# **Supplier Portal Registration Instructions**

Use these instructions to register your company in Fermilab’s Supplier Portal. This includes how to add another contact person, how to add company addresses, and how to add products and services etc. All fields with an asterisk are required. Please use only upper case letters and numbers when entering data.

The **Company Profile** page will be displayed. Your company profile is divided into seven sections, including a review. *Please note that some changes, such as address changes, will trigger approval requests to Fermilab Supplier Administrators. These changes will only take effect after Supplier Administrators approve them.*

Section 1: Company Details

* You will land on the **Company Details** tab. In this section, your company name, **Supplier Type**, **D-U-N-S Number**, and **Tax Organization** are mandatory fields. The company name must be the full legal name of your company. Use the drop down lists to choose the types appropriate for you company.
* Enter your contact information. Once this is entered, you can choose SAVE FOR LATER, and an email will be sent to you with a link to continue the set up at a later time. However, tax information will not save and will have to be reentered.
* Next type your DUNS number. DUNS number is required for all US based companies that will be awarded subcontract with Fermilab. Now click the **Tax Country** box. Start by typing your company’s country and this will bring up a list of countries you can choose from. Select the correct country.
* Next, enter your tax id information. United States companies should enter in the Federal Taxpayer ID box. If you are an individual, enter your social security number instead. All other countries should enter their Tax Registration Number in that box. If this required information is not provided, the registration can’t be approved by Fermilab.
* *If your company is a Small Business*, you are required to provide your annual revenue and the number of employees. In the **Additional Information** section, enter your **Annual Revenue.** In the **Corporate Total Employees** field, enter the number of employees.

Section 2: Contacts

* Hit Next to go the **Contacts** page. Your name should appear here. If you click the **Edit** button, you can add additional information, such as job title and phone number. Also, notice that the box titled administrative contact is checked. Every profile needs an administrative contact. Since you are the only contact set up for this business initially, you are the administrative contact by default. You will see that the **Request user account** box is checked as well. This is because every business profile is also required to have at least one user account. If you look at the bottom of the screen, you can see that various roles have already been assigned to this contact by default. You don’t need to make any changes to these roles.
* You can also add additional contacts by clicking the **Create** button. First name, last name and email are required. If you want this person to be able to perform administrative tasks in the Supplier Portal, such as adding other contacts, check the **Administrative contact** box**.** If this person needs his or her own user account, check the **Request user account** box. Click **OK**. Then click **Next** to go to the next section.
* If you would like to inactivate a contact, change the status field to “Inactive”.

Section 3: Addresses

In this section, you will be able to enter your company’s addresses.

* To add an address, click the **+** button. Please note that the **Address Name** field can only accept 12 characters; therefore, we suggest you name your address by using the first three letters of the city plus dash plus state code plus dash plus a number. For example, you can use “LOS-CA-1” to represent your first location in Los Angeles, California.
* In the **Address Purpose** section on the right, there are three checkboxes. The first one is **ordering**. Check this box if you want Fermilab to use this address to create purchase orders. The second one is **remit to**. Check this box if you want Fermilab to send any payments to this address. The third one is **RFQ or bidding.** Check this box if you want to set this address as the primary address for Fermilab’s solicitations.
* Next enter the name of your country in the **Country** box, choose your country and type your address.
* Enter the name of your city and hit the tab key. This would bring up a list of city names. Choose the city with the correct county and state and then click **OK**. Similarly, you can enter the postal code and choose it from the dropdown menu. In addition, enter the 4-digit **Postal Code Extension** if it is applicable to your US zip code.
* Now enter your **County** name if it did not pre-populate.
* In the **Additional Information** section, enter your **Congressional District**. If you are not sure about your congressional district, check it out at <https://www.govtrack.us/congress/members>. Next, enter the **DUNS** number associated with this address. Click **Next** to go to the next section.
* If you would like to inactivate an address, enter today’s date in the Inactive Date field.
* When you are done, hit **OK**.

Section 4: Business Classifications

* In this section, you can add your company’s business classifications and upload your certification documents*.*
* If your business doesn’t have a special classification, such as minority owned, veteran owned etc., click the box **None of the classifications are applicable**.
* If your business has a special classification, click the **+** button and select a classification from the dropdown list.
* Under certifying agency, select either **Self-Certified or Other.** If Other, enter the other certifying agency name.
* Optionally, under **Certificate**, enter the certificate number. Then enter its start date and expiration date.
* If you want to attach a copy of your certificate, click the **+** sign to add an attachment

Section 5: Products and Services

* *In this section, you can select the NAICS codes that best classify the goods and services your company provides. By selecting the appropriate codes, your company will have a better chance of getting invited to a solicitation that matches your company’s business offerings*.
* On the left-hand side of the page, click the Actions down arrow. Then click the **Select and Add.** Or choose the “Select and Add” icon. Now click the small arrow icon next to the words “Products and Services” to expand the list. Once you’ve selected your products and services, scroll down and click **Apply** and then click **OK**. Click the **Save** button to save your changes.
* You may go to census.gov, FIND A CODE, to help identify your appropriate NAICS codes.

Section 6: Questionaire

In this section, you need to tell us whether your company is U.S. based. If your answer is yes, you need to upload your W9. This will take a few clicks. Once finished, click **Next** to go to the review page.

Section 7: Review

After you are done entering your company’s information, you may review your changes by clicking on Review at the top right. You may do more editing or submit. You will receive a confirmation message. To log out from the Supplier Portal, click Done, then click your name in the top-right corner and click the **Sign Out** link.