

## 1. Registering as a New Supplier

Thank you for your interest in doing business with Dallas County!

Follow these instructions to register as a Prospective Supplier and request a Supplier Portal profile.

### *Gather Your Info Before You Get Started:*

To expedite your Supplier Registration, you should be prepared to provide the following information:

1. **Company Details:** Legal Business Name, Tax Organization type, Tax Identification Number(s), and the Primary Contact information for the registration.
2. **Contacts:** Names and unique, valid Email Addresses. **Please note, you MUST provide a valid email address for each contact in order to grant them access to the Supplier Portal.**
3. **Addresses:** Street Name, Postal Code, City, State, as well as Address Purposes (Ordering, Remit to, and RFP or Bidding Addresses).
4. **Business Classifications:** Any applicable Business Classifications (example: Minority Business Enterprise), Certificate Number from a Certifying Agency, Start and Expiry Dates of your Certification, and a copy of your Certificate to attach to your registration request.
5. **Bank Accounts:** Bank Names, Branch Numbers (Routing Numbers), and Account Numbers. You may choose to skip this step until you've been awarded business from Dallas County, if desired.
6. **Products and Services:** You'll make selections of the Products and Services Categories you wish to offer to Dallas County.



### Step 1: Company Details

Only some information is required to register, but it is advised to input as much relevant information as possible to complete your Supplier Portal profile.

#### Company Details - Required Information

1. **Company:** Enter your legal organization name.
2. **Tax Organization Type:** Click the **dropdown menu** and select an option, such as a Corporation, Partnership, or Individual.
3. Additionally, you must provide at least ONE of the following:  
**D-U-N-S Number, Taxpayer ID, or Tax Registration Number.**
4. **Primary Contact Info:** Enter the contact information for communications regarding this registration. Enter your **First Name** and **Last Name**.
5. **Valid Email Address:** Enter and confirm your **Email Address**.
6. Add optional information if desired. If you do NOT wish to provide optional information, click the **Next** button.

On the Company Details screen, you'll see other fields that you can use to provide other relevant information, which is optional, but advised. Instructions for optional information is provided on the following page.

The screenshot shows the 'Register Supplier: Company Details' form. At the top is a navigation bar with a progress indicator showing steps 1 through 7. Step 1, 'Company Details', is the current step. Below the navigation bar, the form title is 'Register Supplier: Company Details'. A note states: 'Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.' The form fields are: 'Company' (text input, callout 1), 'Tax Organization Type' (dropdown menu, callout 2), 'D-U-N-S Number' (text input, callout 3), 'Tax Country' (dropdown menu, set to 'United States'), 'Taxpayer ID' (text input), and 'Tax Registration Number' (text input, containing '12-3456789', callout 3). At the bottom right are three buttons: 'Next' (callout 6), 'Save for Later', and 'Register'.

#### Your Contact Information

Enter the contact information for communications regarding this registration.

The screenshot shows the 'Your Contact Information' form. It contains four fields: 'First Name' (text input, callout 4), 'Last Name' (text input, callout 4), 'Email' (text input, callout 5), and 'Confirm Email' (text input, callout 5). The 'Email' field contains 'email@example.com' and the 'Confirm Email' field also contains 'email@example.com'.

### Company Details cont.

1. In the Company Details section, add a **Supplier Type** (such as Consultant, Attorney, or Supplier), a **Corporate Website**, or relevant **Attachments** (such as a valid W-9 Form). You can also enter a **Note to Approver** with other information to supplement your registration.
2. In the Additional Information section, add a **Bar Number** (for Attorneys), select a **Gender** and **Ethnicity**.
3. When you've completed entering all relevant details, click the **Next** button to continue your Supplier Registration.

Next, you'll provide Contacts associated with this Supplier Registration. Please note, **you MUST provide a valid email address for each contact in order to grant them access to the Supplier Portal.**

**Register Supplier: Company Details**

1 Supplier Type: Supplier

Corporate Web Site: examplecompany.com

Attachments: None

Note to Approver: Minority-Owned Business

**Additional Information**

2 Bar Number:

Gender: Male

Ethnicity: African American

## Step 2: Contacts

You can add Contacts associated with your Supplier Portal registration, each with varying levels of access to administrate your profile, interact with the County, and complete daily tasks such as invoicing.

Please note, **you MUST provide a valid email address for each contact in order to grant them access to the Supplier Portal.**

### Contacts – Edit Existing Contact Details

One Contact will be automatically created, based on the information entered on the Company Details screen. By default, the first person to register your company will automatically be assigned as an **Administrative Contact**. The administrative contact will have administrative rights in the Supplier Portal and will have the ability to add more contacts and specify their roles and privileges.

1. The first Contact was created as an **Administrative Contact**, based on the information entered on the Company Details screen. To provide additional details, click the **Contact Name** and click the **Edit** button. A pop-up screen will appear.
2. In the Edit Contact screen, enter relevant information as needed, such as **Job Title** or **Phone Numbers**.
3. In the User Account section, you'll see the system **Roles** associated with this contact. Some roles will be automatically assigned by default, and you can add or delete roles as needed. Detailed instructions about Roles are provided in the next section of this document.
4. When you've completed editing this contact, click the **OK** button.

The next section will provide instructions about assigning **Roles** to a contact.

The screenshot shows the 'Register Supplier: Contacts' page. At the top is a progress bar with steps 1 through 7: Company Details, Contacts, Addresses, Business Classifications, Bank Accounts, Products and Services, and Review. The 'Contacts' step is active. Below the progress bar is a table of contacts. The first contact, 'Doe, John' with email 'john.doe@examplecomp...', is highlighted with a red box and a green box. A red callout '1' points to the 'Edit' button in the table's action column. Below the table is the 'Edit Contact: John Doe' form. A green box highlights the 'Phone' and 'Mobile' fields, with a green callout '2' pointing to the 'Mobile' field. Below the form is the 'User Account' section, which is highlighted with a red box and a red callout '3'. The 'User Account' section has a checkbox for 'Request user account' and a table of roles. The table has two columns: 'Role' and 'Description'. The first role is 'Supplier Accounts Receivable Specialist' with the description 'Manages invoices and payments'. At the bottom right, there is an 'OK' button highlighted with a green box and a green callout '4', and a 'Cancel' button.

Register Supplier: Contacts ?

Enter at least one contact.

Actions View Format Create Edit Delete Freeze

Name	Email	Administrative Contact	Request User Account
Doe, John	john.doe@examplecomp...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Edit Contact: John Doe

Salutation

\* First Name John

Middle Name

\* Last Name Doe

Job Title Chief Executive Officer

Phone 1 123 4567890

Mobile

Fax

\* Email john.doe@examplecompany.com

☒ Administrative contact

User Account

☒ Request user account

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments

OK Cancel

### Contacts – User Role Definitions

Below is the list of User Roles and their Definitions. Only assign Roles to the Contacts you wish to be able to complete the tasks as described in the definition. It is advised to assign all Roles to the Primary Contact and Supplier Administrator.



**Supplier Accounts Payable Specialist:** Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.



**Supplier Bidder:** Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requests for information and reverse auctions.



**Supplier Customer Service Representative:** Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include tracking, acknowledging or requesting changes to new orders. Communicates order schedules that are ready to be shipped by submitting advance shipment notices, and monitors the receipt activities performed by the buying organization.



**Supplier Inventory Manager:** Individual in a supplier organization responsible for managing inventory process control from beginning to end. Monitors available supplies, materials and products to ensure that customers, employees and production have access to the materials they need.



**Supplier Sales Representative:** Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to agreements in addition to adding catalog line items with customer specific pricing and terms. Updates contract deliverables that are assigned to the supplier party and updates progress on contract deliverables for which the supplier is responsible.



**Supplier Self Service Administrator:** Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.

### Contacts – Assigning User Roles

Assigning User Roles is important when creating and editing contacts, as this will determine the level of access a user has and the types of [tasks](#) they'll be able to complete in the Supplier Portal.

1. On the Contacts screen, click the **Contact Name** and click the **Edit** button. A pop-up screen will appear.
2. In the Edit Contact screen, under the User Account section, you'll see the system **Roles** associated with this contact. Some roles will be automatically assigned by default, and you can add or delete roles as needed.
3. To add a new Role, click the **Add** icon.
4. A pop-up screen will appear with a list of available roles and their descriptions. **Hover over a Description** to view the full description. Full descriptions are also provided in the next section of this document.
5. Click the **Role** you want to [assign](#), and click the **OK** button. Repeat these steps to add more roles to the contact, as needed.
6. To delete a Role, click the **Role** and click the **Delete (X)** icon.

### Register Supplier: Contacts

Enter at least one contact.

Actions View Format Create Edit Delete Freeze

Name	Email	Administrative Contact	Request User Account
Doe, John	john.doe@examplecomp...	✓	✓

**Edit Contact: John Doe**

User Account

✓ Request user account

Roles

Actions View Format X Add Freeze Detach

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments

Select and Add: Roles

View Format Wrap

Supplier Inventory Manager	Individual in a supplier organization responsible for managing the supplier's inventory.
Supplier Sales Representative	Manages agreements and deliverables for the supplier.
Supplier Self Service Administrator	Manages agreements and deliverables for the supplier company. Primary tasks include: acknowledging or requesting changes to agreements in addition to adding catalog line items with customer specific pricing and terms. Updates contract deliverables that are assigned to the supplier party and updates progress on contract deliverables for which the supplier is responsible.

Rows Selected: 1

5 Apply OK Cancel

### Contacts – Adding a New Contact

One Contact will be automatically created, based on the information entered on the Company Details screen. Use the Contacts screen to add more Contacts, as needed. Remember that **all Contacts MUST have a valid email address to request a user account**. You can add Contacts without an email, but they will NOT have access to the Supplier Portal.

1. To add a new Contact, click the **Create (+)** button.
2. In the Create Contact screen, enter required information, such as **First Name**, **Last Name**, and **Email Address**. Enter relevant information as needed, such as **Job Title** or **Phone Numbers**.
3. If you want this Contact to be able to manage your business profile, click the **Administrative contact** checkbox.
4. If you want this Contact to have a user account in Supplier Portal, click the **Request user account** checkbox.
5. In the User Account section, you'll see the system **Roles** associated with this contact. Some roles will be automatically assigned by default, and you can add or delete roles as needed. To add a new Role, click the **Add** icon. To delete a Role, click the **Role** and click the **Delete (X)** icon.
6. When you've completed editing this contact, click the **OK** button.
7. When you've completed adding and editing all desired contacts, click the **Next** button to continue your Supplier Registration.

Next, you'll provide Addresses associated with this Supplier Registration. You can add different Addresses for: **Ordering**, **Remit to**, and **RFP or Bidding**. You can also choose Contacts to associate with the different Addresses.

The screenshot shows the 'Register Supplier: Contacts' interface. At the top, a progress bar indicates steps 1 through 7, with step 2 (Contacts) currently active. The main heading is 'Register Supplier: Contacts'. Below it, a table lists existing contacts. A red box labeled '1' highlights the '+ Create' button. Below the table, a 'Create Contact' form is shown, with a green box labeled '2' around it. The form includes fields for Salutation, First Name, Middle Name, Last Name, Phone, Mobile, Fax, Email, and Job Title. Checkboxes for 'Administrative contact' (labeled '3') and 'Request user account' (labeled '4') are present. Below the form, the 'User Account' section shows a table of roles. A red box labeled '5' highlights the 'Add' icon in the role table. At the bottom right, a green box labeled '6' highlights the 'OK' button.

Name	Email	Administrative Contact	Request User Account
Doe, John	john.doe@examplecomp...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Create Contact**

Salutation:

Phone:  1  123  4567890

\* First Name:  John

Mobile:

Middle Name:

Fax:

\* Last Name:  Doe

\* Email:  john.doe@examplecompany.com

Job Title:  Chief Executive Officer

☒ Administrative contact

☒ Request user account

**User Account**

Roles

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments

☒

### Step 3: Addresses

You can add multiple Addresses associated with your [organization](#), and add Contacts who are associated with each Address. You can have one Address or add different Addresses for: **Ordering**, **Remit to**, and **RFP or Bidding**.

#### Addresses – Adding a New Address

1. To add a new Address, click the **Create** button.
2. In the Create Address screen, enter required information, such as **Address Name**, **Address Line 1**, and **Postal Code**.  
**Helpful Hint:** Enter the **Postal Code** first, then press the **Tab** key. If there are multiple cities/municipalities associated with this zip code, a pop-up will appear to select the correct one.
3. Click the appropriate checkboxes next to **Address Purpose**.

**Ordering Addresses:** Purchasing documents can be communicated to this address.

**Remit to Addresses:** Invoice payments can be processed at this address.

**RFP or Bidding Addresses:** Negotiations (Solicitations) and bids can be communicated to this address.

4. Add other relevant information, such as **Phone Number** or **Email** that is associated specifically with this Address.
5. You can also add Contacts associated with this Address, which is explained in the next section. If you do NOT wish to add Address Contacts, click the **OK** button and repeat these steps as necessary to add more Addresses. Otherwise, keep the Create Address screen open to add Address Contacts.
6. When you've completed adding and editing all Addresses and Address Contacts, click the **Next** button to continue your Supplier Registration.

The next section will provide instructions about adding **Address Contacts**.

The screenshot shows the 'Register Supplier: Addresses' form. At the top, a progress bar indicates steps 1 through 7: Company Details, Contacts, Addresses (current), Business Classifications, Bank Accounts, Products and Services, and Review. The 'Create Address' form is displayed below. Numbered callouts are as follows: 1 points to the 'Create' button in the table header; 2 points to the 'Address Name' field; 3 points to the 'Address Purpose' checkboxes (Ordering, Remit to, RFQ or Bidding); 4 points to the 'Phone' field; 5 points to the 'OK' button at the bottom right; and 6 points to the 'Next' button at the top right. The form fields include: Address Name (Example Address), Country (United States), Address Line 1 (1234 Example Street), Address Line 2 (Suite 123), Address Line 3, City (Dallas), State (TX), Postal Code (75201), Phone (1 123 4567890), Fax, and Email (address@examplecompany.com). The 'Address Purpose' section has three checkboxes: 'Ordering' (checked), 'Remit to' (checked), and 'RFQ or Bidding' (checked). The bottom right has buttons for 'Create Another', 'OK', and 'Cancel'.



Addresses – Adding Address Contacts

- 1. In the Create Address screen, under the Contact Address section, click the **Add** icon.
- 2. Click the **Name** of the Contact you wish to add to this Address. Click the **OK** button. Repeat these steps to add more Address Contacts, as needed.
- 3. Once you've added all Address Contacts, you'll be taken back to the Create Address screen, and will see the Names under Address Contacts.
- 4. Click the **OK** button to complete adding this Address.
- 5. Once you've added all Addresses and Address Contacts, click the **Next** button to continue your Supplier Registration.

Home

Info

Sign In

1

2

3

4

5

6

7

Company Details

Contacts

Addresses

Business Classifications

Bank Accounts

Products and Services

Review

Register Supplier: Addresses

Next

Save for Later

Register

Enter at least one address.

Actions

View

Format

Create

Edit

Delete

Freeze

Address Name	Address
Example Address	1234 Example Street,Suite 123,Dallas, TX 75202

Create Address

\* Address Name

Example Address

\* Country

United States

\* Address Line 1

1234 Example Street

Address Contacts

Select the contacts that are associated with this address.

1

Actions

View

Format

+

Freeze

Detach

Name

Select and Add: Contacts

View

Format

Wrap

Name	Job Title	Email
Bidder, Example		bidder@exampl...
Doe, Jane		jane.doe@exam...
Doe, John	Chief Executive ...	john.doe@exam...

2

Apply

OK

Cancel

Create Address

Address Contacts

3

Name

4

OK

Cancel

#### Step 4: Business Classifications

You can add Business Classifications that support the tracking of supplier certifications that are important to companies for different reasons, such as for supplier diversity programs. If no Business Classifications are applicable to your business, you can click one checkbox and move to the next step in your Supplier Registration.

#### Business Classifications – Adding a Business Classification

1. If no Business Classifications are applicable to your business, click the **None of the classifications are applicable** checkbox, and click the **Next** button to continue your Supplier Registration.
2. To add a Business Classification, click the **Add (+)** button.
3. In the **Classification** column, click the **dropdown menu** and select an option. Classification Definitions are available in the next section of this document.
4. In the **Certifying Agency** column, click the **dropdown menu** and select a **Certifying Agency**.
  - a. Click **Search** to locate a different Certifying Agency.
  - b. If you are unable to locate the Certifying Agency, click the **OTHER** option in the dropdown menu, and add Attachments and a Note.
5. Enter a **Certificate Number** issued by your Certifying Agency.
6. Enter the **Start Date** and **End Date** of your Certificate.
7. Upload any relevant **Attachments**, such as your Certificate.
8. Add any relevant **Notes**, such as a different Certifying Agency not listed in Search results.
9. Repeat these steps to add more Business Classifications, as needed. Once you've added all applicable Business Classifications, click the **Next** button to continue your Supplier Registration.

The screenshot shows the 'Register Supplier: Business Classifications' form. At the top, a progress bar indicates the current step is 'Business Classifications' (step 4). The form includes a 'None of the classifications are applicable' checkbox (callout 1) and a 'Next' button (callout 9). Below this is a table with columns: 'Classification', 'Certifying Agency', 'Certificate', 'Start Date', and 'Expiration Date'. A dropdown menu for 'Classification' is open (callout 3), showing options like DBE, HUB, LGTBQBE, MBE (selected), MWBE, SBE, SDMBE, SDMWBE, SMWBE, SWBE, VOSB, WBE, and WOSB. The 'Certifying Agency' dropdown is also open (callout 4), showing options like DFWMSDC, NCTRCA, and OTHER. The 'Certificate' field contains 'MBE12345678' (callout 5). The 'Start Date' and 'Expiration Date' fields are set to '01/01/20' (callout 6). Below the table, there are 'Attachments' (callout 7) and 'Notes' (callout 8) sections. A 'Search...' button is located below the 'OTHER' option in the 'Certifying Agency' dropdown (callout 4a/b).

### Business Classifications – Definitions

Here at Dallas County, we embrace and support an inclusive culture where all are respected, their contributions are encouraged and valued, while we seek sustainable and mutually beneficial outcomes for all. This commitment extends to our inclusive supply chain, where we ensure that there are bid opportunities and access for small and diverse owned business who wish to provide their goods and/or services to Dallas County.



#### **Business Classifications:**

**DBE:** Disadvantaged Business Enterprise

**HUB:** Historically Underutilized Business in the state of Texas

**LGBTQBE:** Lesbian, Gay, Bi-sexual, Transgender, Queer, Business Enterprise

**LGBTQBE+:** Gender Non-Conforming, Non-Binary, Gender Expansive Business Enterprise

**MBE:** Minority Business Enterprise

**MWBE:** MWBE-Minority Woman Owned Business

**SBE:** Business that is privately owned with a small number of employees and relatively low revenue

**SDMBE:** Small Disadvantaged Minority Owned Business Enterprise

**SDMWBE:** Small Disadvantaged Minority Woman Owned Business Enterprise

**SMWBE:** Small Minority Woman Owned Business Enterprise

**SWBE:** Small Woman Owned Business Enterprise

**VOSB:** Veteran Owned Small Business owned by a military veteran

**WBE:** Woman Owned Business

**WOSB:** Woman Owned Small Business

### Business Classifications – How Do I Qualify as a Dallas County SBE?

- At the time of the proposal/bid submission, your business must be certified as an SBE by one of the following County approved entities:
  1. [DFW Minority Supplier Development Council](#),
  2. [North Texas Regional Certification Agency \(NCTRCA\)](#) and/or
  3. the [Women's Business Council of Southwest](#),
- Other certifications are not acceptable.
- 51% or more owned and controlled
- Firm must be organized as a for-profit business
- Must also perform a [commercially-useful](#) function on the project and have a local presence in Dallas County Metropolitan Statistical Area (MSA) in order to be counted for SBE points. The MSA includes the following counties: Dallas, Tarrant, ~~Denton~~ and Collin.

### Step 5: Bank Accounts

You can add Bank Accounts at different levels of your organization, if needed. The Bank Accounts you add during registrations are considered "Profile Level" Bank Accounts, the highest-level for payment remittance. If your business only accepts payments in one Bank Account, adding it here will make it your default Primary Bank Account. Once your Supplier Profile has been established, you can also add Bank Accounts at the Address and/or Site levels to ensure payments are received to the correct accounts.

#### Bank Accounts – Adding a Profile-Level Bank Account

1. To add a new Bank Account, click the **Create (+)** button.
2. Enter the **Country** (usually United States). Begin typing the **Bank** name, and options will display. Select the appropriate **Bank** for your account.
3. Enter the **Branch Number**, also known as the Routing Number.
4. Enter your **Account Number**.
5. Optionally, enter additional information, such as: **Account Name**, **Account Type**, **Description**, **Check Digits** (to verify account info), and **Notes to Approver**. Add any other relevant optional information in available fields.
6. Click the **OK** button to add this Bank Account. Repeat these steps as necessary to add more Bank Accounts at the Profile level.
7. Once you've added all Bank Accounts, click the **Next** button to continue your Supplier Registration.

Next, you'll indicate the Products and Services your company provides.


The screenshot shows the 'Register Supplier: Bank Accounts' form. At the top, a progress bar indicates the current step is 'Bank Accounts' (step 5). The form is titled 'Register Supplier: Bank Accounts' and includes a 'Next' button and a 'Save for Later' button. Below the title, there is a prompt 'Enter at least one bank account.' and a 'Create (+)' button, which is highlighted with a red box and a green circle labeled '1'. Below this, there is a 'Create Bank Account' section. It prompts the user to 'Enter account number or IBAN unless account number is marked as required.' and contains several input fields: 'Country' (dropdown menu, highlighted with a green box and a green circle labeled '2'), 'Bank' (dropdown menu, highlighted with a green box and a green circle labeled '3'), 'Branch' (dropdown menu, highlighted with a red box and a green circle labeled '3'), and 'Account Number' (text input field, highlighted with a green box and a green circle labeled '4'). Below these fields is an 'Additional Information' section, which is highlighted with a red box and a green circle labeled '5'. This section includes fields for 'Account Name' (text input, highlighted with a green box and a green circle labeled '5'), 'Account Type' (dropdown menu), 'Description' (text input), 'Check Digits' (text input), and 'Note to Approver' (text input, highlighted with a green box and a green circle labeled '6'). At the bottom right of the 'Additional Information' section, there are two buttons: 'Create Another' and 'OK' (highlighted with a green box and a green circle labeled '6').

### Step 6: Products and Services

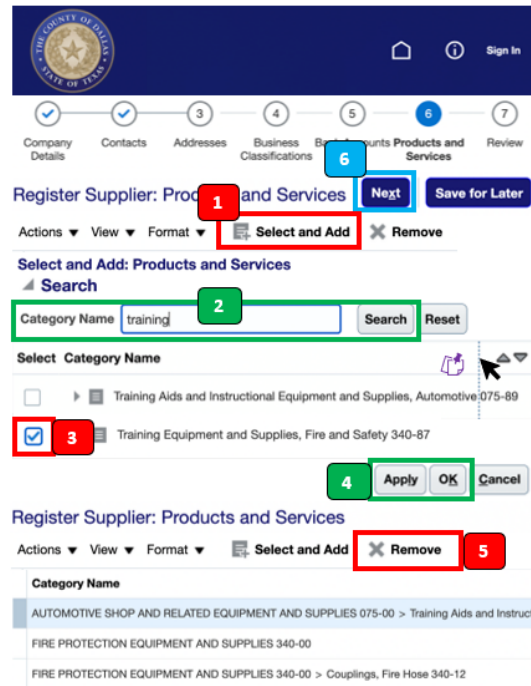
You can add Products and Services to indicate the type of business you'd like to offer to Dallas County. Select all Products and Services categories that fit your business. The County will use your selections to invite you to solicitations/negotiations that match with current needs.

#### Products and Services – Adding Products and Services

1. To add Products and Services, click the **Select and Add** button. A pop-up window will appear.
2. In the Search field, enter the **Product or Service**. Click the **Search** button.
3. A list of matches will appear. Click the **checkboxes** next to the desired Products or Services. Pay attention to the full Category Name to ensure it is the correct Product or Service.

 **Helpful Hint:** You may need to adjust the column width to see the full Category Name. In this example, the Training service selected was for Automotive training (rather than the desired Fire and Safety training category) because a portion of the Category Name was not visible. Click and drag the **cell column** to expand it, much like an Excel spreadsheet.

4. Click the **Apply** button. Repeat these steps to add more Products and Services, as needed. When you've finished adding Products and Services, click the **OK** button. You'll see the Products and Services added to your profile.
5. If needed, click a Product or Service you added in error, and click the **Remove (X)** button to delete it from the list.
6. Once you've added all Products and Services, click the **Next** button to continue your Supplier Registration.



The screenshot shows the 'Register Supplier: Products and Services' interface. At the top, a progress bar indicates steps 1 through 7, with step 6 'Products and Services' highlighted. Below the progress bar, the title 'Register Supplier: Products and Services' is followed by a 'Next' button (callout 1) and a 'Save for Later' button. A toolbar contains 'Actions', 'View', 'Format', 'Select and Add' (callout 2), and 'Remove' buttons. The 'Select and Add: Products and Services' section features a search bar with 'training' entered (callout 3), a 'Search' button (callout 4), and a 'Reset' button. Below the search bar, a table lists category names. The first entry is 'Training Aids and Instructional Equipment and Supplies, Automotive 075-89'. The second entry, 'Training Equipment and Supplies, Fire and Safety 340-87', is selected with a checkbox (callout 5). A '4' is placed over the 'Apply' button. At the bottom, the 'Register Supplier: Products and Services' title is repeated, followed by 'Actions', 'View', 'Format', 'Select and Add', and 'Remove' (callout 6) buttons. A list of added categories is shown below, including 'AUTOMOTIVE SHOP AND RELATED EQUIPMENT AND SUPPLIES 075-00 > Training Aids and Instruct', 'FIRE PROTECTION EQUIPMENT AND SUPPLIES 340-00', and 'FIRE PROTECTION EQUIPMENT AND SUPPLIES 340-00 > Couplings, Fire Hose 340-12'.

Next, you'll Review the information you've provided before submitting your Registration for approval.

### Step 7: Review and Submit

Finally, you'll need to Review your information to verify for accuracy and completeness. Be sure to double-check that all Tax Identifiers, Business Addresses, Contact Email Addresses, and Bank Account information is correct.

#### Review and Submit – Verify for Accuracy and Completeness

1. **Company Details:** Verify that your **Company Name**, **Tax Organization Type**, and any **Tax Identifiers** are correct.
2. **Contacts:** Verify that all your **Contact Names** are spelled correctly, and that each Contact you wish to have access to the Supplier Portal has a **Valid Email Address**.
3. **Addresses:** Verify that your **Addresses** have the correct **Street Name**, **Postal Code**, and **City**. Verify that the **Address Purposes** are correct.
4. **Business Classifications:** Verify that you have listed all applicable **Business Classifications**, and have added any **Attachments** to support your certification by a Certifying Agency.
5. **Bank Accounts:** Verify that your **Bank Account Numbers** and **Bank Names** are correct.
6. **Products and Services:** Verify that you have listed all applicable **Products and Services Categories** you'd like to offer to the County.
7. When you have reviewed and verified all your information for accuracy and completeness, click the **Register** button to submit your registration for approval.

**Congratulations!** You've taken the first step to becoming a Prospective Supplier for Dallas County! **Thank you for your interest in doing business with us!**

You'll receive a few emails welcoming you to the Supplier Portal, verifying that your registration was submitted, and a notification that your user account has been created. You can see an example of the emails you'll receive on the next page of this document.

The screenshot shows the 'Review Supplier Registration: Example Company' page. At the top, a progress bar indicates steps 1 through 7, with step 7 'Review' currently active. Navigation buttons include 'Back', 'Next', 'Save for Later', 'Register', and 'Cancel'. The page is divided into sections, each with a numbered red box indicating a review step:

- 1. Company Details:** A table with columns 'Company', 'Example Company', and 'Taxpayer ID'. Below it, 'Tax Organization Type' is 'Corporation' and 'Tax Registration Number' is '12-3456789'.
- 2. Contacts:** A table with columns 'Name', 'Email', and 'Administrative Contact'. It lists 'Doe, Jane' and 'Doe, John' with their respective email addresses.
- 3. Addresses:** A table with columns 'Address' and 'Address Purpose'. It shows '1234 Example Street, Suite 123, Dallas, TX 75202' with the purpose 'Ordering; Remit to; RFQ or Bidding'.
- 4. Business Classifications:** A table with columns 'Classification', 'Certifying Agency', 'Certificate', and 'Attachments'. It lists 'MBE' with 'DFWMSDC' as the certifying agency and 'MBE12345678' as the certificate.
- 5. Bank Accounts:** A table with columns 'Account Number', 'Currency', and 'Bank'. It shows 'XXXXX6789' as the account number, 'USD' as the currency, and 'WELLS FARGO' as the bank.
- 6. Products and Services:** A table with a 'Category Name' column. It lists 'Couplings, Fire Hose 340-12' and 'Training Equipment and Supplies, Fire and Safety'.

### Step 8: Supplier Portal Emails You'll Receive Upon Registration Approval

You'll receive a few emails welcoming you to the supplier portal, verifying that your registration was submitted, and a notification that your user account has been created. Supplier Registration may take up to thirty (30) business days.

### Supplier Portal Emails

1. Supplier Registration Approval Notification: You'll receive a similar email to inform you that the information you submitted during registration has been reviewed and approved by Dallas County. Registration Approval does NOT guarantee you will be awarded business by Dallas County. You are registered as a "Prospective Supplier", which means you'll be able to view and respond to Requests-for-Proposals and Bidding Opportunities. No action is required at this point.

2. Welcome to Supplier Portal: You'll receive a similar email to introduce you to the Portal and provide a link you'll need to click to get logged in to "OKTA" which will direct you to Dallas County Supplier Portal.

3. After successfully logging in to "OKTA", you will be directed to the supplier portal which will prompt you to the home screen below. From this screen, please click the home screen in the top right corner.

### Welcome to Dallas County

Your registration request to be a supplier for Dallas County has been successfully received and it is being reviewed for approval.

### Registration Request Details

Request Number 382005

Request Date 09 May 2024

Requested By HERNANDEZ, ZEKE

Company HERNANDEZ & SONS LAW FIRM

User account information will be sent in a separate email.



### Welcome to Dallas County Supplier Portal!

Hi <Supplier Contact Name>.

As a Dallas County Supplier you can conveniently access all the applications you normally use, through a single, secure home page. Watch this short video to learn more: <https://www.dcta.com/info-to-okta>

Your Dallas County system administrator has created an Okta user account for you.

Click the following link to activate your Okta account:

[Activate Okta Account](#)

This link expires in 7 days.

