

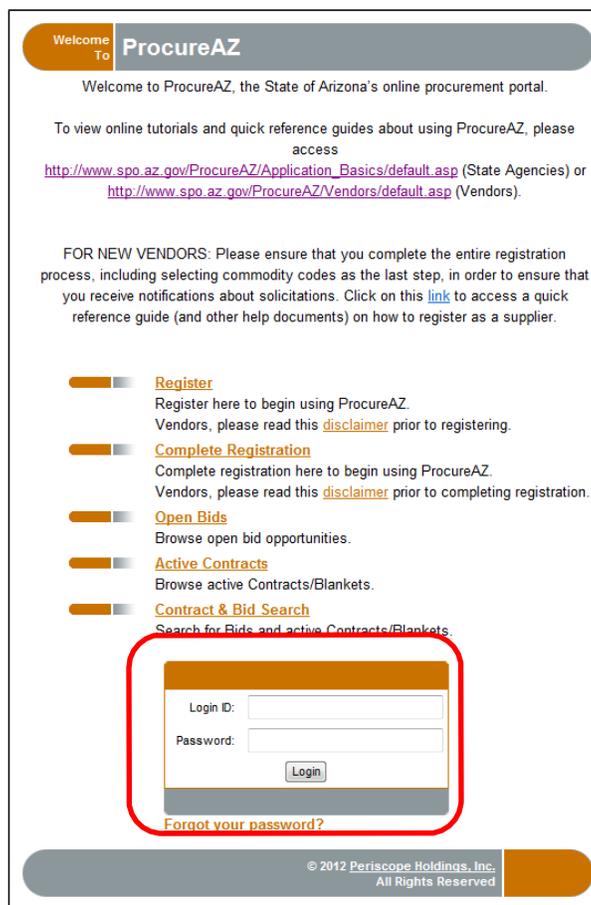
## Vendor Profile Maintenance

The following will guide you through the process of updating and maintaining your Vendor Profile. If you are a not a registered vendor go to <http://www.spo.az.gov/ProcureAZ/Vendors/default.asp> to download the Vendor Registration Guide.

To ensure receipt of notifications about Bid opportunities or to be issued Purchase Orders (POs) through ProcureAZ, you must make sure your information is current in the system.

### Updating Vendor General Information

1. Go to <https://procure.az.gov> and log in by entering your Login ID and Password into the Login Box:



The screenshot shows the ProcureAZ homepage. At the top, it says "Welcome To ProcureAZ". Below that, it says "Welcome to ProcureAZ, the State of Arizona's online procurement portal." There are links for "Application Basics" and "Vendors". A section for "NEW VENDORS" provides instructions on registration. A list of links includes "Register", "Complete Registration", "Open Bids", "Active Contracts", and "Contract & Bid Search". A red box highlights the login form, which contains fields for "Login ID:" and "Password:", a "Login" button, and a "Forgot your password?" link. The footer contains the copyright information: "© 2012 Periscope Holdings, Inc. All Rights Reserved".

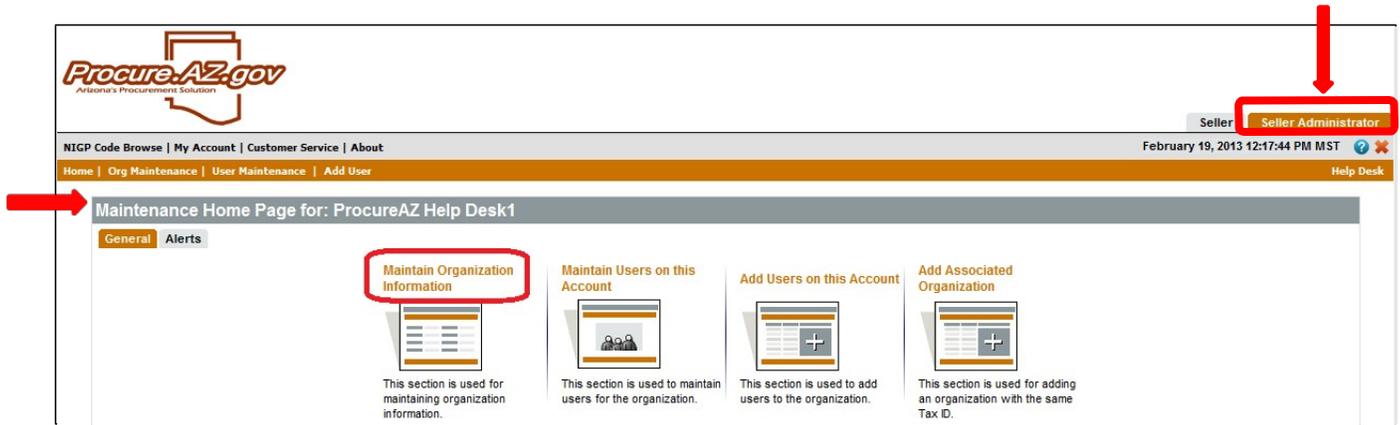
In ProcureAZ, maintaining the company's profile data is done under the **Seller Administrator** role.

**NOTE:** Users without the role of Seller Administrator can only update their personal information by clicking on the **My Account** link.

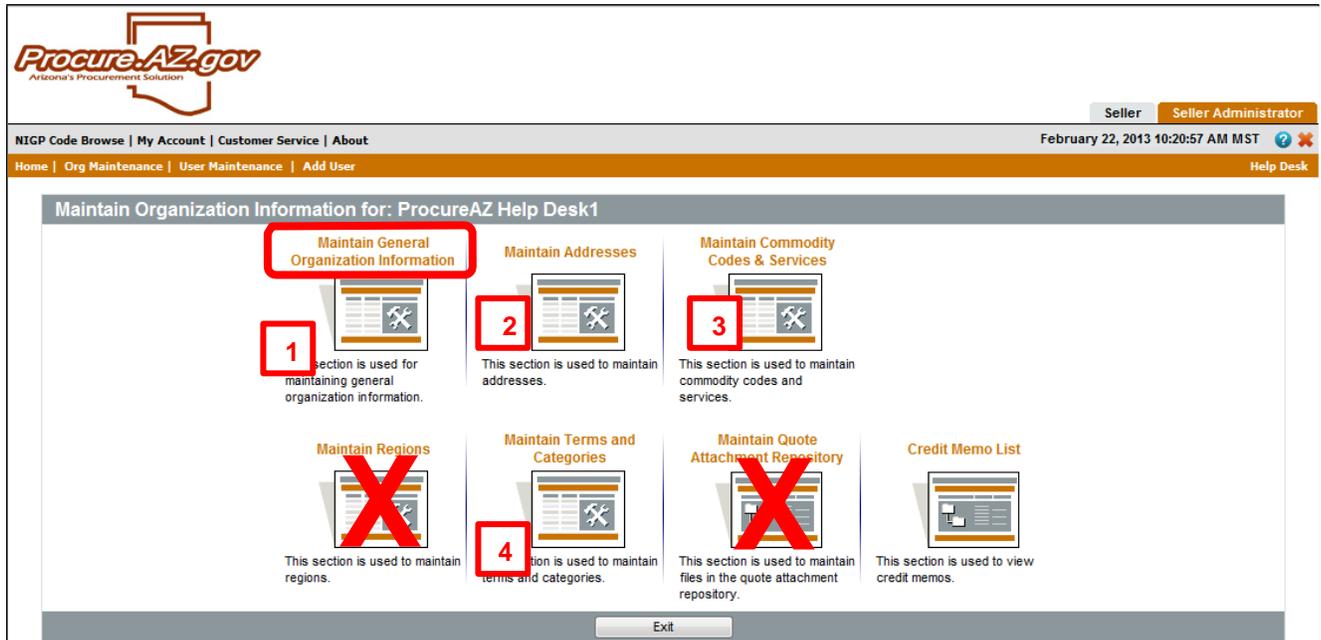
# Vendor Profile Maintenance

Once logged in you will see the home screen “Maintenance Home Page for: <Your Name>”. If you do not see this greeting, click on the Seller Administrator tab in the upper right of the screen.

There are four options on the Homepage: **Maintain Organization Information**, **Maintain Users on this Account**, **Add Users to this Account**, **Add Associated Organization**.



- To manage the company’s profile data click the icon for **Maintain Organization Information**. In this area you can update company 1) general information, 2) addresses, 3) commodities codes and 4) terms & categories/certifications.

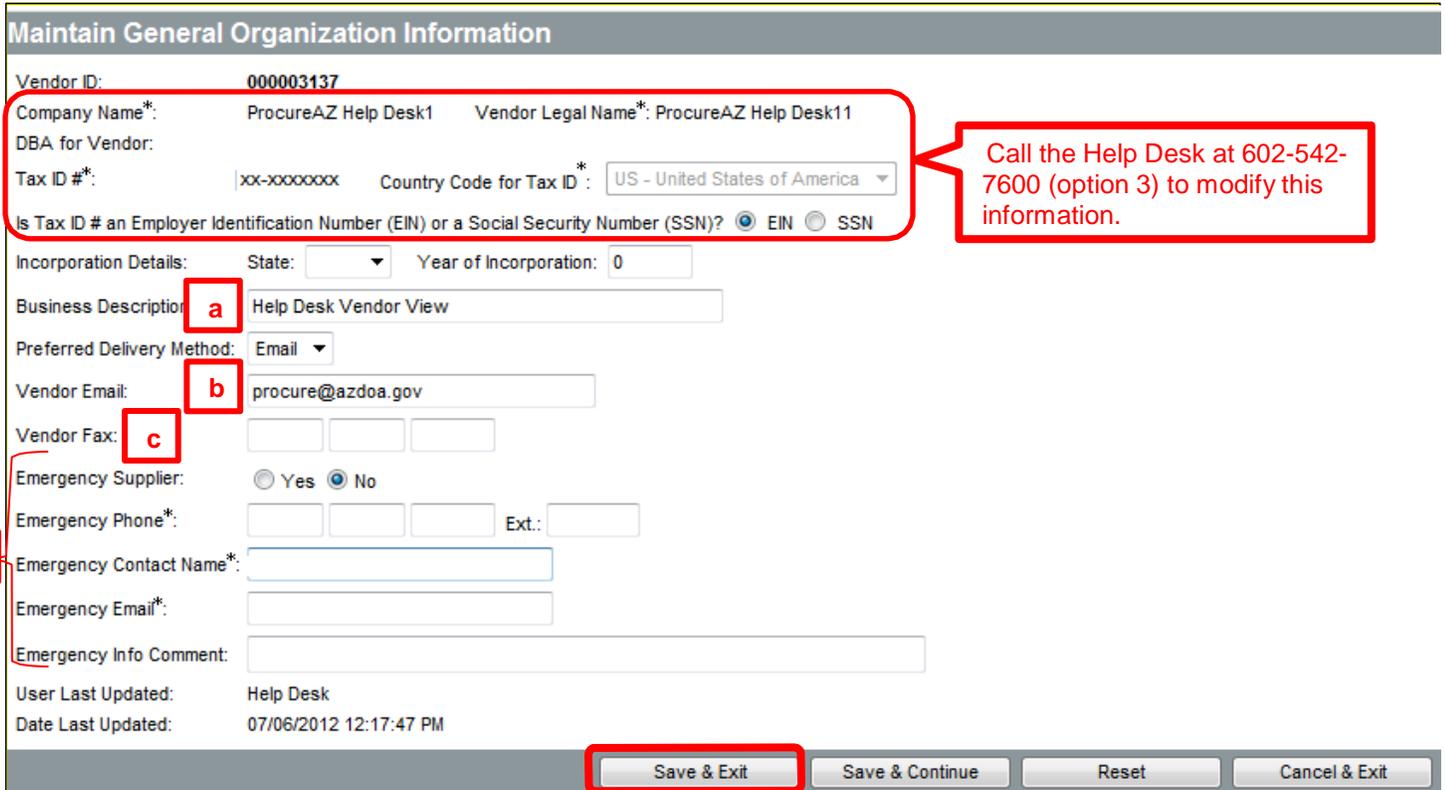


- Click Maintain General Organization Information icon.

# Vendor Profile Maintenance

## Updating General Organization Information

**Maintain General Organization Information:** This page allows you to view the Company Name, Vendor Legal Name, Parent Vendor Account # (if a DBA account), Tax ID #, Country Code for Tax ID, Tax ID type (SSN or EIN). If updates need to be made to any of the above listed fields, please contact the Help Desk at procure@azdoa.gov or call 602-542-7600 (option 3) for assistance.



The screenshot shows the 'Maintain General Organization Information' form. A red box highlights the top section containing Vendor ID, Company Name, Vendor Legal Name, DBA for Vendor, Tax ID #, and Country Code for Tax ID. A callout box points to this section with the text: 'Call the Help Desk at 602-542-7600 (option 3) to modify this information.' Red boxes labeled 'a' through 'd' point to the Business Description, Vendor Email, Vendor Fax, and Emergency Contact Name fields respectively. The 'Save & Exit' button at the bottom is also highlighted with a red box.

1. The following fields are editable:

- a. Business Description
- b. Vendor Email **(The email address entered in the Vendor Email field is the only one that will receive automatic notifications for the vendor account.)**
- c. Vendor Fax
- d. Emergency Supplier Contact Information (Filling out the information to be an emergency supplier means you are available 24 hours a day, 7 days a week to fill emergency State orders.)

2. In order to save your updates click the **“Save & Exit”** button. You will return to the previous screen.

## Vendor Profile Maintenance

### Updating Vendor Addresses

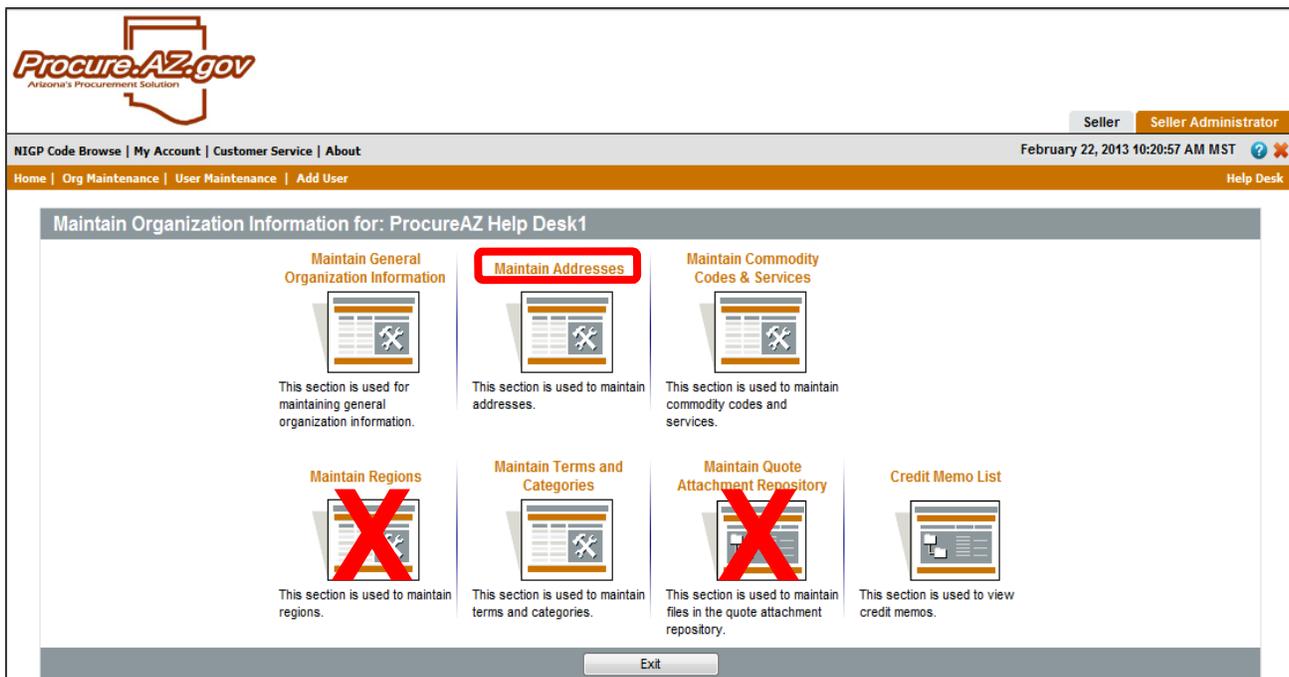
#### **Maintain Addresses**

This option allows you to edit, add, or remove the organization's various addresses that are registered within ProcureAZ. It is a good idea to periodically check your address information to make sure it lists the most current information for your company. This ensures agency buyers will always be able to get in touch with you for bid or purchase opportunities.

ProcureAZ allows you to utilize and save multiple types of addresses for your company:

- **General – Default address and contact information for the account.**
- **Bid** – Address to be reached for Bid opportunities
- **Purchase Order** – Address to be listed on POs
- **Remit** – Address for payments to be sent (must match identical to what is submitted on invoice)

In addition, you can have multiple addresses for each type (example: if you have multiple locations where POs can be sent by the State); however, you will be asked to identify a Default address for each type you create.



Procure-AZ.gov  
Arizona's Procurement Solution

Seller Seller Administrator

NIGP Code Browse | My Account | Customer Service | About February 22, 2013 10:20:57 AM MST ? X

Home | Org Maintenance | User Maintenance | Add User Help Desk

#### Maintain Organization Information for: ProcureAZ Help Desk1

<b>Maintain General Organization Information</b>  This section is used for maintaining general organization information.	<b>Maintain Addresses</b>  This section is used to maintain addresses.	<b>Maintain Commodity Codes &amp; Services</b>  This section is used to maintain commodity codes and services.	
<b>Maintain Regions</b>  This section is used to maintain regions.	<b>Maintain Terms and Categories</b>  This section is used to maintain terms and categories.	<b>Maintain Quote Attachment Repository</b>  This section is used to maintain files in the quote attachment repository.	<b>Credit Memo List</b>  This section is used to view credit memos.

Exit

# Vendor Profile Maintenance

1. Click the **Maintain Addresses** icon. This will provide a list of current addresses registered for your company.

Maintain Addresses for: ProcureAZ Help Desk1				
Name	Address Type	Address Information	Status	Default for Type
<a href="#">Bids</a>	Bid Mailing Address	ProcureAZ Help Desk1 100 N 15th Ave Suite 201-Bids Phoenix, AZ 85007 US Email: procure@azdoa.gov Phone: (602)542-7600	Active	Yes
<a href="#">General</a>	General Mailing Address	ProcureAZ Help Desk 100 N 15th Ave Suite 201 Phoenix, AZ 85007 US Email: procure@azdoa.gov Phone: (602)542-7600	Active	Yes
<a href="#">Remit</a>	Remit Address	ProcureAZ Help Desk 2 100 N 15th Ave Suite 201 - Remit Phoenix, AZ 85007 US Email: procure@azdoa.gov Phone: (602)542-7600	Active	Yes

2. To update an existing address, click the copper link in the **Name** column.
  - You are now able to edit the chosen address. Asterisks (\*) identify required fields. Use the Tab key to advance to the next field, or click in the field with the left mouse button. The image below reflects the required fields grouped together by numbers. Use Mailing Address Line 1 to enter the street address of your company. Enter the name of your company as it will appear on your invoices to the State on Mailing Address Line 3 ONLY if it is different than your company's legal name. If your company name on your invoices is the same as your legal name you only need to complete the street address information along with any building or suite numbers. **Do not use Mailing Line 4.** Make sure you fill out the City, State, Zip and Company Phone fields as well.

**Address Book - ProcureAZ Help Desk1**

**General Mailing Address**

Name this Address\*:

Contact Name\*:

Address Line 1\*:

Address Line 2:

Address Line 3:

Address Line 4:

Country\*:

City\*:  State/Province\*:

ZIP\*:  County:

Phone\*:    Ext:

Toll Free:    Mobile:

Fax:    Email\*:

Id:  Alternate Id:

Status:  Web Address:

Default address for this address type (Begin with http:// or https://)

## Vendor Profile Maintenance

- Once you have completed your updates click **Save & Exit** to save your changes and return to the previous screen.

### Add Addresses

- To add an address, click the **Add Another Address** button on the Maintain Addresses view.

Maintain Addresses for: ProcureAZ Help Desk1				
Name	Address Type	Address Information	Status	Default for Type
<u>General</u>	General Mailing Address	ProcureAZ Help Desk 100 N 15th Ave Suite 201 Phoenix, AZ 85007 US Email: procure@azdoa.gov Phone: (602)542-7600	Active	Yes

**NOTE:** The required data within these fields is the same as if you were updating an existing address (marked by asterisks). The difference in the two processes is that you must choose the **Address Type** from the pull down menu when creating a new address.

**Address Book - ProcureAZ Help Desk1**

**Enter a New Address**

Address Type a Bid Mailing Address

Name this Address\* b Bid Mailing Address

Contact Name\* c Emergency Mailing Address

Address Line 1\* d Purchase Order Mailing Address

Address Line 2: Remit Address

Address Line 3: Sales Address

Address Line 4:

Country\*: US - United States of America e

City\* f State/Province\* g

ZIP\* h County:

Phone\* i Ext:

Toll Free: Mobile:

Fax: Email\* j

Id: Alternate Id:

Status: Active Web Address:

Default address for this address type (Begin with http:// or https://)

Required Fields in the Address screen:

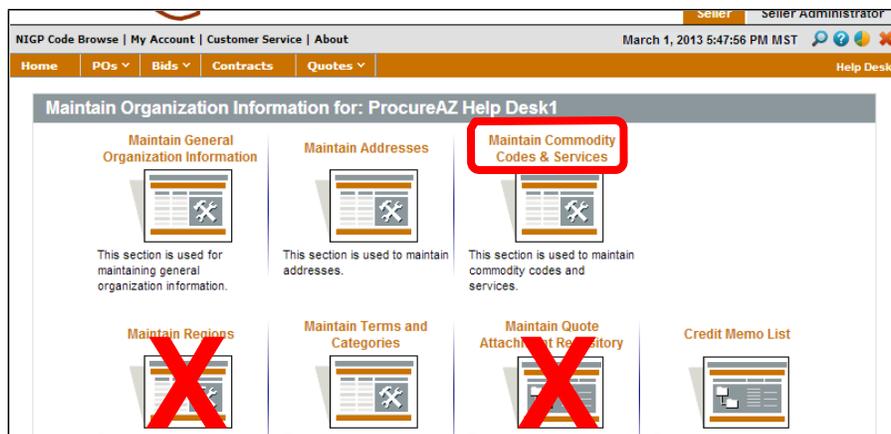
- Address Type - Select the type of address (emergency contact, bid mailing, PO mailing, remittance). This is a required field.
- Name this Address - Enter a descriptive name for the address (i.e. Corporate, Bids, POs, etc).

## Vendor Profile Maintenance

- c. Contact Name - Enter the primary contact person for this address. This is a required field.
  - d. Address Line 1 - Enter the first line of the street address. This is a required field.
  - e. Country - The country. This is not a required field.
  - f. City - Enter the city for the address. This is a required field.
  - g. State/Province - Enter the state or province for the address. If you are not a US or Canadian user please select 'NONE'. An agency representative may contact you for further details. This is a required field.
  - h. ZIP - The ZIP code. US customers please use either ##### or #####-#### format. Canadian customers please use a#a-#a# format. If you are not a US or Canadian user please '00000'. An agency representative may contact you for further details. This is a required field.
  - i. Phone - The phone number associated with this address.
  - j. Email - The email address associated with this address.
2. After filling out the form, be sure to click the **Save & Exit** button to submit the record and return to the Maintain Organization Information homepage.

### Updating Commodity Codes and Services

To view or update information you have provided the State about which goods and services your organization offers, click the **Maintain Commodity Codes and Services** icon.



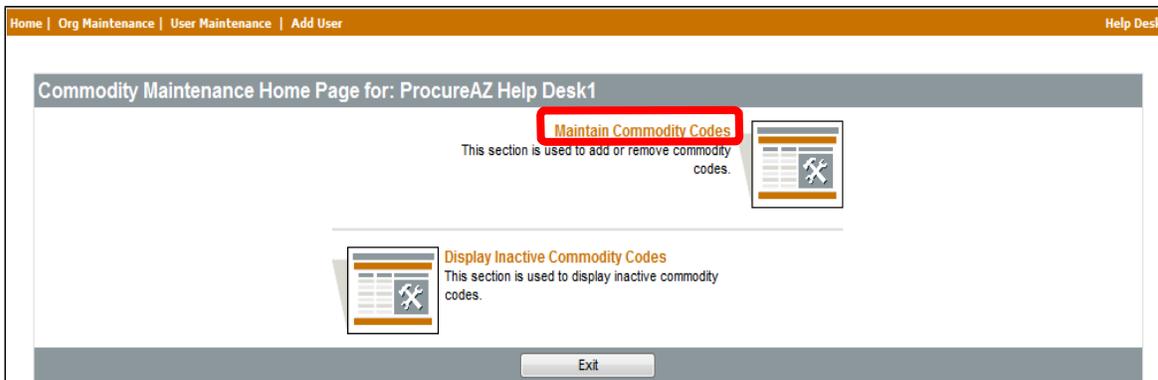
## Vendor Profile Maintenance

From this screen, you can access both **Display Inactive Commodity Codes** (view any codes you had previously registered for, but the State no longer uses) and **Maintain Commodity Codes** (see a list of commodities and services you registered for, add new codes and deactivate codes).



### Deactivating Commodity Codes

1. Click **Maintain Commodity Codes**.



2. To deactivate a code(s) from the existing list of Commodity Codes, check the box in the **Deactivate** column next to the desired commodity code.

Commodity and Service Codes			
Current Codes - ProcureAZ Help Desk1			
Deactivate	Code	Description	Date Added
<input type="checkbox"/>	060-70	Replacement Parts for Chrysler (Mopar)	04/30/2010
<input type="checkbox"/>	285-36	Gates, Electric (Including Card Readers, etc.)	04/30/2010
<input type="checkbox"/>	285-39	Generators, Stationary Type (Not Automotive)	04/30/2010
<input type="checkbox"/>	285-79	Switches, Parts and Accessories (Miscellaneous)	04/30/2010
<input type="checkbox"/>	924-18	Educational Services, Alternative	04/04/2011
<input type="checkbox"/>	946-33	Collection Services, Financial Debt	08/01/2011
<input type="checkbox"/>	948-28	Dental Services	12/21/2010
<input type="checkbox"/>	952-53	Training : H053-00	01/05/2011

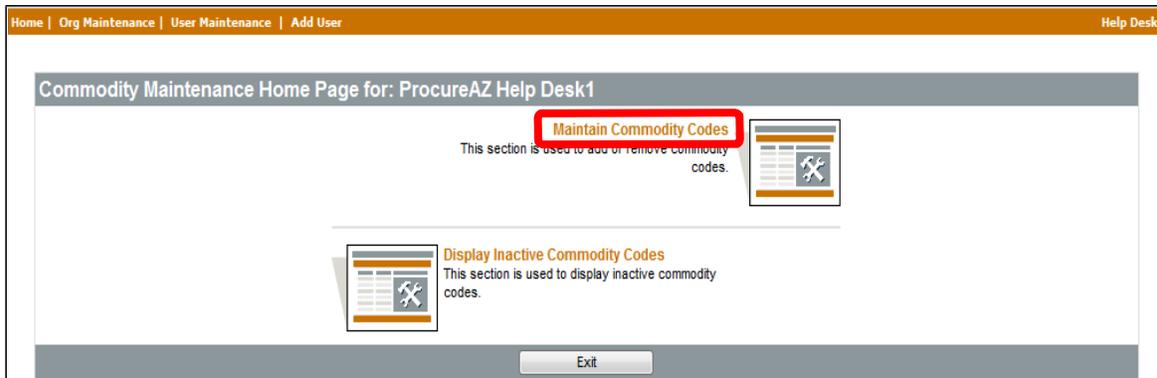
At the bottom of the table, there are three buttons: 'Deactivate Selected Items', 'Add Additional Codes', and 'Cancel & Exit'. The 'Deactivate Selected Items' and 'Cancel & Exit' buttons are highlighted with red boxes.

# Vendor Profile Maintenance

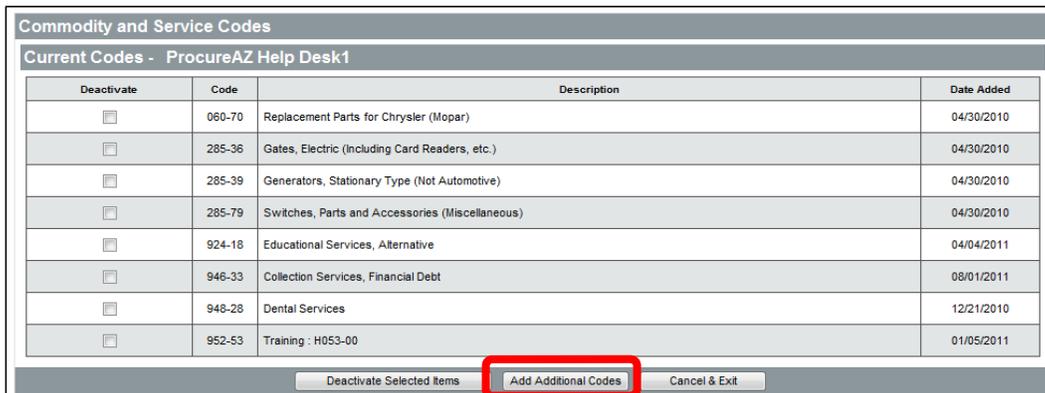
3. Click **Deactivate Selected Items** after checking all the codes you wish to deactivate. The screen will refresh with the requested code(s) removed.
4. To return to the **Commodity Maintenance Homepage** click the **Cancel & Exit** button.

## Adding Commodity Codes

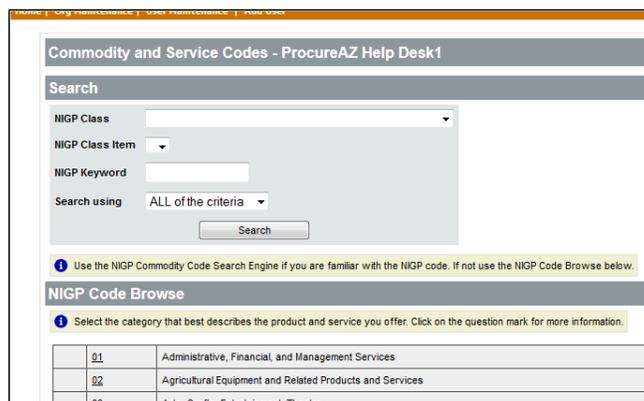
1. Click **Maintain Commodity Codes**.



2. Click the **Add Additional Codes** button:

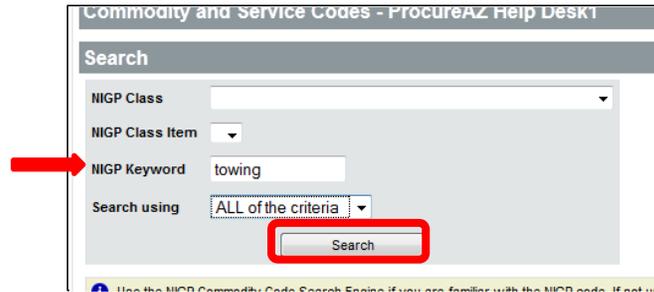


The **Commodity and Service Codes** screen allows you to search for the National Institute of Governmental Purchasing (NIGP) Codes that correspond with what your organization offers:



## Vendor Profile Maintenance

3. Type a keyword into the **NIGP Keyword** field and click the **Search** button.



Commodity and Service Codes - ProcureAZ Help Desk1

Search

NIGP Class

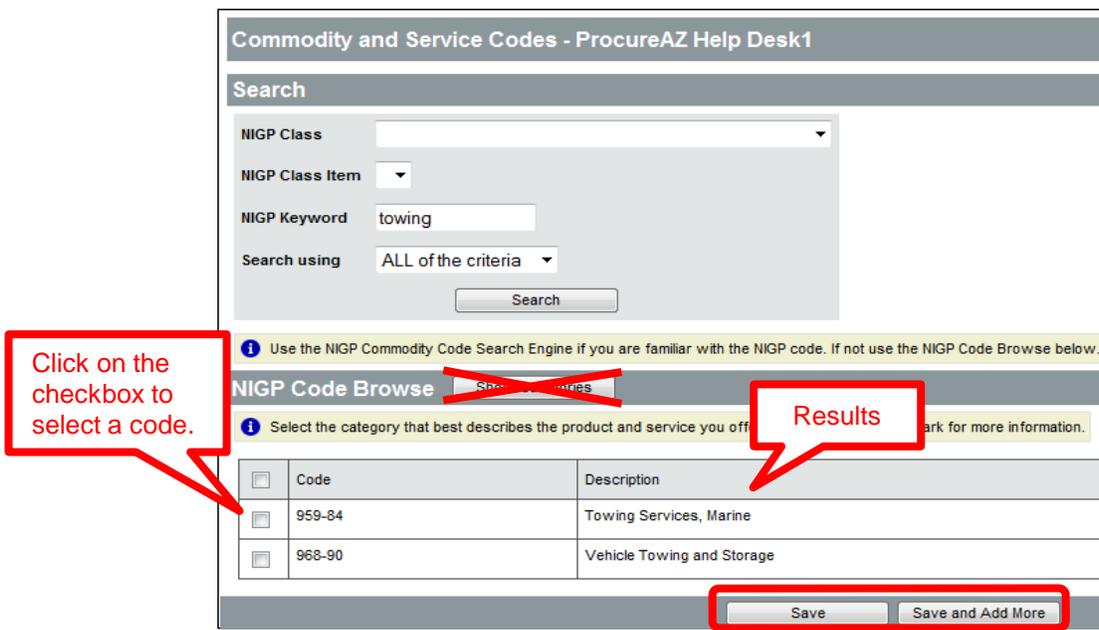
NIGP Class Item

NIGP Keyword

Search using

Use the NIGP Commodity Code Search Engine if you are familiar with the NIGP code. If not use

4. The search results will display below the gray bar. You may need to scroll down to see them.



Commodity and Service Codes - ProcureAZ Help Desk1

Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

Use the NIGP Commodity Code Search Engine if you are familiar with the NIGP code. If not use the NIGP Code Browse below.

**NIGP Code Browse**

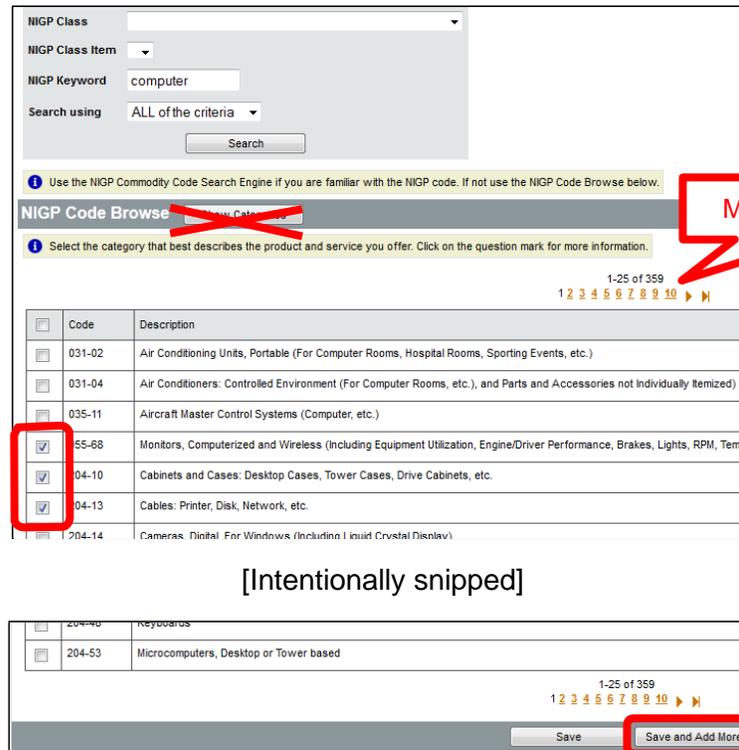
Select the category that best describes the product and service you offer. Click on the checkbox to select a code. Click on the link for more information.

<input type="checkbox"/>	Code	Description
<input type="checkbox"/>	959-84	Towing Services, Marine
<input type="checkbox"/>	968-90	Vehicle Towing and Storage

5. To select a commodity code, click on the checkbox next to it.
6. Once you have selected all the codes that match what you provide, select **Save** or **Save and Add More**.

## Vendor Profile Maintenance

- If there are multiple pages of results, you need to select all the codes you want on the page in front of you, then click the **Save and Add More** button at the bottom of the screen.



1-25 of 359  
1 2 3 4 5 6 7 8 9 10 > >>

<input type="checkbox"/>	Code	Description
<input type="checkbox"/>	031-02	Air Conditioning Units, Portable (For Computer Rooms, Hospital Rooms, Sporting Events, etc.)
<input type="checkbox"/>	031-04	Air Conditioners: Controlled Environment (For Computer Rooms, etc.), and Parts and Accessories not Individually Itemized)
<input type="checkbox"/>	035-11	Aircraft Master Control Systems (Computer, etc.)
<input checked="" type="checkbox"/>	55-68	Monitors, Computerized and Wireless (Including Equipment Utilization, Engine/Driver Performance, Brakes, Lights, RPM, Tempe
<input checked="" type="checkbox"/>	04-10	Cabinets and Cases: Desktop Cases, Tower Cases, Drive Cabinets, etc.
<input checked="" type="checkbox"/>	04-13	Cables: Printer, Disk, Network, etc.
<input type="checkbox"/>	204-14	Cameras: Digital For Windows (Including Liquid Crystal Display)

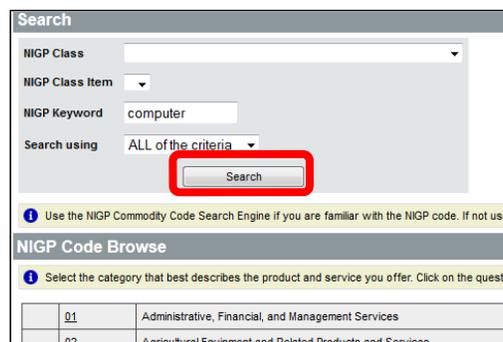
[Intentionally snipped]

<input type="checkbox"/>	204-40	Keyboards
<input type="checkbox"/>	204-53	Microcomputers, Desktop or Tower based

1-25 of 359  
1 2 3 4 5 6 7 8 9 10 > >>

Save Save and Add More

- You will be taken back to the original search screen but your keyword will be saved in the **NIGP Keyword** field. Click the **Search** button to repeat your search.



Search

NIGP Class  
NIGP Class Item  
NIGP Keyword: computer  
Search using: ALL of the criteria

Search

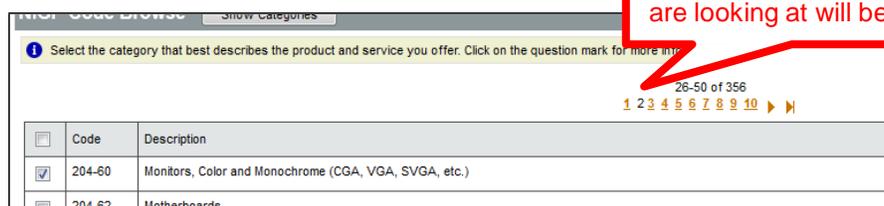
Use the NIGP Commodity Code Search Engine if you are familiar with the NIGP code. If not use

NIGP Code Browse

Select the category that best describes the product and service you offer. Click on the question mark for more information.

01	Administrative, Financial, and Management Services
02	Agricultural Equipment and Related Products and Services

- Click on the page number you wish to add more codes from and repeat steps 7 through 9 until you have added all the codes that you wish to.

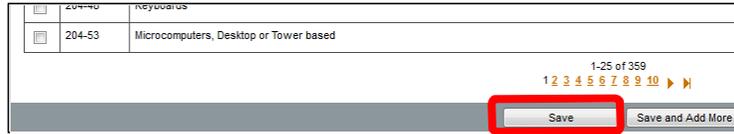


1-25 of 356  
1 2 3 4 5 6 7 8 9 10 > >>

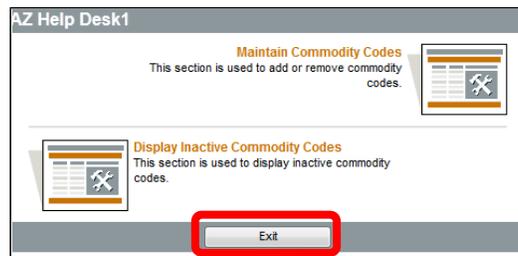
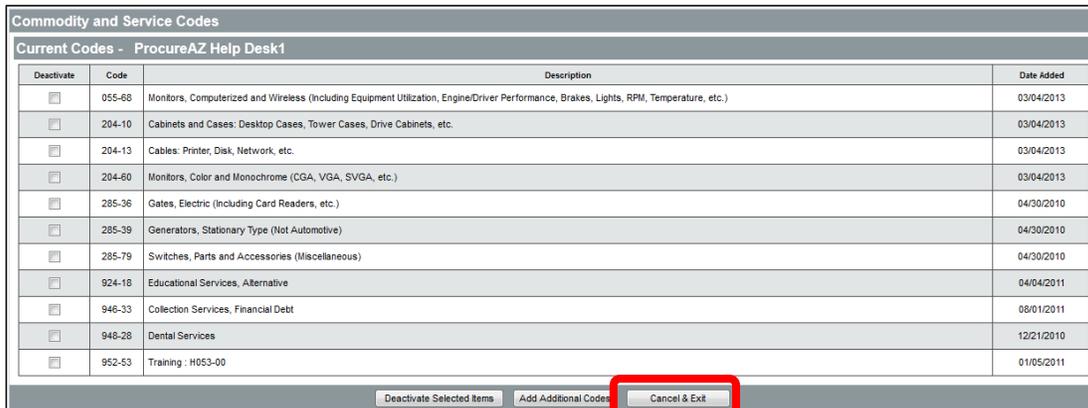
<input type="checkbox"/>	Code	Description
<input checked="" type="checkbox"/>	204-60	Monitors, Color and Monochrome (CGA, VGA, SVGA, etc.)
<input type="checkbox"/>	204-62	Motherboards

# Vendor Profile Maintenance

10. Click the **Save** button.

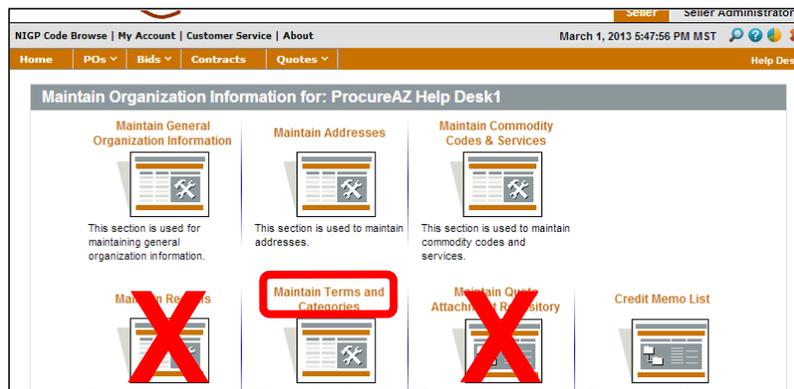


11. If you are finished adding commodity codes click **Cancel & Exit** and then **Exit** to return to the Maintain Organization homepage.



## Updating Terms and Categories

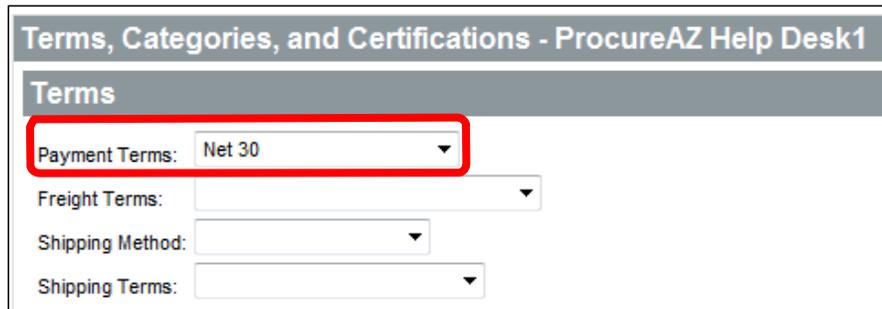
To update information you have provided the State regarding your payment terms and classifications/categories, click the **Maintain Terms and Categories** button. The State cannot send you purchase orders if this page is not filled out correctly. You are responsible for the accuracy of the information.



## Vendor Profile Maintenance

### Selecting Your Terms:

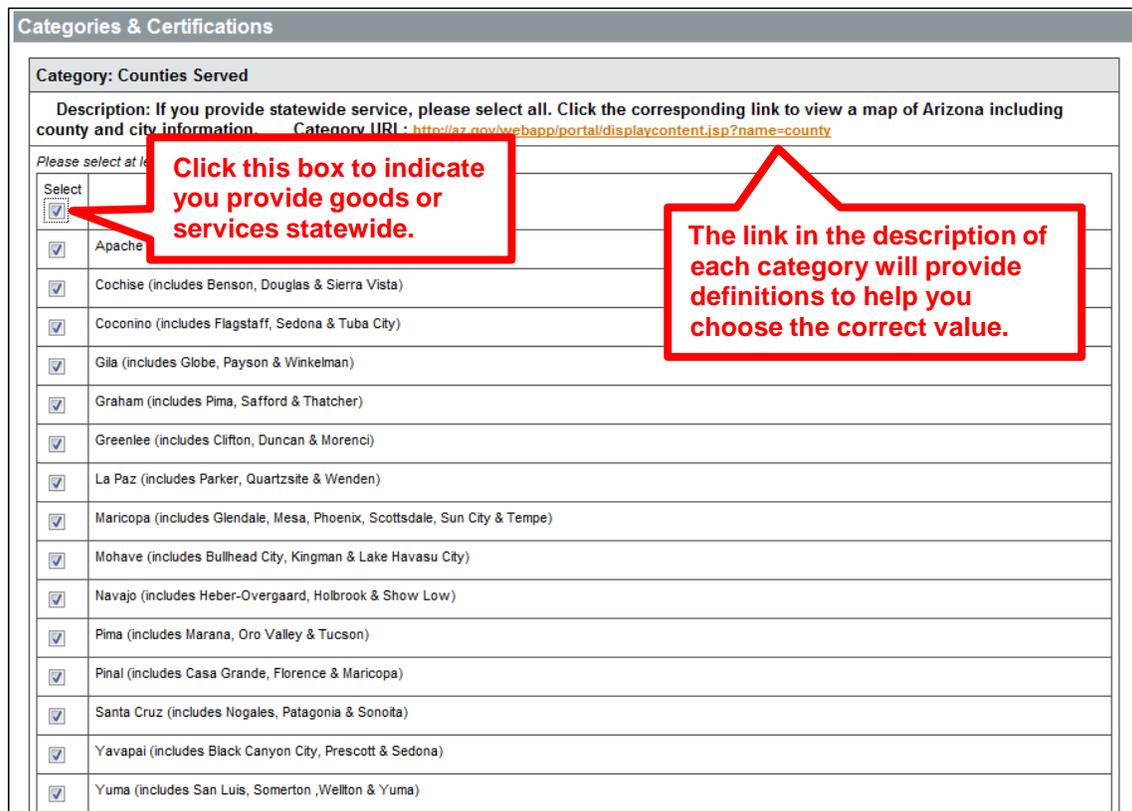
The State cannot send your business a purchase order unless you have selected **Payment Terms** from the drop-down menu in the **Terms** section. If your business does not have specific payment terms the State standard is **Net 30**. When responding to a Bid you can choose to use your default payment terms or select different ones in your quote.



1. Click the pull down arrow next to Payment Terms.
2. Scroll to the bottom of the menu and click Net 30 to select from the menu.

### Counties Served:

3. You may select more than one county, but you **must select at least one**. If you want to indicate you provide goods or services statewide click the top checkbox, otherwise click to select or deselect the counties you wish to serve.



Categories & Certifications	
<b>Category: Counties Served</b>	
Description: If you provide statewide service, please select all. Click the corresponding link to view a map of Arizona including county and city information. <a href="http://az.gov/webapp/portal/displaycontent.jsp?name=county">Category URI: http://az.gov/webapp/portal/displaycontent.jsp?name=county</a>	
Please select at least one county.	
<input checked="" type="checkbox"/>	Select
<input checked="" type="checkbox"/>	Apache
<input checked="" type="checkbox"/>	Cochise (includes Benson, Douglas & Sierra Vista)
<input checked="" type="checkbox"/>	Coconino (includes Flagstaff, Sedona & Tuba City)
<input checked="" type="checkbox"/>	Gila (includes Globe, Payson & Winkelman)
<input checked="" type="checkbox"/>	Graham (includes Pima, Safford & Thatcher)
<input checked="" type="checkbox"/>	Greenlee (includes Clifton, Duncan & Morenci)
<input checked="" type="checkbox"/>	La Paz (includes Parker, Quartzsite & Wenden)
<input checked="" type="checkbox"/>	Maricopa (includes Glendale, Mesa, Phoenix, Scottsdale, Sun City & Tempe)
<input checked="" type="checkbox"/>	Mohave (includes Bullhead City, Kingman & Lake Havasu City)
<input checked="" type="checkbox"/>	Navajo (includes Heber-Overgaard, Holbrook & Show Low)
<input checked="" type="checkbox"/>	Pima (includes Marana, Oro Valley & Tucson)
<input checked="" type="checkbox"/>	Pinal (includes Casa Grande, Florence & Maricopa)
<input checked="" type="checkbox"/>	Santa Cruz (includes Nogales, Patagonia & Sonoita)
<input checked="" type="checkbox"/>	Yavapai (includes Black Canyon City, Prescott & Sedona)
<input checked="" type="checkbox"/>	Yuma (includes San Luis, Somerton, Wellton & Yuma)

## Vendor Profile Maintenance

### **Business Indicator:**

4. Check the box to select a new indicator (**you can only choose one**) If you don't know if you qualify as a small business in Arizona, the link in the **Description** will take you to the definition in Arizona's Revised Statutes.

Category: Business Indicator	
<b>Description: If you need more information about the definition of Small Business, click the corresponding link.</b> <b>Category</b> URL: <a href="http://www.azleg.gov/ars/41/01001.htm">http://www.azleg.gov/ars/41/01001.htm</a>	
Please select exactly one category value	
Select	
<input checked="" type="checkbox"/>	Non-Small, Non-Minority or Non-Woman Owned Business or Individual, Non-Business
<input type="checkbox"/>	Small Business

There are a large number of options to describe your business indicator including the ability to acknowledge ethnicity and gender; the list also includes Non Profit and Government agency.

<input type="checkbox"/>	Minority Owned Business - Hispanic
<input type="checkbox"/>	Non-Profit, IRC 501(c)
<input type="checkbox"/>	Government Agency

Notes:

### **Entity Type:**

5. Click to select the **ONE** category that matches what you have on file with the IRS. **DO NOT SELECT STATE OF ARIZONA EMPLOYEE.** State of Arizona employees are paid through HRIS. If you registered using your own Social Security Number, click on the last checkbox in the list (**Individual/Sole Proprietorship etc.**).

Category: Entity Type	
Please select exactly one category value	
Select	
<input type="checkbox"/>	The US or any of its political subdivisions or instrumentalities
<input type="checkbox"/>	A state, a possession of the US, or any of their political subdivisions or instrumentalities
<input checked="" type="checkbox"/>	Corporation, LLC, or PLLC NOT providing health care, medical or legal services
<input type="checkbox"/>	Partnership, LLP or Partnership organized as LLC or PLLC
<input type="checkbox"/>	Other: Tax Exempt Entity (Describe in Notes section)
<input type="checkbox"/>	Corporation, LLC or PLLC providing health care, medical or legal services
<input type="checkbox"/>	Tax Reportable Entity (Describe in Notes section)
<input type="checkbox"/>	An international organization or any of its agencies/instrumentalities
<input type="checkbox"/>	Individual/Sole Proprietorship or Sole Proprietor organized as LLC, PLLC

Notes:

If you are registering using your own Social Security Number, click on the last checkbox (Individual/Sole Proprietorship etc.).

## Vendor Profile Maintenance

### Veteran-Owned Business:

6. Check the box if you are a Veteran-Owned Business as defined in the description box.

<b>Category: Veteran-Owned Business</b>	
Description: Means the business is at least fifty-one percent owned by one or more veterans or, if publicly held, at least fifty-one percent of the stock is owned by one or more veterans; and the management and daily operations are controlled by one or more veterans who own the business; and the home office of the business is located in Arizona and is not a branch or subsidiary of a foreign corporation, firm or other business. Indicate if business is veteran-owned	
Please select at most one category value	
Select	
<input type="checkbox"/>	Veteran-Owned Business

### Tax ID Certification:

7. Click the checkbox to certify the Employer Identification Number (EIN) or Social Security Number (SSN) you entered in the first pop-up window is correct (this checkbox takes the place of a physical signature).

<b>Category: Tax ID Certification</b>	
Description: A person or entity (in this case, the State of Arizona) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA. You must certify that the TIN you are providing is correct. For more information, go to <a href="http://www.irs.gov">www.irs.gov</a>	
Please select exactly one category value	
Select	
<input checked="" type="checkbox"/>	Under Penalties of perjury, I certify that the number shown on this form is my correct taxpayer identification number.

### Backup Withholding Certification:

8. If you are subject to backup withholding you must indicate so here.

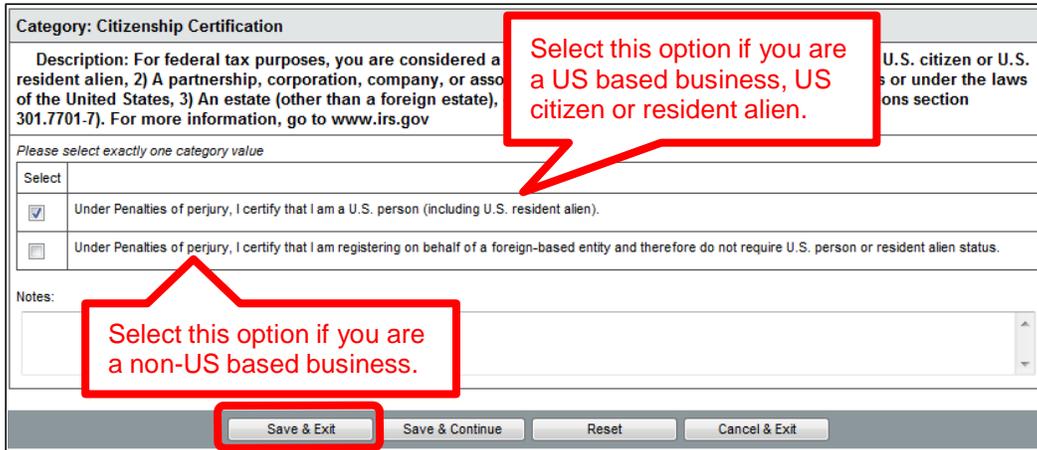
<b>Category: Backup Withholding Certification</b>	
Description: What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 28% of such payments. This is called "backup withholding." The 28% rate is effective until December 31, 2010, and the new rate is to be distributed by the IRS thereafter. Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, reportable gross proceeds paid to attorneys, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding. For more information, go to <a href="http://www.irs.gov">www.irs.gov</a>	
Please select exactly one category value	
<input type="checkbox"/>	Under Penalties of perjury, I certify that I am not subject to backup withholding because I am exempt from backup withholding.
<input checked="" type="checkbox"/>	Under Penalties of perjury, I certify that I am not subject to backup withholding because I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends.
<input type="checkbox"/>	Under Penalties of perjury, I certify that I am not subject to backup withholding because the IRS has notified me that I am no longer subject to backup withholding.

Most vendors select the second option.

# Vendor Profile Maintenance

## Citizenship Certification:

- Select the box certifying you are a US citizen or resident alien, or select the box certifying you are registering for a foreign-based business.



**Category: Citizenship Certification**

Description: For federal tax purposes, you are considered a 1) U.S. citizen or U.S. resident alien, 2) A partnership, corporation, company, or association of the United States, 3) An estate (other than a foreign estate), (see Section 301.7701-7). For more information, go to [www.irs.gov](http://www.irs.gov)

Please select exactly one category value

Select	
<input checked="" type="checkbox"/>	Under Penalties of perjury, I certify that I am a U.S. person (including U.S. resident alien).
<input type="checkbox"/>	Under Penalties of perjury, I certify that I am registering on behalf of a foreign-based entity and therefore do not require U.S. person or resident alien status.

Notes:

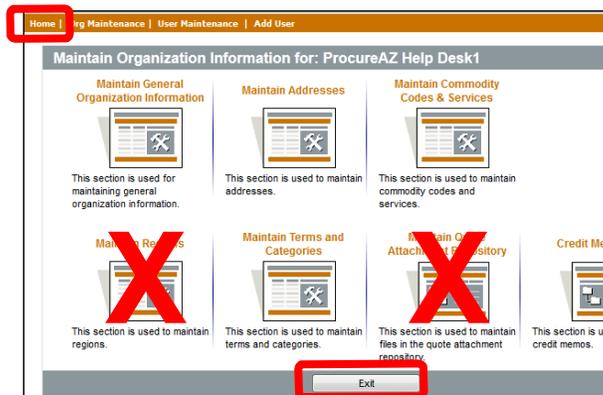
Buttons: Save & Exit, Save & Continue, Reset, Cancel & Exit

*Callout 1: Select this option if you are a US based business, US citizen or resident alien.*

*Callout 2: Select this option if you are a non-US based business.*

- Once all the category selections have been updated click the **Save & Exit** button to return to the **Maintain Organization Information** homepage.

- Click **Home** or **Exit** to return to the Seller Administrator Homepage.



Home | Organization Maintenance | User Maintenance | Add User

### Maintain Organization Information for: ProcureAZ Help Desk1

- Maintain General Organization Information: This section is used for maintaining general organization information.
- Maintain Addresses: This section is used to maintain addresses.
- Maintain Commodity Codes & Services: This section is used to maintain commodity codes and services.
- Maintain Regions: This section is used to maintain regions.
- Maintain Terms and Categories: This section is used to maintain terms and categories.
- Maintain Quote Attachment Repository: This section is used to maintain files in the quote attachment repository.
- Credit Memos: This section is used to maintain credit memos.

Buttons: Exit

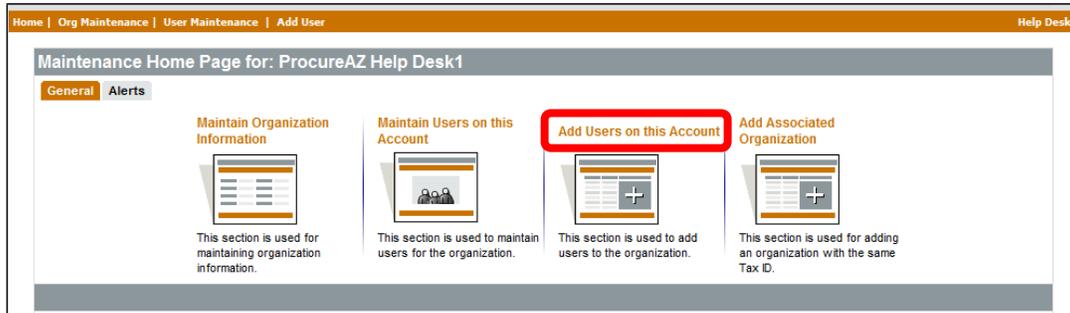
*Callout: Home*

## Adding Users

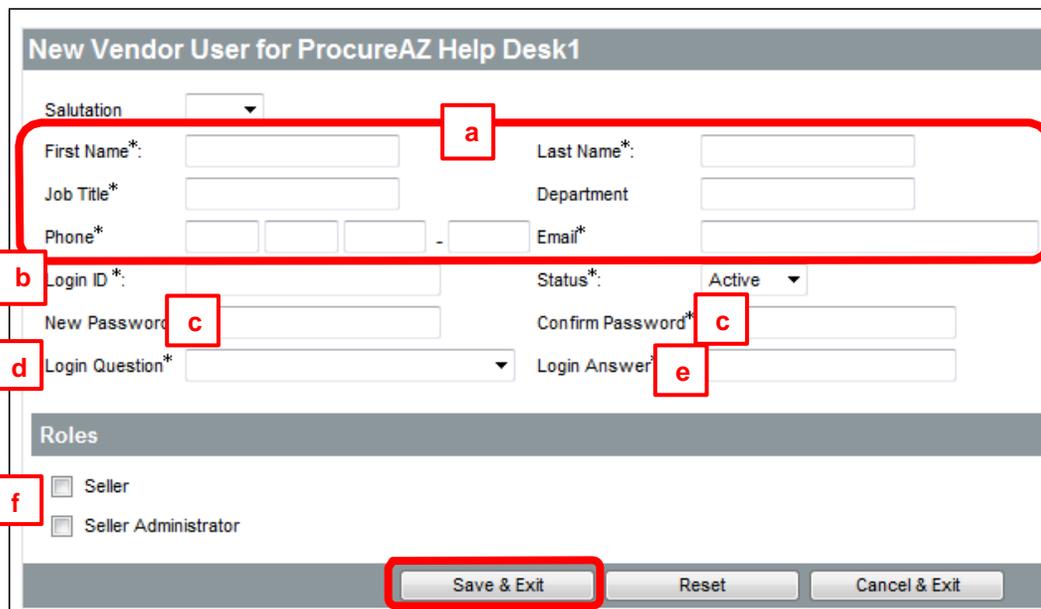
There are two ways to add a new user to an account. You can choose either **Add Users on this Account** or **Maintain Users on this Account**. In this example we will go through the steps of the **Add Users on this Account** process.

# Vendor Profile Maintenance

1. Click Add Users on this Account.



2. Complete the fields listed below in the New Vendor User screen.



- a. First Name, Last Name, Job Title, Phone and Email are all required fields.
- b. Login ID – this needs to be unique throughout the entire system with a minimum of five characters (we recommend using your email address).
- c. Password and Confirm Password – **When creating a new user, use a generic password to start with.** When the user logs in the first time they will be prompted to create a new password immediately. The password needs to be at least six characters, you can use letters and numbers but no special characters (ie. !@#\$%).
- d. Login Question – Choose one of the four login questions from the pull down menu.
- e. Login Answer - Type the answer to the login question you chose.

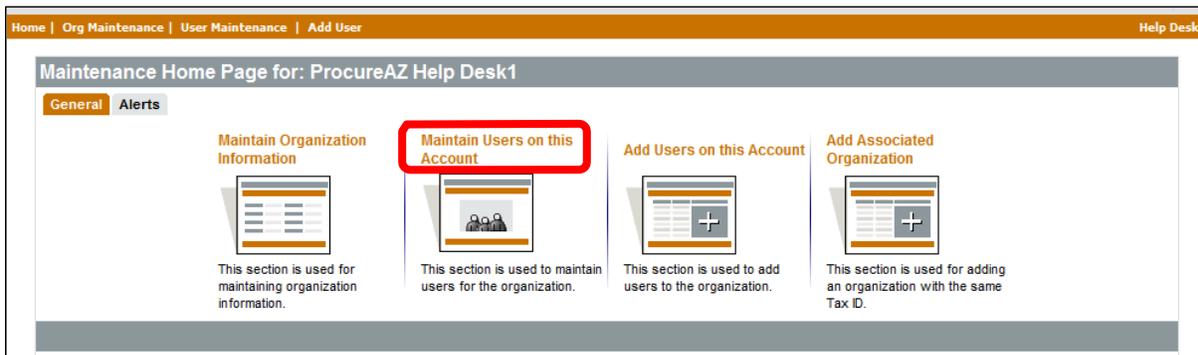
# Vendor Profile Maintenance

- f. Select one or both ProcureAZ roles for the user. The **Seller** role allows the user to respond to open bids and manage purchase orders. The **Seller Administrator** role allows the user to update profile information.
- 3. After all required fields have been entered click the **Save & Exit** button to return to the **Maintenance Homepage**.

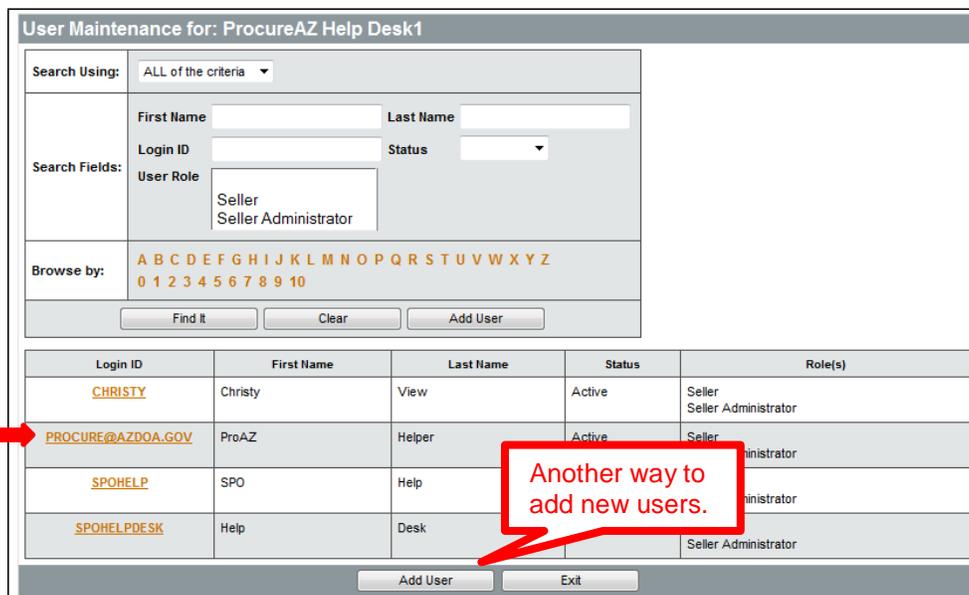
## Maintaining Users

**Maintain Users on this Account**, enables you to determine what users are already set up in the system and to edit their information, including passwords, when necessary. To edit the user settings use the following steps:

- 1. Click **Maintain Users on this Account**.

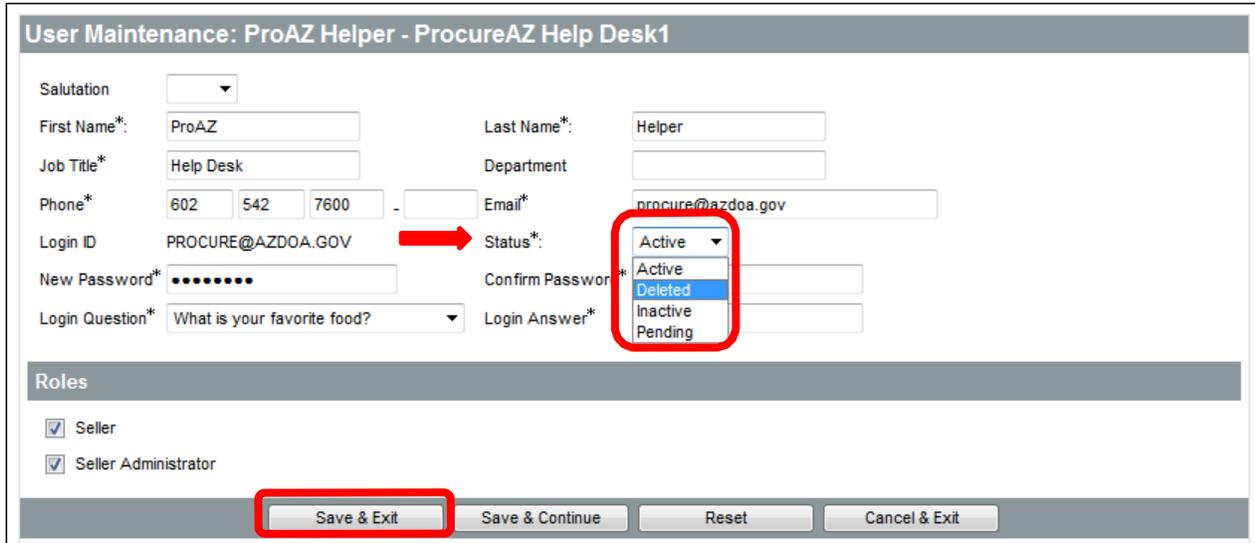


- 2. Click the Login ID of the user you want to edit in the Login ID Column.



## Vendor Profile Maintenance

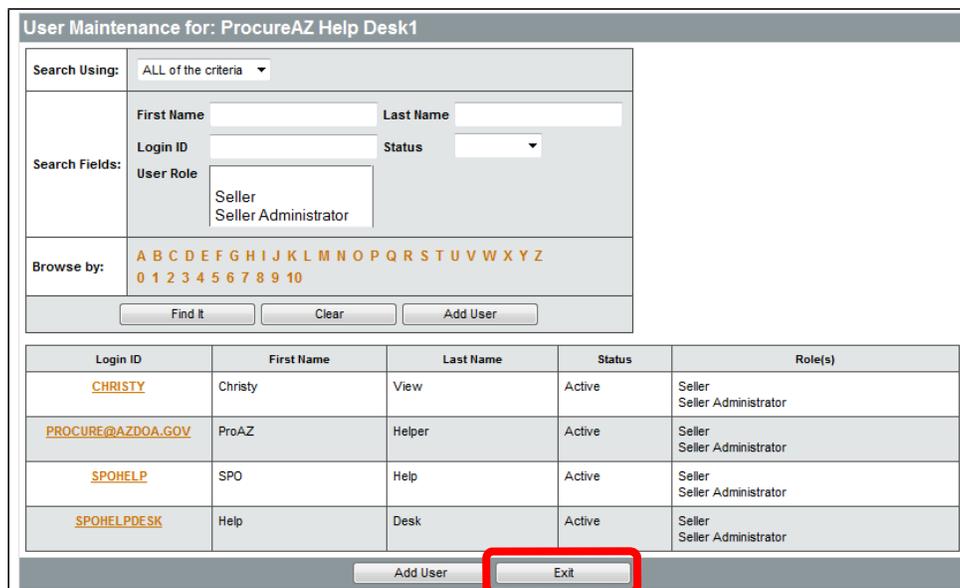
3. Edit the data as needed (refer to the Adding a New User section for an explanation of the fields required).



4. To disable a user click the pull down menu and choose Deleted. This disables the user from accessing ProcureAZ, but does not remove them from the user listing or the system.

**NOTE:** The **Login ID** cannot be edited. If the user needs a new login ID you will need to start from scratch and follow the instructions for adding a new user.

5. Click the **Save & Exit** button when you are finished.



Login ID	First Name	Last Name	Status	Role(s)
CHRISTY	Christy	View	Active	Seller Seller Administrator
PROCURE@AZDOA.GOV	ProAZ	Helper	Active	Seller Seller Administrator
SPOHELP	SPO	Help	Active	Seller Seller Administrator
SPOHELPDESK	Help	Desk	Active	Seller Seller Administrator

6. Click the **Exit** button to return to the **Maintenance Homepage**.

## Vendor Profile Maintenance

### Add Associated Organization

Each vendor that registers with ProcureAZ must have a unique tax identification number. If your organization does business under multiple names, or has subsidiaries and/or divisions that utilize the same tax ID but operate under completely separate circumstances, you may want to register each of these DBAs or subsidiaries or **DBAs** separately. Then each subsidiary can receive and manage solicitation opportunities, contracts and purchase orders within ProcureAZ specific to them. In order for each of these DBAs or subsidiaries to have standalone vendor records in ProcureAZ using the same tax ID, follow the instructions provided below.

- If an affiliated entity has registered within ProcureAZ with the tax ID that you have attempted to register with, then please contact them and have them follow the instructions provided within this guide, which will allow you to register with the same tax ID.
- The same user account cannot have access to multiple vendor profiles within ProcureAZ. If you need to be able to login on behalf of different vendor records, you will need to setup a different ProcureAZ account for each one. A step-by-step registration guide is available at [http://www.spo.az.gov/docs/ProcureAZ/Vendors/20120913\\_Step-by-Step\\_Vendor\\_Registration](http://www.spo.az.gov/docs/ProcureAZ/Vendors/20120913_Step-by-Step_Vendor_Registration) on the State Procurement Office website.

In order to start the DBA registration process, a user from the original vendor account with the Seller Administrator role will need to send out an email with a DBA registration link.

### Sending a DBA Registration Link

1. Click **Add Associated Organization** from the Seller Administrator Maintenance Homepage.



Home | Org Maintenance | User Maintenance | Add User Help Desk

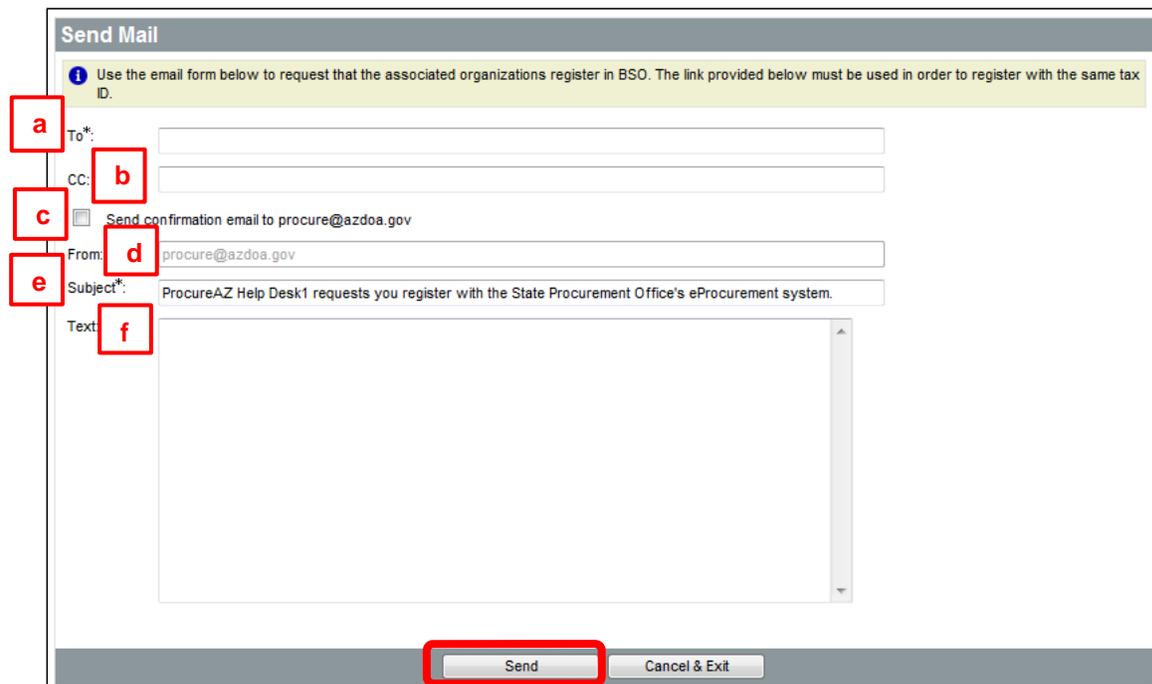
Maintenance Home Page for: ProcureAZ Help Desk1

General Alerts

Maintain Organization Information	Maintain Users on this Account	Add Users on this Account	Add Associated Organization
			
This section is used for maintaining organization information.	This section is used to maintain users for the organization.	This section is used to add users to the organization.	This section is used for adding an organization with the same Tax ID.

## Vendor Profile Maintenance

2. The **Send Mail** screen will appear. Complete the following fields:
  - a. **To** – The email addresses of the individuals that will receive this email.
  - b. **CC** – The email addresses of additional individuals that should receive this email.
  - c. **Send confirmation email to (your email address)** – When checked, an email will be sent to the sender confirming that the email was sent and listing the recipients.
  - d. **From** – This will automatically contain the sender's email address and cannot be edited.
  - e. **Subject** – The subject of the email that will be sent. This field is automatically populated.
  - f. **Text** – The body of the email that will be sent. Although not shown, this automatically populates with a standardized message, which cannot be changed, if you choose to type additional information in this field the text will appear *before* the standard message.

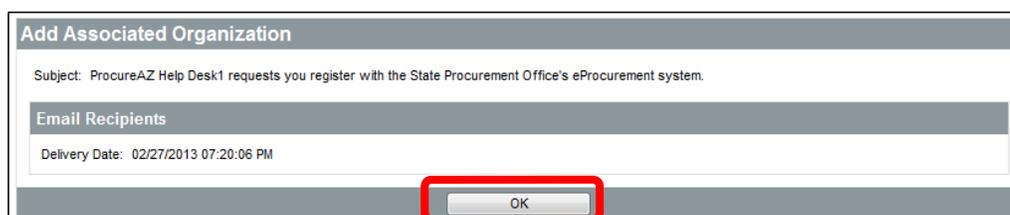


The screenshot shows the 'Send Mail' form with the following fields and their corresponding labels:

- a**: To\* (empty text box)
- b**: CC (empty text box)
- c**:  Send confirmation email to procure@azdoa.gov
- d**: From (procure@azdoa.gov)
- e**: Subject\* (ProcureAZ Help Desk1 requests you register with the State Procurement Office's eProcurement system.)
- f**: Text (empty text area)

At the bottom of the form, the **Send** button is highlighted with a red box.

3. Click the **Send** button when you are finished filling out all the fields. You will receive confirmation the email was sent.



The screenshot shows the 'Add Associated Organization' dialog box with the following information:

- Subject: ProcureAZ Help Desk1 requests you register with the State Procurement Office's eProcurement system.
- Email Recipients (empty list)
- Delivery Date: 02/27/2013 07:20:06 PM

The **OK** button at the bottom is highlighted with a red box.

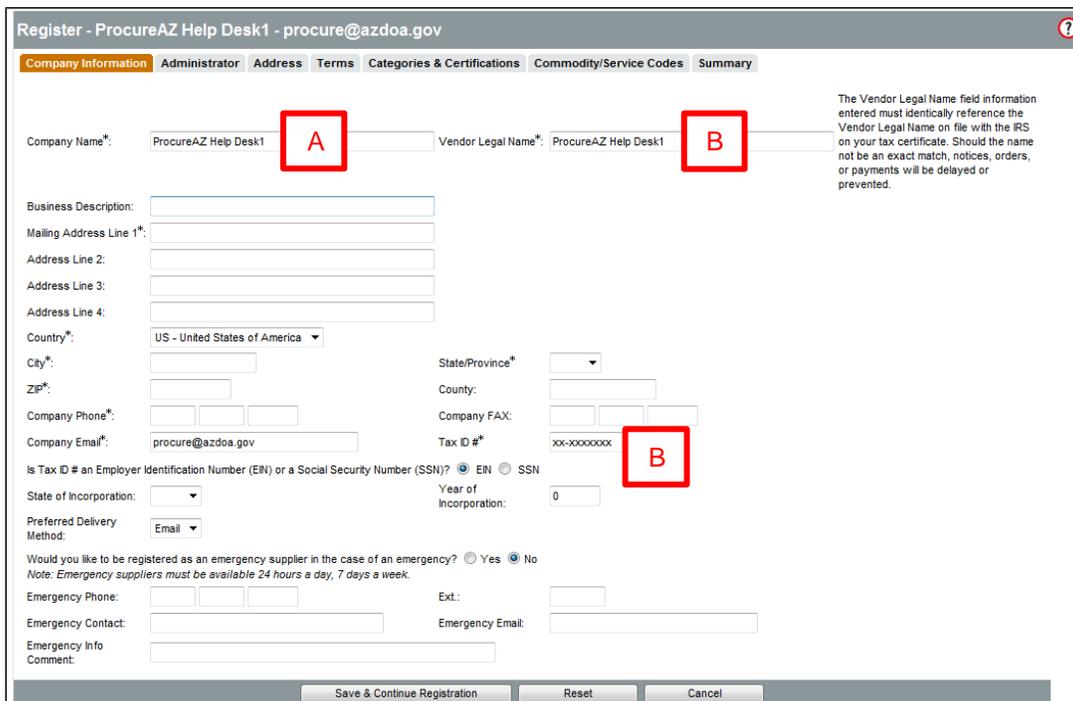
4. Click **OK** to return to the **Maintenance Homepage**.

## Vendor Profile Maintenance

The recipient of the email will get the following message. The highlighted link is what they will need to click in order to begin the DBA registration process.



Once the link is clicked the following page loads in an internet browser:



- A. Company name should reflect the name of the DBA Organization. The field is automatically filled out with the company name on the original account. It should be edited so buyers can recognize it as different from the parent organization.
- B. Vendor Legal Name and Tax ID # fields are auto-populated with data from the original account. The data needs to remain identical to the original account information; therefore it must not be changed.

Use the step-by-step registration guide available at [http://www.spo.az.gov/docs/ProcureAZ/Vendors/20120913\\_Step-by-Step\\_Vendor\\_Registration](http://www.spo.az.gov/docs/ProcureAZ/Vendors/20120913_Step-by-Step_Vendor_Registration) on the State Procurement Office website to complete the DBA registration.

### Additional Information

For more information on how to use ProcureAZ go to <http://www.spo.az.gov/ProcureAZ/Vendors/default.asp> and view the Quick Reference Guides, Step-by-Step Guides, and recorded webinar.