







## Supplier Profile Management– Quick Reference Card

### Navigation Tips

- Fields with the  icon indicate you have to select from a pre-defined list of values. If you know the field value, begin typing it in and press the 'tab' button. Otherwise, click on the  icon and 'QuickSelect' to choose the value.
- All fields marked with '\*' are mandatory fields.
- Use the buttons  and  to navigate between pages.
- Do not use your browser's back button   as it may cause errors.

Your primary contact received an email on approval from Dallas ISD containing login user and password. Use the user/password to maintain your accurate and up-to-date supplier information in Dallas ISD system.

**Please note suppliers are responsible to maintain their information in Dallas ISD system. The district will not be responsible for any payment delays or missed communication regarding bidding opportunities due to incomplete/missing information.**

A sample email is shown below:

To: ABBOT ANDREW  
Sent: 22-DEC-2015 10:30:04  
ID: 8981871

You have been registered at Dallas Independent School District for access to their supplier collaboration network. You can [log on](#) with the username [INFO@TESTMSG1.COM](mailto:INFO@TESTMSG1.COM) and the password Jn6\*D019F.

When you first log on, you will be required to change your password for security purposes. Contact [administrator](#) for additional information.

Thank you.

### Login

Please click on [log on](#) in email or link below.

<https://portal.dallasisd.org>

Enter user/password provided in email. You will be prompted to change password on first time login.

### Forgot Password:

If you forgot the password you previously set, click on


[Login Assistance](#)

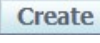

on Login page to reset your password.

Once you login, you will see the following links. Click on 'Supplier Details' to view/update your information



### Address Book:


Click the  icon under 'Update' to make changes to an existing address.

- Make sure 'RFQ only' flag is **checked**
- Check 'Purchasing Address' flag to receive PO at this address.
- Check 'Payment Address' flag to receive payment at this address.
- Enter Address details including Address Line, City, State and Zip Code.
- If you require a separate address for payments, use the  button to add an additional address.
- Please use  under 'Remove' to inactivate any obsolete addresses.

### Contact Directory

[Update to an Existing Contact](#)

Please contact ExistingSuppliers@dallasisd.org if you have further questions.

- Click on  under 'Update' to make changes to an existing contact.

## New Contacts

Press  to create additional contacts.

- Email Address – Enter contacts email address.
- First Name – Enter the first name for the contact.
- Last Name – Enter the last name for the contact.
- Phone Number – Enter the phone number for the contact.

## Banking Details:

DISD encourages all suppliers to provide bank account information in order to be paid electronically.

Please maintain only **one** Active bank account for ACH/Electronic Payments to avoid any confusion.

### Inactivate obsolete Bank Account

- You can inactivate an old bank accounts by selecting a date in 'End Date' field.

### Create New Bank Account

- Click the  button to enter your bank account details.
- Country - The default value is 'United States'. Do not update this field as Dallas ISD makes electronic payments in US only.
- Branch - Select the option 'Existing Branch'  
 New Branch  
 Existing Branch
- Branch Name - Enter your 9 digit bank routing number or select it from the list of values.
- Account Number - Enter your bank account number.

\* Account Number

If for some reason, you want to be paid via 'Check', enter 'NA' in Routing Number and your Supplier Name in 'Account Number' fields.

Routing Number

\* Account Number

## Organization – Payment Method /Remittance Email


If you want to update your 'Payment method' or 'Remittance Email Address' where you get payment confirmation email, please follow steps below:

Click  on the left and then tab

Payment Method: You can select any of the following payment Methods

\* Payment Method

Electronic: Electronic Payment directly credited to your bank account that you provided in previous section 'Banking Details'.

 *In order to be paid electronically, make sure you have a proper bank account entered in section 'Banking Details'.*

Check: If you want payment via Check.

ePayables: Participation in Bank of America's ePayables program is recommended if the supplier can accept and process credit card payments. The following form provides details about this payment offering:

[ePayables Program \(Download details\)](#)

Email Address for Remittance Advice – Enter the email address where payment notifications should be sent.

\* Email Address for Remittance

## Business Classifications

- Make sure all information in M/WBE section is up-to-date.
- Please check the classification/s that apply if you are an M/WBE certified business.

Please contact ExistingSuppliers@dallasisd.org if you have further questions.

- Enter Minority type, Certificate Number, M/WBE Certifying Agency and Expiry date of the certificate.
- In order to be considered as M/WBE business, it is required to attach scanned copy of the latest certificate on the last page.

### Products and Services

- Make sure to periodically review and update the Products and Services as the codes may be updated over time. It is very important to select carefully. Dallas ISD will use this data to notify vendors of procurement opportunities and will not be responsible for lost communication due to incorrect selection in this section.
- Select the **Create** button and check the 'Applicable' checkbox for all Products and Services that your company provides.
- Select the **Next 10** button to scroll through all of the offerings.
- Click the **Apply** button when you are finished with your selections.

### Organization – Attachments

Please attach the Form **W-9** before pressing the **Submit** button. Failure to attach this form will result in processing delays. Form **should not** be emailed.

- [Form W-9](#) (Request for Taxpayer Identification Number and Certification.)
- [Conflict of Interest Questionnaire.](#)  
(Only if there is a conflict)
- [Felony Conviction Notice.](#)  
(Only if there is a conflict)

**NOTE: Select n if there is no FCN or CIQ under the Business/Organization Tab**

The following form is optional and may be submitted as required:

- Minority/Women Business Enterprise (M/WBE).
- Scanned Copy of Voided Check if Wells Fargo cannot verify your banking option.

Organization - Additional Information:

- Supplier Type - Select the appropriate Supplier Type from the list of values. Most vendors will select the 'Vendor – Goods & Services' option.
- Chamber & Contractor Affiliations – Check all that apply.
- 1099 Applicable – Check if applicable.
- Joint Venture? – Check if applicable.
- Legal Structure – Select a value from the list