Before you proceed, please click here to complete the Consent and Authorization Agreement (“Agreement”), which is required to respond to bids in PHLContracts. Completing and signing this form is Step 1 of the vendor registration process. You will upload the Agreement to your vendor profile in Step 11 of the migrated vendor registration process outlined below.
### Table of Contents

Overview of the PHLContracts Vendor Portal ................................................................. 1  
Vendor Roles and Activities .......................................................................................... 2  
Responsibilities of the Seller Administrator Role ....................................................... 2  
Responsibilities of the Seller Role ............................................................................... 3  
Registering as a New Vendor ....................................................................................... 3  
  Step 1. Complete Your Consent and Authorization Agreement .................................... 4  
  Step 2. Access the PHLContracts Website ................................................................... 5  
  Step 3. Submit Organization Identification Information ................................................. 6  
  Step 4. Complete the Company Information Page ......................................................... 7  
  Step 5. Complete the Administrator Information Page ................................................ 8  
  Step 6. Complete the Address Information Page .......................................................... 9  
  Step 7. Terms Page ..................................................................................................... 10  
  Step 8. Complete the Categories and Certifications Page ............................................ 10  
  Step 9. Complete the Commodity/Service Codes Page ............................................... 13  
  Step 10. Review Registration Information Summary Page .......................................... 16  
Appendix A – PHLContracts Navigation Overview ...................................................... 22  
  Header & Navigation Bars ............................................................................................ 22  
  NIGP Code Browse .................................................................................................. 22  
  My Account ............................................................................................................... 23  
  Red and Yellow Error Messages ................................................................................. 23

For additional information on Seller Administrator functions, please refer to the Seller Administrator’s Guide available by clicking the Help icon (question mark) located in the upper right portion of the main user menu of PHLContracts.
Registering as a PHLContracts Vendor

Welcome to the PHLContracts Procurement System

Overview of the PHLContracts Vendor Portal

The City of Philadelphia Procurement system (PHLContracts) is powered by Periscope Holdings Inc.’s BuySpeed software, an Internet-enabled application that provides decentralized purchasing functionality specifically designed for government agencies.

To those vendors already registered with the City of Philadelphia. If you are already registered with eContract Philly website or the Office of Economic Opportunity Compliance reporting system, this does not replace those database systems. This system provides new functionality to businesses that are interested in contract opportunities posted by the Procurement Department related to construction, supplies, equipment, non-professional services and concession (or revenue generating) contracts. If you choose to register, you will have the opportunity to register for industry specific areas that are of interest to you. You will only be notified of bids/RFPs that are posted to this site in those industries that you select. However, it is at your discretion whether you choose to complete registration.

The PHLContracts Vendor Portal allows sellers (vendors) of goods and services to:

- Register with the City of Philadelphia by completing an online application and completing the Consent and Authorization Agreement
- Maintain their organization information
- Maintain information on commodities and services they offer
- Maintain information on certifications and categories they belong to
- View bid opportunities and respond (with Quotes) electronically online
- View active contracts and search contracts and bids
- View purchase orders (contracts) sent to them
- Receive procurement news and information directly from the City.
Vendor Roles and Activities
Registered vendor users are assigned one of two roles in the PHLContracts system:

<table>
<thead>
<tr>
<th>Role</th>
<th>Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seller Administrator</td>
<td>Organizational maintenance focus</td>
</tr>
<tr>
<td>Seller</td>
<td>Purchasing information focus</td>
</tr>
</tbody>
</table>

Important concepts related to vendors and vendor users:

- Our goal is for vendors to use the PHLContracts system to initially register and to maintain their organizational information *
- Vendors must complete their registration and maintain ‘Active’ status in order to receive a contract in PHLContracts
- Seller Administrators can perform all of the Seller role functions
- Registered vendor organizations may have multiple Seller Administrators and multiple Sellers
- The individual who initially registers their organization in PHLContracts will by default be assigned the Seller Administrator role
- Each vendor organization must maintain at least one individual assigned the Seller Administrator role

* As part of the initial roll out of the PHLContracts system, vendors with active and recent purchase orders will be automatically registered in the system. Please refer to additional user guides related to ‘Migrated Vendors’ for specific information on what these vendors need to do to complete required organization information.

Responsibilities of the Seller Administrator Role
Seller Administrators should be prepared to perform the following tasks:

- Maintain vendor organization information including:
  - Company general profile
  - Address information
  - Commodity and service information
  - Certification and category information

- Ensure the organization’s Consent and Authorization Agreement (“Agreement”) is completed and uploaded to the organization’s profile. The Agreement can be found by clicking here.
Registering as a PHLContracts Vendor

• Manage access to the PHLContracts system for company representatives, including Sellers and other Seller Administrators

• Review Vendor News and Vendor Alerts issued by the City of Philadelphia through the PHLContracts system

Seller Administrators should refer to the Seller Administration User Guide available by clicking the Help icon (question mark) located in the upper right portion of the main user menu of PHLContracts. Additional questions may be directed to the City of Philadelphia Procurement Customer Service Representative at (215) 686-4755, (215) 686-4720, (215) 686-4721, or email PHLContracts@phila.gov.

Responsibilities of the Seller Role
Sellers should be prepared to perform the following tasks:

• Regularly access the PHLContracts system to review available bids

• Respond with Quotes and other requested information required by City buyers to conduct procurements and purchases

Sellers should refer to the Seller User Guide available by clicking the Help icon (question mark) located in the upper right portion of the main user menu. Additional questions may be directed to Procurement Customer Service at (215) 686-4755 / (215) 686-6720 or by email at PHLContracts@phila.gov.

Registering as a New Vendor

Information Requirements

In order to complete your organization’s PHLContracts registration, you will need to provide several types of information, including:

• Basic organization information (legal name, tax ID, business addresses and contacts);
• The commodities and services your organization provides;
• Vendor Certification and Category information
• Vendor users (Seller Administrators and Sellers); and
• Upload the required Consent and Authorization Agreement
Registration Steps

Step 1. Complete and Sign the Consent and Authorization Form
Step 2. Access the PHLContracts Website
Step 3. Submit Organization Identification Information
Step 4. Complete the Company Information Page
Step 5. Complete the Administrator Information Page
Step 6. Complete the Address Information Page
Step 7. Skip Terms Page
Step 8. Complete the Categories and Certifications Page
Step 9. Complete the Commodity/Service Codes Page
Step 10. Review Registration Information Summary Page
Step 11. Once you complete Registration, upload the Consent and Authorization Agreement.

If you have questions about basic features of the PHLContracts system, including: logging into the system, navigating the menus, and how to access the Seller Administrator Guide refer to Appendix A of this guide.

The remainder of this section steps you though the process of registering as a new vendor with ABC Supply as an example

**Step 1. Complete Your Consent and Authorization Agreement**

Before you get started in the system, please complete and sign the Consent and Authorization Agreement. The Consent and Authorization Agreement is required by all vendors if they wish to respond to bids posted on PHLContracts. Any quote submitted through PHLContracts by a vendor that has not completed and uploaded its signed Agreement to its profile, will be considered non-responsive and not be reviewed, unless the vendor attaches the completed Agreement as part of its quote. You will upload the Agreement to your PHLContracts profile in Step 11 of this eleven step process. Once the completed and fully executed Agreement is uploaded to your vendor profile, it will not have to be submitted again unless instructed otherwise by the City.

Instructions for completing and uploading the required Consent and Authorization Agreement can be found by clicking here.
Step 2. Access the PHLContracts Website

Visit PHLContracts at, www.phlcontracts.phila.gov, to begin the registration process.

As shown in the diagram above, to begin the registration process, click on the Register option.

Note: Select the Complete Registration option if you started the registration process earlier but did not complete it and now wish to complete your registration. You will need to supply the assigned vendor number and email address used during the earlier session.
Step 3. Submit Organization Identification Information

The following page is used to obtain four items of organization identification information. The Tax ID is verified against existing vendors to confirm that the organization has not already registered. Complete the following fields and click the Submit button:

- Tax ID (and whether this ID is an EIN or SSN)
- Company Name
- Country
- Email Address

Note: If the Tax ID has already been used to register, you will receive an error message and will not be able to register. Verify the Tax ID used. If you believe you are using the proper TAX ID, please contact Procurement Customer Service at (215) 686-4755 assistance. If the Tax ID you provided is not in use and all other information is supplied, you will receive the New Vendor Registration page series, which contains seven tabs for completing your organization’s registration. Registration should take about 30 minutes to complete.
Step 4. Complete the Company Information Page

The following fields are automatically filled out based on the information you entered in the initial pop-up window, please make sure you provided the correct information:

1. Company Name
2. Vendor Legal Name
3. Company Email Address

Along with entering the required information in fields marked by an asterisk (*), you must also provide (see numbers in diagram above)

4. Business Description
5. Company Phone Number
6. Whether Tax ID used is a SSN or EIN*
7. Incorporation Information

Note: Vendors who anticipate providing product and services on an emergency basis should complete the Emergency Supplier fields:

- Emergency Supplier check button (yes or no – default)
- Emergency Phone Number*
- Emergency Contact Name*
- Emergency Email*
- Emergency Info Comment
Registering as a PHLContracts Vendor

Note: Fields which are required if ‘Emergency Supplier’ is checked (Yes) are identified with an asterisk Emergency Supplier information may be added/revised at any time by the Seller Administrator.

After completing all necessary fields, click on the Save & Continue Registration button to proceed to the next step.

Step 5. Complete the Administrator Information Page

As shown in the diagram above, on this page you will be required to provide:

- Name
- Job Title
- Department
- Phone Number
- Email Address
- Desired system login ID
- Password (re-enter to confirm)
  - Must be between 6 and 15 characters
  - Must include both alpha and numeric characters
  - Must include at least one special character (e.g., #, @, %, $, !)
Additional requirements for passwords:
  - Passwords must be changed every 180 days
  - A password cannot be reused until 5 other passwords have been used
  - After 4 unsuccessful attempts to login, the account will be locked
- Login Question and Login Question Answer

Note: You are required to enter information in fields marked by an asterisk to continue registration

After completing all required fields, click Save & Continue Registration to proceed to the next step.
Step 6. Complete the Address Information Page

In this step you will enter all addresses used by your organization.

Note: Initially, you will see the address information which was entered when the vendor account was created. That information becomes the General/Corporate Mailing address. You can click on the General Field to the left of the address to review/edit that address information or you can click on the Add Another Address button to add another address.

As shown in the diagram above, in order to add an additional contact and address the following information is needed.

1. Name for Address
2. Contact Name
3. Address
4. Phone
5. Email address

Note: You are required to enter information in fields marked by an asterisk to continue registration.

*If you wish to add more addresses, select the Save & Add Another button, otherwise select Save & Continue Registration to proceed to the next step.*
Registering as a PHLContracts Vendor

Step 7. Terms Page
Terms information is not in use by PHLContracts. Click on the Continue Registration button to continue to the next registration step.

Step 8. Complete the Categories and Certifications Page
On this page, you specify which Vendor Categories your organization falls within and the Certifications (e.g., licenses) you maintain.

Note: This information is important to the City and to Vendors because it specifies characteristics about the vendor which are used to determine eligibility for certain types of procurement programs. As you will see in the table below, updates to most of the vendor categories are restricted to City of Philadelphia Vendor Administrators (Procurement Department personnel). However, vendors are encouraged to input information on certain categories and their related certifications.

The following table presents the vendor categories in use at this time:

<table>
<thead>
<tr>
<th>Vendor Category</th>
<th>Response Required</th>
<th>Certification-Enabled</th>
<th>Restrict to Vendor Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consent and Authorization Agreement Confirmation</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Consent Form Submitted</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Commercial Activity License (CAL)</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>W9 on File</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Annual Bid Security Fee (SS&amp;E)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Minority Business Enterprise (MBE)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Women Business Enterprise (WBE)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Minority/Women Business Enterprise (MWBE)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Disabled Business Enterprise (DSBE)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Disadvantaged Business Enterprise (DBE)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Self-Reported Minority, Woman, or Disabled Business</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Small Business Entity (SBE)</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Local Business Entity (LBE)</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Women on Boards (WOB)</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Slavery Affidavit (SA)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Contractor's License (CL)</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Demolition License (DL)</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Demo Annual Processing Fee (DAP)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>OSHA 30 (O30)</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Audited Financial Statements (AFS)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Registering as a PHLContracts Vendor

Note: Some responses must be entered to complete this page of the registration. In addition to the response provided a vendor must provide documentation of eligibility for this category designation by a recognized authority (see the diagrams below). Only the Vendor Administrator can enter the selection (upon receipt of certification documentation or document).

Failure to complete, sign, and submit the Consent and Authorization Agreement (“Agreement”) will result in any quote submitted by a vendor being deemed non-responsive. The Agreement can be found by clicking here.

Certification Enabled: Vendor must provide documentation of eligibility for this category designation by a recognized authority.

Restricted to Vendor Administrator: Only the Vendor Administrator can enter the selection (upon receipt of certification documentation or document).

Once you have entered data on this page, click Save & Add Certification. Following this initial saving of data, some categories may appear with an Add Certification option. If so, please click the link and enter the appropriate information on the certification (e.g., licensing information).

Once you have entered data on this page, click Save & Add Certification to proceed to the next step.
Registering as a PHLContracts Vendor

Following this initial saving of data, some categories may appear with an Add Certification option (see diagram below). If so, please click the link and enter the appropriate information on the certification (e.g., licensing information).

A typical certification will look like this when the link is clicked.

<table>
<thead>
<tr>
<th>Category: Small Business Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description: Small Business Entity</td>
</tr>
<tr>
<td>Please select at most one category value</td>
</tr>
<tr>
<td>Select</td>
</tr>
<tr>
<td>YES Add Certification</td>
</tr>
<tr>
<td>Notes</td>
</tr>
</tbody>
</table>

Once you have completed entering the certification information, click Save & Exit. Now this certification information will be reflected under the related category.

After Completing the vendor certification, be sure to save by clicking either Save & Continue Registration so you won't lose your updates or Save & Add Certification to add another certification.
Step 9. Complete the Commodity/Service Codes Page

Your next step is the **Commodity/Service Codes** selections (NIGP codes are going to be used at the City). This will help ensure that you receive notifications about Bid opportunities for those commodities and services.

The following pages show how ABC Supply would select the NIGP Codes for products (commodities) they provide.

Vendors select the commodities and services they provide from a list of NIGP commodity/service codes. At a minimum, one commodity/service code must be designated, but vendors are encouraged to select all products and services they desire to provide to the City. This will ensure that they are notified of the opportunities to do business with the City on an ongoing basis.

*The NIGP Commodity/Services Code is an acronym for the National Institute of Governmental Purchasing's Commodity/Services Code. The **NIGP Code** is a coding taxonomy used primarily to classify products and services procured by state and local governments in North America.*

*Note: Initial notification of bidding opportunities are sent to the email address provided on the General tab of the Vendor profile.*

The **Commodity/Service Codes** page looks like the diagram below:
Registering as a PHLContracts Vendor

ABC Supply provides artwork and art supplies.

There are three different techniques you can use to search for and select codes all of which are explained below.

1. For example, in the first method, you select the NIGP Class 052 – Art Objects, which returns a list of all NIGP Class Items within that class. You can select multiple items (or all items) within that class list by checking the boxes.

![Commodity Code and Service Codes - ABC Supply](image)

Select all the class items that fall within your selected category. You may select multiple class items within a class list.
2. The second method is to select individual NIGP Classes and Class Items using the Class and Item drop down lists. For example, select Class Code 052 ‘Art Objects’ from the NIGP Class drop down list.
3. The third method available to identify NIGP codes is to search by NIGP Keyword. For example, enter ‘Recycled Art’ in the NIGP Keyword field then click the Search button.

Once all applicable Commodity Codes and Services have been selected and saved, click the Continue Registration button.

Step 10. Review Registration Information Summary Page

The Summary page allows you to review the registration information you have entered. You can return to any tab and revise information before submitting your company’s registration.

Once you are satisfied with your registration information, click on the Complete Registration button at the bottom of the page.
Once you have completed the registration process, you will receive a message similar to the following, advising you that your registration has been received and that you will receive an email notifying you that your system access has been granted.

From this point on, you will log in to PHLContracts using your User ID and Password like the following for Jack Lantern of ABC Supply:

Note: The PHLContracts system will send you an acknowledging email when your registration is completed.
Registering as a PHLContracts Vendor

For security purposes, you will be required to select a new password the first time you log in to PHLContracts using your Logon ID and initial password.

As a Seller Administrator, when you log in to the PHLContracts system you have the option to select either the Seller Administrator role main menu or the Seller role main menu. You do this by selecting tabs in the upper right corner of the main page.

The Seller Administrator main menu looks like screenshot number one, below. Upon first viewing this page, the Seller Administrator should go to the Maintain Organization Information Page.

![Maintain Organization Information](image)

The Seller Administrator will then select the “Maintain General Organization Information” option seen in screenshot number two. Here, the Seller Administrator can upload the required completed Consent and Authorization Agreement. The file upload tool can be seen in screenshot number three.
Registering as a PHLContracts Vendor

Upload Consent and Authorization Agreement

The Seller main menu looks like this:

Information on maintaining vendor information is provided in the Seller Administrator reference guide: Maintaining PHLContracts Vendor Information.
The vendor status of your organization will remain ‘Pending’ until the City of Philadelphia Vendor Administrator has reviewed your information and changed the status to ‘Active’.
Registering as a PHLContracts Vendor

Appendix A – PHLContracts Navigation Overview

Header & Navigation Bars

The navigation menu allows you to move within the application and gives you access to open and closed bids, purchase orders, contracts, quotes and account maintenance. As you travel through the application, you will always see this menu at the top of each page.

Left Side

![Navigation Menu](image)

Right Side

![Right Side Menu](image)

There are several key icons in the navigation menu.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Access to the on-line help manual.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Log out of PHLContracts</td>
</tr>
</tbody>
</table>

NIGP Code Browse

The NIGP Code Browse link in the Header bar allows you to search commodity codes by Class and Class Item codes set up and maintained in your PHLContracts database.
Registering as a PHLContracts Vendor

My Account

The My Account link in the navigation menu allows you to keep your individual user profile current. Modifying your personal login information does not change your company’s general information with the agency. To maintain the overall organization information with an agency, you must have the role of Seller Administrator and must use the Maintain Agency Users functions.

Use the Edit button to update your personal information. You can change your title, contact information, as well as your login password and login security question and answer. You may also select the default tab that you wish to begin on once you log in and view your home page. You must enter your password for the changes to become effective.

NOTE: This is where you can change your PHLContracts password.

Red and Yellow Error Messages

PHLContracts has developed a series of messages that will display when data inside your document is not right, criteria are not met or when required fields are not properly filled out. Messages in yellow are errors that do not require any intervention. The document can continue the message is strictly for your information. Pop-up messages will also appear when required fields were left blank or invalid data was entered.