filter section allows you to narrow the results based on certain criteria including:

- Title
- Opportunity Number
- Start Date range (From and To)
- End Date range (From and To)

If you enter filter criteria, click on the **Submit** button to limit the results based on your criteria.

Click on the **Reset** button to clear all the filter criteria entered.

Results

Please be sure to view both "My List" and "Other Active Opportunities."

Solicitation(s) to which you have been invited and/or responded

My List

Other Active Opportunities

Opp. No	Agency	Title	Start Date	End Date	Time Remaining	Bid Status	Actions
IFB18000073 ★	Anne Arundel County	Testing Pending Vendor Invitation	June 08, 2018 at 7:00:00 AM EDT	June 15, 2018 at 12:30:00 PM EDT	4d:2h:35m	Active	⋮

[+ Add New Response](#)

Displaying: 1-1 / 1 << < 1 > >>

★ - New Solicitations, yet to be reviewed.

🔥 - Quick Solicitations that are about to end

Be sure to view both ‘My List’ and ‘Other Active Opportunities’.

- **My List** (default) shows solicitations to which you have been invited and/or responded.
- **Other Active Opportunities** shows other active opportunities within Anne Arundel County.

Opp. No	Agency	Title	Start Date	End Date	Time Remaining	Bid Status	Actions
IFB18000073	Anne Arundel County	Testing Pending Vendor Invitation	June 08, 2018 at 7:00:00 AM EDT	June 15, 2018 at 12:30:00 PM EDT	4d:2h:35m	Active	⋮

+ Add New Response

Clicking on the **Opportunity Number** link will display a formatted version of the solicitation.

Solicitation Summary

IFB18000073 - Testing Pending Vendor Invitation (Formal)

No	IFB18000073
Type	Formal Solicitation (ITB,RFP,RFI)
Duration	<i>Start Date</i> June 08, 2018 at 7:00:00 AM EDT <i>End Date</i> June 15, 2018 at 12:30:00 PM EDT
Agency	
Contact Details	Abigail Donahoo One Bayport Way Newport News VA, 23606 United States Tel: (757) 768-2989 Fax: wp.stage@proactis.com
Description	testing
Delivery Term	Free On Board Destination
Payment Terms	Vendor Specified

No documents were issued along with this Solicitation.

▶ Solicitation Header - Introduction

Clicking on the **Print** button at the bottom of this display downloads a PDF version of the solicitation for you to save or to print.

Clicking on the action icon from a particular solicitation will bring up a list of choices.

Bid Status	Actions
Active	⋮

Solicitation IFB18000073

+ Add New Response

🖨 Print

Clicking on **Print** in the list displayed downloads a PDF version of the solicitation for you to save or to print.

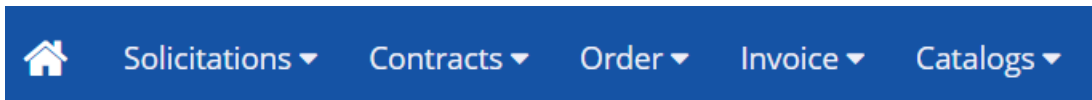
Clicking on + **Add a New Response** in the list displayed – or clicking on the + **Add New Response** link – allows you to respond to this solicitation.

Responding to a Solicitation

Please refer to the ‘**How to Respond to a Solicitation**’ instructions on the **P.O.R.T.** website.

Toolbar

- **Toolbar**



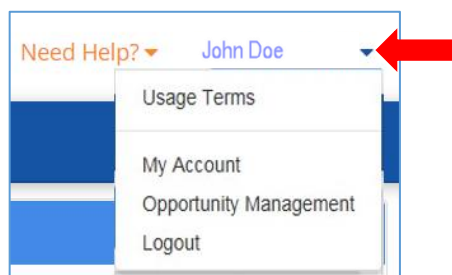
- **Home Icon** on the toolbar enables you to immediately return to the vendor home page from wherever you are in the system.



- **Solicitations** on the toolbar enables you to view current and past solicitations.
- **Contracts** on the toolbar enables users within your organization who have been granted ‘Access to Contract Management’ to view and download contracts that have been awarded to your organization (if applicable).

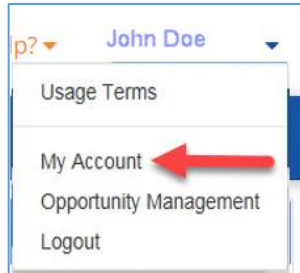
Note: **Orders**, **Contracts**, and **Invoices** on the toolbar are not applicable to Anne Arundel County vendors at this time.

- **User Menu** (drop-down located by your name at top right corner) provides access to Usage Terms as well as the **My Account** link which can be used to edit your organization’s profile.

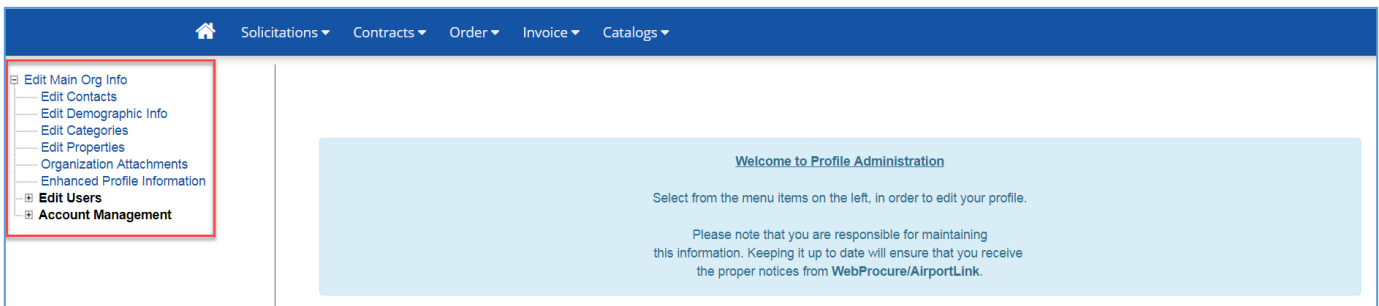


Edit Profile/My Account

User Menu (drop-down located by your name at top right corner) provides access to the **My Account** link which opens the administration module to manage your company’s information including editing and updating information entered during the registration steps.

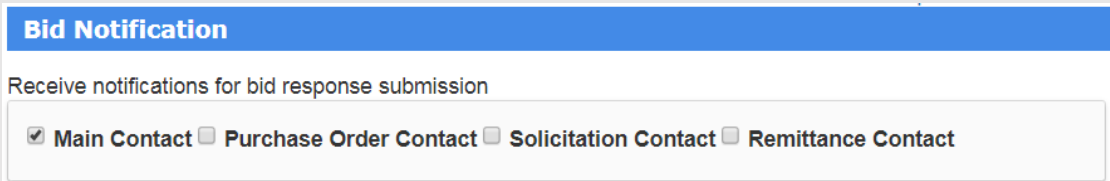


After clicking on **My Account**, the **Profile Administration** page will display. The links on the left side may be selected to edit or add contacts, company information, commodity categories, and additional profile information. In addition, this is where users are added to the system, passwords are reset, and permissions are assigned.



SPECIAL NOTE ABOUT BID NOTIFICATIONS AND CONFIRMATION OF BID SUBMISSIONS:

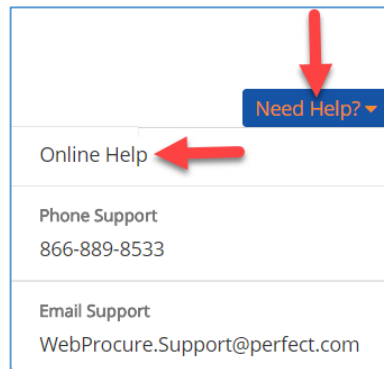
Vendors responding to bids electronically through **P.O.R.T.** need to edit their vendor account/profile in order to receive an automated confirmation that their electronic bid response was successfully submitted to the County. After selecting **My Account** from the User Menu, click on **Edit Main Org Info** and scroll down the main screen to the **Bid Notification** section. Check the appropriate box as to which organizational contact(s) should receive the notification (typically this would be the Main Contact) and then scroll to the bottom of the page and click **Save**.



Bid Response Instructions – Step-by-step instructions for a vendor to use when submitting online responses to bid opportunities can be found on the **P.O.R.T.** website.

Online Help

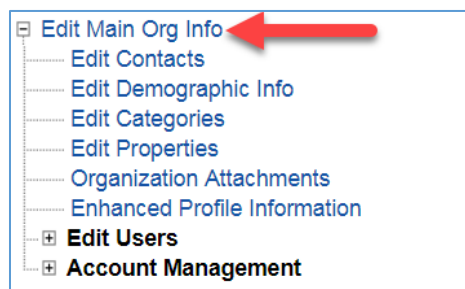
Many topics are covered in online help inside of **WebProcure**. There are also video simulations available to guide you through responding to a solicitation and maintaining your organization’s information. To get to Online Help, click on the down arrow next to **Need Help?** and click on **Online Help**.



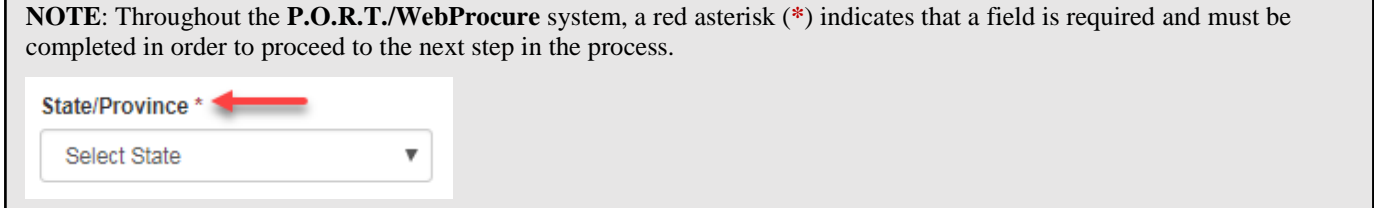
NOTE: **WebProcure** is a SaaS product used by multiple organizations. It runs off a common code base that can be configured differently for each implementation and modules purchased. Therefore some of this generic online help will not be applicable to Anne Arundel County’s **P.O.R.T.** system.

Edit Main Organization Info

Select the **Edit Main Org Info** option from the menu tree on the left and the **Main Information** page will display.



NOTE: Throughout the **P.O.R.T./WebProcure** system, a red asterisk (*) indicates that a field is required and must be completed in order to proceed to the next step in the process.



Main Information

On the **Main Information** page you can view all of your organization’s contact information, make updates, and/or verify your organization’s general information. Enter any updated or additional information regarding your organization in the desired field. Remember that no information will be permanently saved until you scroll to the bottom of the page and click the **Save** button.

Main Information

Main Contact	Glenn Hickman ▼ *	Add User
Company Name <small>(as shown on your income tax return)</small>	Christy Consulting Inc. *	
Doing Business As Name (D/B/A)	<input type="text"/>	
Homepage address:	<input type="text"/>	
System ID	122900	
DUNS Number (Unique Identifier)		
Federal Tax Id	99-9999444	
SSN		
	This office is:	
	<input checked="" type="radio"/> Parent/Holding Company <input type="radio"/> Branch *	
Parent DUNS (Unique Identifier)		
Enterprise Type	Limited Liability Company - C Corporation ▼ *	
Exempt from backup withholding	<input type="checkbox"/> For other details and a copy of Form W-9 For other details and a copy of Form W-9	
Medical or Legal Service Provider	<input type="checkbox"/>	
State In Which Incorporated	Maryland ▼	
Time Zone	(GMT-05:00) Eastern Time ▼ *	

[Add User](#) Refer to the ‘Edit Users / Add New Users’ section of this document.

- **Company Name*:** This field contains the information that was entered during your initial registration in the ‘**Legal Business Name of Entity/Individual**’ field. It must be the legal business name as shown on the form W-9 or your complete individual name (first, middle, last, suffix).
- **Doing Business As Name (DBA):** Optional operating name of a company, as opposed to the legal name of the company.
- **Homepage Address** – Optional home page address of your company.
- **System ID** – WebProcure system identifier for your company. This may not be changed.
- **DUNS Number (Unique Identifier)** – is used to differentiate between entities that share a common taxpayer identification number. This may not be changed.

- **Federal Tax ID or SSN** – The Federal Employer Identification Number (FEIN) or a Social Security Number (SSN) entered during the initial registration process and used to identify your organization in P.O.R.T. This may not be changed.

NOTE: To make modifications to a DUNS number, FEIN, or Social Security Number, contact Perfect Commerce's WebProcure Technical Support at (866) 889-8533 or WebProcure.Support@perfect.com.

- **This office is: ***

Choose the appropriate designation for your organization:

- **Parent/Holding Company** – This is the default designation and applies to your organization if it is the parent or headquarters location of your organization. Also, if you are an individual/sole proprietor, be sure this option is selected.
- **Branch/DBA** – If your organization is a child company or branch location of another entity, select this option. You will be required to enter your DUNS number or a nine-digit unique identifier in the Unique Branch Identifier (DUNS) field.

- **Enterprise Type*** – Use the drop-down menu to identify the type of enterprise that best represents your organization. If you are registering with a FEIN number, the options include: Benefit Corporation (B Corp)

- C Corporation
- Individual/Sole Proprietor
- Limited Liability Company – C Corporation
- Limited Liability Company – Partnership
- Limited Liability Company – S Corporation
- Other: Federal Tax Exempt/Non Profit
- Other: Government Entity
- Partnership
- S Corporation
- Trust Estate

- **Exempt from backup Withholding** – this field is not used by Anne Arundel County.
- **Medical or Legal Service Provider** – this field is not used by Anne Arundel County.
- **State in Which Incorporated** – Use the drop-down list to select the state where your organization is incorporated.
- **Time Zone***: - Use the drop-down list to select the appropriate time zone for your company.

The screenshot shows a form with the following fields and values:

- Company Address**: 15002 Narrows Lane *
- City**: Bowie *
- County**: (empty)
- Country**: United States *
- State**: Maryland *
- Other Region (NON US/Canada/Mexico only)**: MD
- ZIP/Postal Code**: 20716 *
- Company Phone**: 301-333-4444 *
- Company Fax**: (empty) * Fax and/or email address
- Company Email**: (empty)
- Company Confirm Email**: (empty)
- Locale**: English / United States

Below the form, there is a note: "An email address is required if your Fax Number is the same as your Phone Number. Email is also required for international vendors. You can obtain a free e-mail address and account by clicking here. [Need an E-mail Address?](#)"

Footer information: WebProcure Usage Terms Accepted On Date: 06/05/2018 (MM/DD/YYYY); Created On: June 05, 2018 at 8:08:33 AM. A note at the bottom left states "* Denotes a required field".

- **Company Address*** – Use the two lines to enter the street address or post office box information in full for your main headquarters. The address entered will also be the main address for your organization in the P.O.R.T. system. If you change this address, you may need to change the address of your Main Contact as well.
- **City*** – Enter the city where your organization is located.
- **State/Province*** – Use the drop-down menu to select the state where your organization is located.
- **Other Region (NON-US/Canada/Mexico only)** – This field is not used by Anne Arundel County.
- **Postal/Zip Code*** – Enter the postal code or zip code with extension, if known, for your organization.

NOTE: The application will perform an address validation. If the address cannot be located, you have the option of correction any errors that may exist or may acknowledge that the entered address is correct by double-clicking the [here](#) link.

The error message is displayed in a box with a red border. It reads: "Postal / Zip Code * 23606 - We could not find this address. Please check for spelling errors. If it appears correct, please double click [here](#)".

- **Company Phone *** – Enter the primary contact’s 10-digit **Primary Phone Number** with no spaces or hyphens.
- **Company Fax*** – Enter the primary contact’s 10-digit **Fax Number** with no spaces or hyphens.
- **Company Email*** – Enter your company’s general email address.
- **Company Confirm Email*** – Re-enter your company’s general email address to ensure that it was entered correctly.
- **Locale** – this field is not used by Anne Arundel County.

Bid Notification

Receive notifications for bid response submission

Main Contact Purchase Order Contact Solicitation Contact Remittance Contact

[Top](#)

Permissions

Bids/Quotes <ul style="list-style-type: none">* Create/Edit Item Reminders* Respond to Bids/Quotes* View Past Bids/Quotes	Catalogs <ul style="list-style-type: none">* Access to eCatalogs
Collaboration <ul style="list-style-type: none">* Manage Collaboration* View Collaboration	Contract Management <ul style="list-style-type: none">* Access to Contract Management
General <ul style="list-style-type: none">* Access to Account Management* Access to Edit Organization's Information	Invoice <ul style="list-style-type: none">* Invoice Creation* View Invoice
Order Management <ul style="list-style-type: none">* Access to Order Management* Acknowledge Orders	

[Save](#) [Reset](#)

Bid Notification

The **Bid Notification** section allows the vendor to select a contact(s) who will receive bid submission email notifications.

Bid Notification

Receive notifications for bid response submission

Main Contact Purchase Order Contact Solicitation Contact Remittance Contact

Note: Vendors responding to bids electronically through **P.O.R.T.** need to edit this section of their vendor profile in order to receive an automated confirmation that their electronic bid response was successfully submitted to the County. There are four contacts who can be chosen to receive notifications; i.e. Main Contact, Solicitation Contact, Purchase Order Contact and Remittance Contact.

Permissions

All Permissions for the vendor organization will be enabled by default during your company’s initial registration. Additional information on Permissions that can be assigned to users can be found under the ‘Edit Users / Add New Users’ section of this document.

Note: Anne Arundel County vendors do not currently have access to Order Management, Catalogs, or Invoice.

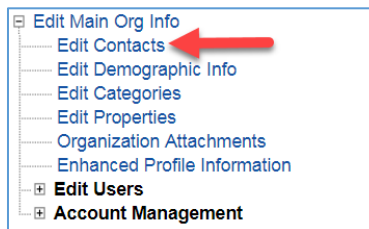
Permissions	
Bids/Quotes * Create/Edit Item Reminders * Respond to Bids/Quotes * View Past Bids/Quotes	Catalogs * Access to eCatalogs
Collaboration * Manage Collaboration * View Collaboration	Contract Management * Access to Contract Management
General * Access to Account Management * Access to Edit Organization's Information	Invoice * Invoice Creation * View Invoice
Order Management * Access to Order Management * Acknowledge Orders	

Click **Save** to apply the modifications to the Vendor Account/Profile before leaving the **Main Information** page. The **Reset** button will return changes to the previously saved information.



Edit Contacts

Select the **Edit Contacts** option from the menu tree on the left and the **Main Information** page will display.



Four Contact Information sections will display

- **Main Contact** Information
- **Purchase Order Contact** Information
- **Solicitation Contact** Information
- **Contract Contact** Information
- **Remittance Contact** Information

Purchase Order Contact Information

Purchase Order Contact

[Copy Main Contact](#)

Salutation:

First Name: *

Middle Initial:

Last Name: *

Phone Number: * Ext.

Email Address: * Email address and/or Fax

Fax Number: *

Note: E-mail takes precedence over fax, so if you provide both, Solicitation notices will be sent via e-mail only.

Purchase Order Address

[Copy Main Address](#)

Address: *
 (optional)
 (optional)

City: *

Country: *

State: *

Other Region:

ZIP/Postal Code: *

IMPORTANT: If the **Purchase Order, Solicitation, Contract, and Remittance Contact** is the same as the **Main Contact**, simply click the **Copy Main Contact** button and **Copy Main Address** button in each section respectively. This transfers the **Main Contact** and **Main Address** information into that section.

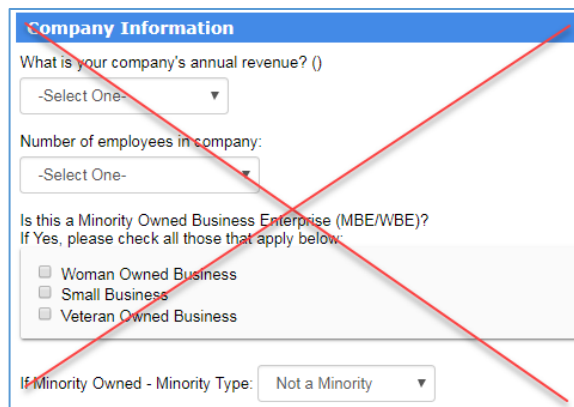
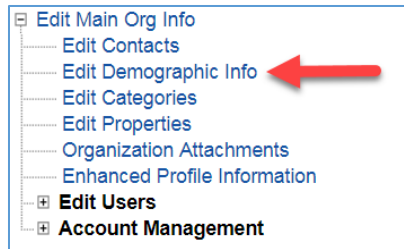
[Copy Main Contact](#)

[Copy Main Address](#)

Change of Address: If you are editing an address in the **Edit Contacts** section of your vendor profile, you will also need to edit the Company Address on the **Main Organization Information** page if the change of address is applicable to your main contact. Any address change made on the **Edit Contacts** page **will not** automatically update the address on the **Main Organization Information** page of your vendor profile.

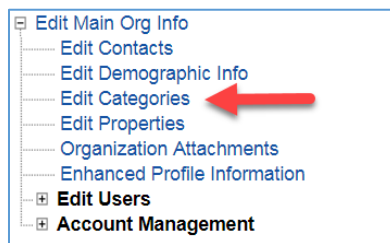
Edit Demographic Information

The **Edit Demographic Info** option from the menu tree on the left is **not applicable** for Anne Arundel County vendors.



Edit Categories

The **Edit Categories** option from the menu tree on the left to select NIGP codes applicable to your organization.

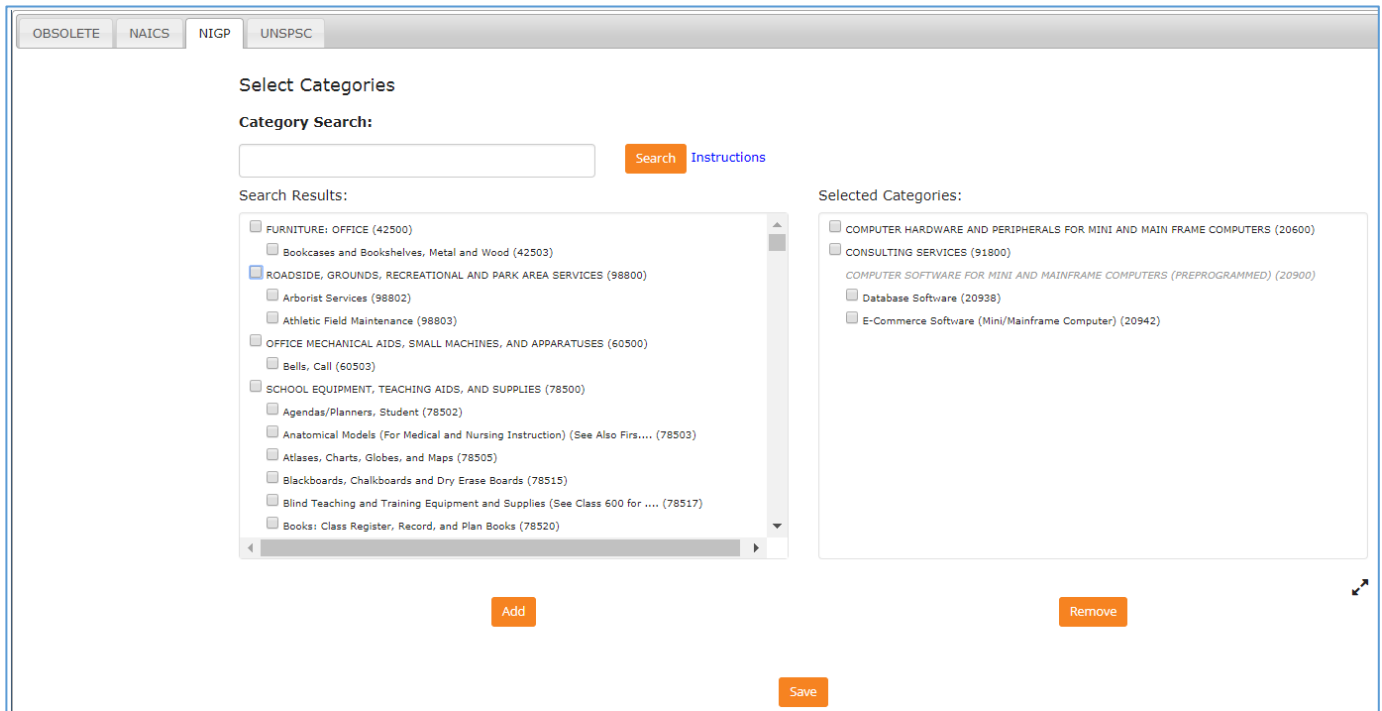


The **P.O.R.T.** system defaults to the **NIGP** code standard. Other tabs are irrelevant to Anne Arundel County vendors.



Select the NIGP commodity and service codes below which best apply to your organization's business. Selecting these codes will enable your organization’s Solicitation Contact to receive automated email notifications on bid opportunities posted by Anne Arundel County that match your NIGP codes. It will also make your organization easier to find when agencies are preparing to make a purchase.

You must select at least one NIGP commodity/service code to complete your registration. If you do not wish to receive solicitation notifications, please select 'Unknown' – otherwise, select all that apply.



To expedite selection, you may enter a keyword or phrase and click **Search**. For example, if you enter a keyword of “software”, only those NIGP categories related to software will be displayed under **Available Categories**. To select a category, click in the box left of the category and then click on the **Add** button to move the category to the right under **Selected Categories**.

To remove a category, remove the check mark next to the category under **Selected Categories** and then click on the **Remove** button to move the category to the right under **Selected Categories**.

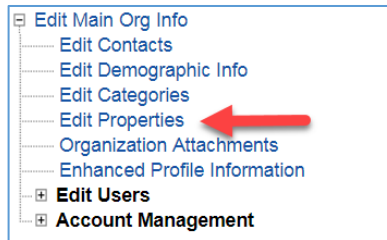
Clicking on **Clear Search** will clear the categories under **Available Categories** from your previous search and allow you to search again.

Note the hierarchical nature of these codes. Selecting the highest level will include all the sub-levels underneath. Selecting a sub-level will be more specific (see example on previous page).

IMPORTANT: In order to save your category code selections, you must click on the **Save** button at the bottom of the page.

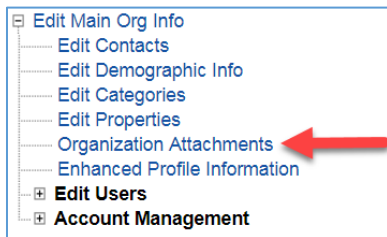
Edit Properties

The **Edit Properties** option from the menu tree on the left is **not applicable** for Anne Arundel County vendors.

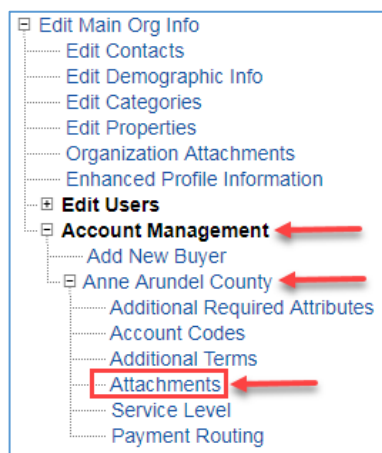


Organization Attachments

The **Organization Attachments** option from the menu tree on the left is **not applicable** for Anne Arundel County vendors.

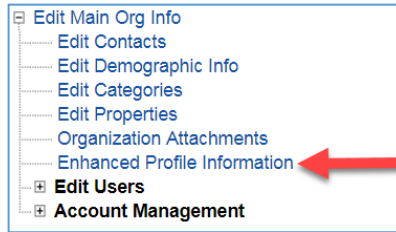


IMPORTANT: To add or delete attached documents, select **Account Management, Anne Arundel County, Attachments** from the menu tree on the left.

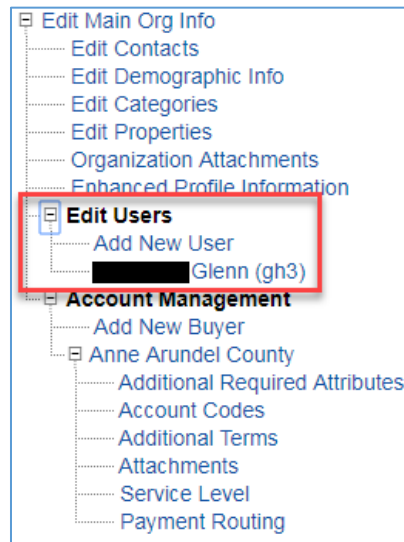


Enhanced Profile Information

The **Enhanced Profile Information** option from the menu tree on the left is **not applicable** for Anne Arundel County vendors.



Add New User



The **Add New User** option from the menu tree on the left allows you to add a new user by entering user information (name, address, & email), credentials (username & password) and permissions (what they are allowed to do in the system).

New User under XXXXXXXXXX Consulting Inc.

User Information

First Name	<input style="width: 90%;" type="text" value=""/>	*
Middle Initial	<input style="width: 60%;" type="text" value=""/>	
Last Name	<input style="width: 90%;" type="text" value=""/>	*
Country	<input style="width: 95%;" type="text" value="-Select One-"/>	*
Address	<input style="width: 95%;" type="text" value=""/>	*
	<input style="width: 95%;" type="text" value=""/>	
	<input style="width: 95%;" type="text" value=""/>	
City	<input style="width: 90%;" type="text" value=""/>	*
State	<input style="width: 95%;" type="text" value="Choose a Country First"/>	*
Other Region (NON US/Canada/Mexico only)	<input style="width: 95%;" type="text" value=""/>	
ZIP	<input style="width: 90%;" type="text" value=""/>	*
Phone	<input style="width: 95%;" type="text" value=""/>	*
Fax Number	<input style="width: 95%;" type="text" value=""/>	* Fax and/or email address
Email	<input style="width: 95%;" type="text" value=""/>	
Confirm Email	<input style="width: 95%;" type="text" value=""/>	

This user will receive notices of Solicitations at the e-mail address or fax number provided. An email address is required if your address and account by [clicking here](#).

- **First Name*** / **Middle Initial** / **Last Name***
Enter the user’s **First Name**, **Middle Initial**, and **Last Name**.
- **Country*** –Select Country from drop-down list.
- **Address***– Use the three lines to enter the user’s street address or post office box information in full.
- **City*** – Enter the user’s city.
- **State*** – Use the drop-down menu to select the user’s state.
- **ZIP*** – Enter the user’s postal code or zip code with extension, if known.
- **Phone*** - Enter the user’s 10-digit phone number with no spaces or hyphens.
- **Fax Number*** – Enter the user’s 10-digit fax number with no spaces or hyphens.
- **Email** – Enter the user’s email address.
- **Confirm Email** – Re-enter the user’s email address to ensure that it was entered correctly.

Please Note : Passwords must be at least 8 characters in length, must be a mix of upper-case letters, lower-case letters, numbers, and special characters, and must not be the same as any password used within the past five (5) generations.

Password

User Name

Password

Verify Password

Top

Permissions

Bids/Quotes

- Create/Edit Item Reminders ?
- Respond to Bids/Quotes ?
- View Past Bids/Quotes ?

Collaboration

- Manage Collaboration ?
- View Collaboration ?

General

- Access to Account Management ?
- Access to Edit Organization's Information ?

Order Management

- Access to Order Management ?
- Acknowledge Orders ?

Catalogs

- Access to eCatalogs ?

Contract Management

- Access to Contract Management ?

Invoice

- Invoice Creation ?
- View Invoice ?

- **User Name*** - Enter the user's UserName. This will be used to Login to the Anne Arundel County Vendor Portal. The User Name is not case sensitive; however, User Names must be unique in the WebProcure system. It is recommended that you use the person's *first initial* and *last name* (i.e. jsmith). If the **User Name** entered is not unique, an error message will be displayed at the top of the page.



- **Password***

Type in a password. The **Password** field is case sensitive. It will be used to Login to the Anne Arundel County Vendor Portal.

NOTE: Password length must be greater than 8 characters and must contain at least one uppercase, one lowercase, and one special character.

- **Confirm Password***

Enter the password a second time in this field to ensure accuracy. If the **Password** and the **Confirm Password** entries do not match, you will be forced to enter both again.

NOTE: If a user exceeds a limit of five (5) consecutive login attempts, their account will be locked and will require an administrative user to reset their password. To request a password reset, a user can send an email to webprocure-support@proactis.com or call (866)889-8533.

Permissions

Section	Permissions
Bids/Quotes	<input type="checkbox"/> Create/Edit Item Reminders ? <input type="checkbox"/> Respond to Bids/Quotes ? <input type="checkbox"/> View Past Bids/Quotes ?
Collaboration	<input type="checkbox"/> Manage Collaboration ? <input type="checkbox"/> View Collaboration ?
General	<input type="checkbox"/> Access to Account Management ? <input type="checkbox"/> Access to Edit Organization's Information ?
Order Management	<input type="checkbox"/> Access to Order Management ? <input type="checkbox"/> Acknowledge Orders ?
Catalogs	<input type="checkbox"/> Access to eCatalogs ?
Contract Management	<input type="checkbox"/> Access to Contract Management ?
Invoice	<input type="checkbox"/> Invoice Creation ? <input type="checkbox"/> View Invoice ?

Select the applicable permissions for the user profile being created. The following permissions are available for assignment to a new user's profile:

Bid/Quotes

- **Create/Edit Item Reminders** – Allows users to create and edit line item reminders.
- **Respond to Bids/Quotes** – Allows users to respond to Formal (Bids) and Informal (Quotes) Solicitations. Note: When the permission **Respond to Bids/Quotes** is assigned to a new user or added to an existing user, an advisory message will display:

This permission should only be granted to actual persons, not "generic" users or accounts. This permission grants the user the ability to respond on behalf of your organization, legally binding your company to the response. The user's unique login serves as an electronic signature to for such transactions in the system.

Click "Continue" to verify your understanding and grant the user this permission. Otherwise, click "Cancel".

“This permission should only be granted to actual persons, not ‘generic’ users or accounts. This permission grants the user the ability to respond on behalf of your organization, legally binding your company to the response. The user’s unique login serves as an electronic signature for such transactions in the system.”

When you click the **Continue** button to verify your understanding and grant the user this permission. Otherwise, click the **Cancel** button.

- **View Past Bids/Quotes** – Allows users to view finalized or closed solicitations.

Collaboration

- **Manage Collaboration** - Allows users to post questions to the Questions & Answers section of the Collaborate page and view the Bulletin Board topics.
- **View Collaboration** - Allows users to view the Questions & Answers as posted by suppliers and buying organizations for a solicitation.

General

- **Access to Account Management** - Allows users to access the Account Management area to manage buying organization relationships which would include being able to update the 'Additional Required Attributes' for Anne Arundel County.
- **Access to Edit Organization's Information** - Allows users to access Profile Management and perform edits to the organization's main profile and the user profiles.

Order Management – not used by Anne Arundel County at this time

- **Access to Order Management** – Users with this permission will see the Orders section on the landing page as well as have access to the Orders listing page.
- **Acknowledge Orders** – Users with this permission will allow the user to acknowledge an order or flag the order as pending.

Catalogs – not used by Anne Arundel County

Contract Management

- **Access to Contract Management** – Users with this permission will have access to the company's contracts. A 'Contracts' drop-down will be visible for the user and they will be able to view all the contracts the County has awarded to their company. They will also be able to download any contract documents after clicking on the contract number in the Number column on the Contracts landing page.

Invoices – not used by Anne Arundel County

To assign a specific permission to the user, simply check the box next to the permission. To remove a specific permission, un-check the box next to the permission.



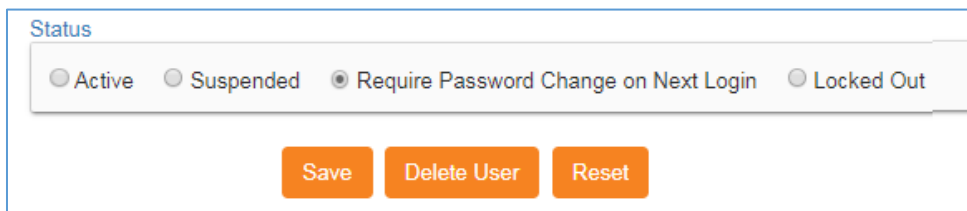
To assign all displayed permissions to the new user, click the **Select All** button.

To remove all assigned permissions from the new user, click the **De-Select All** button.

Clicking on the **Reset All** button clears assigned permissions and reverts back to last saved settings.

Clicking on the **Reset** button clears all entered data and assigned permissions without saving.

Click the **Save** button to complete the process of adding a new user. Once a new user is saved, the page will refresh to display a new section called Status.

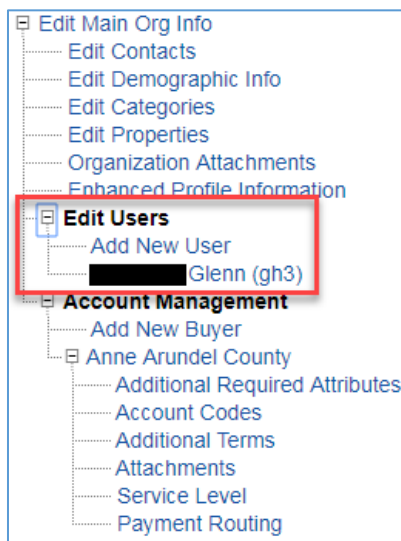


The screenshot shows a 'Status' section with four radio button options: 'Active', 'Suspended', 'Require Password Change on Next Login' (which is selected), and 'Locked Out'. Below these options are three orange buttons: 'Save', 'Delete User', and 'Reset'.

By default, the status is set to **Require Password Change on Next Login**. When the new user logs into **P.O.R.T.** successfully for the first time, the user will be prompted to create a new password that is meaningful to them. You cannot manually change their account status to **Active**. Once the new user logs in and changes their password, the system will automatically update their profile status to Active.

You can change a user's status to **Suspended**, should their access to WebProcure be placed on hold or removed. The status of **Locked Out** will occur automatically if the user locks their account due to a number of unsuccessful log in attempts.

Edit Existing User

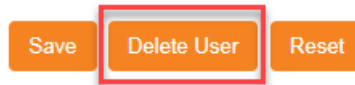


To change or add additional user information (name, address, & email), credentials (password) and permissions (what you are allowed to do in the system) for an existing user, click on their name under the **Edit Users** option from the menu tree on the left.

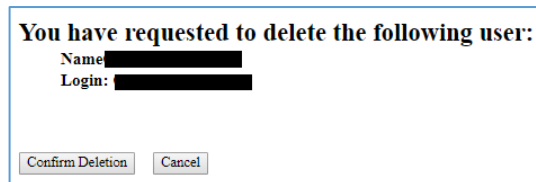
The **Edit Existing User** works the same as **Add New User** except that information will already exist in most fields and you will not be able to change the person's **User Name**. For instructions on how to edit an existing user, see the **Add New User** section in this document.

To remove a user for your organization, click on the user's name under **Edit Users** option from the menu tree on the left.

Scroll to the bottom of the User Information screen that populates and click **Delete User** button at the bottom of the page.

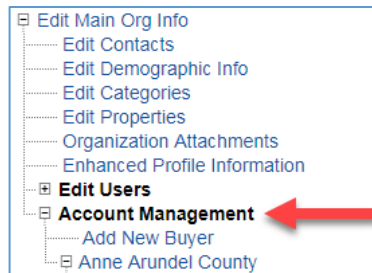


A confirmation message will display:



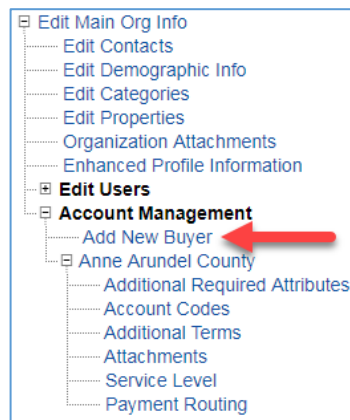
To proceed with removing the user from the WebProcure system, click the **Confirm Deletion** button. To end the deletion process and keep the user's profile in the system, click the **Cancel** button.

Account Management



Expand the **Account Management** option from the menu tree on the left.

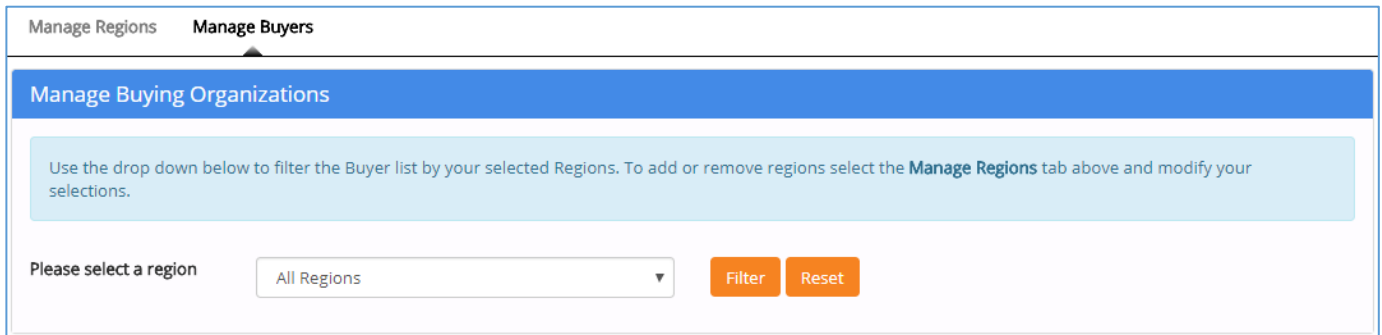
Add New Buyer



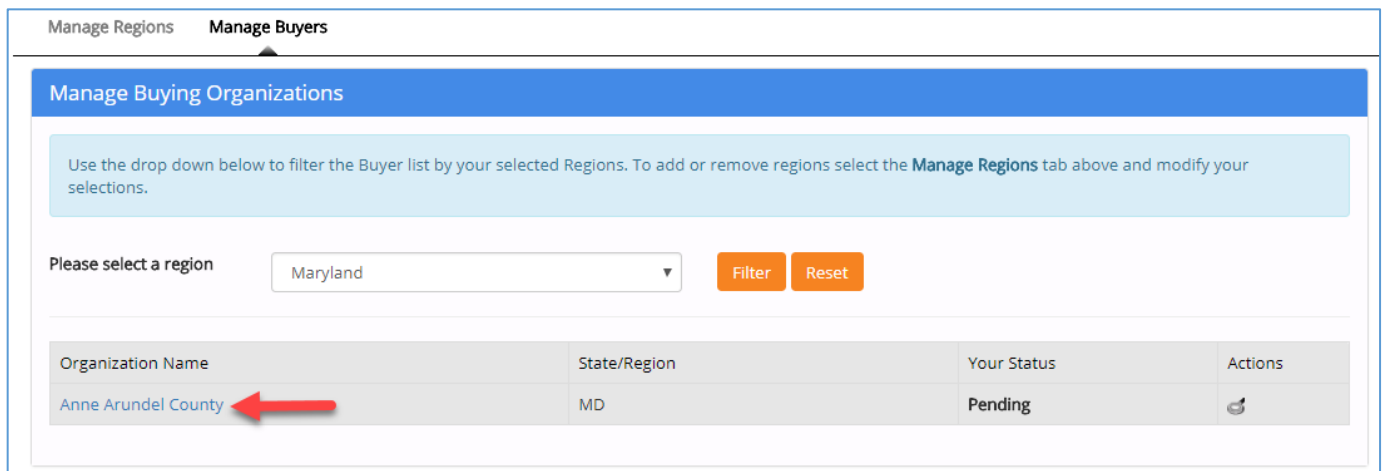
Note: Most vendors for Anne Arundel County will not use this option.

If your organization is already a registered vendor for a different buying organization in **WebProcure** (such as another state or municipality) and you need to add Anne Arundel County to your profile, a new Buyer Account can be added by a user(s) with the appropriate permissions.

Click the **Add New Buyer** link under **Account Management** from the menu tree on the left, and the **Manage Buying Organizations** page will be displayed.

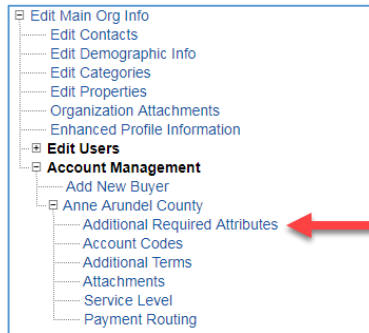


From the **Please select a region** prompt use the drop-down list to select “Maryland” and click on the **Filter** button.



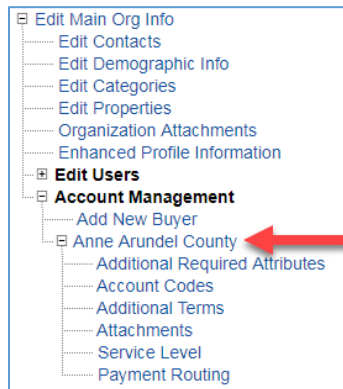
This will show **Anne Arundel County** in the search results. Your status as a vendor for Anne Arundel County will appear as **Pending** until **Approved** by the County.

Information on the **Additional Required Attributes** for Anne Arundel County, Maryland can be found by expanding the **Anne Arundel County** option from the menu tree on the left and clicking on the **Additional Required Attributes** link.



Anne Arundel County

Expand the **Anne Arundel County** option from the menu tree on the left.



Additional Required Attributes



Click the **Additional Required Attributes** link under **Anne Arundel County** from the menu tree on the left, and the **Additional Required Attributes for Anne Arundel County** page will be displayed.

Additional Required Attributes for Anne Arundel County

Additional Required Attributes for "Anne Arundel County"

Business Verifications
Vendor Payment Terms

Terms of Payment*:

Affiliation with County Employee(s)

Affiliations exist*:

1. Employee Name:

Affiliation Type:

County Agency Where Employed:

2. Employee Name:

Affiliation Type:

County Agency Where Employed:

3. Employee Name:

Affiliation Type:

County Agency Where Employed:

Additional Affiliations:

Terms of Payment

- **Terms of Payment** – Enter your standard terms of payment. Typically this is “Net 30”.

Affiliation with County Employee(s)

➤ **Affiliation with County Employee(s) ***

In accordance with Anne Arundel County Code, Article 8-2-120, you must indicate whether or not any affiliations with County employees or officials exists (such as relative, business associate, etc.).

Affiliations exist

1. Employee Name	Affiliation Type	County Agency Where Employed
<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Employee Name	Affiliation Type	County Agency Where Employed
<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Employee Name	Affiliation Type	County Agency Where Employed
<input type="text"/>	<input type="text"/>	<input type="text"/>

If additional affiliations exist, please provide the same details as above for each additional affiliation in the space provided below.

Additional Affiliations

If you have any existing affiliations, select “Yes” from the drop-down list and provide their name, affiliation type (i.e., relative, business associate, etc.), and the County agency where they are employed. There is room for three names, affiliations, and agencies. Should you have more, enter them in the **Additional Affiliations**.

If you have no existing affiliations, select “No” from the drop-down list and skip down to the **Professional Licensure** section.

Professional Licensure

➤ **Professional Licensure** – If your organization possesses one or more professional licensures, enter the **License Name** and **License Description** of each.

Professional Licensure

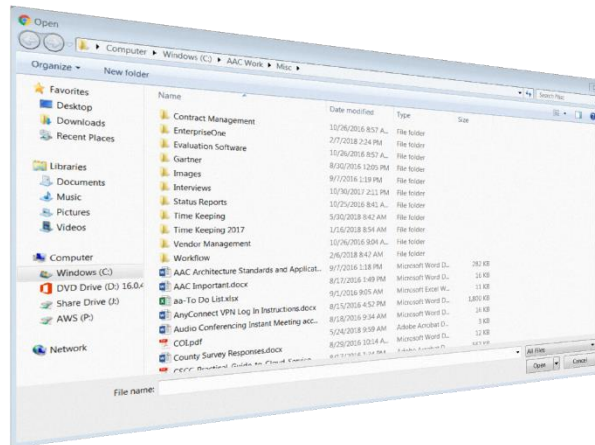
License Name(s):

License Description:

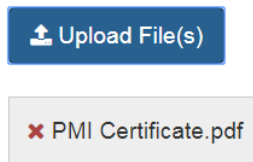
To upload associated documents proving your Licensure or Certification, click the “Upload Files” button.



From the Choose File to upload dialog box, navigate to the local or network location of your document, select the file, and click the “Open” button.



The selected file will display below the “**Upload File(s)**” button as shown in the sample image below:



You may upload as many files as you like by repeating this process. If the wrong file was uploaded, simply click on the red **x** beside the file you want to remove.

Most file formats are accepted (pdf, doc, gif, bmp, etc.). If you do not have a scanner, you can take a picture of a document with a camera or smart phone, save it on your computer, and attach the picture to your registration.

Minority Business Enterprise MBE

➤ Diversity / Disadvantaged / Veteran / Small Business Classifications

This information is optional and may not apply to your organization. You may self-certify by leaving the 'Certified By' field blank. Please select all business classifications that apply to the principal owner of your organization from the options below:

Diversity / Disadvantaged / Veteran Business Classifications	
<input type="checkbox"/> African American-owned business	
Certified By:	<input type="text"/>
Certification Expiration Date:	<input type="text"/>
<input type="checkbox"/> Asian-owned business	
Certified By:	<input type="text"/>
Certification Expiration Date*:	<input type="text"/>
<input type="checkbox"/> Hispanic-owned business	
Certified By:	<input type="text"/>
Certification Expiration Date:	<input type="text"/>
<input type="checkbox"/> Woman-owned business	
Certified By *:	<input type="text"/>
Certification Expiration Date:	<input type="text"/>
<input type="checkbox"/> Disabled-owned business	
Certified By :	<input type="text"/>
Certification Expiration Date:	<input type="text"/>
<input checked="" type="checkbox"/> Veteran-owned business	
Certified By:	<input type="text"/>
Certification Expiration Date:	<input type="text"/>
<input checked="" type="checkbox"/> Small business	
Certified By:	<input type="text"/>
Certification Expiration Date:	<input type="text"/>

Note: As defined by the State of Maryland, a minority business enterprise (MBE) is any legal entity that is, at least, 51% owned and controlled by one or more minority, female, socio-economically disadvantaged, or disabled individual.

If your Minority Business Enterprise (MBE) has been officially certified by a federal or municipal agency (or other official certifying body), enter the agency or department name in the **Certified By** field. You may self-certify by leaving the 'Certified By' field blank.

Maryland SDAT Number

- **Maryland State Department of Assessments and Taxation** - To become an approved vendor, you must have a registration number issued by the Maryland State Department of Assessments and Taxation (SDAT).

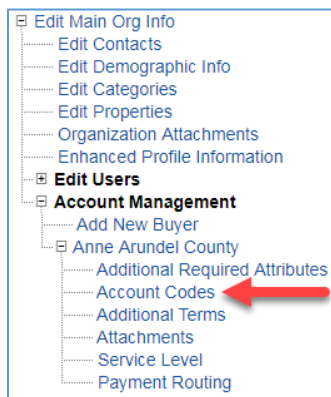
SDAT Number:

If you do not have an SDAT Number, you can register for an identification number [here](#).

You can check your business standing with SDAT or order a Certificate of Status [here](#). Look up your business, select “View Business Details” then select “Order Certificate of Status”.

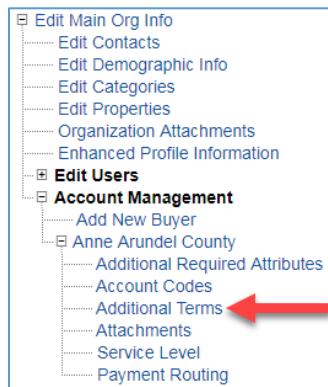
Account Codes

The **Account Codes** option from the menu tree on the left is **not applicable** for Anne Arundel County vendors.

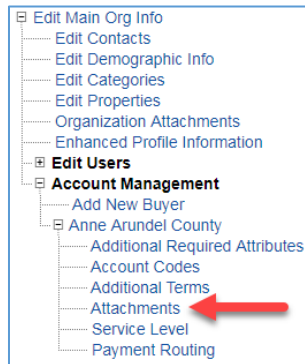


Additional Terms

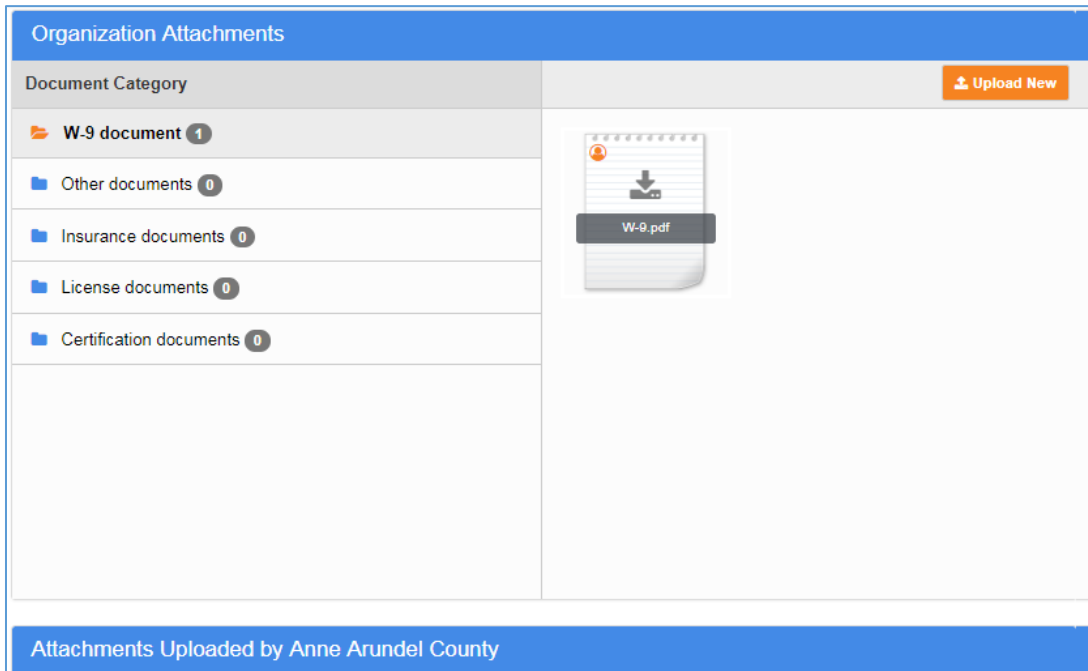
The **Additional Terms** option from the menu tree on the left is **not applicable** for Anne Arundel County vendors.



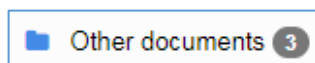
Attachments



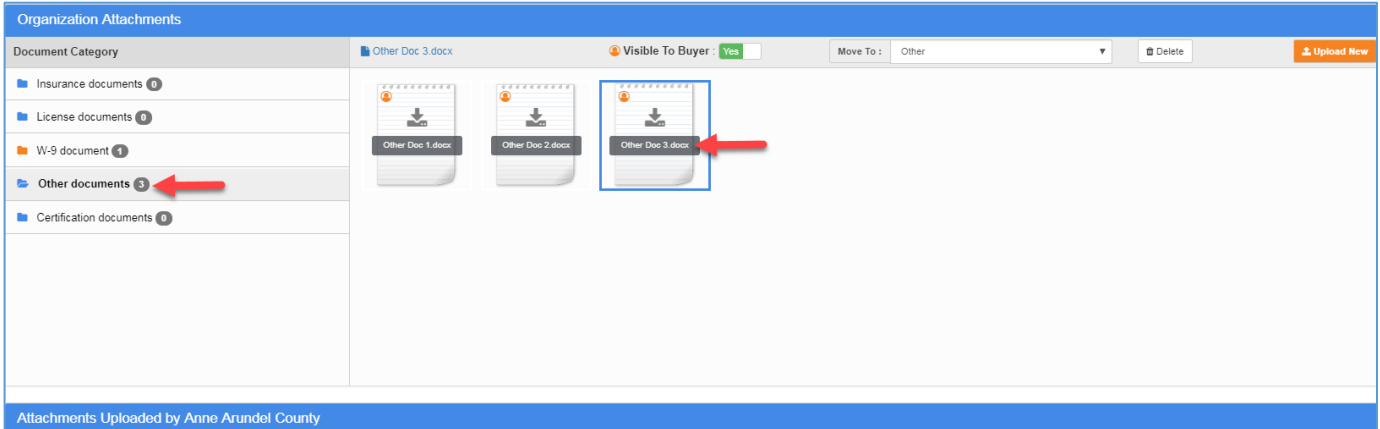
Click the **Attachments** link under **Anne Arundel County** from the menu tree on the left, and the **Organization Attachments** page will be displayed.



The page shows the number of documents uploaded in each Document Category within the little gray circle.



Manipulating a Document



Clicking on a Document Category will display any documents uploaded for that category. Clicking on a specific document displayed will display that document's name in the tool bar and provide you several options:

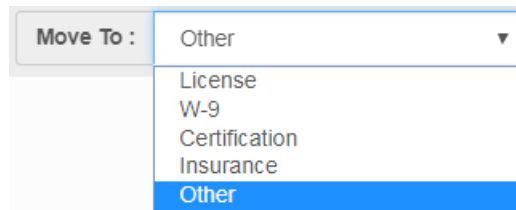


Visible to Buyer



This option defaults to Yes, meaning that Anne Arundel County will be allowed to view the contents of the selected document. Clicking to the right of Yes, changes the option selection to No – meaning Anne Arundel County cannot view the contents of the uploaded document. You should leave this option as Yes.

Move To:



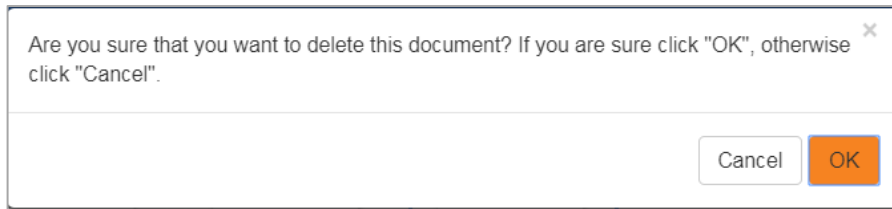
This option allows you to move the selected document to another Document Category. Simply click on the category and the document will be re-located.

Delete



To remove the selected document from this Document Category, click on the Delete button.

A confirmation dialog box will appear:

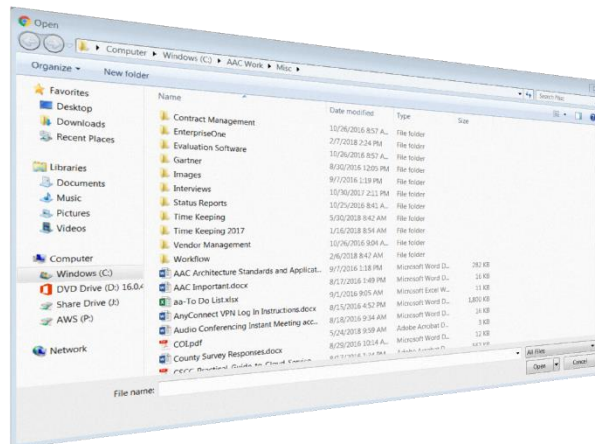


If you are sure that you want to delete this document, click the OK button, otherwise click on the Cancel button.

Upload New



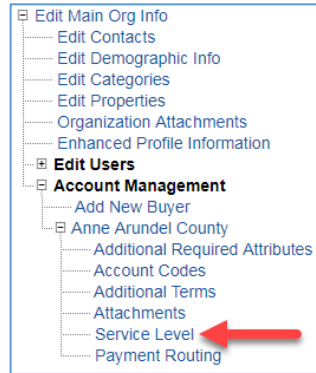
To upload a new document to this Document Category, click on the **Upload New** button. From the Choose File to upload dialog box, navigate to the local or network location of your document, select the file, and click the “Open” button.



The uploaded file will appear in this Document Category.

Service Level

The **Service Level** option from the menu tree on the left is **not applicable** for Anne Arundel County vendors.



Payment Routing

The **Payment Routing** option from the menu tree on the left is **not applicable** for Anne Arundel County vendors.

