



Cuyahoga County  
Together We Thrive

# Supplier Portal

## *Instructions Guide*





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## Glossary

Term	Definition
<b>Supplier Portal</b>	This is where outside entities register online and create an account. Once an account is created, a supplier can view and respond to events.
<b>Suppliers</b>	Any entity that registers in the Supplier Portal.
<b>Vendors</b>	Entities that do business with the County. After a supplier has registered, Fiscal AP will create them as vendor if they are selected for an award or a contract.
<b>Events</b>	Events can be bids, RFPs, RFQs, RFBs, or any other solicitations.
<b>Event Preview Date</b>	Open date for suppliers to view the event but not be able to respond.
<b>Event Q and A Dates</b>	The dates that suppliers can submit questions regarding an event.
<b>Event Open Date</b>	Date that suppliers can enter responses.
<b>Event Close Date</b>	Date that suppliers can't enter responses after it passes.
<b>Articles</b>	The high level grouping of multiple terms.
<b>Terms</b>	The terms and conditions language of an event or contract.



## Supplier Portal

In this guide, you will be introduced to the following processes:

- ◆ Supplier Registration
- ◆ Update Supplier Profile
- ◆ Create a new Location/ Contact to Supplier
- ◆ Browse Open Events
- ◆ Inquire on Event as Supplier
- ◆ Ask a Question
- ◆ Respond to an Event
- ◆ Submit a No Bid Response
- ◆ Update Response to an Event

All processes in this section are performed by the **Supplier**.

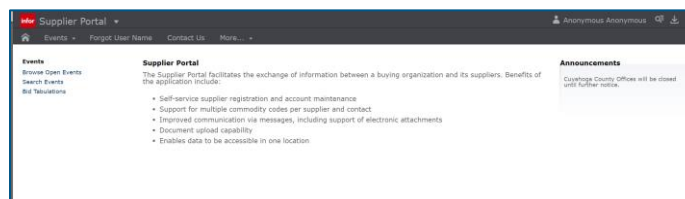
### Supplier Registration

New Suppliers will go to the **Supplier Portal** and register. Suppliers will have the ability to pick their diversity codes, upload their W9 and select their commodity codes.

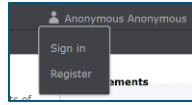
#### To Register using Supplier Portal



1. In your browser go to <https://ccprod-lm01.cloud.infor.com:1442/lmscm/SourcingSupplier/html/SourcingSupplier?csk.SupplierGroup=CUYA&csk.CHP=LMPROC>
2. The **Supplier Portal** home page appears.



3. In the top right corner, click **Anonymous Anonymous**.
4. Click the **Register** link.



*The Supplier Registration, Terms and Conditions page appears.*

5. Scroll to the bottom and click to checkmark the **Accept the Terms and Conditions** check box.

6. Click the **Next** button.

*The Supplier Registration, Contact Information page appears.*

- a. In the **User Name** field, type a user name you will use in the portal.
- b. In the **Password** field, type user defined password.
- c. In the **Confirm Password** field, retype user defined password.



**Note:** Be sure to maintain your exact User ID and Password (they are case-sensitive). You will need this to log in on your next visit.

- d. In the **First Name** field, type first name.
- e. In the **Last Name** field, type last name.
- f. In the middle **Phone Number** field, type phone number.
- g. In the **Email Address** field, type email address. \*This email will be the primary contact email. Be sure to verify accuracy.
- h. Fill in other fields, as applicable.

7. Click **Next**.

*The Supplier Registration, Company Information page appears.*

- a. In the **Company Name** field, type company name.
- b. In the **Tax Id Type** field, select the appropriate tax id type.
- c. In the **Tax Id** field, type federal EIN number or appropriate tax id type.
- d. In the **Country** field, select **United States of America**.
- e. In the **Address Line 1** field, type the appropriate address.
- f. In the **Address Line 2-4** fields, type additional address information, as appropriate.
- g. In the **City** field, type the city.
- h. In the **State Province** field, select the state.
- i. In the **Zip Code** field, type the zip code.
- j. Select the checkbox for **Check If Remit To Address Is The Same As Mailing Address**.


**Note:** Only select this checkbox if the remit to is the same as the mailing address. If it is not, complete the **Remit to Name and Address** section.

- k. Fill in other fields, as applicable.



8. Click the **Next** button.



*The Supplier Registration, Diversity Codes page appears.*

- Click the **Helper List** icon  on the top left corner of the screen.
- From the **Active Diversity Codes** screen, select the appropriate diversity codes.
- Click the **Attach to Supplier** button.
- Click the **Close** button.

9. Click the **Next** button.

*The Supplier Registration, Questions page appears.*

- For question 1 “**Can you attach your W9**”, in the **Answer** field, select the appropriate response.

- If you answered **Yes** to question 1, be sure to enter the document title you are uploading in the text box. Then, follow the steps below to attach the W9.
  - In the **Attach document** field, click the **attach** icon .
  - In the **Attach document** screen, click the **file** icon .
  - Navigate in your local PC and select a document.



- iv. Click the **Open** button.
- v. Click the **OK** button.

Attach document

Title:

File:

File Type:

OK Cancel


- 10. Click the **Next** button.

*The Supplier Registration, Commodity Codes page appears.*

Supplier Registration

Terms And Conditions ☒ Contact Information ☒ Company Information ☒ Diversity Codes ☒ Questions ☒ **Commodity Codes** ☐ Proxy Notifications ☐ Status ☐

Commodity Code  Description

- 11. Click the **Helper List** icon  on the top left corner of the screen.
- 12. From the **Commodity Codes** screen, select your applicable commodity code(s). \*Commodity codes are standard classification codes for products and services used to detail where money is spent within an organization. Using these codes tells Procurement Services what kinds of items are purchased most, so we can build better contracts to serve your needs.
- 13. Click the **Attach to Contact** button.
- 14. Click the **Close** button.

Available Commodity Codes

Commodity Search

Commodity Code Description

<input type="checkbox"/>	888	ARMCHAIRS
<input type="checkbox"/>	890	ACOUSTICAL TILE, INSULATING MATERIALS, AND
<input type="checkbox"/>	897	AMUSEMENT DECORATIONS, ENTERTAINMENT
<input type="checkbox"/>	940	ANIMALS, BEES, MARINE LIFE, AND POULTRY, E
<input type="checkbox"/>	990	ART EQUIPMENT AND SUPPLIES
<input type="checkbox"/>	992	ART OBJECTS


Attach to Contact Close

- 15. Click the **Next** button.

*The Supplier Registration, Proxy Notifications page appears.*





16. Click the **Add** icon  on the top left corner of the screen.
17. From the **Proxy Notification** screen, fill in all applicable fields to add additional email addresses to receive account notifications.

18. Click the **Next** button.  
*The Supplier Registration, Status page appears.*

19. Confirm that your Registration status is complete.  
**Note:** If the **Registration status** shows as **Not complete**, review all tabs to ensure all applicable information has been submitted.
20. Note your **Supplier Number** \_\_\_\_\_.
21. Click the **Home** icon in the top left corner of the screen.
22. Review the registration email that is sent to the registration email you provided.  
**Note:** You must log out and log back in to set up your security questions. These questions are required if you ever forget your password.



**Very Important:** After you have registered as a Supplier, immediately log out of the system and log back in with your new user ID and password. On your second log-in, you will be prompted to answer a series of security questions. Please provide a written response to each question and select “save” at the top, left of your screen. If these security questions are not answered, you will not be able to reset your password.

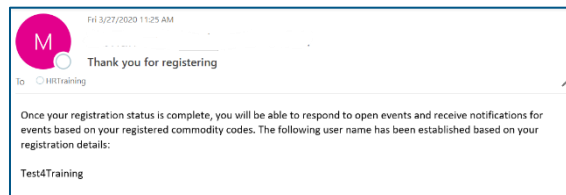
23. In the upper right corner, click your login name.
24. Click **Sign out**.
25. In the upper right corner, click **Anonymous Anonymous**.
26. Click **Sign in**.
27. Enter your **User Name** and **Password** and click **Login**.
28. You will be prompted to answer 5 security questions. Type the response for **ALL FIVE** questions and click the **save** icon.

**Note:** Security questions will enable you to reset your password in the future when needed.

29. Click the **Home** icon in the upper right corner of the screen.

#### Expected Results:

- ◆ New Supplier is registered and received confirmation email.



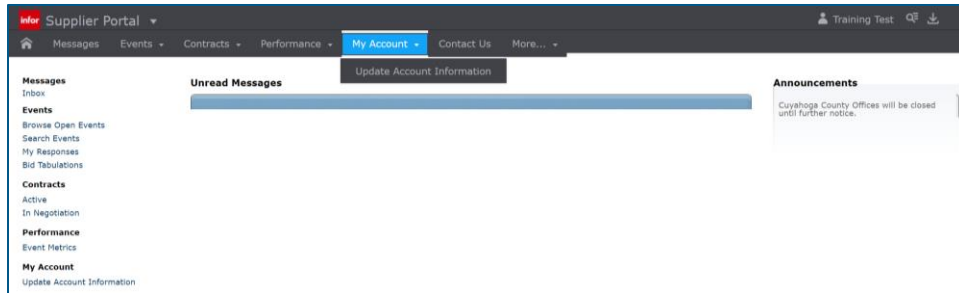
## Update Supplier Profile

Suppliers can make updates to their profile as needed.

### To Update Supplier Profile

1. From the **Supplier Portal** home page, click the **My Account** tab.
2. Click **Update Account Information**.





3. Update account information as applicable. Use the tabs on the left side of the screen to view and update additional account information.

4. Click the **Save** button on the top left corner of the screen.

**Note:** The **Save** button will appear after you have updated information in at least one field and clicked into another field.

#### Expected Results:

- ◆ Supplier updated their supplier profile.

### Create New Supplier Contact and Location

Suppliers can create new contacts and locations for their supplier profile.

#### To Create a New Contact and Location for Supplier

1. From the **Supplier Portal** home page, click the **My Account** tab.
2. Click the **Update Account Information** link.
3. Click the **My Contact** tab on the left side of the screen.





4. To create a new contact, click the **Create Contact** button.
  - a. In the **User Name** field, type a user name you will use in the portal.
  - b. In the **Password** field, type a user defined password.
  - c. In the **Confirm Password** field, retype the user defined password.
  - d. In the **First Name** field, type the first name.
  - e. In the **Last Name** field, type the last name.
  - f. In the middle **Phone Number** field, type the phone number.
  - g. In the **Email Address** field, type the email address.
  - h. Fill in other fields, as applicable.
5. Click the **Mailing Address** tab.
  - a. In the Country field, select **United States of America**.
  - b. In the **Address Line 1** field, type the appropriate address.
  - c. In the **Address Line 2-4** fields, type additional address information, as appropriate.
  - d. In the **City** field, type the city.
  - e. In the **State Province** field, select the state.
  - f. In the **Zip Code** field, type the zip code.
6. Click the **Next** button.
7. Click the **Helper List** icon on the top left corner of the screen.
8. From the **Commodity Codes** screen, select your applicable commodity code(s).
9. Click the **Attach to Contact** button.
10. Click the **Close** button.
11. Click the **Next** button.
12. Click the **Add** icon on the top left corner of the screen.
13. From the **Proxy Notification** screen, fill in all applicable fields to add additional email addresses to receive account notifications.
14. Click the **Next** button.

**Expected Results:**

- ◆ Supplier created a new contact.

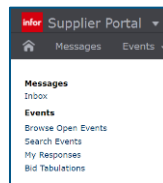


## Browse Open Events

Suppliers will log into Supplier Portal and submit responses, update existing responses, or ask questions to the Buyers.



1. From the **Supplier Portal** home page, click the home icon on the top left.
2. Click the **Browse Open Events** link on the left side of the screen.



*The Open Events screen will open.*

Event #	Version	Name	Category	Sub-Category	Type	Reference	Open Date	Close Date	Status
25		Temp staff for County	FORMAL RFP		FORMAL RFP				Open
26		Building Security	FORMAL RFP		FORMAL RFP (FS)				Open
27	2	Bulletin Board	FORMAL RFP		FORMAL RFP (FS)				Open
30	2	Seal bump and service	FORMAL RFP		FORMAL RFP				Open
33	3	Seal bump and service	INFORMAL		INFORMAL				Open
34	1	Seal bump and service	INFORMAL		FORMAL RFP				Open
35	3	Seal bump	INFORMAL		FORMAL RFP				Open
42	1	Seal bump and service	FORMAL RFP		FORMAL RFP (FS)				Amendment in progress
43	1	Insurance	FORMAL RFP		FORMAL RFP				Amendment in progress
50		Raven Planting	FORMAL RFP (PROFESSIO		FORMAL RFP (FS)				Open
56	1	Cleaning services	FORMAL RFP		FORMAL RFP				Open

3. Search for an event that you would like to view.
4. Double-click the event to open it.
5. Review the event details using the tabs on the left side of the screen.

**Note:** From the **Event Summary** screen, you can ask a question about the event, submit a no bid response, or respond to the event.

Event # 30 Version: 2 Event Name: Seal bump and service

Buttons: No Bid, Respond Now, Ask A Question

**Summary**

**Description**

Driver: County core team member responsible for running the script.  
Documenter: Infor team member responsible for completing the script capture documents.  
Facilitator: Infor lead in charge of the CRP session.  
Participants: County core team members, change

**Rules**

Type: FORMAL RFP Currency: USD  
Seal Bid: No All Lines Required: No  
No Bond Required: No



## To Inquire on an Event

Suppliers can search for events, including historical events, by following the instructions below.



1. From the **Supplier Portal** home page, click the home icon on the top left.
2. Click on **Events**, then click **Search Events**.
3. You can use any of the available fields to search. For example, in the **Commodity Search** field, type the commodity code you want to see events related to.
4. Review the events showing.
5. Double-click on the event.

## Ask a Question

Suppliers will log into Supplier Portal and submit responses, update existing responses, or ask questions to the Buyers.

### To Ask Question



1. From the **Supplier Portal** home page, click the home icon on the top left.
2. Click the **Browse Open Events** link on the left side of the screen.
3. Search for an event that you would like to view.
4. Double-click the event to open it.
5. Review the event details using the tabs on the left side of the screen.
6. Click the **Ask A Question** button.

Event Summary		
Print		
Event #:	30	Version: 2
Event Name:	taco bump and service	
<div>No Bid Respond Now Ask A Question</div>		
Summary		
Contacts	Description	
Questions		

7. In the **Question** field, type your question.



8. Click the **Save** icon .
9. Click the **Back** arrow on your browser.

#### Expected Results:

- ◆ Question is asked and sent to the contact on the event.

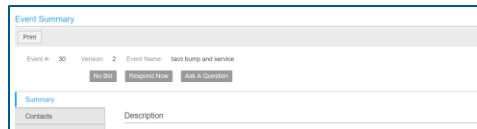
### Respond to an Event

Suppliers will be able respond to any open event. Suppliers must click submit after entering responses.

#### To Respond to Event



1. From the **Supplier Portal** home page, click the home icon on the top left.
2. Click the **Browse Open Events** link on the left side of the screen.
3. Search for an event that you would like to view.
4. Double-click the event to open it.
5. Review the event details using the tabs on the left side of the screen.
6. Click the **Respond Now** button.



*The Event Response screen appears.*

7. Select the **Terms and Conditions** checkbox.
8. Click the **Next** button.  
*The Line Responses screen appears.*
9. In the **Line Responses** screen, click the **Respond** hyperlink on the right side of the screen.



Line #	Item	Description	Line Quantity	Response Quantity	UOM	Unit Price	Extended Price
1	SERVICE	service	1,000	0.000	EA	0.00	0.00
2	TACO BURP	taco burp	4,000	0.000	EA	0.00	0.00

10. Fill in all applicable fields.

11. Click the **Next** button.  
*The Summary Screen Appears.*

12. Click the **Event Response** button.

13. Click the **Next** button.  
*The Question Responses screen appears.*
14. Fill in all question and answer fields. If a question requires an attachment, add the attachment.





15. Click the **Next** button.  
*The Response Attachments screen appears.*

16. In the **Response Attachments** screen, click the **Create** button.

17. In the **Attachment** field, click the **File** icon.

18. Select the file to upload.
19. Click **Open** button.
20. Click the **OK** button.
21. Click the **Next** button.  
*The Submit Response screen appears.*
22. Ensure your response is complete.

**Note:** If your response is **incomplete**, review all tabs to ensure all applicable information has been submitted.



23. Click the **Submit** button.
24. Click the **Home** button on the top left corner of the screen.

### Expected Results:

- ◆ Responded to sealed event in Supplier portal.

## Submit a No Bid Response

If a supplier chooses not to bid on an event, they are encouraged to enter a no bid response to give a reason for the no bid. No bid information helps Cuyahoga County to improve our requests through feedback relating to the bid request and/or the reason(s) why a Vendor cannot furnish the requested goods/service.

### To Submit No Bid Response to Event



1. From the **Supplier Portal** home page, click the home icon on the top left.
2. Click the **Browse Open Events** link on the left side of the screen.
3. Search for an event that you would like to view.
4. Double-click the event to open it.
5. Review the event details using the tabs on the left side of the screen.
6. Click the **No Bid** button.

7. In the **No Bid Reason** field, select the appropriate reason code.



8. Click the **OK** button.

#### Expected Results:

- ◆ Submitted a No Bid response.

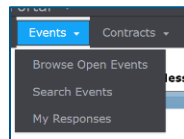
### Update Response to an Event

Suppliers will have the ability to update their responses after they are submitted as long as the event has not closed.

#### To Update Response to Event



1. From the **Supplier Portal** home page, click the home icon on the top left.
2. Click the **Events** link on the top of the screen, then click **My Responses**.



3. Select the **Responses Open for Award** tab.
4. Find the event response you want to update.
5. Right-click on the event and click **Modify Response**.
6. Click the **Yes** button on the **Confirmation Required** window.
7. Click the **Unsubmitted Initial Responses** tab.

**Note:** If the response you are editing is a **Best and Final** or **Pricing** response, click the appropriate tab.

8. Right-click on the response you want to edit.
9. Click **Update**.



*The Event Response screen appears.*

10. Update your response as applicable.
11. On the **Submit Response** screen, click the **Submit** button.
12. Click the **Home** button on the top left corner of the screen.

**Expected Results:**

- ◆ Response modified by supplier.

## Reset Account Password

If you forget your account password, you can reset it. You must have answered the security questions when you registered your account in order to complete the password reset process.

### To Reset Account Password

1. From the login screen, click the **Forgot your Password?** link.

County of Cuyahoga logo

User Name \*

Required

Password \*

Login

[Register a new user](#) [Forgot your password?](#)

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2. Type your **User Name** and click **Reset**.

Reset your Password

Enter your username:

User Name

Reset

Go Back

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3. Answer your security question and click **Reset**.

**Note:** If your security question does not display, it was not set up properly during registration and you are unable to reset your password. At this point, if you are unable to successfully log back into the Supplier Portal, please call the Office of Procurement and Diversity at 216-443-7200, during the hours of 8:30 AM-4:30PM EST Monday - Friday.

4. You will be logged into the system and prompted to type in a new password. Type the new password in both the **New Password** and **Confirm New Password** fields.
5. Click the **Save** icon.

### Expected Results:

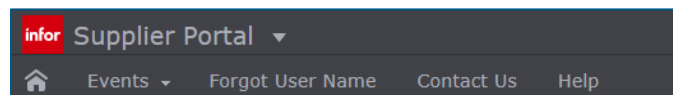
- ◆ Password reset by supplier.

## Forgot User Name

If you forget your Supplier Portal user name, you can have it emailed to the account you registered with.

### To Retrieve User Name

1. On the Supplier Portal Home Page, click **Forgot User Name**.



2. Enter the email address you registered with. You will be prompted to enter the email address twice.
3. Click the **OK** button.



**Expected Results:**

- ◆ Your user name will be emailed to you.