Before you proceed, please go to [www.phila.gov/procurement/](http://www.phila.gov/procurement/) 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 Four of the migrated vendor registration process outlined below.
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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 in PHLContracts.
Overview of the Vendor Management Process

Three significant characteristics of the new PHLContracts vendor registration process are:

1. It is Internet based, allowing direct access to most transactions from a variety of devices, including traditional workstations, laptops, tablets, and smartphones.
2. It eliminates much of the ‘paper flow’. E-commerce features such as email alerts, simplified quote replies, and attachment of electronic documents, support more efficient processing of transactions and allows past information to be referenced and in some cases reused.
3. Most information search and maintenance transactions required of vendors are now ‘self-serve’, saving vendors time and allowing work to get done outside standard business hours.

Probably the most visible difference to vendors is that the registration process is ‘brought forward’ in their relationship with the City. Rather than wait until the vendor is awarded or has been selected for a contract, they are being asked to register and supply information about their organization much earlier. The expanded database of vendors allows the City to proactively identify and alert vendors of bid opportunities.

Migration of Current Vendors

Information on a number of existing City vendors has been loaded to the PHLContracts vendor database. These vendors are being contacted and provided instructions on how to log in and complete their registration. (Options for verifying if your organization is already registered are explained in the Frequently Asked Questions section of this guide).

Registered vendors are encouraged to specify:

1. The products and services they wish to provide to the City by updating the commodity and service information section of their profile. City buyers use this information to identify and alert vendors about new available bids matching their offerings. Vendors can still log in and search through all open bids, but they will find it more efficient to register their commodities and receive alerts of new open bids on those commodities.

2. The defined certifications and vendor categories they meet/match (e.g., small business entity). Vendors are able to designate some of these categories, but
others require submission of supporting documentation. It is important that vendors keep this information updated as it affects eligibility for certain bidding opportunities.

3. Internal contacts who will serve as Seller Administrators as well as contacts who will serve in Seller roles.

Steps Vendors Should Follow to Complete Their Registration

To complete your registration, you simply need to perform the following 7 steps to update your migrated vendor account. This process should take approximately 30 minutes to complete for most vendors.

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 4 of this 7 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 at www.phila.gov/procurement/.

Step 2. Getting Started – Log into the PHLContracts System

The primary contact of the migrated vendors will receive an email containing the link to the City of Philadelphia PHLContracts site and their initial password. Their PHLContracts system login ID will be the email address to which the email from the City was sent.

The initial password will be: buysp55d!

Note: The first time the Seller Administrator logs in to the PHLContracts system, he/she will be prompted to select a new password (conforming to the password format
requirements the City has adopted which is 6 – 15 characters which include both alpha and numeric characters and at least one special character).

In this guide, we will follow the steps Jack Lantern of ABC Supply would follow once he has received the email advising him that his organization has been set up in the City’s PHLContracts system. He would follow the link to the login page.

Jack would NOT select the Register option on this page because ABC Supply has already had their registration started by the Vendor Migration process. A completely new vendor would use the Register option.

Jack uses his email address as his login ID and buysp55d! (from his email) as his password.

For security purposes, Jack is directed to select a new system password (his login ID remains the same). To do this, Jack must enter the password sent initially plus the new password (entered a second time to confirm the entry).

Passwords must conform to the following format and are case sensitive:

- 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:
Seller Administrator – Accessing/Updating Migrated Accounts

- 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

Example of a conforming password: Rabbitt123!

When Jack logs into PHLContracts, by default he will be in the Seller role as shown below.

To switch to the Seller Administrator role, he simply needs to click on the user icon on the top right of the screen, then click on the down triangle and select Seller Administrator.
Step 3. Review/Update Basic Vendor Organization Information

The PHLContracts system recognizes that ABC Supply’s vendor information is incomplete, so the first page Jack receives is the Maintenance Home Page. **Until the vendor account is updated, the functions that Jack may perform in the system are limited, and a contract cannot be issued to ABC Supply.**

The **Maintain Organization Information** option contains several sub-options for specific types of vendor information.

The sub-options Jack will use to complete ABC Supply’s registration are:

- Maintain General Organization Information
- Maintain Addresses
- Maintain Commodity Codes & Services
- Maintain Terms & Categories

The Maintain Quote Attachment Repository function is not in use at this time.

The Regions and Credit Memo List option are not in use at this time.
Maintaining General Organization Information

The existing general information that was migrated from City systems is displayed. Some of the information migrated from that system may be out of date. Jack can update fields, including business description, incorporation information, and general email address.

**Note:** The general email address is very important for doing business with the City. This email address is used by PHLContracts to send notifications of bidding opportunities based on the commodity codes that the vendor has selected.

The remainder of the general information cannot be updated by the Seller Administrator, specifically: vendor number, company name, vendor legal name, Tax ID. If this information needs to be revised, Jack should contact a City Procurement Customer Service Representative (215) 686-4755 / (215) 686-4720, or email PHLContracts@phila.gov.

On this page, Jack can add forms and attachments to ABC Supply's registration. Use of forms is explained in another User Guide. Examples of attachments include: copies of signed documents, certificates, and licenses. The process of uploading attachments is intuitive. All common file types can be used as attachments.
If your company anticipates providing product and services on an emergency basis, you 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

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.

When finished, Jack clicks on the **Save & Exit** button to return to the previous option menu.

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 completed 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. 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 at [www.phila.gov/procurement/](http://www.phila.gov/procurement/).

Step 5. Review, Update & Add Addresses

<table>
<thead>
<tr>
<th>Maintain Organization Information for: ABC Supply</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain General Organization Information</td>
</tr>
<tr>
<td>Maintain Addresses</td>
</tr>
<tr>
<td>Maintain Commodity Codes &amp; Services</td>
</tr>
<tr>
<td>Maintain Regions</td>
</tr>
<tr>
<td>Maintain Terms and Categories</td>
</tr>
<tr>
<td>Maintain Quote Attachment Repository</td>
</tr>
<tr>
<td>Credit Memo List</td>
</tr>
</tbody>
</table>

This section is used for maintaining general organization information.

This section is used to maintain addresses.

This section is used to maintain commodity codes and services.

This section is used to maintain regions.

This section is used to maintain terms and categories.

This section is used to maintain files in the quote attachment repository.

This section is used to view credit memos.
The General/Corporate Mailing Business Address migrated from the City’s systems is displayed.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address Type</th>
<th>Address Information</th>
<th>Status</th>
<th>Default for Type</th>
</tr>
</thead>
</table>
| General    | General/Corporate Mailing Address | Jack Lantern  
101 Oak Street  
Oakton, VA 22824  
US  
Email: ABCSUPPLY@ATT.NET  
Phone: (703)555-5555 | Active | Yes              |

Jack can review and modify this initial General/Corporate Mailing Address by clicking on the **General** button preceding it, or he can click on the **Add Another Address** button to add additional addresses for Remittances (payments) and Sales (purchase orders). If remittance and sales addresses are not specified, the general address will be used for all documents associated with ABC Supply.

**Note:** *The system allows a single General Address and multiple Sales and Remittance addresses. If multiple addresses of these last two types are specified, one must be designated the Default address for that address type. (If only one address of a type is entered, it automatically becomes the default for that type.)*
Editing the Existing General Address:

![Address Book - ABC Supply](image)

- **Name this Address**: General
- **Contact Name**: Jack Lantern
- **Address Line 1**: 101 Oak Street
- **Country**: US - United States of America
- **City**: Oakland
- **ZIP**: 22804
- **Phone**: 703 555 5555
- **Fax**:
- **Id**: 4336
- **Status**: Active
- **Email**: ABCSUPPLY@ATT.NET
- **Web Address**: (Begin with http:// or https://)

Buttons:
- Save & Exit
- Save & Continue
- Reset
- Cancel & Exit
Adding another Address: (remittance address example shown)

When all Address Information fields have been entered, Jack clicks the **Save & Exit** button to return to the address list page. The list of ABC Supply's addresses now reflects the new remit address. Jack did not have to designate this remit address as the primary remit address because it was the only remit address specified for ABC Supply.

Jack can continue to add additional addresses by clicking the **Add Another Address** button or click the **Exit** button to return to the previous menu.
Step 6. Specify Commodity Codes & Services

Vendors should select the commodities and services codes they provide from a list of NIGP commodity/service codes in PHLContracts. 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.

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.
The Commodity/Service code page looks like the following. Jack can search for and select codes using any of three techniques, all explained below.

**Commodity Code and Service Codes - ABC Supply**

**Search**

- **NIGP Class**
- **NIGP Class Item**
- **NIGP Keyword**

**Search using**

ALL of the criteria

**Search**

**NIGP Code Browse**

Select the category that best describes the product and service you offer. Click on the question mark for more information.

- **01** Administrative, Financial, and Management Services
- **02** Agricultural Equipment and Related Products and Services
- **03** Arts, Crafts, Entertainment, Theatre
1. Select Individual NIGP Class and Item Combinations

The first method is to select individual NIGP Classes and Class Items using the Class and Item drop down lists. Select Class Code 052 ‘Art Objects’ from the NIGP Class drop down list.
Then, select the NIGP Class Item 76 ‘Recycled Art Objects’ from that drop-down list because ABC Supply supplies recycled arts to institutions and governments.

Save this specific product/service to ABC Supply’s profile by checking the box preceding it and pressing the **Save and Add More** button. Repeat this process, selecting individual codes or selecting multiple codes at a time.
### Commodity Code and Service Codes - ABC Supply

#### Search

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>NIGP Class</td>
<td>052 - ART OBJECTS</td>
</tr>
<tr>
<td>NIGP Class Item</td>
<td>76 - Recycled Art Objects</td>
</tr>
<tr>
<td>NIGP Keyword</td>
<td></td>
</tr>
<tr>
<td>Search using</td>
<td>ALL of the criteria</td>
</tr>
</tbody>
</table>

#### NIGP Code Browse

Select the category that best describes the product and service you offer. Click on the question mark for more information.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>052-76</td>
<td>Recycled Art Objects</td>
</tr>
</tbody>
</table>

[Save] [Save and Add More]
2. Select from a NIGP Class List

In the second 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.

These selections must be saved before you go on to identify more codes (Save and Add More).
3. Use NIGP Keyword Search

The third method available to identify NIGP codes is to search by NIGP Keyword. Enter ‘Recycled Art’ in the NIGP Keyword field then click the **Search** button.

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

A list of NIGP Commodity codes (5-digit code and description) containing that phrase is displayed. Check the box preceding them, then click either the **Save & Add More** or the **Save & Edit** button.

When he is finished updating ABC Supply’s Commodity Code selections, Jack clicks on the **Save & Exit** button to return to the previous option menu.
Step 7. Specify Certifications and Category Information

This is the page where you specify Vendor Categories your organization falls within and the Certifications (e.g., licenses) you maintain. 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 procurements or purchases. 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 and Authorization Agreement Received</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Minority, Woman, or Disabled Vendor - Self-reported</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Small Business Entity (SBE)</td>
<td>No</td>
<td>No</td>
<td>No</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>No</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>Local Business Entity (LBE)</td>
<td>No</td>
<td>No</td>
<td>Yes</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>

Response Required: Some responses must be entered to complete this page of the registration. For example, the “Consent and Authorization Agreement Confirmation” category is a required field. Upon selecting “Yes” the Seller Administrator agrees to upload the completed Agreement form to the organization’s profile. The Agreement can also be submitted as an attachment to the first quote submitted by a vendor in PHLContracts.

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. Go to [www.phila.gov/procurement](http://www.phila.gov/procurement) to download the Agreement.

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).

For many vendors, many of the categories on the Terms & Categories page are not applicable. However, migrated vendors should review the information on this page to ensure its accuracy. Initial data has been migrated on the following categories:

1. Minority Business Enterprise (MBE)
2. Women Business Enterprise (WBE)
3. Minority/Women Business Enterprise (MWBE)
4. Disabled Business Enterprise (DSBE)
5. Local Business Entity (LBE)

If you believe that any of the values (Yes) on these five categories are incorrect, please contact a Procurement Customer Service Representative at (215) 686-4755 / (215) 686-4720 or email PHLContracts@phila.gov.

There are certain categories that may be controlled by the Seller Administrator including:

- Minority, Woman, or Disabled Vendor - Self-reported
- Small Business Entity (SBE)

If your company falls into one of these categories, please click the “Yes” value on that category. Then click Save & Exit at the bottom of the page.

Congratulations, you have now completed updating your migrated account.