# Vendor Registration Instructions

**May 4, 2018**

1. For the best Vendor Registration experience, use Google Chrome or Mozilla Firefox. Microsoft Internet Explorer (IE) is not recommended.
   - If using IE to register, the *File Insert* dialogue will not immediately display when attempting to attach a W-9. If this occurs, click **Register.** The missing W-9 will flag as an error, and the *File Insert* dialogue will display correctly.

2. Important information related to completing *Company Details*:
   - *Tax Organization Type* – Choose the drop down that matches your W-9. If you are not clear, choose **Other**.
   - *Supplier Type* – Leave blank or choose **Supplier-Vendor**. Do not choose any other option. All other options are for Citizens internal use only.
   - *Vendor Classification* – Leave blank. This is for Citizens internal use only.
   - *CPIC Sunbiz Status* – Leave blank. This is for Citizens internal use only.
   - *Document Number* – This refers to your *Florida Department of State Identification Number*.

3. Important information related to completing *Addresses*:
   - *Address Name* – Enter the name of your city. This will be identical to the city name used in the full business address.

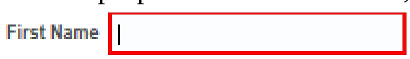
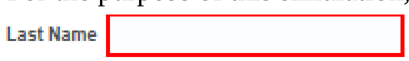
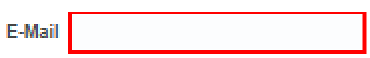
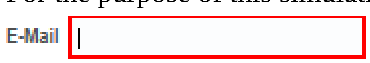
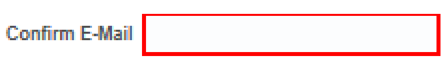
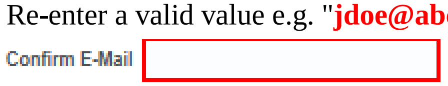
4. Important information related to completing *Questionnaire*:
   - A pop-up window with the following message may appear:

     *You do not have permission to add a new attachment.*

     If this occurs, click **Register**. The missing W-9 will flag as an error, and the pop-up window message no longer will display.

# Register Supplier - External Registration Request

| Step | Action |
|---|---|
| 1. | *Note:* A supplier would receive an email with a link to the *Register Supplier: Company Details* page. |
| 2. | Click in the **Company** field.<br>Company |
| 3. | Enter the desired information into the **Company** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**ABC Company**".<br>Company |
| 4. | Click the **Tax Organization Type** list.<br>Tax Organization Type |
| 5. | Click the **Corporation** list item.<br>Corporation |
| 6. | Click the button to the right of the **Supplier Type** field.<br>Supplier Type |
| 7. | Click the **Supplier- Vendor** list item.<br>Supplier-Vendor |
| 8. | Click in the **Tax Country** field.<br>Tax Country |
| 9. | Enter the desired information into the **Tax Country** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**Un**" (for United States).<br>Tax Country |
| 10. | Click the **United States US** list item.<br>United States US |
| 11. | Click in the **Taxpayer ID** field.<br>Taxpayer ID |

| Step | Action |
|---|---|
| 12. | Enter the desired information into the **Taxpayer ID** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**999999123**".<br> |
| 13. | Click the button to the right of the **Taxpayer ID Type** field.<br> |
| 14. | Click the **FEIN** list item.<br><br>FEIN = Federal Employer Identification Number.<br> |
| 15. | Click in the **First Name** field.<br> |
| 16. | Enter the desired information into the **First Name** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**John**".<br> |
| 17. | Click in the **Last Name** field.<br> |
| 18. | Enter the desired information into the **Last Name** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**Doe**".<br> |
| 19. | Click in the **E-Mail** field.<br> |
| 20. | Enter the desired information into the **E-Mail** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**jdoe@abc.com**".<br> |
| 21. | Click in the **Confirm E-Mail** field.<br> |
| 22. | Enter the desired information into the **Confirm E-Mail** field.<br><br>Re-enter a valid value e.g. "**jdoe@abc.com**".<br> |

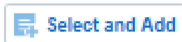
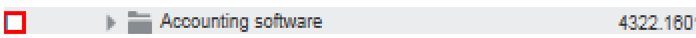
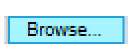
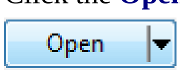
| Step | Action |
|---|---|
| 23. | Click the **Next** button to navigate to the *Contacts* page.<br>Next |
| 24. | The *Register Supplier: Contacts* page is displayed.<br><br>Click the **Edit** button.<br>Edit |
| 25. | The *Edit Contact* popup is displayed.<br><br>The contact name is mostly complete, but additional details can be added as needed.<br><br>Click in the **Job Title** field.<br>Job Title |
| 26. | Enter the desired information into the **Job Title** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**Sales Rep**".<br>Job Title |
| 27. | Click the **OK** button.<br>OK |
| 28. | Click the **Next** button to navigate to the *Addresses* page.<br>Next |
| 29. | Click the **Create** button.<br>Create |
| 30. | The *Create Address* popup is displayed.<br><br>Click in the **Address Name** field.<br>Address Name |
| 31. | Enter the city name into the **Address Name** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**Jacksonville**".<br>Address Name |
| 32. | Click in the **Country** field.<br>Country |
| 33. | Enter the desired information into the **Country** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**Un**" (for United States).<br>Country |

| Step | Action |
| --- | --- |
| 34. | Click the **United States US** list item.<br>United States US |
| 35. | Click in the **Address Line 1** field.<br>Address Line 1 |
| 36. | Enter the desired information into the **Address Line 1** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**123 Vendor Rd**".<br>Address Line 1 |
| 37. | Click in the **Postal Code** field.<br>Postal Code |
| 38. | Enter the desired information into the **Postal Code** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**32202**".<br><br>*Hint:* Enter postal code first, then pick the city and state from a short list.<br>Postal Code |
| 39. | Press **[Tab]**. |
| 40. | For the purpose of this simulation, click the **32202, Jacksonville, Duval, FL** cell.<br>32202, Jacksonville, Duval, FL |
| 41. | Click the **OK** button.<br>OK |
| 42. | *Note:* Select Ordering and Remit to if both purposes share the same address. If not, then add additional addresses for each purpose.<br><br>Click the **Ordering** option.<br>☐ Ordering |
| 43. | Click the **Remit to** option.<br>☐ Remit to |
| 44. | Click the **RFQ or Bidding** option.<br>☐ RFQ or Bidding |
| 45. | Click the **Select and Add** button. |

| Step | Action |
|---|---|
| 46. | The *Select and Add: Contacts* popup is displayed.<br><br>Click the **Doe, John** highlight button.<br> |
| 47. | Click the **OK** button to accept the Contact.<br> |
| 48. | Click the **OK** button to accept the Address.<br> |
| 49. | Click the **Next** button to navigate to the<br>*Business Classifications* page.<br> |
| 50. | Click the **Add Row (+)** button.<br><br>*Note:* Select the 'None of the classifications are applicable' box if none of these apply:<br><br>- Vendor Diversity Declarations (VDD)<br>- Service Organization Controls Report (SOC)<br>- Proof of Insurance<br><br> |
| 51. | Click the button to the right of the ***Classification** field.<br> |
| 52. | Click the **Florida Business Enterprise** list item.<br> |
| 53. | Click the button to the right of the **Certifying Agency** field.<br> |
| 54. | Click the **Florida Department of State** list item.<br> |
| 55. | Click in the **Certificate** field.<br> |
| 56. | Enter the desired information into the **Certificate** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**123456**". |
| 57. | Click in the **Start Date** field.<br> |

| Step | Action |
|---|---|
| 58. | Enter the desired information into the **Start Date** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**1/1/2016**". |
| 59. | Click in the **Expiration Date** field. |
| 60. | Enter the desired information into the **Expiration Date** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**12/31/2017**". |
| 61. | Click the **Attachments** button to add any supporting documents. |
| 62. | The *Attachments* popup is displayed.<br><br>Click the **Browse** button. |
| 63. | The *Documents Library* page is displayed.<br><br>Click the **FBE Document.docx** list item. |
| 64. | Click the **Open** button. |
| 65. | The attachment is returned.<br><br>Click the **OK** button. |
| 66. | Click the **Next** button to navigate to the *Bank Accounts* page. |
| 67. | Click the **Create** button.<br><br>*Note:* Adding a bank account at registration is optional and can be completed at a later date. |
| 68. | The *Create Bank Account* popup is displayed.<br><br>Click in the **Country** field. |

| Step | Action |
|---|---|
| 69. | Enter the desired information into the **Country** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**Un**" (for United States).<br>Country |
| 70. | Click the **United States US** list item.<br>United States US |
| 71. | Click the button to the right of the **Bank** field.<br>Bank |
| 72. | For the purpose of this simulation, click the **1ST BANK** list item.<br>1ST BANK |
| 73. | Click the button to the right of the **Branch** field.<br>Branch |
| 74. | For the purpose of this simulation, click the **92901434-MTBROADUS** list item.<br>92901434-MTBROADUS |
| 75. | Click in the **Account Number** field.<br>Account Number |
| 76. | Enter the desired information into the **Account Number** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**123456**".<br>Account Number |
| 77. | Click in the **Account Name** field.<br>Account Name |
| 78. | Enter the desired information into the **Account Name** field.<br><br>For the purpose of this simulation, enter a valid value e.g. "**My Checking**".<br>Account Name |
| 79. | Click the button to the right of the **Account Type** field.<br>Account Type |
| 80. | Click the **Checking** list item.<br>Checking |
| 81. | Click the **OK** button.<br>OK |

| Step | Action |
|---|---|
| 82. | Click the **Next** button to navigate to the *Products and Services* page.<br> |
| 83. | Click the **Select and Add** button.<br> |
| 84. | The *Select and Add* popup is displayed.<br><br>Scroll to search for any commodity codes that you may provide to Citizens.<br><br>For the purpose of this simulation, click the **Accounting Software** option.<br> |
| 85. | Click the **Apply** button.<br> |
| 86. | Click the **OK** button.<br> |
| 87. | Click the **Next** button to navigate to the *Questionnaire* page.<br> |
| 88. | For the purpose of this simulation, click the **a. Please submit a valid W- 9 Form with your registration.** option.<br> |
| 89. | Click the **Manage Attachments (+)** button to add the W- 9 document.<br> |
| 90. | The *Attachments* popup is displayed.<br><br>Click the **Add (+)** button.<br> |
| 91. | Click the **Browse** button.<br> |
| 92. | The *Documents Library* is displayed. Open the appropriate file.<br><br>For the purpose of this simulation, click the **W- 9 Form.pdf** list item. |
| 93. | Click the **Open** button.<br> |

| Step | Action |
|---|---|
| 94. | The attachment is returned.<br><br>Click the **OK** button to accept the attachment.<br>OK |
| 95. | There may be more questions to answer so be sure to click the **Arrow** button (or the section drop down). |
| 96. | For the purpose of this simulation, click the **b. I registered using a Federal Employee Identification Number (FEIN)** option or SSN option appropriately.<br>b. I registered using a Federal Employee Identification Number (FEIN). |
| 97. | Click the **Next** button to navigate to the *Review* page.<br>Next |
| 98. | *Note:* Review the details before submitting. |
| 99. | After reviewing the Supplier Registration, click the **Register** button.<br>Register |
| 100. | Your registration has been submitted. It will be process in a timely manner and you will receive an E-mail with login instructions.<br><br>Click the **OK** button.<br>OK |
| 101. | **Congratulations!**<br><br>You have successfully completed:<br><br>- How to Register as a New Supplier with Citizens Property Insurance Corporation.<br>**End of Procedure.** |