WebProcure™

Supplier Registration and Portal User Guide

Table of Contents

Introduction 3

Required Registration 3

Supplier Self-Registration 4

Getting Started 4

Step 1 – Collect Information and General Disclaimer 4

Step 2 – Organization Information 5

Step 3 – Organization Contact Information 6

Step 4 – Commodity / Service Code Selection 8

Submit My Registration 9

Login to WebProcure 10

WebProcure Usage Terms and Conditions 10

WebProcure Home Page 11

Contract Award Supplier Requirements 13

Additional Required Attributes 13

Contractor's Declaration Attesting to Compliance with Executive Order No. 13G 13

Attachments 14

Add / Edit / Delete Users 16

Online Help 17

Introduction

The State of Connecticut has implemented a web-based, statewide e-sourcing solution called, CTsource. CTsource is a web-based sourcing solution that utilizes WebProcure software through our partnership with Perfect Commerce, LLC, and replaces our current homegrown Biznet Solution. CTsource helps suppliers enhance their business relationships by streamlining the solicitation process (bids/proposals) and improving communication about business opportunities. By registering with CTsource, suppliers will automatically receive notification of business opportunities from the State of Connecticut. Suppliers will also receive solicitation notifications from other buying organizations (public sector entities) that also use the WebProcure software for their sourcing needs. Once registered within CTsource, your organization has the ability to self-register with other buying organizations.

Required Registration

All suppliers who currently (or potentially) sell products and/or services to the State will be required to register their business with CTsource. The supplier registration portal for registering your business is accessible from the CTsource website at:

CTsource Supplier Portal Registration

This document serves as a guide on how to quickly register your organization and maintain your supplier account in the CTsource solution after establishing your username and password.

Supplier Self-Registration

CTsource provides suppliers with the ability to self-register. This is a multi-step process to establish company and contact information and United Nations Standard Products and Services Codes (UNSPSC) commodity classifications.

Getting Started

It is suggested that you have the following information on hand to complete the required sections of the supplier registration process:

- Organization Information
- Organization's Taxpayer ID Number (TIN/FEIN/SSN)
- Business Type (Corporation, LLC, Sole Proprietorship, etc.)
- Main Contact Information including Email Address (to receive solicitation notifications)
- Commodity / Service Code Selection (UNSPSC)

You will also have the opportunity to enter and maintain supplemental information after establishing a username and password for the **State Contracting Portal**

CTSource Bid Board | CTSource Contract Board | CTSource Registration

After gathering the necessary information, access the **CTsource Supplier Portal Registration**:

The **CTsource Supplier Portal** opens to the required Registration pages.

Step 1 - Collect Information and General Disclaimer

The first step in the registration process is to collect the information that will be necessary to complete your registration and obtain a username and password. This includes, the previously mentioned, taxpayer information, contacts, and commodity classifications.

Located at the bottom of this first step, is the General Disclaimer for the State of Connecticut.

The disclaimer states: 'The State of Connecticut is not responsible for and accepts no liability for any technical problems that result from using this website. In addition, the State of Connecticut is not responsible for problems related to the transmission of data to and from this site.'

Agreeing to the General Disclaimer is a requirement as indicated by the red asterisk (*). To proceed with the registration, check the Yes, I agree check box. Click Next to advance to Step 2.

Step 2 - Organization Information

In step two, you will begin entering the information that was collected in step one. A red asterisk (*) indicates that a field is required and must be completed to proceed to the next step in the registration.

Complete the fields as follows:

- **Legal Name of Entity / Individual** – Your organization's legal name must match the company name on record with the IRS for your Tax Identification Number. If you file with a Social Security Number, you must enter your name exactly as it shows on your Federal Tax Return. This field accepts up to 50 alphanumeric characters.

- **Address**– Use the two lines to enter street address or post office box information in full. Each of the Address and Address Line 2 fields accept up to 30 characters.

- **City**– Enter the city where your organization is located. This field accepts up to 50 characters.

- **State / Province** – Use the drop-down menu to select the state where your organization is located. If your organization is located outside of the continental United States, choose the last option, listed as Other from the listing of available choices.
  - If Other is selected from the State / Province menu, a new, required Other Region* field will display. Enter the appropriate region in this field.

- **Postal / Zip Code**– Enter the postal code or zip code with extension, if known, for your organization.

  Application Note: The application will perform an address validation. If the address cannot be located, you have the option of correcting any errors that may exist or you may acknowledge that the entered address is correct by clicking the here link.

- **Type of Business**– Use the drop-down menu to identify the type of enterprise that best represents your organization. Options include:
  - Benefit Corporation (B Corp)
  - C Corporation
  - Individual/Sole Proprietor
  - Limited Liability Company – C Corporation
  - Limited Liability Company – Partnership
  - Limited Liability Company – S Corporation
  - Other: Federal Tax Exempt / Non-Profit
  - Other: Government Entity
  - Partnership
  - S Corporation
  - Trust / Estate

- Choose the appropriate designation for your organization:
  - **Parent / Holding Company** – This is the default designation and applies to your organization if it is the parent or headquarters location of your organization.
  - **Branch –** If your organization is a child company or branch location of another entity, select this option.

  NOTE: If your organization has a DBA, please register the DBA separately as a 'Branch'

- **Federal Employer Identification Number* - OR – Social Security Number*** – During your initial registration, either a Federal Employer Identification Number (FEIN), or a Social Security Number (SSN), needs to be entered to identify your organization. The State of Connecticut may use this information to associate your WebProcure registration with their accounting and payment systems for Federal tax reporting.

  Application Note: The Clear link, located to the right of the Federal Employer Identification Number and Social Security Number text entry fields, allows you to empty those fields and re-enter numbers as needed.

- **DUNS Number** – Enter the DUNS number issued by Dunn & Bradstreet, which provides unique identifiers of single business entities, while linking corporate family structures together. This field must contain 9 digits. It cannot contain letters or symbols.

  NOTE: This field is required when registering as a 'Branch'.

Select Next to advance to Step 3.

Step 3 - Contact Information

In step three, you will enter the Main point of contact information for your organization and create login credentials. The main contact will be allowed to manage your organization's account profile, add users to the system, identifies who will be allowed to receive notifications, who is authorized to submit and commit solicitation responses on behalf of your organization. The email address entered here will receive all UNSPSC notifications. A red asterisk (*) indicates that a field is required and must be completed to proceed to the next step in the registration.

Complete this page as follows:

- **Salutation** – Use the drop-down menu to choose the appropriate salutation for the main contact. This selection is optional.
- **First Name**– Enter the first name of the main contact. This field is required. Last Name– Enter the last name of the main contact. This field is required.
- **Job Title** – If desired, enter the job title of the main contact. This field is optional.
- **Main Phone Number**– Enter an area code, prefix, and phone number for the main contact. Use digits only, no spaces or hyphens. If applicable, enter a direct extension number.
- **Fax Number** – If applicable, enter a fax number for the main contact. Enter area code, prefix and fax number.
- **Email Address**– Enter a valid email address for the main contact. A confirmation email will be sent to the email address entered here.
- **User Name**– Enter a unique username that you will use to access the WebProcure application. The application will perform a validation to ensure the User Name is unique.
- **Password**– Passwords must be at least 8 characters in length, must be a mix of upper-case and lower-case letters, numbers and special characters.
- **Confirm Password**– Enter the password a second time in this field to ensure accuracy.
- **Address**– Use the two lines to enter street address or post office box information in full. Each of the Address and Address Line 2 fields accept up to 30 characters.
- **City**– Enter the city where your organization is located. This field accepts up to 50 characters.
- **State / Province** – Use the drop-down menu to select the state where your organization is located.
- **Postal / Zip Code**– Enter the postal code or zip code with extension, if known, for

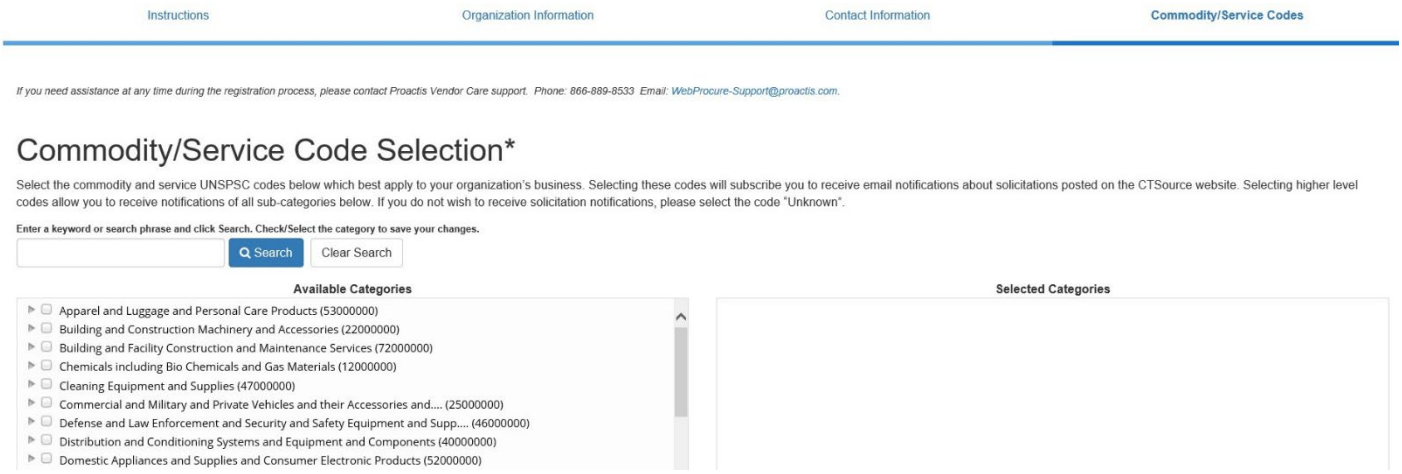
your organization.

Additional Contacts

The additional contacts section can be completed during this registration or later once you are logged into CTsource. If additional contact information is not provided, the main point of contact will be designated for each of the specific contacts: Solicitation Notification and Contract Notification. To enter the information during registration, click the Now button. The page will refresh to display additional contact entry fields. Click Next to advance to Step 4.

Step 4 – Commodity/Service Code Selection

In step four, select the UNSPSC (United Nations Standard Products and Services Codes) commodity and service code(s) which best apply to your organization's business. The UNSPSC selection will subscribe which solicitation notifications will be sent to the Main contact email.



To locate a commodity category or code, enter a full or partial code or a keyword in the Search field.

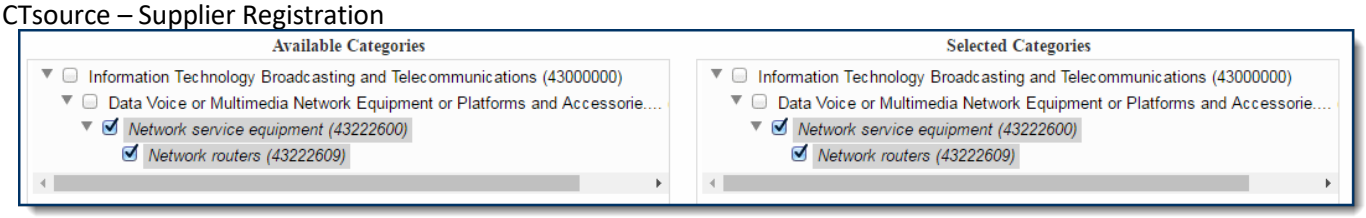
Available Categories

Available Categories that match your entered search term(s) are listed on the left panel of the page.

Select Categories

Check the box of one or more categories that are applicable to your organization.

Once a top-level or sub-level category is selected, the system automatically displays them in the Selected Categories section to the right.



Remove Selected Categories

To remove a category from the Selected Categories section, simply click the box to the left of the category name to clear the check mark. Repeat this process for each category to be removed.

Category selection is the final step in registration.

Submit My Registration

When finished with all four steps of your CTsource registration, simply click the Submit button to finalize the registration process.

Upon successful and completed registration, a registration confirmation page will display.

An email confirmation will be sent to the email address of the main contact identified in step three of your registration.

This page acknowledges your registration as complete. You may log into the system by clicking the "Take me to WebProcure Now" link provided on screen or by selecting the link that will be included in your confirmation email.

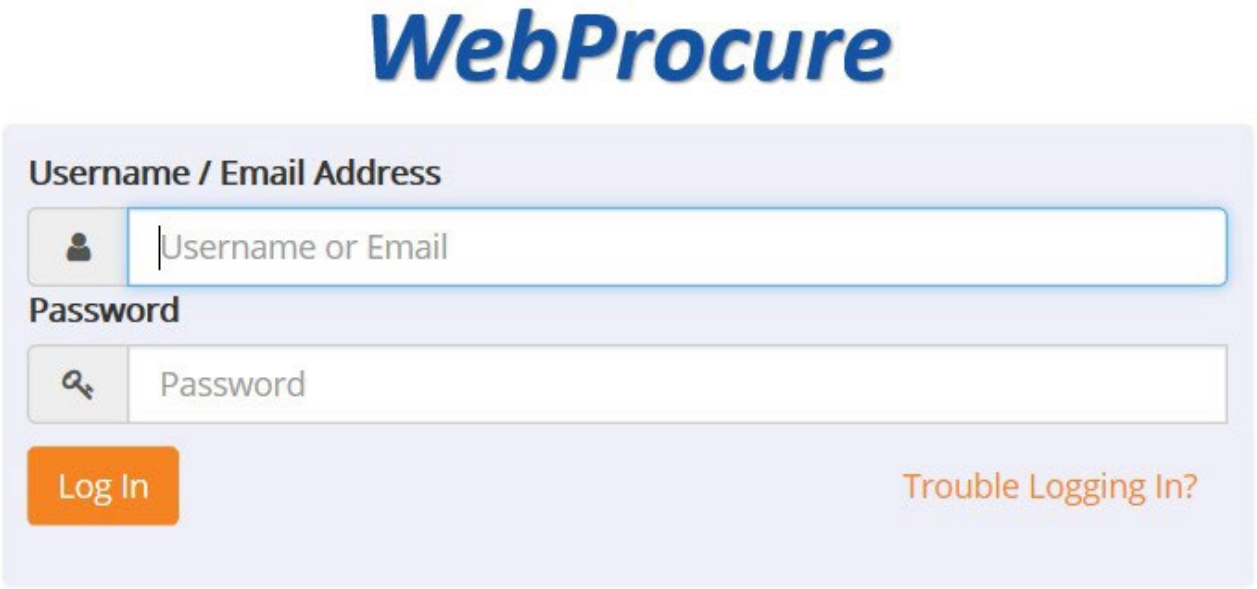
If the State of Connecticut publishes any opportunities for the categories of the UNSPSC commodity codes you have chosen to provide, you will receive an automated email alert to the main contact email address shown on this page. You may identify other individuals to be notified of opportunities within the Supplier Portal; for example, an additional contact email may be identified under Solicitation Contact or by establishing another user profile for someone in your organization.

NOTE: Please know that you are responsible for maintaining the accuracy of this account's profile information. After completing the registration, it is recommended that you login to CTsource periodically to verify information. This will ensure that you receive any applicable communications.

For further assistance with registration, please contact via e-mail suppliersupport@proactisservicedesk.com or by phone, 866-446-8203.

Log into WebProcure

At the successful completion and confirmation of your registration, you may select the "Take Me to WebProcure" hyperlink provided on screen or select the link that will be included in your confirmation email. Either path will take you to the login page:



Enter your chosen Username.
Enter the Password that you created during registration. Select Login.

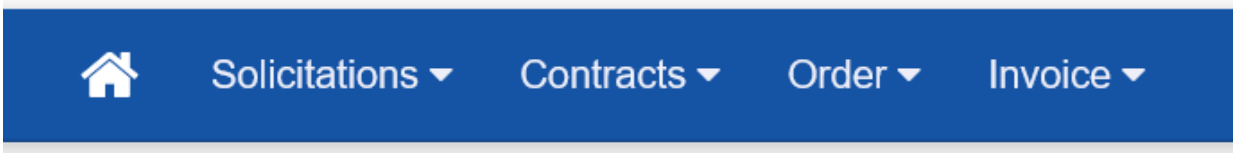
WebProcure Usage Terms and Conditions

The State of Connecticut has partnered with Perfect Commerce, LLC to provide the WebProcure solution of CTsource. Upon your initial login, you will be presented with the WebProcure Terms and Conditions. Use the vertical scroll bar to view the terms and conditions in their entirety. Once reviewed, click Accept to continue into the application.

If you choose to Decline these usage terms and conditions, you will not be able to successfully login to the application or participate in State of Connecticut business opportunities.

WebProcure Home Page

Once the terms are accepted, the home page displays a dashboard of information for the buyers your organization is affiliated with in the application (e.g. State of Connecticut, State of Rhode Island, City of Pittsburg, etc.). The following breaks down an explanation of the menu options and links within the dashboard:



- **Home Icon** once clicked will always bring you back to the WebProcure Home Page.

- **Solicitations** drop-down menu enables you to view current and past solicitations for the State of Connecticut or any other buying organization partnered with the WebProcure System.
- **Contracts** drop-down menu provides quick access to view contracts.
- The State of Connecticut does not utilize WebProcure for Order and Invoice tracking; drop-down menus are *Not Applicable* for the State of Connecticut.

The following section describes the links within the center of the dashboard:

- **Message Board** section includes news about the CTsource WebProcure software.
- **Reminders** section contains prompts advising suppliers to update their account profile with current information and other miscellaneous information.
- **Documents** section identifies the number of Formal and Informal Solicitations available for review and response, as well as, the number of Contracts available for view. Formal Solicitations within CTsource support the sealed-bid process and are open to all suppliers within a category code. Informal Solicitations are for invitation only sourcing opportunities within a category.
- **Performance Assessment Data** allows information will be provided in the future.
- **User Menu** (click drop down arrow next to your user name in the top right corner of the Home Page) This menu provides access to Usage Terms, My Account (to manage your organization's profile for the State of Connecticut) and Opportunity Management (where you can apply to do business with other buyers utilizing WebProcure).

My Account

My Account opens the administration functionality to manage your organization's details including the information entered during the registration steps. This information may be edited and updated as needed.

The links listed under Edit Main Org Info may be selected to:

- Edit Contacts – add or change contact information for your organization.
- Edit Demographic Info – not applicable.
- Edit Categories – add or change UNSPSC commodity codes only.
- Edit Properties – not applicable.

- Organization Attachments – all documents can be seen and managed here.
- Enhanced Profile Information – not applicable.

Edit Users - this is where additional users for your company are added to the system, passwords are reset, and permissions are assigned.

Account Management – this is where suppliers will add specific information for each Buyer(s) with whom they do business with in the WebProcure application. The State of Connecticut is one of the Buyers available for suppliers to potentially contract with in WebProcure.

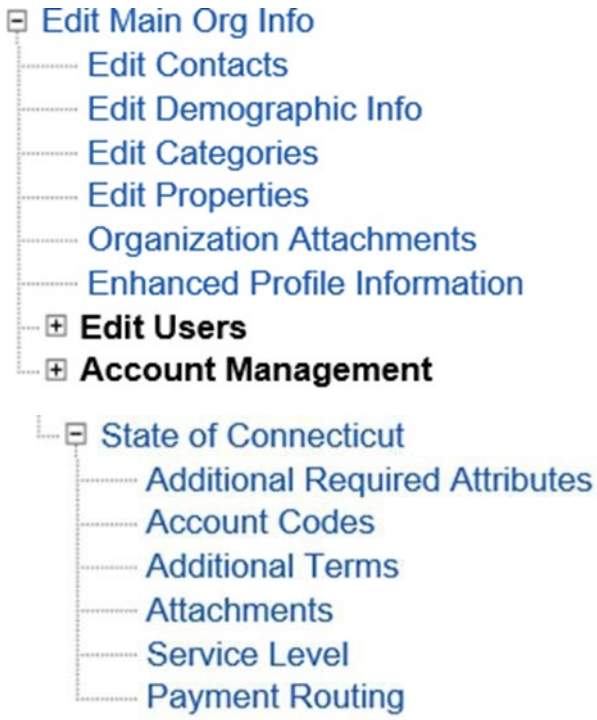
The State of Connecticut requires suppliers to enter and maintain important organizational information in their supplier profile including current Certificates of Insurance, W-9 Form, Diversity Certifications and annual upload of several Statutory Affidavits/Certifications.

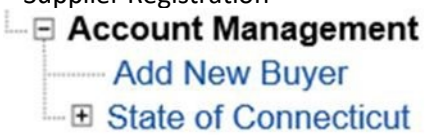
Contract Award Supplier Requirements

Prior to contract award, a supplier will be required to update specific information under the User Menu, My Account, Account Management menu option. The supplier will expand this menu option, expand the State of Connecticut menu option and click on either the Additional Required Attributes or Attachments links to enter or maintain requirements.

Follow the navigation path:

Account Management, State of Connecticut, Additional Required Attributes





NOTE: The options Account Codes, Additional Terms, Service Level and Payment Routing are standard options made available. The State of Connecticut does not require or monitor information entered within these pages.

The solicitation will detail contract requirements the supplier is expected to maintain throughout the term of the contract, for example, insurance requirements. Suppliers will be directed to submit the following information within the Additional Required Attributes and Attachments links where applicable:

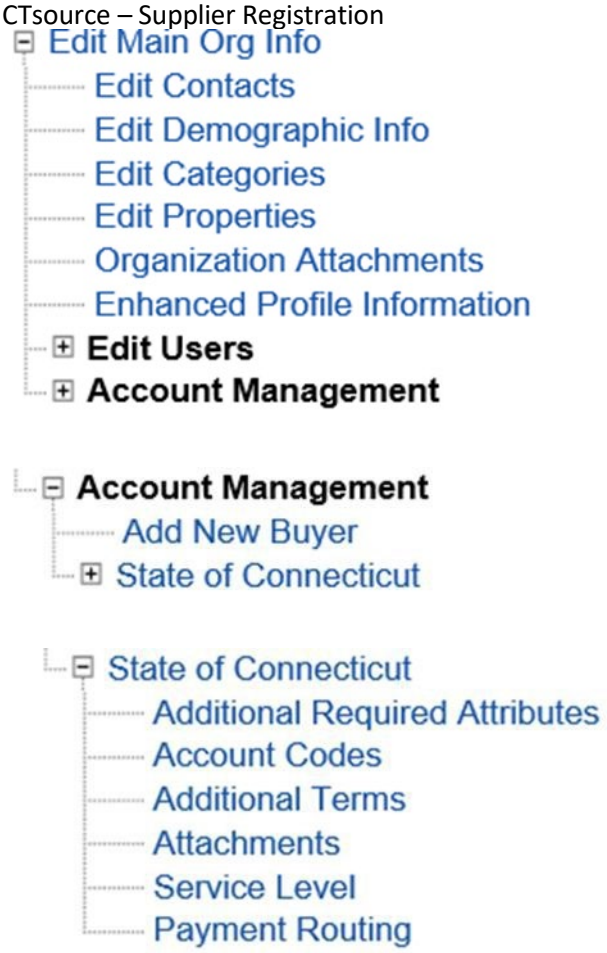
- General Proof of Insurance
- Connecticut Economic Impact Form
- Additional Company Information
- Small/Minority Business Enterprise Certification (SBE/SMBE)
- Disadvantaged Business Enterprise (DBE)
- Prequalification Documents for Construction Services
- Commission on Human Rights and Opportunities (CHRO)
- Current Certificate of Insurance Document(s)
- Statutory Affidavits/Certifications
- Contractor's Declaration Attesting to Compliance with Executive Order No. 13G

The following section is necessary to complete within the Additional Required Attributes menu option upon contract award in WebProcure for the State of Connecticut:

- Supplier Insurance Information
- Connecticut Economic Impact Form
- Additional Company Information
- Small/Minority Business Enterprise Certification
- Disadvantaged Business Enterprise (DBE)
- Prequalification Document(s) for Construction Services

Attaching Documents

The following section details how to attach (upload) documents into WebProcure. Follow the navigation path Account Management, State of Connecticut, Attachments



Suppliers awarded a State contract will be required to upload and maintain the following documents in their appropriate Document Category folders:

- Current Certificate of Insurance Document(s) – Upload to the Insurance Documents folder

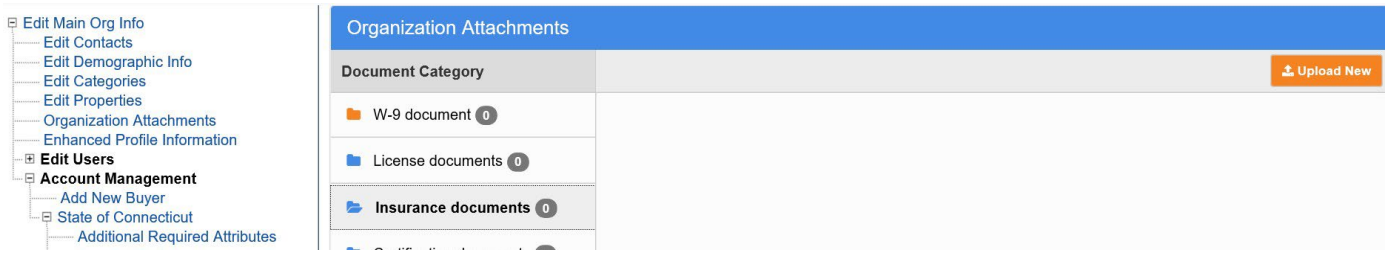
Suppliers may be requested to upload information in the other available document categories as directed by the solicitation or contract documents.

The same steps apply for all attachments requested by the State of Connecticut. It is important to upload your documents in the appropriate folders. Below is a detailed example of how to upload insurance documents.

Supplier Insurance Information

Suppliers are required to upload and maintain current insurance documents prior to an award and throughout the duration for any State Contract awarded. Insurance types and limits are identified in the specific contract document.

To upload documents, go to: Account Management, State of Connecticut, Attachments. Select Insurance documents folder and click the Upload New button located in the top right corner.



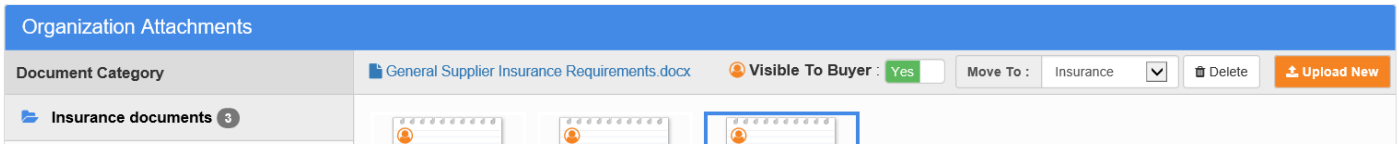
Navigate to the local or network location of your insurance document(s), select the file by either double clicking on it to automatically upload or click on it once and click Open to upload. The document will upload and the file will display inside the Insurance documents folder. Multiple insurance documents can be entered into this folder; repeat the above steps for each insurance document to be uploaded.

If a mistake is made, it can be rectified by following the steps below:

Maintaining Attachments

When you click on an attachment action items appear:

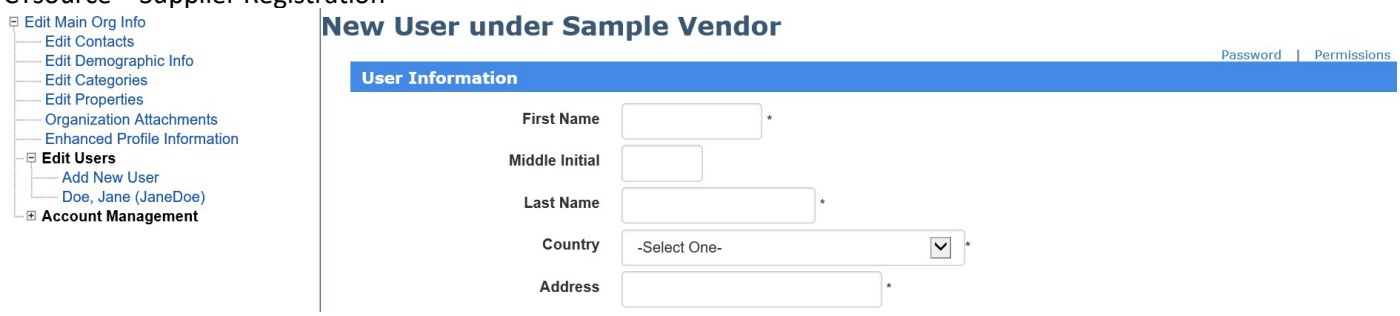
- Visible to Buyer: You can determine whether or not the Buyer (State of Connecticut) can see the documents.
- Move To: If you upload a document to the wrong Document Category you can change it.
- Delete: Click the Delete button to remove a document.



Add / Edit / Delete Users

The main contact for your organization has the ability to add additional users with their own Login credentials and permissions. The new user can be set up to receive solicitation notifications based upon the UNSPSC codes entered for the organization and other permissions related to responding to solicitations, etc. The main contact can also edit or delete a user when necessary.

To Add New User follow the navigation path below and enter the required fields:



To edit or delete a user, select the username under Edit Users. This is also where the main contact will maintain password information for users whether they are locked out and need a reset or require login suspension for the system.

Use the asterisk (*) in any field to search for information in the system.

Online Help

This topic and more is covered in online help inside of WebProcure. There are also video simulations available to guide you through responding to a solicitation and maintaining your organization's information.

NOTE: For questions relating specifically to State of Connecticut solicitations, please email the Contract Specialist listed on the solicitation directly.