



Accepting an Invitation and Registering in eMACS

OVERVIEW

The goal of this task is to describe how to accept a registration invitation from the State of Montana's eProcurement system, eMACS. The State uses two levels of vendor registration:

- Profile 1 vendor registration requires basic company information such as company addresses and contacts, as well as commodity codes. Profile 1 registration allows you to receive notifications of solicitation postings and to respond to solicitations through the eMACS system.
- Should your company be awarded a contract, you will be invited to complete a Profile 2 vendor registration which requires you to provide basic company information in addition to tax information, proof of insurances, and payment information.

Once you complete the Profile 2 vendor registration, you will not receive any more vendor registration emails as you will have completed all levels of registration.

For assistance or if you have questions, contact the State's eMACS Support Unit: emacs@mt.gov.

RECEIVING THE VENDOR INVITATION EMAIL

The Vendor Invitation process is initiated by a State user inviting a vendor. This triggers eMACS to send out an automatically-generated email inviting the vendor to register. The email includes information about eMACS and a link to the State's vendor portal to complete the registration process.

1. Within the email, click **Register Now** to begin the registration process.
2. You will be directed to the **Welcome to Vendor Registration** screen in the State's vendor portal.

CREATING A USER ACCOUNT

Before you begin your registration, you will need to create a user account in eMACS.

1. From the **Welcome to Vendor Registration** screen, click **Continue with Registration**.
2. Enter your account information as directed on-screen.
3. Click **Create Account**.
4. You will see a welcome message, and the registration wizard will be on the left-side of your screen:
 - Depending on which registration profile has been selected by the State user who is inviting you, you will see the sections you need to complete.
 - Gray check marks indicate sections that are uncompleted, which will turn green when completed.
 - All required fields are marked with an asterisk.

- In some areas Required Information will be listed in a blue bar at the top of the screen. This information **MUST** be provided in order to complete the registration.
5. Click **Next** in the **Welcome** section to begin the registration process.

COMPLETING A PROFILE 1 VENDOR REGISTRATION

1. **Company Overview**. This section contains basic identifying information such as Doing Business As name and DUNS Number, as well as website address.
 - **Doing Business As (DBA)**. If your company is known by some name other than the legal name, enter it here.
 - **Country of Origin**. Enter your company's country of origin.
 - **Does your business have a DUNS Number? (Dun & Bradstreet)**. If applicable, click yes and enter your company's Dun & Bradstreet Number.
 - **Legal Structure**. Select the appropriate legal structure for your organization.
 - **Website**. You can provide the link to your website.
 - Click **Next**.
2. In the **Business Details** section at least one commodity code must be selected. Under **Products and Services**, select your commodity code(s) (which are classification codes for products and services purchased by the State).
 - Click **Edit** by the **Commodity Codes** field. Within the **Commodity Code** pop-up, select from the list or enter a description or keyword into the search bar and click **Search**. Select the Commodity code(s), and click **Done**.
 - Click **Next**.
3. **Addresses**. In this section your Physical address is required. You can add multiple Physical addresses, if needed. Click **Add Address** and the **Add Address** pop-up will appear:
 - Enter a label into the **What would you like to label this address?**
 - Under **Which of the following Business Activities Take Place at This Address?**, select Other (physical).
 - Click **Next**.
4. In the second **Add Address** step, complete **Address Details**:
 - Select the **Country** from the drop-down menu, enter address information into **Address Lines**, **City/Town**, **State/Province**, and **Postal Code**.
 - You can enter phone and fax numbers with the address, as well.
 - Click **Next**.
5. In the third **Add Address** step, complete contact information for a primary contact person or you can update and/or add more Contacts later from the Contacts page.



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- Enter a label into the **Contact Label** field, then enter **First Name, Last Name, Email address**, and a **Phone** number for the contact.
 - Click **Save Changes**.
6. In the **Contacts** section, contacts must be created for Fulfillment and Sales.
- Click on Add Contact and select Fulfillment.
 - Enter a label into the **Contact Label** field, then enter **First Name, Last Name, Email address**, and **Phone** number for the contact.
 - Click on **Save Changes**. Repeat the same process for the Sales contact.
7. **Diversity Information:** Select the appropriate Diversity Classification(s) for your organization.
- **Does your business qualify as a Diverse Supplier?** Select **Yes** to proceed with selecting diversity classifications. Select **No** or **Decline to Answer** if appropriate. If there are any existing diversity classifications indicated, they will be removed upon your confirmation of **No** or **Decline to Answer** selections. If **Yes** is selected, the option to **Add Diversity Classification** will show.
 - **Add Diversity Classification.** To add a diversity classification, select **Add Diversity Classification**. Select the appropriate classification. Diversity classifications are added individually.
 - **Small Business Enterprise.** If you selected Small Business Enterprise and you are SBA SAM listed, you will need to enter your CAGE code.
 - Click Next.
8. At the end of the Profile 1 registration profile, you are asked to certify that the information is true and accurate. If you did not complete all of the required information in the registration profile, an error message will appear on the **Certify and Submit** screen. Click on the link or links to the areas that you missed completing.
- If there is no error message, fill in your information for **Preparer's** information: **Preparer's Initials, Preparer's Name, Preparer's Title**, and **Preparer's Email Address**.
 - Check the box beside **I certify that all information provided is true and accurate**.
 - Click **Submit**. Once this is clicked, a confirmation page will appear stating that your registration profile has been submitted.

COMPLETING A PROFILE 2 VENDOR REGISTRATION

If your company is already registered in the eMACS system as a Profile 1 vendor and you have been invited to complete your registration as a Profile 2 vendor some of your information from the Profile 1 registration will be provided in the Profile 2 registration. This information can be updated if needed, as well, some of the following sections will apply.

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If you have never registered but have been invited to a Profile 2 registration, you must first create an account (see Creating A User Account on Page 1) then complete all the following sections.

1. Click **Get Started** in the **Welcome** section to begin.
2. **Company Overview.** This section contains basic identifying information such as legal and doing business as names, legal structure, and tax identification number, as well as website address.
 - **Legal Company Name.** The legal name under which your company does business.
 - **Doing Business As (DBA).** If your company is known by some name other than the legal name, enter it here.
 - **Country of Origin.** Enter your company's country of origin.
 - **Dun & Bradstreet Number (DUNS).** Enter your company's Dun & Bradstreet Number if available
 - **Legal Structure.** Select the appropriate legal structure for your organization.
 - **Tax ID Type.** This field only shows if you have selected **Individual/Sole Proprietorship** as the Legal Structure. Select if your tax identification number is a Federal ID or a Social Security Number. This is only required when registering in Profile 2.
 - **Tax ID Number.** Enter the appropriate tax identification number for your organization. This value must be 9 digits. Please note that if you selected Social Security Number as the Tax ID Type, this value will be masked upon saving the page, and visible to users with the appropriate permission. This is only required when registering in Profile 2.
 - **Are you exempt from backup withholding?.** Select Yes or No to indicate if your organization is exempt from backup withholding. This is only required when registering in Profile 2.
 - **Website.** Enter the URL for your company's web page.
 - **Additional Questions**
 - **Registered with Secretary of State Office. If you select yes, you will need to enter your registration number.**
 - **Construction Contractor. If you select yes, you will need to enter your Contractor Registration Number.**
3. In the **Business Details** section, at least one commodity code must be selected.
 - Under **Products and Services**, select your commodity code(s) (which are classification codes for products and services purchased by the State).



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- Click **Edit** by the **Commodity Codes** field. Within the **Commodity Code** pop-up, select from the list or enter a description or keyword into the search bar and click **Search**. Select the Commodity code(s), and click **Done**.
 - Click **Next**.
4. In the **Addresses** section, Fulfillment, Remittance, and Physical addresses are Required Information. You can add as many of these address types as you need.
- **Address Label**. Enter a label for the address. This name will display in the audit history log and to customers. This field is required to save the address, and can be edited at any time.
 - **Address Type**. Select the address type: Fulfillment Center, Physical, or Remittance. You may have multiple values for each type of address. This field is required to save the address, and cannot be changed once saved.
 - **Country**. Select from the dropdown list of countries.
 - **Address Lines 1-3**. Enter in the address on the appropriate lines.
 - **City**. The city for the address.
 - **State/Province**. Depending on the country selection, you may have a dropdown list of states/provinces available. Or, enter the appropriate value if none are provided.
 - **Postal Code**. The postal code for the address.
 - **Phone**. The main telephone number for this address, including country code, area code, phone number and extension if applicable.
 - **Toll Free Phone**. Enter a toll free number for this address, if applicable.
 - **Fax**. Enter the main fax number for this address.
 - **Primary**. Displays Yes or No options. **Yes** is selected if the address is the primary address for the address type. **No** is selected if the address is not the primary for the address type.
5. **Contacts**: Select to add contacts for the supplier organization. Contacts may be associated to an Address that exists in the Addresses section of the profile. **A Fulfillment and Remittance contact is required to complete registration.**
- **Contact Label**. Enter a label for the contact. This label will display in the audit history log and to customers. This is different than the contact first name and last name, but can be that value if appropriate. This field is required to save the contact, and can be edited at any time.
 - **Contact Type**. Select the contact type: Catalog, Corporate, Customer Care, Fulfillment, PO Failure, Remittance, Sales, Technical and Other. You may have multiple values for each contact type. This value is required to save the address and cannot be changed once saved.
 - **First Name**. The contact's first name.
 - **Last Name**. The contact's last name.
 - **Title**. The contact's title.
 - **Email**. The contact's email address.
 - **Phone**. The contact's phone number, including country code, area code, phone number and extension if applicable.
 - **Toll Free Phone**. If the contact can be reached via a toll free number, enter the value, including an extension if applicable.
 - **Fax**. Enter the fax number for the contact.
 - **Primary**. Displays Yes or No options. **Yes** is selected if the contact is the primary contact of that type. **No** is selected if the contact is not the primary for the contact type.
 - **Associated Address**. Once the contact is saved, you may associate an address for the contact. Select the Manage Associated Addresses from the Edit button drop-down to see available addresses. You may associate one address with a contact.
6. **Locations**. Locations are groups of addresses and contacts that are related to a specific location of your business. You may only have one location, but have several buildings (physical addresses) at the Location. Or you may have different locations throughout the US, and associate different addresses with each location. In this section you will add Locations for your organization, to which addresses and contacts can be associated. Location types include Headquarters, Fulfillment Center, and Other. Locations are only required when registration in Profile 2.
- **Location Label**. Enter the Location Label. This value is displayed in the audit history log. This field is required to save the location and can be edited at any time.
 - **Location Type**. Select from the available Location Types: Headquarters, Fulfillment Center, or Other. This field is required to save the location and can be edited at any time.
 - **Primary**. Displays Yes or No options. **Yes** is selected if the location is the primary location of that type. **No** is selected if the location is not the primary for the location type.
 - **Location Description**. Enter a description of the location, if appropriate, up to 700 characters.
 - **How would you like to receive purchase orders for this location?** This option is available if your organization is not currently configured to transmit orders via cXML. Select the purchase order delivery method for this location. Please note that this does not determine the actual delivery of purchase orders for your organization. That is configured for each customer as part of the vendor enablement process. These fields are for informational purposes only, and used by some customers to populate



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appropriate information in their external systems. When Email or Fax are selected, additional fields display:

- **For Email selection.** Enter and confirm Email Address for purchase order delivery
 - **For Fax selection.** Enter the fax number for purchase order delivery.
 - **Effective Date.** Enter the effective date for this location.
 - **Assigned Addresses.** You may associate multiple addresses with the location. Select the **Edit** button, and select from the available active addresses. You may select one address from each address type. To remove an associated address from the Location, select the **Remove** icon.
 - **Assigned Contacts.** You may associate multiple contacts with the location. Select the **Edit** button, and select from the available active contacts. You may select one contact from each contact type. To remove an associated contact from the Location, select the **Remove** icon.
7. **Diversity Information:** Select the appropriate Diversity Classification(s) for your organization.
- **Does your business qualify as a Diverse Supplier?** Select **Yes** to proceed with selecting diversity classifications. Select **No** or **Decline to Answer** if appropriate. If there are any existing diversity classifications indicated, they will be removed upon your confirmation of **No** or **Decline to Answer** selections. If **Yes** is selected, the option to **Add Diversity Classification** will show.
 - **Add Diversity Classification.** To add a diversity classification, select **Add Diversity Classification**. Select the appropriate classification. Diversity classifications are added individually.
 - **Small Business Enterprise.** If you selected Small Business Enterprise and you are SBA SAM listed, you will need to enter your CAGE code.
8. In the **Insurance** section, you will add insurance information and attach the insurance documents. Insurance information is not required for the Profile 1 registration process and is only gathered when registering for Profile 2 prior to entering into a contract. Agencies may require more than one insurance type.
- Click on **Add Insurance**, and select the type of insurance you are adding.
 - Enter the **Policy Number**, and select the applicable **Insurance Limit** from the drop-down menu.
 - Enter the **Expiration Date** following the date format shown, or use the calendar.
 - Enter the **Insurance Provider**, and optionally, the Insurance Agent and Phone Number.
 - To upload and save your insurance certificate, click the **Upload** button. The **Add Attachment** pop-up will appear: Enter a **Title** for your

document, then click **Browse** and select the file from your computer. Click **Add**.

- Click **Save Changes**, then click **Next** to continue.
9. You may need to include payment information. To include information about a Direct Deposit (ACH) account, in the **Payment Information** section:
- Click **Add Payment Information**, and select *Direct Deposit (ACH)*.
 - In the **Add Payment Information** pop-up that appears, first enter a **Payment Title**, which could be *Direct Services Account* or *Payment Account*.
 - The **Payment Type** will already be pre-filled with *Direct Deposit (ACH)*.
 - You can enter Direct Deposit Format or Electronic Remittance Email.
 - Select your **Currency** format from the drop-down menu.
 - Enter your **Bank Account** information: **Country, Bank Name, Account Holder's Name, Account Type, Routing Number, and Account Number**.
 - Enter the bank's address in **Address Line 1, City/Town, State/Province, and Postal Code**.
 - Click **Save Changes**, then **Next**.
10. In the **Tax Information** section, enter required tax information, such as a W-9 form.
- Click **Add Tax Document** and select **W-9** to add this form.
 - In the **Add Tax Document** pop-up that appears, the **Tax Type** will be pre-filled. Enter a **Tax Document** name and select the **Tax Document Year**, then click **Upload** to attach the form.
 - If you do not have a copy of your W-9 form, click **Download Pre-populated Tax Document**. This link will create an electronic W-9 form based on the information entered.
 - Click **Save Changes**, then **Next**.
7. If all the checks on the last screen are green, you have completed your Profile 2 vendor registration. At the end of the Profile 2 registration profile, you are asked to certify that the information is true and accurate. If you did not complete all of the required information in the registration profile, an error message will appear on the **Certify and Submit** screen. Click on the link or links to the areas that you missed completing.
- If there is no error message, fill in your information for **Preparer's** information: **Preparer's Initials, Preparer's Name, Preparer's Title, and Preparer's Email Address**.
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