SCPro – Registering and Managing Supplier Accounts

Supplier Management

Duration: **60 minutes**

House Rules

Find a quiet place to focus on the course

Be respectful of other participants

Actively listen, engage, and ask questions

Let the facilitator know if you need help

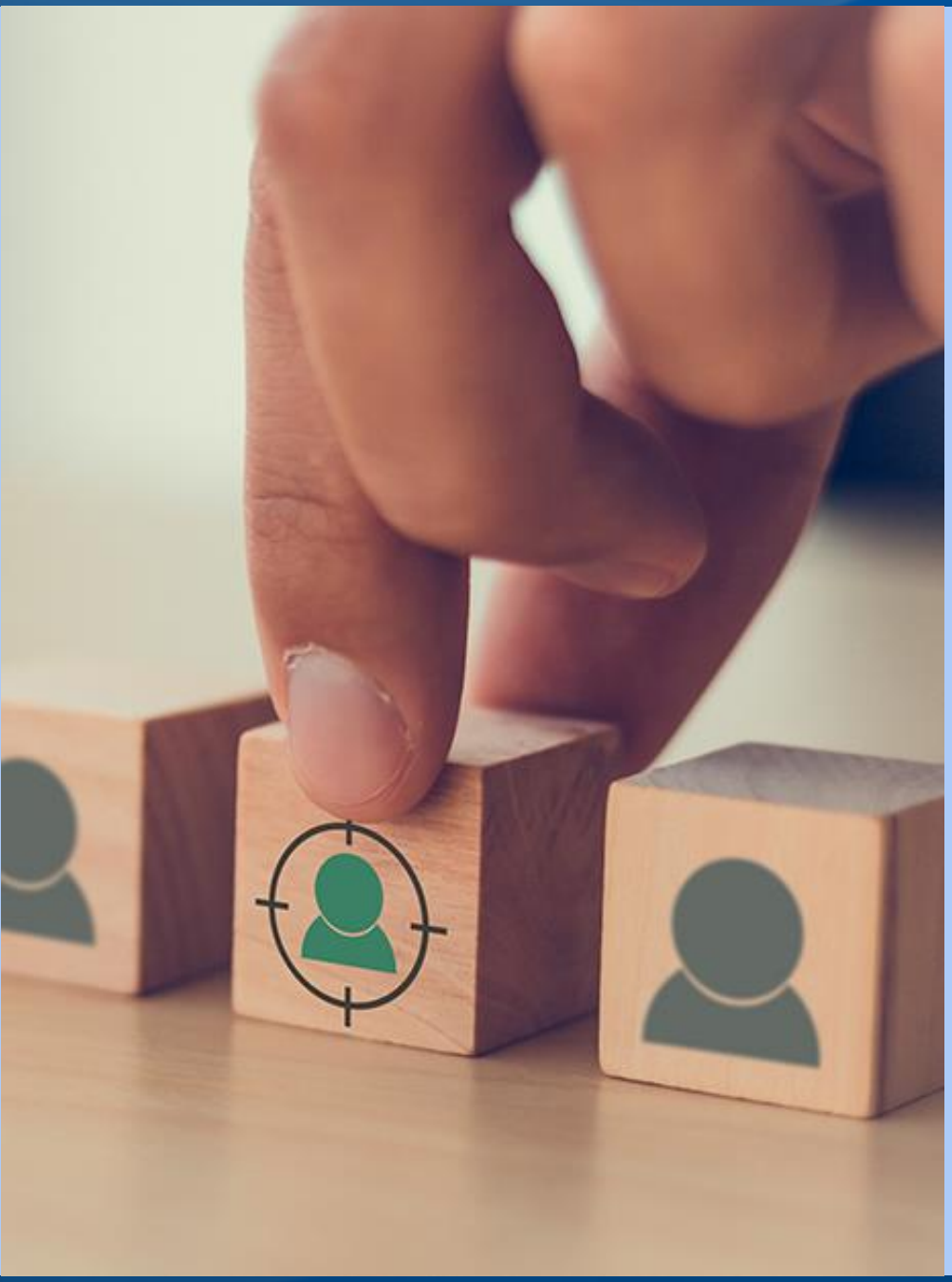
When not speaking, mute your microphone

SCPro Benefits

Allows users to focus on activities specific to their role on the team

Streamline the search for information and provide clarity on action items

Facilitate collaboration among supplier teams and with the State.



Course Prerequisites

Not applicable

Target Audience

- Supplier Admin

Course Agenda

Course Agenda

Course Introduction and Objectives

Lesson 1: Initial Registration

Lesson 2: General Navigation

Lesson 3: Full Registration

Lesson 4: Managing Supplier Information

Course Conclusion

Course Learning Objectives

The **SCPro Registering and Managing Supplier Accounts** course details how to submit the initial registration, complete the full registration process, and manage supplier information.

After completing this course, you will be able to:

1. Submit initial registration in SCPro.
2. Update profile information and locate various information within SCPro.
3. Complete full registration and manage supplier information.

Key Terms

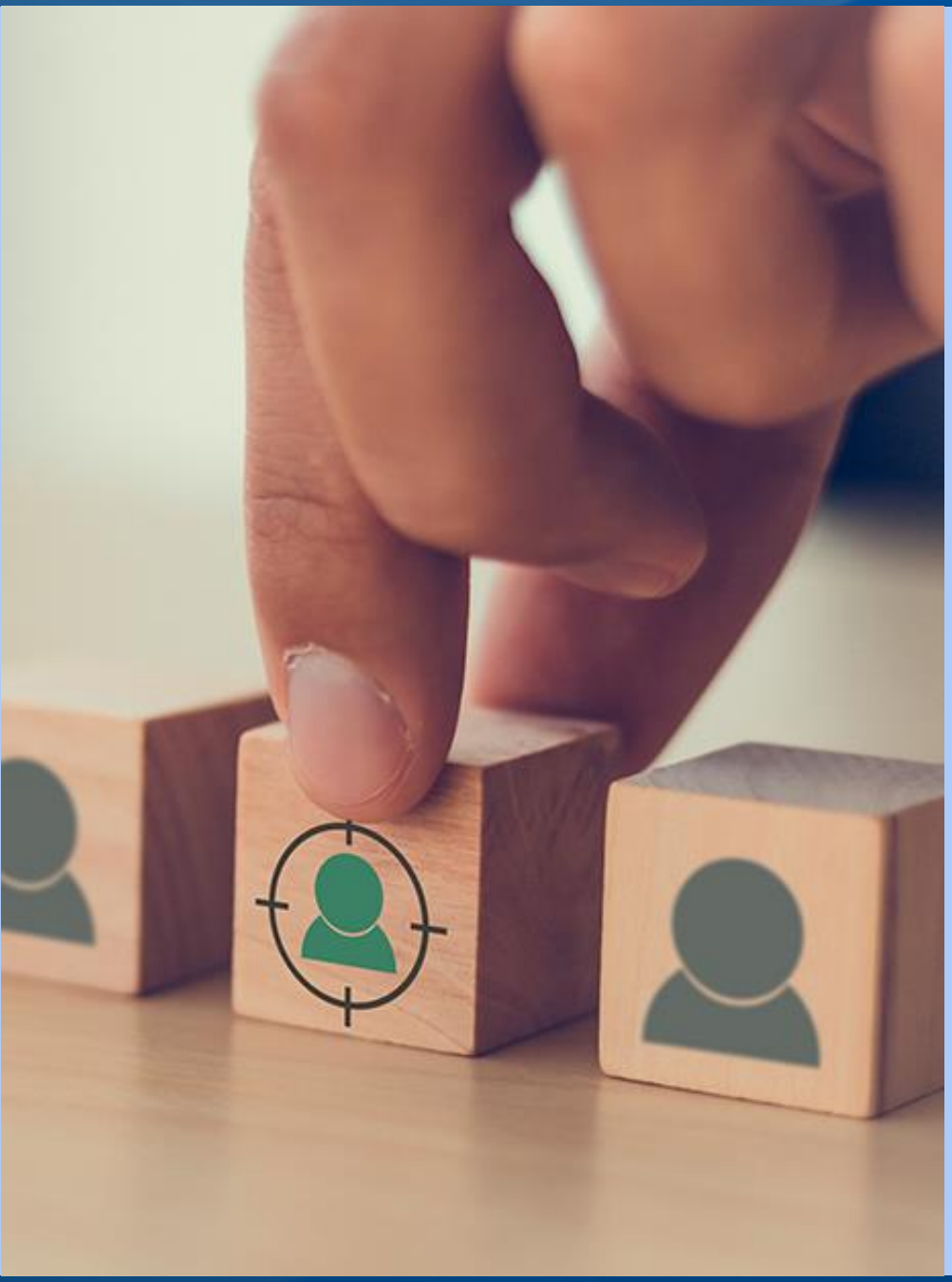
The following Key Terms will be referenced in this course:

Term	Description
Initial Registration	Initial registration allows suppliers to submit information that grants them the ability to participate in sourcing projects.
Full Registration	Full registration requires suppliers to go through a more thorough vetting process. This is required before receiving purchase orders or payment.
Supplier Record	The supplier record consolidates a supplier's information in SCPro.
Head Office	This designation creates a "parent supplier" that has a unique supplier number in SCPro. This supplier record can be linked to other supplier records or Sites.
Site	This designation creates a "child supplier" that has a unique supplier number in SCPro. It is linked to a "parent supplier".
Supplier Admin	The primary manager of supplier information for a bidder/supplier in SCPro.

Key Changes

These key changes will be discussed throughout this training:

- Suppliers will sign up for access to SCPro in order to manage all procurement activities including submitting bids, managing contracts, and receiving purchase orders.
- All supplier contacts can be listed on the supplier record and individual profile information such as email and phone number can be self-managed by the user.
- Supplier performance will be managed within SCPro allowing suppliers to collaborate with the State on new ways to improve the relationship.

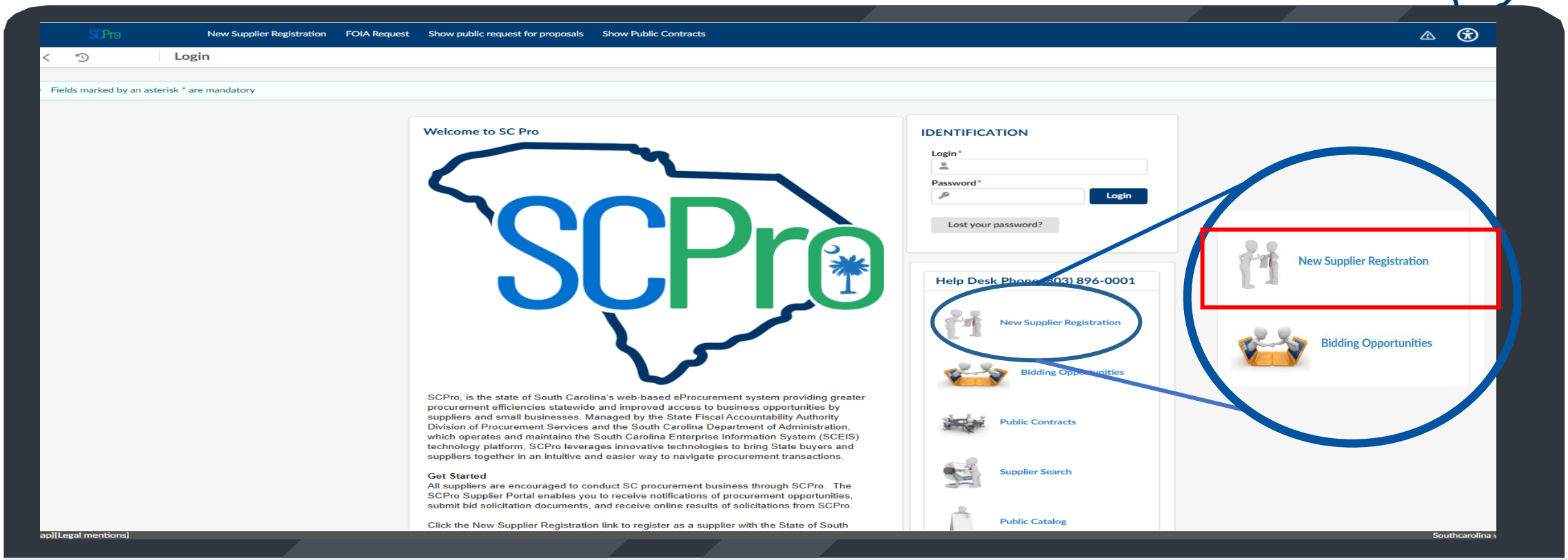


Lesson 1

Initial Registration

- ✓ Initiating the Request
- ✓ Completing the Registration Form
- ✓ Demonstration 1: Submitting Initial Registration
- ✓ Bidders vs. Suppliers

Initiating the Request



The link to the initial registration form can be found on the login page for SCPro. Accessing the form does not require credentials.

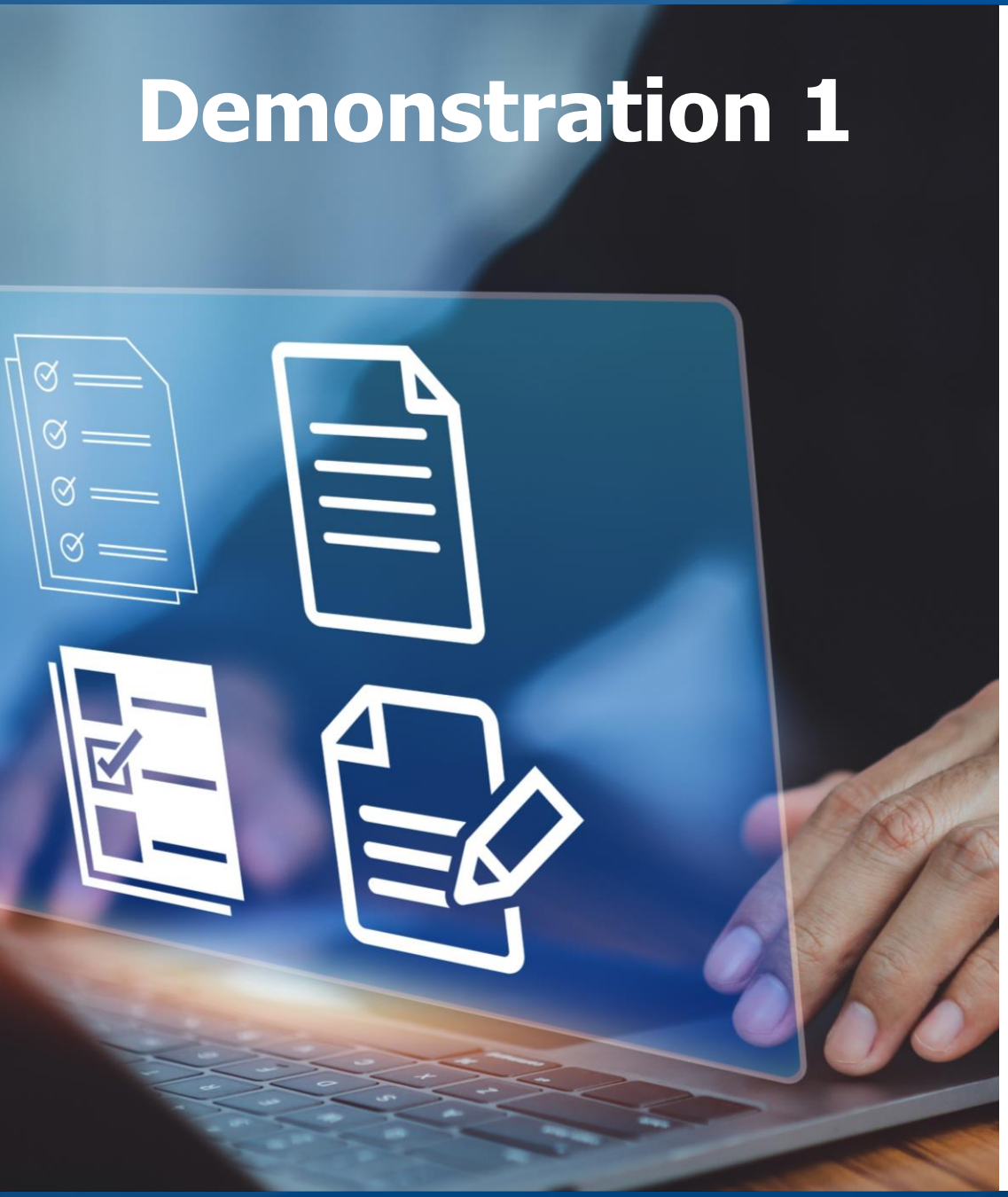
Completing the Registration Form

After opening the initial registration form, suppliers will fill in various pieces of information and create a username/password to access SCPro.

Representatives for potential suppliers will be required to submit basic information about the company and themselves:

- ✓ **Registration Type:** Identify if the company is U.S. based or international
- ✓ **Company Information:** Basic information such as name, entity type, tax ID number, and SAM ID (if applicable)
- ✓ **Legal Address Information:** Primary mailing address for the organization
- ✓ **Contact Information:** Name, email address, position, and phone number for the primary contact at the organization
- ✓ **Additional Details:** Indicates the organization's intent to bid, counties served, and what commodities the company can provide.
- ✓ **Security Control:** A CAPTCHA verification to filter out spam

Demonstration 1



Submitting Initial Registration

We will now demonstrate how to submit the initial registration request form in SCPro.

Bidders vs. Suppliers

Depending on the stage of the registration process a company sits in, the term used to describe them and the actions they can take will differ.

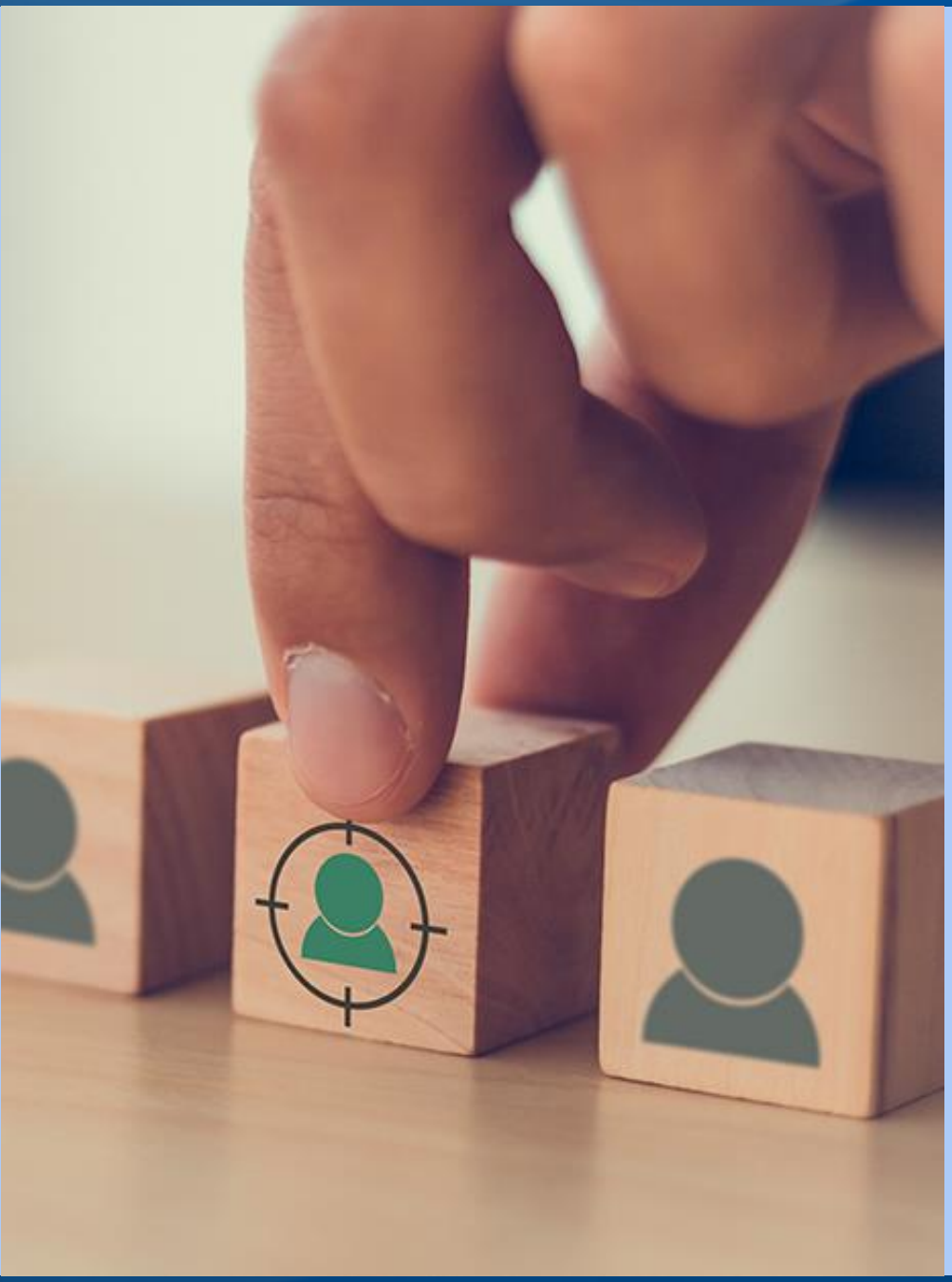
Bidder
- Has completed initial registration
- Can access sourcing projects in SCPro
- Can submit bids for sourcing projects in SCPro

Supplier
- Has completed initial and full registration process
- Can access sourcing projects in SCPro
- Can submit bids for sourcing projects in SCPro
- Can receive an active contract with the State
- Can receive orders and submit invoices

What's Next?

After the initial registration is submitted:

1. The potential supplier (a.k.a. bidder) can participate in sourcing projects.
2. The supplier record is labeled as a Head Office. Note: Only Supplier Admins can create additional supplier records that represent sites.
3. The Supplier Admin listed on the supplier record is able to log in and submit full registration or make changes to certain information on the supplier record (without submitting a change request).



Lesson 2

General Navigation

- ✓ Navigating the Homepage
- ✓ SCPro Main Menu
- ✓ Reviewing the Supplier Record
- ✓ Profile Settings
- ✓ Demonstration 2: Navigating SCPro

General Navigation

Upon login, supplier contacts can see a dashboard or homepage with key bidder/supplier information.

The bidder/supplier homepage and menu has been curated so that users can easily find relevant information to execute procure-to-pay activities. Bidders/suppliers will see the following information:

- ✓ **Main Menu:** Information and activities are grouped into modules (e.g. General Info, Sourcing, Contracts, etc.).
- ✓ **Homepage:** The homepage contains quick access icons that link directly to different pages within SCPro or initiate specific actions such as importing a catalog. Users can also leverage the **Validations** section to see a list of review/approvals that require their attention.
- ✓ **Profile:** These pages allow users to update their personal information such as address and phone number. Users can also update their preferences and notification settings.

SCPro Modules

At the top of the homepage, there are different menus or modules:

1. **General Info:** This is where the information on the supplier record can be viewed and updated.
2. **Sourcing:** All bid opportunities and bid activity that you are participating in or have been invited to will appear here.
3. **Contracts:** All pending and active contracts will be listed here.
4. **Catalogs:** If your company has items in a hosted catalog, this is where the items can be entered or updated using the import process.
5. **Performance:** All exceptions, collaboration plans, and performance evaluations can be viewed here.

Tabs on the Supplier Record

1. Company Information

This tab includes general information about the supplier such as Legal Name, DBA Name, Website, Tax ID Number, Legal Structure, and Address.

2. Banking Information

This tab includes a link to FiServ, where you will manage your relevant banking information with the State. (Accessed only by Supplier Finance and Supplier Admin roles)

3. Contacts

This tab includes information for team members on the supplier's team. Different roles allow the team members to manage specific information on the supplier record and take certain actions within SCPro.

4. Documents & Certifications

This tab allows suppliers to upload additional documents.

Tabs on the Supplier Record Cont'd

5. Qualifications

This tab contains information on what counties the supplier serves, what commodities they can provide, and which WMBE categories they fall into.

6. P2P Information

This tab includes information about procure-to-pay processes such as order locations and payment locations.

7. Debarment/Suspension

This tab lets suppliers know if they were/are debarred or suspended.

8. Change Log

This tab contains details for any information change requests submitted for the supplier record.

Supplier Roles

Each contact on the supplier record must be assigned at least one role.

Term	Description
Supplier Admin	• Primary contact for all activities • Can only be assigned to one user • Full access to supplier account information (excludes banking information) • Must have login credentials • Can view and edit supplier documents
Backup Supplier Admin	• Back up contact for all activities that Supplier Admin handles • Can only be assigned to one user • Full access to supplier information (excludes banking information) • Must have login credentials • Can view and edit supplier documents
Supplier Finance	• Manages supplier banking information • Can view the entire supplier record, but cannot make edits outside of banking information • Can only be assigned to one user

Supplier Roles (Cont'd)

Each contact on the supplier record must be assigned at least one role.

Term	Description
Legal Contact	• Limited view of supplier record • Full access to manage S2C and P2P transactions • Indicates primary contact for legal and sourcing notifications
Sourcing Contact	• Limited view of supplier record • Full access to manage S2C and P2P transactions • Indicates primary contact for bid opportunities
Contract Contact	• Limited view of supplier record (view only) • Full access to manage S2C and P2P transactions • Indicates primary contact for contracts notifications
Catalog Contact	• Limited view of supplier record • Full access to manage S2C and P2P transactions • Indicates primary contact for catalog notifications (e.g. item expiration, updates)
PO Contact	• Limited view of supplier record • Full access to manage S2C and P2P transactions • Indicates primary contact for issuing purchase orders

Supplier Hierarchy

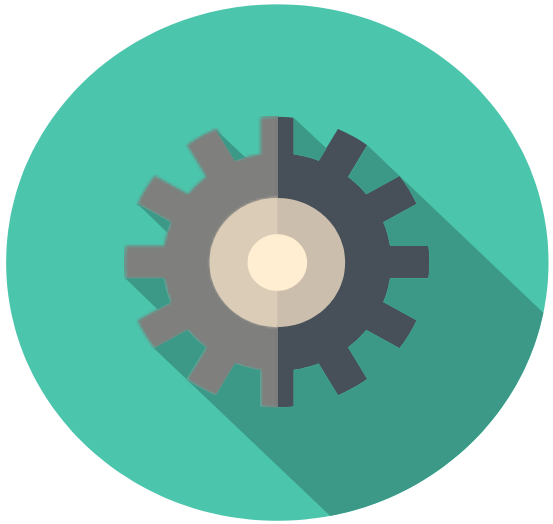
A company can have multiple supplier records in SCPro that are linked together to form the supplier hierarchy. Each designation dictates what actions can be performed.

Head Office
- Has completed initial and full registration
- Can function as a "parent" to other supplier records

Site Supplier
- Has completed initial and full registration
- Will receive purchase orders

Profile Settings

Each user can maintain their individual settings on their profile.



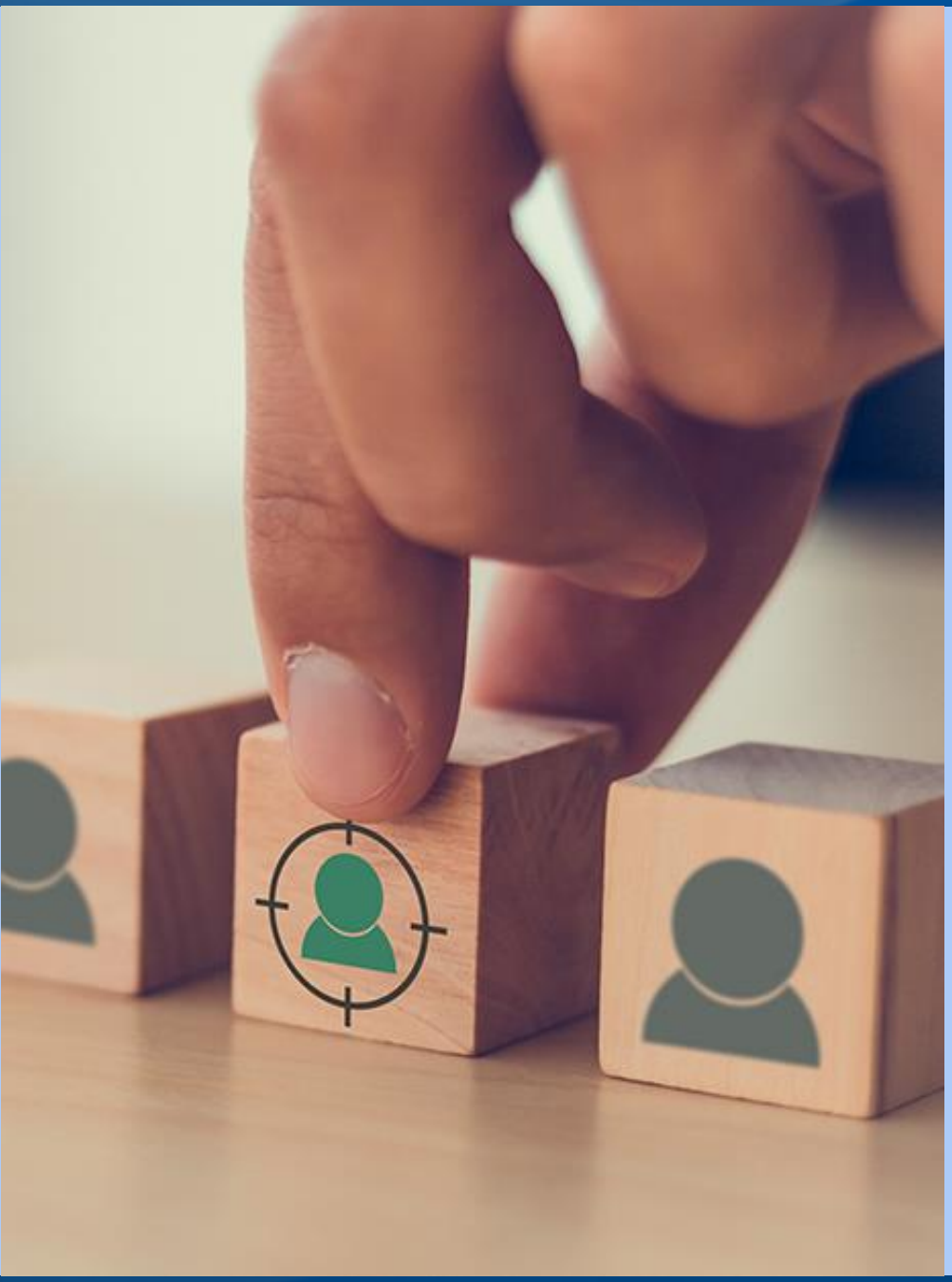
The following information is editable under your profile settings:

1. **Identity:** Basic information such as name and job title/position.
2. **Contact:** Email address, phone number, and mailing address.
3. **Password:** Allows for passwords to be changed.
4. **Photo:** Users can upload a headshot.
5. **General Preferences:** Time zone, language, currency, and other formatting options.
6. **Notification Preferences:** The frequency that you receive email notifications. **Note:** Some email notifications **cannot** be turned off.

Demonstration 2

Navigating SCPro

We will now demonstrate how to navigate the SCPro homepage and modules.



Lesson 3

Full Registration

- ✓ Awards, Contracts, and Full Registration
- ✓ Demonstration 3: Submit a Full Registration Request

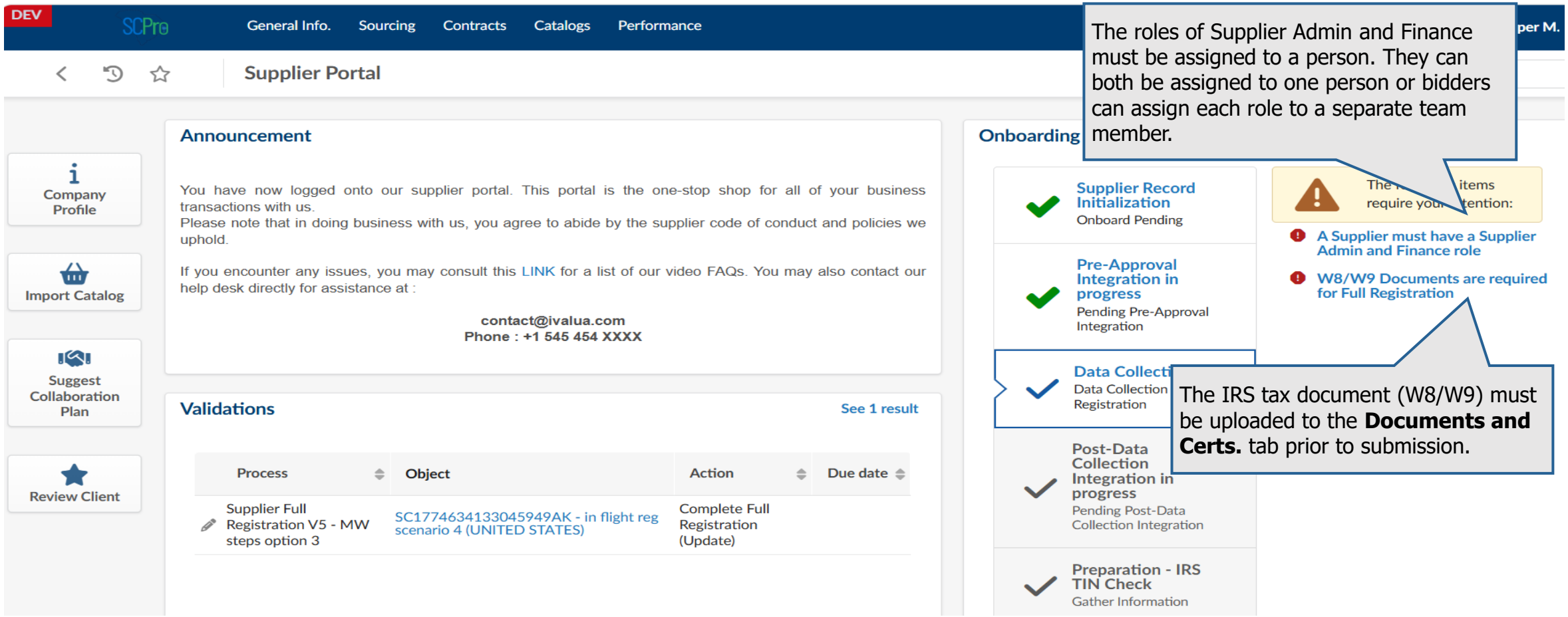
Awards and Contracts

After a sourcing project is completed, new contract records can be created, or existing contract records can be amended in SCPro.

The full registration process must be completed before the State can award contracts or issue purchase orders.

Completing Full Registration

A checklist will appear on the homepage showing the next steps to complete onboarding, including submitting full registration. Prior to full registration, bidders will see alerts with specific actions that need to be taken.



Request Approval Workflow

If the registration type is Corporate or Other or if the Supplier is a Site, the workflow will route directly to SFAA/CG Approval steps

1

Data Checks

SCPro automatically checks the registration type. Additional State approvers are then pulled in to conduct a TIN check.

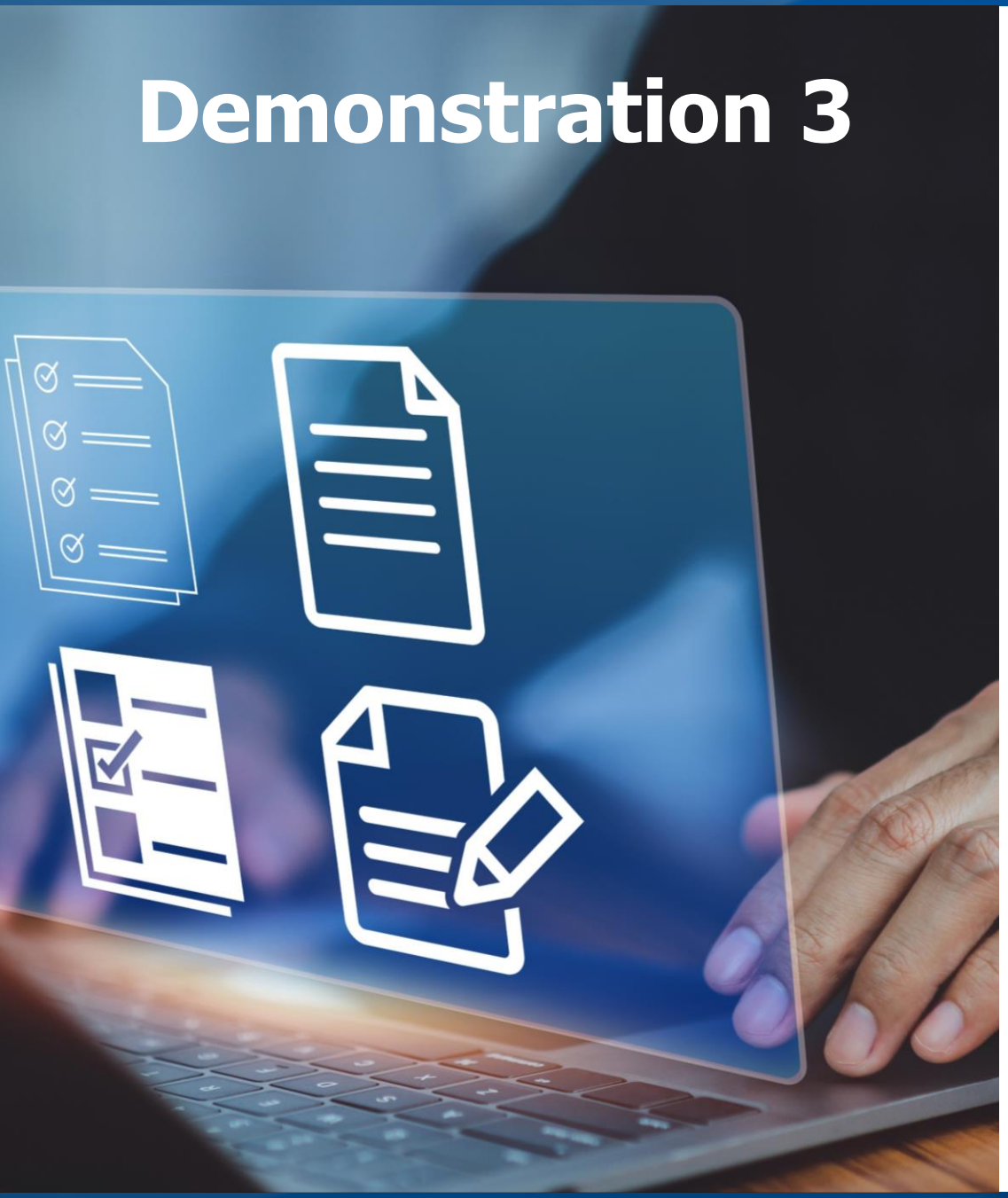
2

State Approvals

This step pulls in users from different State departments to review the data on the record and enter a decision

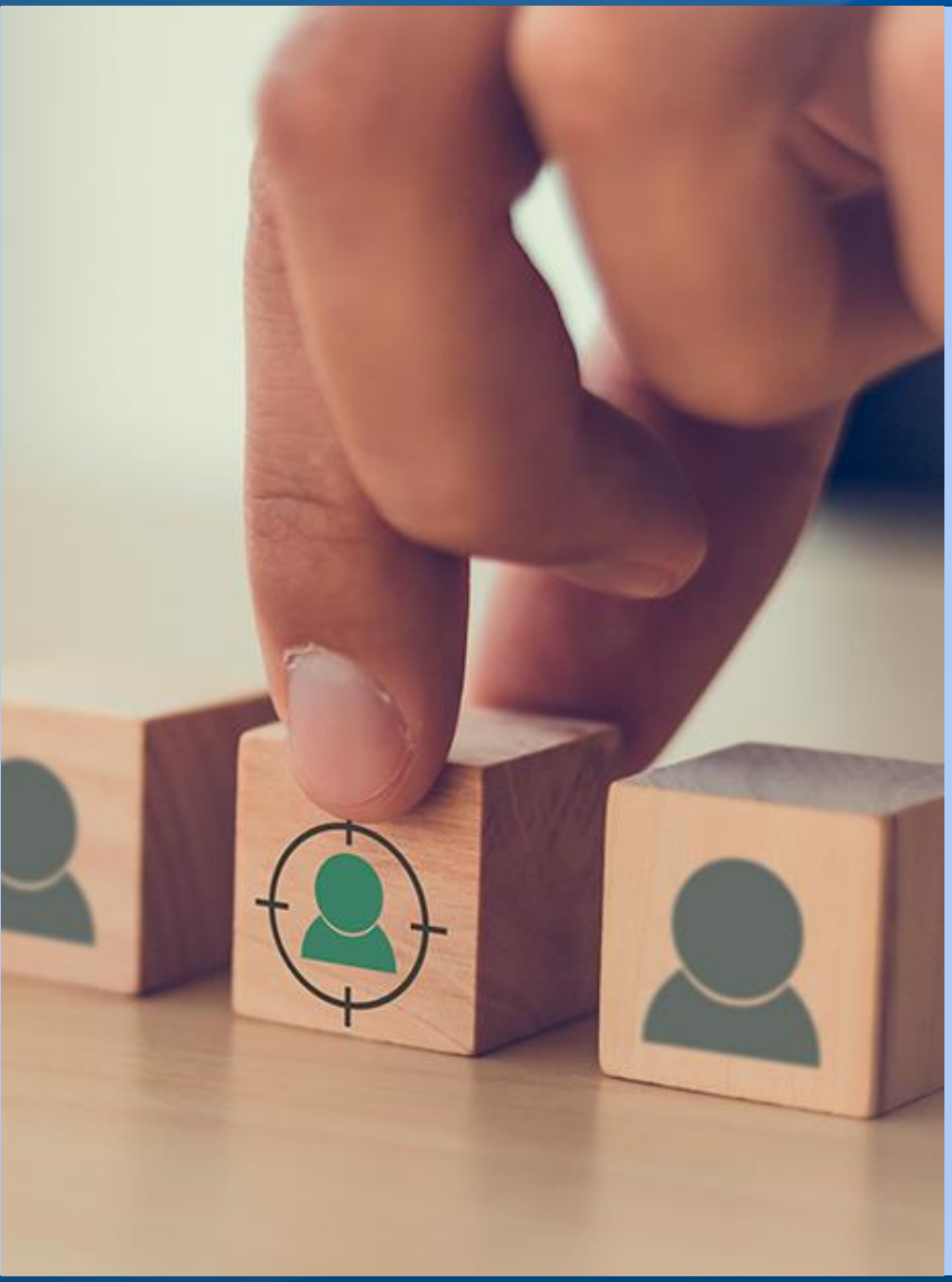
An email notification will go out when the registration request is fully approved.

Demonstration 3



Submit Full Registration

We will now demonstrate how to submit a full registration request in SCPro.

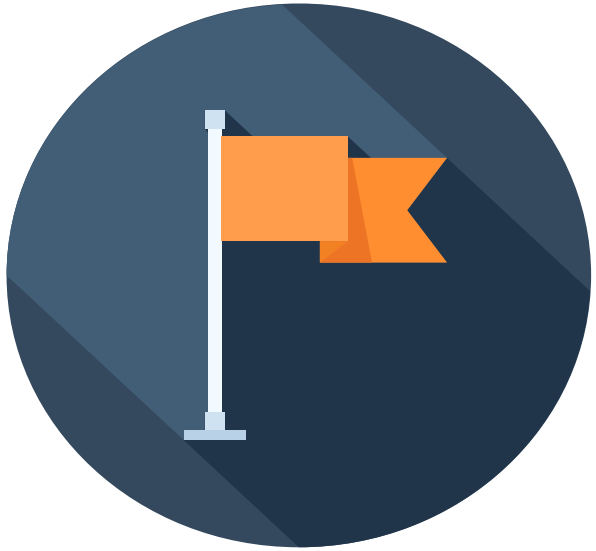


Lesson 4

Managing Supplier Information

- ✓ Exceptions
- ✓ Collaboration Plans
- ✓ Risk Assessments
- ✓ Change Requests
- ✓ Demonstration 4: Submitting an Information Change Request

Exceptions



Exceptions allow State users to submit feedback on a supplier's performance as it relates to SCPro activity (example: contract, purchase order, invoice, etc.).

Exceptions are typically suggestions for improvement and will fall into a specific category:

1. Delay
2. General
3. Price
4. Quality

Exceptions can lead to a collaboration plan being created to document how the exception will be addressed.

Not all exceptions will result in a collaboration plan.

Collaboration Plans

Collaboration Plans allow suppliers and the State to create a finite timeline of actions to address an issue or implement change in the relationship.

These plans are typically preceded by an exception and that customer feedback is used to shape what actions need to be taken. The plan is drafted, reviewed, and approved by both the State and the supplier.

Not all exceptions will result in a collaboration plan.

Risk Assessments

Risk assessments are evaluations meant to measure the risk of the State doing business with a specific business. This information is gathered via assessments and the results will be made available to the supplier.

The categories of assessment are:

1. Contract Risk (includes data security and physical security elements)
2. Greenhouse Gas Risk (includes environmental factors)
3. Supplier Risk (includes data security and supplier financial risk factors)

If an assessment is conducted, scores will be visible on the supplier record.

Change Requests

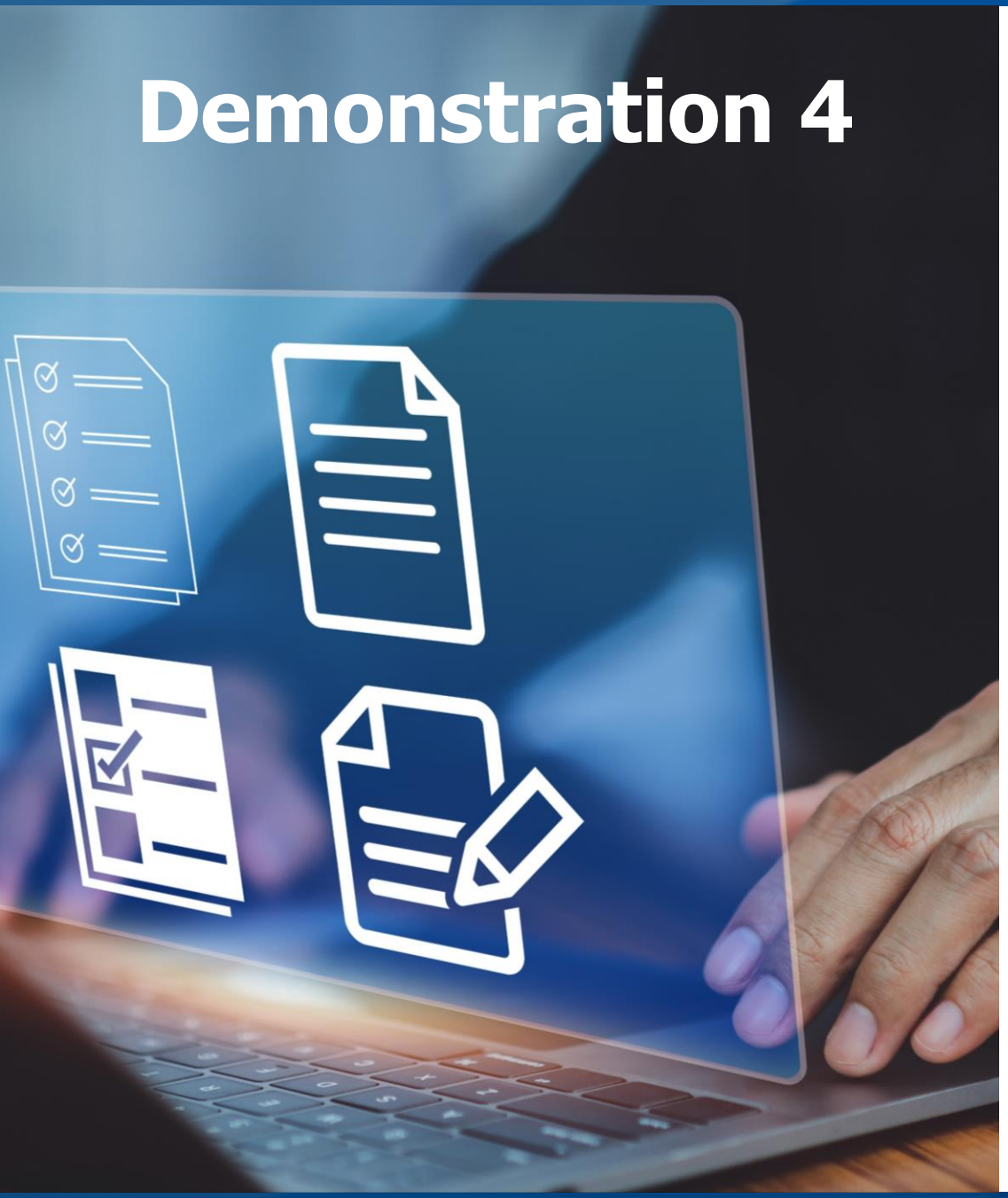
Changes to the supplier record can be initiated by the supplier or an authorized State user. The request will require the creator to enter a reason for the change. The change must be fully approved before the data is updated.

The following actions require a change request:

1. **General Change Request:** This is an update to data housed on the **General Info.** tab
2. **Deactivation due to fraud***
3. **Deactivation (general)***
4. **Reactivation***

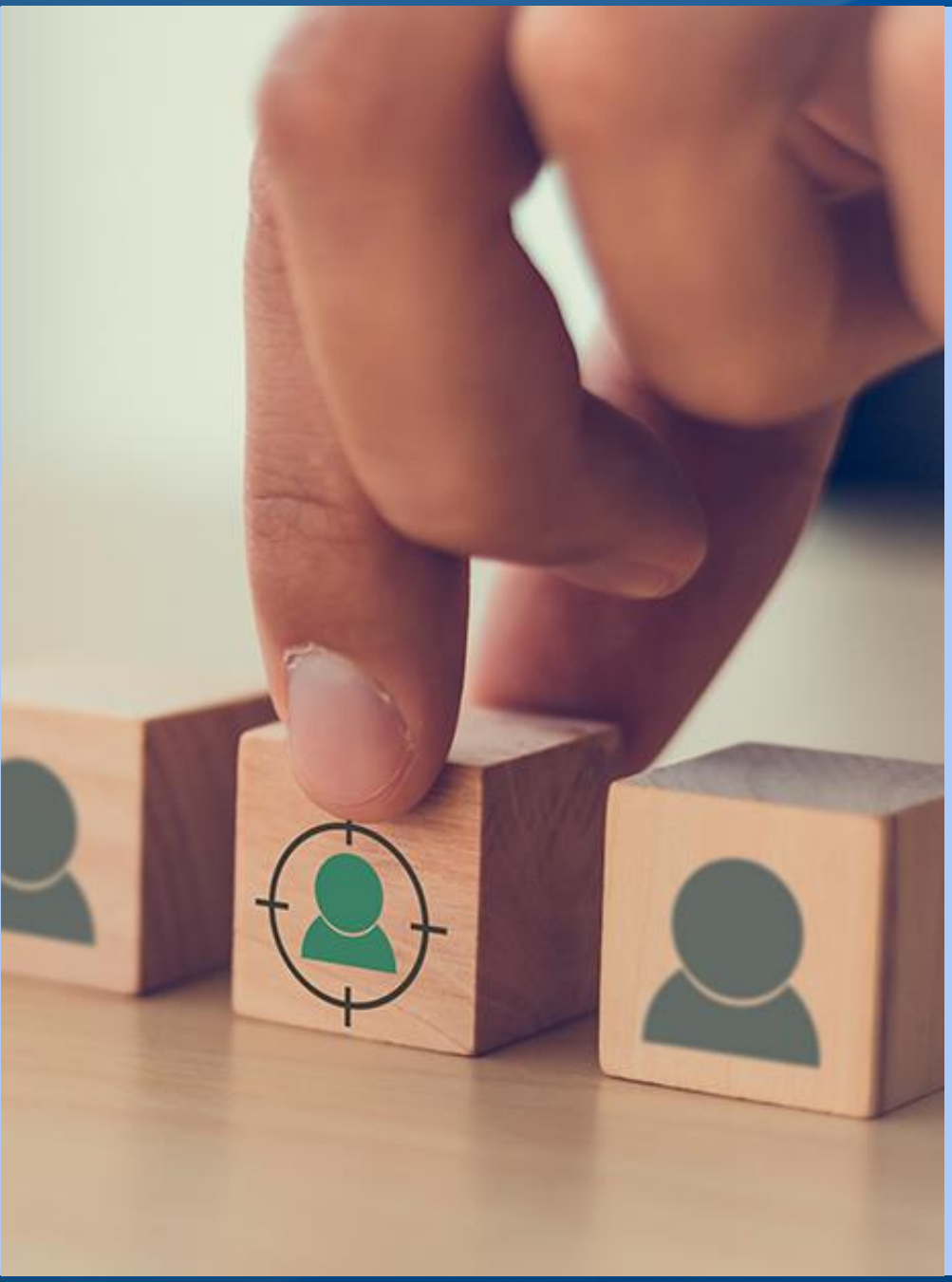
***These types of change requests can only be submitted by authorized State users.**

Demonstration 4



Submit a Supplier Information Change Request

We will now demonstrate how to submit request to change information on the supplier record in SCPro.



Course Conclusion

Key Takeaways

Now that you are familiar with the process of registering and managing supplier accounts in SCPro, take a moment to note the following key takeaways:

1 Initial Registration

The initial registration process allows potential suppliers to quickly submit basic information to gain access to SCPro and submit bids.

2 General Navigation

The homepage and main menu (modules) are curated to show relevant and high priority information

3 Full Registration

The full registration process requires suppliers to enter more detailed information about their organization and upload high priority documents.

4 Managing Supplier Information

Changes to company information can easily be made through change requests where they are reviewed and approved before replacing outdated data.

Course Summary

You should now be able to:

1. Submit initial registration in SCPro.
2. Update profile information and locate various information within SCPro.
3. Complete full registration and manage supplier information.

CONGRATULATIONS

You have successfully completed the **Registering and Managing Supplier Accounts** course.