

The North Carolina electronic Vendor Portal (NC eVP) is an internet application that allows companies and individuals to register to do business with the state of North Carolina. The application allow Vendors to register for the Department of Administration procurement related systems including the Interactive Purchasing System (IPS), the Statewide Uniform Certification (SWUC) Program – HUB Certification, and NC E-Procurement in one central location.

This guide will provide detailed steps to complete the registration process. If there are any questions during the registration, please contact the NC electronic Vendor Portal Help Desk via phone at 888-211-7440, option 2, or via email at <u>vendor@nc.gov</u>.

## I. NC eVP Register Vendor Page

- 1. Navigate to <u>https://vendor.ncgov.com</u> to begin the registration process. If the "**Register Vendor**" page does not immediately appear, click "**Register Now**" under the "**Login**" button.
- 2. Enter the company name in the "Vendor Name" field.
- 3. Select the appropriate option from the "Vendor Type" drop-down menu.
  - a. U.S. Vendor:
  - b. Foreign Vendor with U.S. Federal Tax ID Number
  - c. Foreign Vendor without U.S. Federal Tax ID Number
- If you are registering with a U.S. Federal Tax ID Number, enter the company's Federal Tax ID Number (without the dashes) into the "Federal Tax ID Number" and "Re-enter Tax ID Number" fields. The Federal Tax ID Number is also known as the Federal Employer Identification Number (FEIN).

**Note:** The **"Vendor Name"** field has a maximum length of 50 characters (including spaces, punctuation, and special characters). Please enter as much of the company's name as will fit in the free-text field.

**Note:** Registration on this system requires submission of either an Employer Identification Number (EIN) or a social security number. We strongly recommend using an EIN because it will minimize the risks to personal financial information associated with the use of a social security number. Vendors registering with their social security numbers should use their full legal name in the **"Vendor Name"** field and their Social Security Number in the **"Federal Tax ID Number"** field (without the dashes).

**Note:** More information on registering as an Individual or Sole Proprietorship can be found in the "Registering with NC E-Procurement- Individuals/Sole Proprietors" job aid on the <u>NC E-Procurement</u> <u>Portal Vendor Training</u> page.



5. Click the "**Register**" button to continue.

Register Vendor	Enter the <b>"Vendor Name"</b> , select the <b>"Vendor Type"</b> , and enter the <b>"Federal Tax ID Number"</b> to begin registration.	
Vendor Name. O Vendor Type. Select Federal Tax ID Number. O	For which services can ( register within the electronic Vendor Portal? NC E-Procurement @ Your Service NC E-Procurement @ Your Service Vendor receive purchase orders from State Entitle Interactive Purchasing System (IPS) Vendors can receive e-mail notifications of procurement and construction opportunite based on designated commodity/construct codes. HUB Certification Vendors must request certification through electronic Vendor Portal if they wish to be	
Re-enter Tax ID Number	certified as a Historically Underutilized Business	

#### II. Create a User Profile

 The Create Your Profile page contains several required fields to provide more information about the person registering your company. Complete the "First Name," "Last Name," "Email," "Re-enter Email," "Country/Region," "Phone Number," "Username," "Password," "Re-enter Password," "Security Question 1," "Answer 1," "Security Question 2," "Answer 2," "Security Question 3," and "Answer 3" to create the profile.

**Note:** The Username should be 6-20 characters long and is case sensitive. This Username will not be used by other users to log in, so it should be one that is unique to the user and easy to remember.

**Note:** The Password should be 8-35 characters long. Confirm that the Password meets the requirements listed on the screen below the "**Password**" field.

The password must contain:

- At least one lowercase letter
- At least one uppercase letter
- At least one number
- At least 8 characters
- At least one special character (ex. @, #, \*)

The password cannot contain:

- \, +, /, ", ', `, space
- Your username
- A character repeated more than twice in sequence (ex. aaa)
- More than two consecutive letters in alphabetical order
- More than two consecutive keyboard characters (ex. QWE)
- Commonly used words and variations (ex. pa\$\$w0rd)



2. Click the "Create Profile" button to continue with registration.

## III. Verify Email Address

- 1. Upon clicking "Create Profile," a verification email will be sent to the email address provided on the "Create Your Profile" page.
- 2. Access the email and click on the link to complete the email verification process.

o Example User,
sk you for your interesten store pursees with the State of North Control To control and the your registration, you must verify your email address. Please click the following link to verify and the click of the cli
assistance with registration, please visit the <u>NCT-Procurement</u> website.
w believe you received this small in error, please contact the NC electronic Vendor Portal Helpdesk at 888-213-7440 Opt. 2 or vendor@nc.grv
tê you,
st/P Team 2/1/7440

- 3. Upon clicking the link in the email, the user will be directed to the "Login" page, and a message indicating that the email verification was successful will appear.
- 4. Log into the vendor account using the previously established username and password.

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### **IV. Registration Type**

1. The *Registration Type* page is where the vendor will choose the services in which the company will participate. Select the checkbox beside the appropriate Registration Type(s).

**Note:** The Registration Type(s) selected will affect the information that is collected in the rest of the registration process.

- a. **NC E-Procurement** registration allows vendors to receive purchase orders from state agencies, community colleges, K-12 school systems, and local governments.
- Interactive Purchasing System (IPS) registration allows vendors to receive email notifications of procurement and construction opportunities based on designated commodity and construction codes.
- c. **Historically Underutilized Businesses (HUB) Certification** allows vendors to request certification as a Historically Underutilized Business with the state of North Carolina.



Note: If HUB Certification is selected, IPS registration must also be selected.

Note: Click the "Learn More" button to learn more about any one of the programs.

2. Click the "Next" button to save the selection(s) and advance to the next page.

Note: The selections on this page can be updated up until the point that the Terms of Use are accepted.

#### V. Company Information

- 1. Complete the information in the "General Vendor Information" section:
  - a. "Vendor Name" Defaults based on the information entered in the "Vendor Name" field when beginning the registration. This should be the Company Name as state of North Carolina buyers would recognize the company. If you are doing business as an individual, please use your full legal name. The "Vendor Name" field can be changed at any time.

**Note:** The **"Vendor Name"** field has a maximum length of 50 characters (including spaces, punctuation, and special characters). Please enter as much of the company's name as will fit in the free-text field. Proactively providing buyers with the shortened name can help avoid confusion.

- b. "Company Website" (Optional) Enter the website for the company in this field. If the company does not have a website, the field can be left blank. The website should be entered in the following format: <u>http://www.yourcompanyname.com</u>.
- c. "Ariba Network ID" (Optional) If the company has registered on the Ariba Commerce Services Network, the Ariba Network ID should be entered in this field. If the company does not have an Ariba Network ID, the field should be left blank. For an explanation of Ariba Services, visit <u>www.ariba.com</u>.
- d. "Dun and Bradstreet Number" (Optional) The Dun and Bradstreet Number is a worldwide method of classifying businesses. The number can be used to uniquely identify a business, or to link it to other entities within a corporation. If the company does not have a Dun and Bradstreet Number, this field should be left blank.
- "Customer Number" This is a unique system-generated number, and is not an editable field. This number should be noted, as it can be used to identify the company when speaking to the NC eVP Help Desk.

Vendor Name	Company Website	Ciptional
Company ABC	http://www.yourcompany.com	
Ariba Network ID 💿 Optional	Dun and Bradstreet Number	Optional
	9	



- 2. Complete the "Tax Information" section for the company.
  - a. **"Federal Tax Number"** This is not an editable field. The Federal Tax ID number is defaulted based on the information entered at the beginning of the registration process.
  - b. "IRS Verification Status" This is not an editable field. The "IRS Verification Status" field will display "Pending" until the IRS TIN (Tax Identification Number) matching process is complete for the vendor information.
  - c. **"Are you registering as an Individual/Sole Proprietorship?"** Select the **"Yes"** or **"No"** radio button depending on whether or not you are registering as an Individual/Sole Proprietorship.
  - d. "Previous Federal Tax ID Number" (Optional) Enter the previous Federal Tax ID Number for the business, if applicable. If there are multiple previous Federal Tax ID Numbers, enter the most recent number. This field is seen and used only by the Help Desk for administrative purposes only. Buyers will not have access to this information.
  - e. **"Is your Business based in North Carolina?"** Select **"Yes"** or **"No."** Businesses based in North Carolina are businesses who have their main office in North Carolina.
  - f. "Vendor Name on Tax Documentation If a 1099 form should be prepared to report payments received to the IRS, enter the business name that should appear on the form here. This field has a maximum length of 70 characters (including spaces, punctuation, and special characters). For individuals, this will be your full legal name. If you select "No" under "Are you registering as an Individual or Sole Proprietorship?" this field will auto-fill with the "Vendor Name" entered above.

Federal Tax Number	IRS Verification Status 💿
998877889	Pending
Are you registering as an Individual or Sole Proprietorship?	Previous Federal Tax ID Number 🕕 Cottons
🔿 Yes 🖲 No	
Is your Business based in North Carolina?	Vendor Name on Tax Documentation

- 3. The last section on the *Company Information* page is the "Business Characteristics" section. This information will be used to determine HUB Certification.
  - a. "Is your business Not for Profit?" Select "Yes" or "No"
  - b. "Is your business a Non Profit Work Center for the blind and severely disabled?" Select "Yes" or "No"
  - c. **"Is your business any of the following government entities?"** Select the radio button for the applicable government entity. If none listed apply, select the **"No"** radio button.
  - d. **"Is your business any of the following educational entities?"** Select the radio button for the applicable educational entity. If none listed apply, select the **"No"** radio button.
  - e. "Is your business classified as a small business?" Select "Yes" or "No"
  - f. "Is your business a Disabled Business (Enterprise)?" Select "Yes" or "No"



4. Click the "Save" button to save the selections and the "Next" button to advance to the next page.

Business Characteristics	~
Is your business Not for Profit?	Is your business a Non Profit Work Center for the blind and severely disabled? Yes  No
Is your business any of the following government entities?	Is your business any of the following educational entities?
O NC Local Government Entity	O NC Community College
O NC State Government Entity	O NC Local School System
Out of State Government Entity (State or Local)	O NC University System
O US Federal Government Entity	Out of State University
No	No
Is your business classified as a small business?	Is your business a Disabled Business Enterprise?
O Yes  No	O Yes  No
	Save Next →

## VI. Adding/Managing Contacts

- 1. The *Contacts* page contains the contacts associated with the company's registration.
- 2. If necessary, add any additional contacts to the account by clicking the "Create New" button.



**Note:** Other possible contacts to add may include contacts who receive payments of goods or services, receive purchase orders, receive invoices, and/or receive bid notifications.

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* Registration Type Company Information Contacts Addresses Locations eQuote Information HUB Certification Terms of Use	Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts Contacts	Sort By: Newest to Oldest
		Next >

- 3. Complete the required fields, including "First Name," "Last Name," "Email," "Re-enter Email," "Country/Region", and "Phone" to add additional contacts.
- 4. **"Designate user as the Main Contact" –** Checking this box is optional and will designate the new contact as the Main Contact. This action will remove the designation from the existing Main Contact, as there can only be one Main Contact, per account.

Note: The Main Contact will be used as a point of contact for eVP related communications.

5. Assign Role – Select the radio button or checkbox for the role that is appropriate for the contact.

**Note:** More than one user can be assigned to each role.

**Note:** If the **"Account Manager"** radio button is selected, at least one access level must be selected: **"Account Maintenance"** or **"Location Maintenance"**.

6. Click the "Save" button to save the new contact and the "Next" button to advance to the next page.

**Note:** Clicking the **"Save"** button on the create mode of the **Contacts** page will trigger an email to be sent to the newly added contact and inviting him or her to join the account.



First Name:	Last Name:
Email:	Re-enter Email:
someone@example.com	someone@example.com
Title:	Country/Region:
e.g. President, Manager	United States -
Phone:	Extension:
(###) ###-####	Ext.
Account Owner	
Assign Role: Account Owner Provides user with full access to cr	eate, update, and remove all content on the vendor account. pt the terms of use on behalf of the company.
Assign Role: Account Owner Provides user with full access to cr User will have the authority to acce Account Manager Vendor (must se Account Maintenance: Provides user with access to c	eate, update, and remove all content on the vendor account. pt the terms of use on behalf of the company.
Assign Role: Account Owner Provides user with full access to or User will have the authority to acce Account Manager Vendor (must se Account Maintenance: Provides user with access to a to create and edit Bill To. Ord Location Maintenance: Provides user with access to a codes, construction codes, an	eate, update, and remove all content on the vendor account. pt the terms of use on behalf of the company. lect at least one access level) reate and edit contacts and addresses. Also provides access
Assign Role: Account Owner Provides user with full access to cr User will have the authority to acce Account Manager Vendor (must se Caccount Maintenance: Provides user with access to a to create and edit Bill To, Order Location Maintenance: Provides user with access to a codes, construction codes, an create and edit Bill To, Order I	eate, update, and remove all content on the vendor account, pt the terms of use on behalf of the company. Lect at least one access level) reate and edit contacts and addresses. Also provides access er From, Remit To, and IPS divisions for locations. ssigned locations to which he or she can edit commodity d contractor services information. Also provides access to
Assign Role: Account Owner Provides user with full access to or User will have the authority to acce Account Manager Vendor (must se Account Maintenance: Provides user with access to o to create and edit Bill To. Order Location Maintenance: Provides user with access to a codes, construction codes, and create and edit Bill To. Order I Read Only Vendor	eate, update, and remove all content on the vendor account, pt the terms of use on behalf of the company. Lect at least one access level) reate and edit contacts and addresses. Also provides access er From, Remit To, and IPS divisions for locations. ssigned locations to which he or she can edit commodity d contractor services information. Also provides access to

**Note:** If additional contacts need to be added, click the "**Create New**" button again and complete steps 1-3 in this section.

### VII. Adding/Managing Addresses

- The Addresses page contains addresses to be assigned to Locations later in the registration process. NC E-Procurement vendors will need addresses for purchase orders, payments, and invoices. Vendors will need an address for purchasers to contact the vendor for quotes. Click the "Create New" button to create a new address.
- 2. Below the "Address Name" field, select the appropriate radio button indicating the location of the address, either "United States" or "International".

Note: This selection will determine the required fields for this address.

- 3. Complete the following required fields if "United States" was selected.
  - a. "Address Name" Enter the name of the address for this location.
  - b. "Street 1" and "Street 2" Enter the Street Address or PO Box of the address.
  - c. "City" Enter the City where the address is located.
  - d. "State" Select the State where the address is located in the drop-down menu.
  - e. "Zip" Enter the postal Zip Code.



f. "NC County" – Select the County where the address is located. This is only required if the vendor is located within the state of North Carolina.

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× Registration Type Company Information Contacts	Addresses	
Addresses O Locations O eQuate Information HUB Certification O Terms of Use O Billing	Create new address to associate with locations. NC E- payments, and invoices. The IPS directory also requires	Procurement vendors will need addresses for purchase orders, an address.  Sort By:  Create New
Summary	Address Name Address Name	Street 2
	Street 1	Apt., Suite, etc.
	City	State:
	City	Select -
	Zip	NC County
	Zip	Select
		Cancel Save

- 4. Complete the following required fields if "International" was selected.
  - a. "Address Name" Enter the name of the address for this location.
  - b. "Street 1" and "Street 2" Enter the Street Address or PO Box of the address.
  - c. "City" Enter the City where the address is located.
  - d. "Province/Region" Select the Province/Region where the address is located.
  - e. "Zip" Enter the postal Zip Code.
  - f. "Country" Select the Country where the address is located.
- 5. Click the "Save" button to save the address, and then the "Next" button to advance to the next page.



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× Registration Type Company Information Contacts Addresses	Addresses	
Locations eQuote Information HUB Certification Terms of Use Billing Summary	Create new address to associate with locations. NC E-Pro payments, and invoices. The IPS directory also requires a	ocurement vendors will need addresses for purchase orders, n address. Sort By: Select - Create New
	Address Name Address Name O United States () International Street 1	X X Street 2 Street 2
	City City Zip Zip	Province/Region Province/Region Country Select -
		Cancel Save Next →

**Note:** If additional addresses need to be added, click the **"Create New"** button again and complete steps 1-5 in this section.

Note: If an address needs to be updated, click the pencil icon next to the specific address.



## VIII. Adding/Managing Locations



- 1. On the *Locations* page, a vendor can add Locations and assign Contact/Location assignments. Complete the following fields to create the Location:
  - a. "Location Name" Enter the Location Name to uniquely identify the company location. Buyers will use the "Location Name" field to select the destination for their purchase order. The Location Name should include any information needed to uniquely identify the location: division name, subsidiary business name, geographic location, product division, etc. This field will be seen in the buyer system and will be used by buyers to select the correct location to send their purchase order to.
  - b. **Customer Number** The Customer Number will be system-generated, non-editable, and will consist of the Customer Number of the vendor, followed by a letter.
  - c. **Subscribing Services** This section will update based on the Contact/Location assignments selected for each location.
  - d. Default Purchasing Location Check this box if you want to designate this location as the default location in NC E-Procurement for purchase order delivery. This will be the location that defaults on purchase orders created by buyers; however, buyers will be able to select a different location if desired.

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* Registration Type Company Information Contacts Addresses	Locatio	ns	
Locations eQuote Information HUB Certification G Terms of Use G Billing Summary		Location Location Information Location Name:	<u>-Collapse All</u>
	Create New	Customer Number: Subscribing Services:	



- 2. Complete the *Location Contacts* section.
  - **a.** Select the designated contact(s) to manage the location.

Location Contacts		
Please s	elect the designated contacts to manage this location:	
$\checkmark$	Account Owner	<u>^</u>
	Account Manager - Location Maintenance	~

3. Create the "Contact/Location" assignments, which may include "NC E-Procurement Order From", "NC E-Procurement Remit To", "NC E-Procurement Bill To" and "IPS". The "Contact/Location" assignment consists of a contact, address and additional information such as ordering method.

**Note:** If, on the **Registration Type** page, a vendor did not select to register for NC E-Procurement @ Your Service, "NC E-Procurement Order From", "NC E-Procurement Remit To", and "NC E-Procurement Bill To" will not display on the **Locations** page.

**Note:** If, on the *Registration Type* page, a vendor did not select to register for IPS Registration, the "IPS" section will not display on the *Locations* page.

- 4. If applicable, complete the "NC E-Procurement Order From" section. Select an existing Contact/Location assignment from the drop-down menu or create a new Contact/Location assignment by clicking the "Create New" button and completing the following fields:
  - a. "Order From Name" Enter the name of the location to which purchase orders will be received (ex. Raleigh Orders, Corporate Orders, Timber Orders).
  - b. "Address Name" Choose an Address Name from the drop-down menu or click the "Create New Address" link to enter a new address to which purchase orders will be received.
  - c. "Contact Name" Choose a Contact Name from the drop-down menu or click the "Create New Contact" link to enter a new contact to receive purchase orders.
  - d. "Ordering Method" Select the preferred method of receiving orders from entities using NC E-Procurement: "Fax", "Email", or "Ariba Network".
  - e. "Email" Enter the email address where purchase orders for the location should be emailed. If "Email" was not selected in the "Ordering Method" section, the "Email" field can be left blank.
  - f. "Fax" Select the "Country/Region" and enter the fax number where purchase orders for the location should be faxed. If "Fax" was not selected in the "Ordering Method" section, the "Fax" field can be left blank.
  - g. Click the "Save" button to save the information.



cify where purchas	e orders will be sent.	
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Address Name:	+Create New Address	
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Contact Name:	Select Option	e .
	+Create New Contact	
Ordering Method: 🕕	Select	÷
Email:	someone@example.com	
Re-enter Email:	someone@example.com	
	<u></u>	
Fax Country/Region:	United States (+1)	*
Fax:	(###) ###+####	
	12	

- 5. If applicable, complete the "**NC E-Procurement Remit To**" section, which is the address to which payment for goods and services should be sent. Select an existing Contact/Location assignment from the drop-down menu or create a new Contact/Location assignment by clicking the "**Create New**" button and completing the following fields:
  - a. "Remit To Name" Enter the name of the location to which payment for goods and services should be sent. (Ex. Raleigh Remit To, Corporate Remit To, Accounts Receivable, etc.)
  - b. "Make Checks Payable To" Select the radio button for "Vendor Name", "Location Name", or "Vendor Name on Tax Documentation". The Vendor Name is the name entered in the "Vendor Name" field when beginning the registration. The Location Name is the value entered in



the "**Location Name**" field at the beginning of this section. The Vendor Name on Tax Documentation is the name entered on the *Company Information* page.

**Note**: The **"Official Name on Tax Documentation"** option will display in this field if it is different from the **"Vendor Name"**.

- c. "Address Name" Choose an Address Name from the drop-down menu or click the "Create New Address" link to enter a new address to which payment for goods and services should be sent.
- d. "Contact Name" Choose a Contact Name from the drop-down menu or click the "Create New Contact" link to enter a new contact that should be associated with payments made to the company.
- e. **"Fax"** Select the appropriate Country/Region from the **"Country/Region"** drop-down menu and enter the Fax Number for the address.
- f. Click the "Save" button to save the information.

Pecify where payment for goods and/or services will be sent.   elect or create a contact/location assignment:   Not Applimatize   Permit To Name:   Make checks payable to:   Address Name:   Select Option +Create New Address   Contact Name:   Select Option +Create New Contact   Fax Country/Region:   Fax:	IC E-Procurer	nent Remit To	8
Not Applimable       -       Create New         Remit To Name. <ul> <li>Make checks</li> <li>Location Name</li> <li>Location Name</li> <li>Vendor name on tax documentation to:</li> </ul> Address Name:       Select Option •       •         •Create New Address       •       •         Contact Name:       Select Option •       •         •Create New Contact       •       •         Fax Country/Region:       United States (+1) •       •	6-8 10 10		
Remit To Name:         Make         checks         payable         Vendor Name         O Vendor Name         Vendor name on tax documentation         to:         Address Name:         Select Option         +Create New Address         Contact Name:         Select Option         +Create New Contact         Fax         Country/Region:	elect or create a co	ntact/location assignment:	
Make checks payable to:       Image: Constant Name Image: Constant Name Image: Constant Name Select Option *Create New Address         Address Name:       Select Option *Create New Address         Contact Name:       Select Option *Create New Contact         Fax Country/Region:       United States (+1)	Not Applicable	- Create New	
Make checks payable to:       Image: Constant Name Image: Constant Name Image: Constant Name Image: Constant Name:         Address Name:       Select Option Image: Select Option Image: Constant Name:         Contact Name:       Select Option Image: Select Option Image: Select Option Image: Constant Name:         Fax Country/Region:       United States (+1)			1
Make checks       O       Location Name         payable to:       Vendor name on tax documentation         Address Name:       Select Option         *Create New Address         Contact Name:       Select Option         *Create New Contact         Fax Country/Region:       United States (+1)	Remit To Name:		1
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+Create New Address Contact Name: Select Option  +Create New Contact Fax Country/Region: United States (+1) +	- 1870 A 1870 A 1970 A 19		
Contact Name: Select Option  +Create New Contact Fax Country/Region: United States (+1)  +	Address Name:	Select Option -	
Fax Country/Region:		+Create New Address	
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Country/Region:		+Create New Contact	
Fax: (###) ###~####		United States (+1) -	
	Fax:	(www)-www-wwww	
Cancel		Cancel Save	,

6. If applicable, complete the "**NC E-Procurement Bill To**" section, which is the address to which the transaction fee invoice for NC E-Procurement will be sent. Select an existing Contact/Location assignment from the drop-down menu or create a new Contact/Location assignment by clicking the "**Create New**" button and completing the following fields:



- a. "Bill To Name" Enter the name of the location to which invoices will be received (ex. Raleigh Office, Accounts Payable, Corporate Accounts Payable).
- b. "Address Name" Choose an Address Name from the drop-down menu or click the "Create New Address" link to enter a new address to which invoices will be received.
- c. "Contact Name" Choose a Contact Name from the drop-down menu or click the "Create New Contact" link to enter a new contact who should be the contact to receive invoices. This person may be contacted if there are questions about payments.
- d. "Billing Method" Select "Email" or "Fax" from the drop-down menu depending on the preferred Billing Method.
- e. "Email" Enter the Email Address where invoices for the location should be emailed. If "Email" was not selected in the "Billing Method" drop-down menu, the "Email" field can be left blank.
- f. **"Fax"** Select the appropriate Country/Region from the **"Country/Region"** drop-down menu and enter the Fax Number for the address. If **"Fax"** was not select in the **"Billing Method"** drop-down menu, the **"Fax"** field can be left blank.

ecify where invoice	for the NC E-Procurement transaction (	fee will be sent.
elect or create a co	stact/location assignment:	
Not Applicable	- Create New	
Bill To Name:		
Address Name:	Select Option	
	+Create New Address	
Contact Name:	Select Option	•
	+Create New Contact	
Billing Method:	Select	-
Email:	someone@example.com	
cinan.		
	1	
Re-enter Email:	someone@example.com	
2		
Fax Country/Region:	United States (+1)	-
Fax:	(###) ###-####	
		( Cancel Save

g. Click the "Save" button to save the information.



7. If applicable, complete the "**IPS**" section, which is the address to which Interactive Purchasing System (IPS) bid notifications will be sent. Select an existing Contact/Location assignment from the drop-down menu or create a new Contact/Location assignment.

**Note:** This Contact/Location assignment will also display in the IPS directory and as a selectable HUB location on the *HUB Certification* page (if applicable).

- a. "IPS Name" Enter the name of the location to which IPS bid notifications will be received.
- b. "Address Name" Choose an Address Name from the drop-down menu or click the "Create New Address" link to enter a new address to which IPS bid notifications will be received.
- c. "Contact Name" Choose a contact name from the drop-down menu or the "Create New Contact" link to enter a new contact who should receive IPS bid notifications.
- d. "Fax" Select the appropriate Country/Region and enter the Fax Number to which IPS bid notifications should be faxed.
- e. "Toll-Free Phone" Enter the Phone Number for this location.
- f. "Receive electronic notification of bids to this location?" Select the "Yes" or "No" radio button depending on whether or not the company wants to receive electronic notification of bids to this location. If "Yes" is selected, additional checkboxes will display. Check the boxes for applicable services to receive notification of bids to this location.
- g. Click the "Save" button to save the information and the "Next" button to advance to the next section.

**Note:** If an additional location needs to be added, select the "**Create New**" button located inside the box in the top left corner titled "**All Locations**" and complete steps 1-7 in this section. An additional location may be added if additional contacts should receive bid notifications.

>5		3
intact/location assig	cation assignment to which IPS bid notification ment will also display in the IPS directory and UB Certification page (if applicable).	nd an a natectable
steet or create a co	itact/tocation assignment	
Perit Application	- Create New	
		/
IPS Name-		
Address Name:	Select Option	1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 -
	+Create New Address	
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	+Create New Contact	
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Country/Region		
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		Construction of Construction o
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Country/region	A SHORE	
Toll-free Phone.	(4444) 9999 44499	Contract (
1.000.000.000.000	Commission of the second secon	
Toll-free Phone	1	
Ext	- Ext.	
Receive electronic	notification of bids to this location?	
(6) Yes		
O No		
Cloods and 5		
Construction     Design Service		
See Contraction		
		Cancel Save



- 8. The next section of the *Locations* page is the "Commodity Codes" section:
  - a. Click the **Pencil icon** to add Commodity Codes to the selected location.

Note: Selection of Commodity Codes is optional. It will assist buyers when searching for vendors.

**Note:** Each Location for the vendor will display in the sidebar that is located in the box titled **"All Locations"**.

All Locations	Loca	tion Commodity Codes Construction Codes
Anytown	0	The North Carolina Division of Purchase and Contract is currently using the NIGP Commodity Code Listing. Selection of these codes is optional; however, it will assist buyers when searching for and purchasing from vendors.
		Please Note: For IPS registered vendors, the selections made below will determine notifications that may be sent via email.
Create New	<u>c 1 1 1</u>	$\langle r \rangle$
	Select	the commodities this location of your business provides:
		nmodity codes have been selected. Please click the pencil icon to view ole selections.
		Next →

b. Select the appropriate Commodity Codes that describe the goods that the company provides. More than one Commodity Code can be selected.

**Note:** There may not be a Commodity Code that specifically describes the commodities that the company provides. Select the Commodity Codes that fit best. The Commodity Codes selected will determine what bid notifications you receive.

- c. Once all applicable Commodity Codes are selected, click the **"Save"** button to save the selections and click the **"Next"** button to proceed to the **"Construction Codes"** section.
- 9. The next section of the *Locations* page is the "Construction Codes" section:
  - a. Click the **Pencil icon** to add Construction Codes to the selected location.



**Note:** Construction Codes identify products and services provided by companies in the construction industry.

Note: Selection of Construction Codes is optional but will assist buyers when searching for vendors.

Locat	ion	Commodity Codes	Construction Codes	Contractor Services
6		ction of construction c I searching for vendors	odes is optional; however	r, it will assist buyers
Select	the cor	nstruction services this	location of your busines	is provides:
		ion codes have been ections.	selecte <mark>d. P</mark> lease click t	he pencil icon to view
				Next >

- a. Select the Construction Codes that apply to the company.
- b. Once all applicable Construction Codes are selected, click the "Save" button to save the selections and click the "Next" button to proceed to the "Contractor Services" section.
- 10. The next section of the *Locations* page is the "Contractor Services" section:
  - a. Select the checkboxes for the Contractor Services applicable to the selected location.

Note: Selection of Contractor Services is optional but will assist buyers when searching for vendors.

b. Once all applicable Construction Codes are selected, click the **"Save"** button to save the selections and click the **"Next"** button to advance to the next page.



	Commodity Codes	Construction Codes	Contractor Services
Sel whe	ection of contractor ser en searching for vendors	vices is optional; howeve	r, it will assist buyers
heck all th	at apply. You do not hav	e to be a licensed contra	actor to register.
) esign Serv	ices		
Archite	ctural Services		
	ctural Services ering Services		
Enginee	ering Services n Services		
Construction	ering Services	,	
Construction	ering Services n Services L Contractor		
Construction	ering Services n Services L Contractor L Trades/Sub Contractor		

#### IX. Participating in eQuote

- 1. The *eQuote Information* page will display for vendors who elected to register for NC E-Procurement.
- In the "Activation" section, answer the question, "Would you like to participate in eQuote?" Select the "Yes" or "No" radio button depending on whether or not the vendor would like to participate in eQuote.

**Note:** eQuote is an electronic service that allows suppliers to receive and respond to electronic requests for quotation from buyers within the State of North Carolina. eQuote is most appropriate for suppliers of goods. eQuote categories will be set up automatically in the vendor's new eQuote account based on the Commodity Codes selected on the *Locations* page.

a. If "Yes" is selected, select an eQuote Main Contact from the "eQuote Main Contact" drop-down menu and an eQuote Main Contact Location from the "eQuote Main Contact Location" drop-down menu.

**Note**: The eQuote system will send the eQuote Main Contact an email upon receiving the activation information from the North Carolina electronic Vendor Portal.

3. Click the "Save" button to save the information and the "Next" button to advance to the next page.





### X. HUB Certification

 The HUB Certification page will collect the initial details necessary for certification as a Historically Underutilized Business (HUB).

**Note:** The *HUB Certification* page will only be visible to vendors that selected to request HUB Certification on the *Registration Type* page.

**Note:** Official HUB Certification must be received from the HUB Office. The company's HUB Certification Status will remain as "**Not Certified**" until notification of certification has been received. To learn about Historically Underutilized Businesses and to complete registration, visit <u>http://www.doa.state.nc.us/hub/</u>.

- 2. Complete the "Historically Underutilized Business (HUB)" section
  - a. Select the HUB Main Location from the "HUB Main Location" drop-down menu. The Main Contact for that location will automatically populate in the "HUB Main Contact" field.

**Note:** Only Locations that are participating in IPS are able to be selected in the "**HUB Main** Location" drop-down menu.



<i>≦</i> .₩		HELP ( 🕹
# Registration Type Company information Contacts	HUB Certification	
Addresses Locations eQuate Information	Historically Underutilized Business (HUB)	•
Terms of Use G Billing Summary	HUB Status: Not Certified	Learn More 🤿

3. Complete the "HUB Categories" section by selecting the applicable HUB Categories.

**Note:** Multiple HUB Categories may be selected during registration; however, if the company is determined to be HUB eligible it will be certified for only one HUB Category, in the following order: Minority before Female, Female before Disabled, Disabled before Disadvantaged.



/B Stat	us: 📵	Not Certified	
IUB Main Location 🕕		IPS 1 -	Learn More ->
JB Main Contact		Jan Vnc	
JB C	ategories		
	least one categ	aged. ory the firm would qualify for as a Historically	Underutilized Business
	least one categ		Underutilized Business
	Least one categ		Underutilized Business
	least one categ		Underutilized Business
	Minority Select Female Disabled		
	Minority Select Female Disabled	a disability as defined in G.S. 168-1 or G.S. 1684	

- 4. Complete the "Ownership of Firm" section.
  - a. Select the appropriate value from the from the "Ownership Type" drop-down menu.
  - b. Enter the Business Start Date in the "Business Start Date" field.
  - c. Click the "Create New" button to add an owner.
  - d. Complete the required fields "First Name", "Last Name", "Ownership %", "Voting %", "Years Owned", "Race", "Sex", and "Person with Disability" for the newly added owner.
    e. Click the "Done" button to add the owner.



Ownership of Fir			
Ownership Type	Select		
Business Start Date			
or each voting and owne	rship percentage, the tol	als should sum to 100%	
		Sort By	
		Select -	Create New
First Name		Last Name	
Ownership %		Voting %	
L		L	
Years Owned		Race	
		Select +	
Sex		Person with Disability	
Sector M.	-	Select -	
Select			
Select		Cancel	

f. "Is management and daily business operations of this firm controlled by the person who owns at least 51% interest or stock in the firm?" – Select the "Yes" or "No" radio button depending on whether or not this is true for the vendor.

**Note:** If an additional owner needs to be added, click the "**Create New**" button again and complete steps d-f in this section.

5. Click the "Save" button to save the information and the "Next" button to advance to the next page.

**Note:** Additional documentation must be sent to the HUB Office within 30 days of the certification application or request of certification. Please go to the <u>HUB Office website</u> to view the list of required documents.



#### Additional Certification Steps

A Statewide Uniform Certification (SWUC) application or Statewide re-certification application and additional required documentation must be sent to the HUB Office within 30 days of this online certification/recertification request. Submission of this documentation helps the HUB Office assess your business' qualification but does not always result in certification. Please go to the <u>HUB Office website</u> to view the certification / re-certification application and list of required documents.



#### XI. Terms of Use

 The *Terms of Use* page will display the Terms of Use for all services that were selected on the *Registration Type* page. Review the Terms of Use for NC E-Procurement, IPS, and/or HUB Certification and select the checkbox within each section.

**Note:** The NC E-Procurement Terms of Use may be found <u>here</u>. If there are questions about the transaction fee referenced in the Terms of Use, please refer to the "**Fee Questions**" section of the **Vendor Frequently Asked Questions** page on the NC E-Procurement web site at <u>http://eprocurement.nc.gov/Vendor/FAQ.html</u>.

2. After selecting the appropriate checkboxes, click the "I Accept" button to accept the Terms of Use.

Note: Only a user with the role of Account Owner can accept the Terms of Use.

**Note:** The Terms of Use cannot be accepted if required information on the account has not been completed.

**Note:** Once the Terms of Use have been accepted, the **Terms of Use** page will display the name of the person who accepted the terms and the date they were accepted.

3. The vendor should see a message stating that they have successfully registered for the applicable services (NC E-Procurement, HUB, and/or IPS).







# XII. Summary

1. Review the company information on the *Summary* page and confirm that all details are correct. Expand each section header by clicking the arrow icons.

Note: This page can be printed by clicking the "Print" button.

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Registration Type	Summary		
Company Information Contacts	Summary		
Addresses			
Locations	Vendor Status: Active		
eQuote Information			Pint V
HUB Certification	Company Information		
Terms of Use Billing	General Vendor Information		
Sammary			LAND BALLON
	Vendor Name: Company ABC	Company Website:	Customer #: 371691
	Airbe Network ID: Not Specified	Dun and Bradstreet #: Not Specified	
	Tax information		~
	North Carolina Based: No	Individues/Sole Proprietorship: No	Federal Tax ID #: 996677689
	IRS Verification Status: Pending	Name on tex documentation: Company ABC	Previous Federal Tax ID # Not Specified
	Business Characteristics		\$
	Smail Business: No.	Educational Entity: No	Government Entity: No
	Not for Profit: No	Disabled Business Enterprise: No	Non Profit Work Center for the blind and severely disabled: No
	Contacts		
	Doe, John gewendor@grid2.buyer.nc - +1 (999) Main Account Contact, HUB Main Co		
	Doe, Jane JaneDoel Bexample.com - +1 (111) 116 Read Only Vendor	-m <sub>C</sub>	
	Location		
	Anytown		×
	Location Information		
	Location Name: Anytown	Location Status ACTIVE	Custamer #: 371691-A
	Default Purchasing Location, Ves	Subscribing Services: NC E-Procurement, IPS	
	Location Contacts: John Doe		
	NC E-Procurement Order From		
	Order From Name: Anytown	Contact Name: John Doe	Ordering Method: Email
	Address: Anytown IOD Main St Anytown, NC 22222 United States	Emsil: JohnDo2@example.com	Fito:

2. The NC eVP registration is now complete and the company will immediately be visible in Public Vendor Search. Vendors who register prior to 4:30pm will be visible to buyers and will start receiving IPS bid notifications the next business day.