Supplier Portal User Guide: Registration & Account Management Instructions

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SECTION 1 - Welcome to the RTS Supplier Portal!

The Rochester Genesee Regional Transportation Authority is pleased to provide an online portal to streamline and simplify doing business with suppliers. Through the portal, suppliers can receive notifications of sourcing events, bid on those events, review contracts, view progress of orders, and see payment information.

To be eligible to bid on events, you must create a user account and register with your company information.

1.1   *Getting to the Supplier Portal*

    A.   Navigate to the Supplier Portal at https://supplierportal.myrts.com

    B.   From here, you can:
        a.   Register as a supplier.
        b.   Login with your username and password.
            i.   PW Requirements: Minimum Length = 8
            ii. Alpha/Numeric Required & Case Sensitive
            iii. Maximum Character Repeat = 2
        c.   Browse and search events for opportunities to do business with RTS.
        d.   View RTS policies and contacts.
        e.   Have your username sent to your email address (if you have forgotten it).

1.2   *Contact Us*

    A.   For technical questions regarding the portal, click contact us at the top of the page.

SECTION 2 - Supplier Portal Registration (New Users)

Note: any items with an asterisk are required.

2.1   *Begin the Registration Process*

A. You will need the following information and documents on hand when you register:
   a. Federal Tax ID Number or Social Security Number
   b. Electronic copy of W-9. You will be required to attach it to your registration.
   c. Company name, address, and phone number
   d. Business Type
   e. Commodity Codes pertaining to your business
   f. Electronic copy(ies) of all Diversity Certifications, DBE, MBE, WBE, SDVOB, if applicable. You will be required to attach to your registration.

B. Click the Register link top left-hand corner of the page.

2.2   *Accept the Terms and Conditions for Use of the Supplier Portal*

A. Reviewing the Terms & Conditions, check the box labeled Accept Terms and Conditions and click the Continue button to move to the next step.

2.3   *Enter Contact Information*

A. In the Create An Account section:
   a. Enter a User Name.
   b. Enter a Password and re-type it in the Confirm Password box.

B. Enter information in the Enter Information About Yourself section.
   a. The items with an asterisk are required.

C. Once completed, click the Continue button to move to the next step.

2.4   *Enter Company Information*

A. Enter information in the Company Information section, complete the boxes noted with an asterisk. The remaining boxes are welcome to be completed, but not required.

B. In the Address Information section, complete the boxes noted with an asterisk. The remaining boxes are welcome to be completed, but not required.
   a. You may either enter a Remit To Address or check the box labeled "Check If Remit to Address Is The Same As Mailing Address".

C. Click the Continue button to move to the next step.

2.5   *Assign Diversity Codes*

A. Click the Add button to display the list of Active Diversity Codes.

B. Click each check box that applies.
   a. You can select more than one code at a time.
   b. You can use the arrows at the bottom to get from one page to the next.

C. Click the Attach to Supplier button and click the Continue button to move to the next step.

2.6   *Answer Questions Posed by RTS*

A.   Review each question and answer each to the best of your ability. Each question may have different requirements than the others so read the italicized words under the question.

B.   When answering a question, you may need to perform one of these actions.
   a.   Select an answer from a list
      i.   Click the arrow icon and then select the appropriate answer.
   b.   Attach a document to a question
      i.   Click the Browse button, and then find and select the appropriate file.
   c.   Add comments
      i.   Click in the text box and type your comments.

C.   When all questions have been answered, click the Continue button to move to the next step.

2.7   *Link Commodity Codes to Vendor Profile*

* Note: This step is required to complete registration. Commodity codes are the mechanism RTS staff will use to notify Suppliers of Events. Suppliers with incomplete profiles cannot receive notifications.

A.   Click the Add button to display the Available Commodity Codes window.

B.   Enter text in the Search tool to find commodities by part of the Code or Description if desired.

C.   Select the check box for the desired categories.

D.   Click the Attach to Contact button and then click the Continue button to move to the next page.

E.   You can use the arrows at the bottom to get from one page to the next.

F.   When all applicable codes have been attached, click the Continue button to move to the next step.

2.8   *Set Proxy Notifications*

In this optional step, you can designate one or more additional people to receive notifications regarding bidding events. A proxy contact does not need to be registered on the portal to receive notifications. Note: Proxy's are not additional contacts. They can receive notifications of Events, but will not be able to submit a response. If you would like to set up additional contacts with their own username and password please see Section 3 – Managing Your Account.

A.   Click the Add button to display the Proxy Notifications window.

B.   Enter the First Name, Last Name, and Email Address of the proxy contact.

C.   If multiple proxies are being added, click Save and New. Otherwise, click Save.

D.   Click the Continue button to move to the next step.

2.9   *Finalize Registration*

When registration is completed with no errors, the Status page displays Registration status: Complete.

A.   Click the Done button.

2.10   *Set Up Security Questions*

A. Immediately after registering, click the Logout link at the top of the page, and then Login using your new user name and password. The portal will then prompt you to set up your password reset security questions.
   i.   If you ever need to reset your password, you will need to answer a security question.

B. Answer the three questions and click Save to return to the Home page.

SECTION 3 - Managing Your Account

3.1   *Adding Secondary Users from Your Company*

A. Suppliers can have as many secondary users as desired, however secondary users will have to be added by RTS Staff.

B. Use the attached **Contacts for Vendor Profile Account** form to add contacts. Take note of the order contacts should be entered. When complete, email the form to CivilRightsReporting@myRTS.com.

3.2   *Resetting a Password*

A. On the main page, click Login

B. Click "Forgot your password?" link to display the Reset Password page.

C. Enter your username in the field provided and click the arrow.

D. Answer the Security Question you set up for your account and click the arrow.

E. In the Reset Password window, enter your new password

F. Confirm your new password and click the Save button.

3.3   *Forgot User Name*

A. On the main page, click the "Forgot User Name?" link to display the Forgot User Name page.

B. Enter your Email Address and confirm, then click the OK button.

C. You will receive an email with your username.

ADDITIONAL CONTACTS FOR SUPPLIER PROFILE FORM

_____   _____
Vendor Name   Supplier Number
                                            Assigned During Registration

IMPORTANT NOTE: The contact who is authorized to execute the contract should be identified in line #1. A contact for Civil Rights related issues/reporting should be listed in line #2. In addition, please provide any other individuals you want assigned to roles (billing, insurance certificates, sales representatives etc.) under your user account.

1.) _____   _____   _____
     Name of Contact Authorized to Sign   Title   Desired User Name
          Contract Documents

     _____   _____   _____
               Email   Telephone   Receive Event Notifications:
                                                                   Y/N

2.) _____   _____   _____
     Name of Contact for Civil Rights/Diversity   Title   Desired User Name
          Program Related Issues

     _____   _____   _____
               Email   Telephone   Receive Event Notifications:
                                                                   Y/N

3.) _____   _____   _____
               Name   Title   Desired User Name

     _____   _____   _____
               Email   Telephone   Receive Event Notifications:
                                                                   Y/N

4.) _____   _____   _____
               Name   Title   Desired User Name

     _____   _____   _____
               Email   Telephone   Receive Event Notifications:
                                                                   Y/N

5.) _____   _____   _____
               Name   Title   Desired User Name

     _____   _____   _____
               Email   Telephone   Receive Event Notifications:
                                                                   Y/N