



Miami-Dade County

Convert a Bidder to a Supplier

Version 1.0

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PURPOSE AND DESCRIPTION

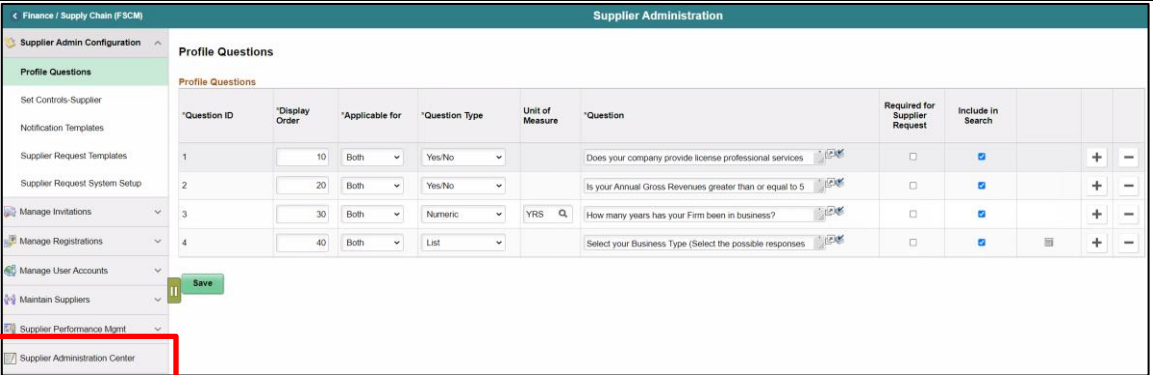
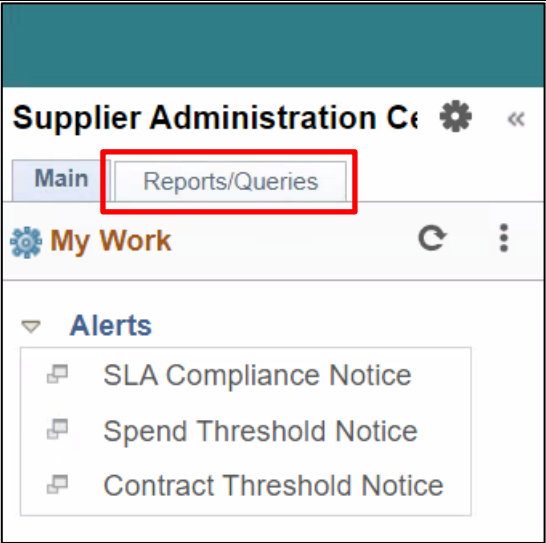
Purpose


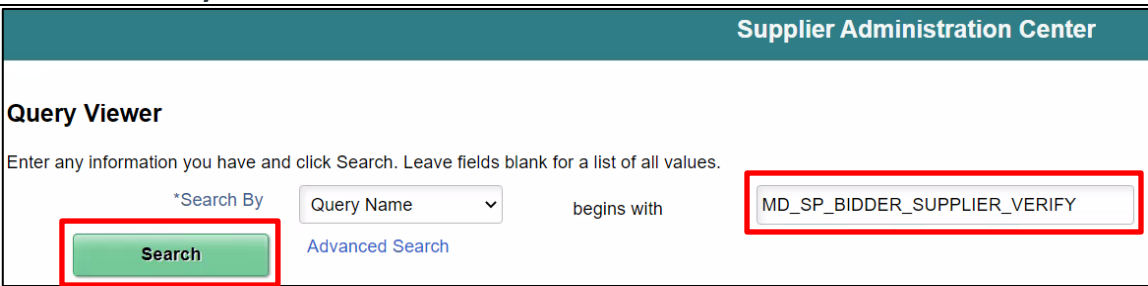
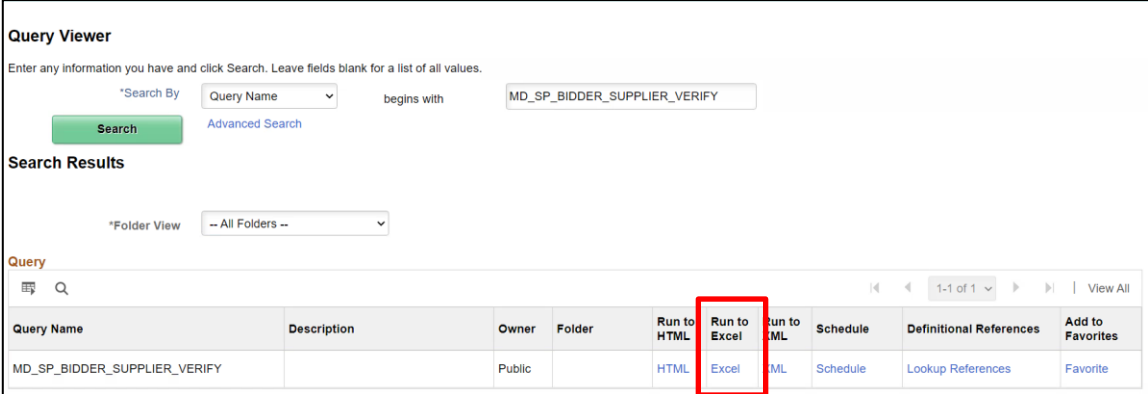
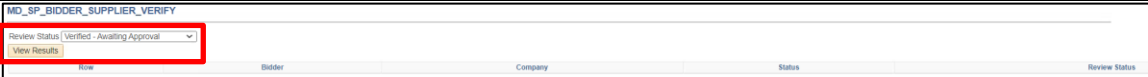

This document explains the key activities involved in Bidder management. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

Description

The key activities involved for running the MD_SP_Bidder_Supplier, verify Bidder information, and converting a Bidder to a Supplier.

MD_SP_BIDDER_SUPPLIER_VERIFY QUERY

Step	Action
1.	Log in to the INFORMS.
2.	Navigate to the Supplier Administration page: Finance / Supply Chain (FSCM) > Supplier Administration.
3.	 <ul style="list-style-type: none"> • Select Supplier Administration Center.
4.	 <ul style="list-style-type: none"> • Select Reports/Queries.

5.	 <ul style="list-style-type: none"> Select Query Viewer.
6.	 <ul style="list-style-type: none"> Enter MD_SP_BIDDER_SUPPLIER_VERIFY in the begins with field. Select Search.
7.	 <ul style="list-style-type: none"> Select Run to Excel.
8.	 <ul style="list-style-type: none"> Select Verified – Awaiting Approval from the Review Status drop-down. Select View Results.
9.	 <ul style="list-style-type: none"> Open the Excel document that is created.

10.

	A	B	C	D
1	MD_SP_BIDDER_SUPPLIER_VERIFY	3		
2	Bidder	Company	Status	Review Status
3	B000006904	ARCHITECTS INTERNATIONAL INC	Active	Verified - Awaiting Approval
4	B000008918	Unlimited Auto Glass Corp	Active	Verified - Awaiting Approval
5	B000008862	SLM ENGINEERING INC	Active	Verified - Awaiting Approval
6				

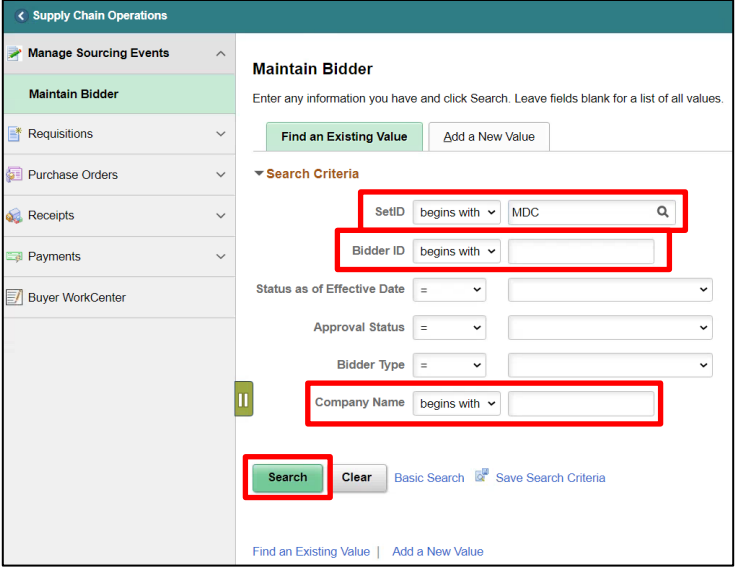
The excel document displays all Bidders that are ready to be converted to Suppliers by the Central Finance Approver staff.

Note: Save this document to use as a reference when performing the Convert Bidder to Supplier process.

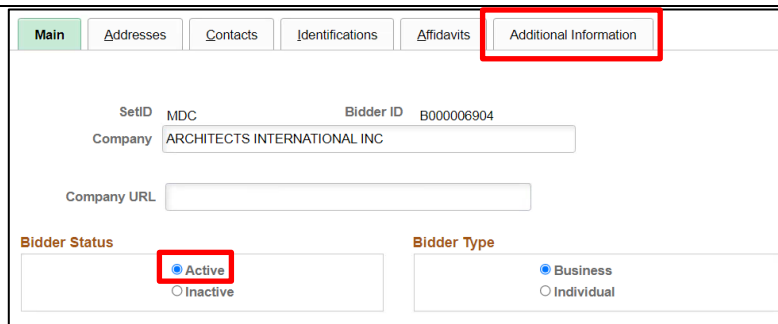
11.

- End of Process.

VERIFY BIDDER INFORMATION

Step	Action
1.	Log in to the INFORMS.
2.	Navigate to the Maintain Bidder page: Finance / Supply Chain (FSCM) > Supply Chain Operations > Buyer > Maintain Bidder > Find an Existing Value.
3.	 <ul style="list-style-type: none"> Enter MDC in the SetID field. Enter the Bidder ID and/or Company Name. Select Search.

4.



Main | Addresses | Contacts | Identifications | Affidavits | **Additional Information**

SetID: MDC Bidder ID: B000006904
 Company: ARCHITECTS INTERNATIONAL INC
 Company URL:

Bidder Status
☒ Active
☐ Inactive

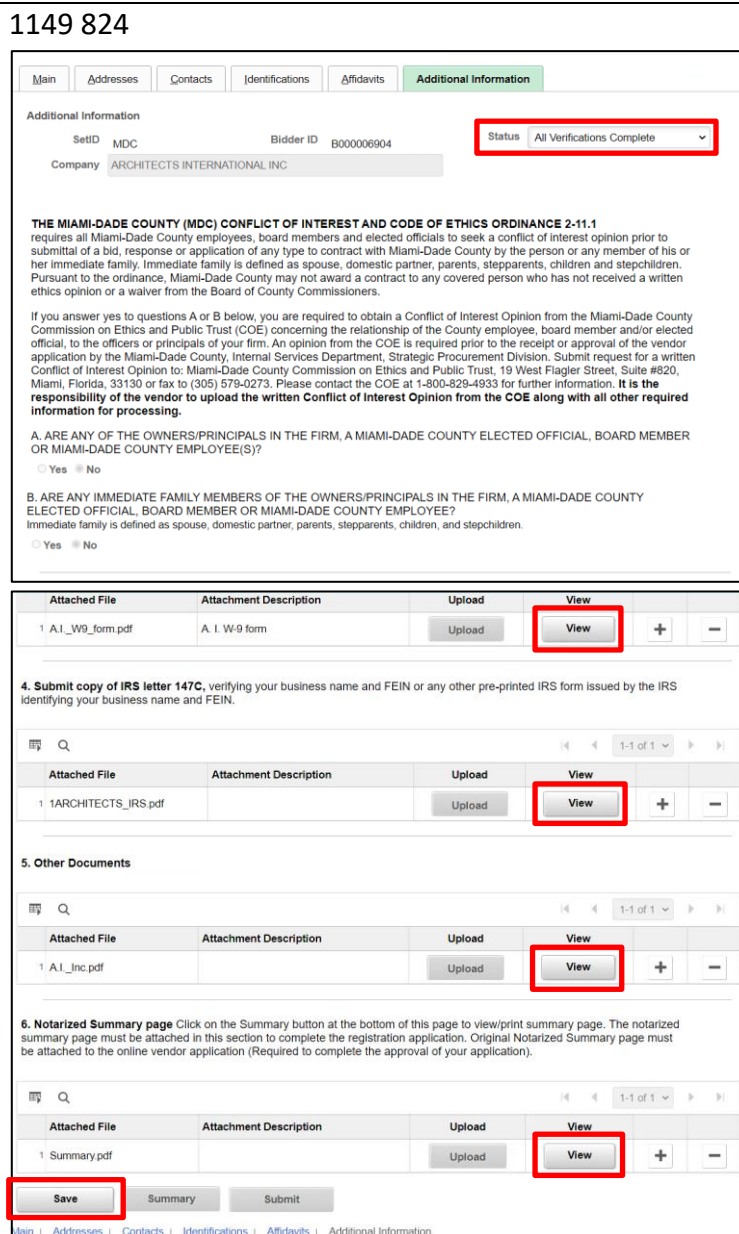
Bidder Type
☒ Business
☐ Individual

Bidders ready to convert display as Active.

- Select the **Additional Information** tab.

5.

1149 824



Main | Addresses | Contacts | Identifications | Affidavits | **Additional Information**

Additional Information
 SetID: MDC Bidder ID: B000006904 Status: All Verifications Complete
 Company: ARCHITECTS INTERNATIONAL INC

THE MIAMI-DADE COUNTY (MDC) CONFLICT OF INTEREST AND CODE OF ETHICS ORDINANCE 2-11.1
 requires all Miami-Dade County employees, board members and elected officials to seek a conflict of interest opinion prior to submittal of a bid, response or application of any type to contract with Miami-Dade County by the person or any member of his or her immediate family. Immediate family is defined as spouse, domestic partner, parents, stepparents, children and stepchildren. Pursuant to the ordinance, Miami-Dade County may not award a contract to any covered person who has not received a written ethics opinion or a waiver from the Board of County Commissioners.

If you answer yes to questions A or B below, you are required to obtain a Conflict of Interest Opinion from the Miami-Dade County Commission on Ethics and Public Trust (COE) concerning the relationship of the County employee, board member and/or elected official, to the officers or principals of your firm. An opinion from the COE is required prior to the receipt or approval of the vendor application by the Miami-Dade County, Internal Services Department, Strategic Procurement Division. Submit request for a written Conflict of Interest Opinion to: Miami-Dade County Commission on Ethics and Public Trust, 19 West Flagler Street, Suite #820, Miami, Florida, 33130 or fax to (305) 579-0273. Please contact the COE at 1-800-829-4933 for further information. **It is the responsibility of the vendor to upload the written Conflict of Interest Opinion from the COE along with all other required information for processing.**

A. ARE ANY OF THE OWNERS/PRINCIPALS IN THE FIRM, A MIAMI-DADE COUNTY ELECTED OFFICIAL, BOARD MEMBER OR MIAMI-DADE COUNTY EMPLOYEE(S)?
☐ Yes ☒ No

B. ARE ANY IMMEDIATE FAMILY MEMBERS OF THE OWNERS/PRINCIPALS IN THE FIRM, A MIAMI-DADE COUNTY ELECTED OFFICIAL, BOARD MEMBER OR MIAMI-DADE COUNTY EMPLOYEE?
 Immediate family is defined as spouse, domestic partner, parents, stepparents, children, and stepchildren.
☐ Yes ☒ No

Attached File	Attachment Description	Upload	View
1 A. I. W-9 form.pdf	A. I. W-9 form	Upload	View

4. Submit copy of IRS letter 147C, verifying your business name and FEIN or any other pre-printed IRS form issued by the IRS identifying your business name and FEIN.

Attached File	Attachment Description	Upload	View
1 ARCHITECTS_IRS.pdf		Upload	View

5. Other Documents

Attached File	Attachment Description	Upload	View
1 A. I. Inc.pdf		Upload	View

6. Notarized Summary page Click on the Summary button at the bottom of this page to view/print summary page. The notarized summary page must be attached in this section to complete the registration application. Original Notarized Summary page must be attached to the online vendor application (Required to complete the approval of your application).

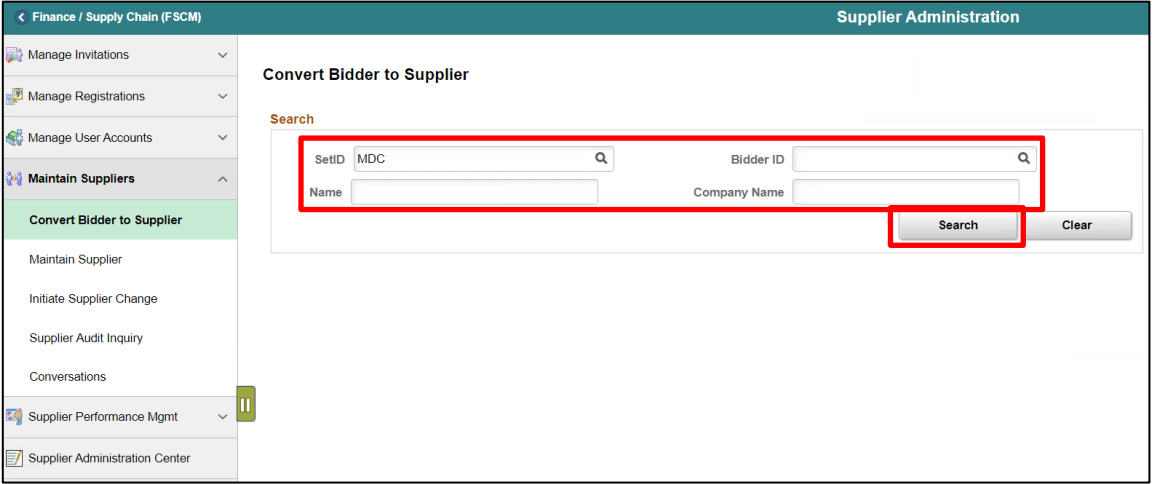
Attached File	Attachment Description	Upload	View
1 Summary.pdf		Upload	View

Save Summary Submit

Main | Addresses | Contacts | Identifications | Affidavits | Additional Information

	<ul style="list-style-type: none"> • Select View and verify the attached files. • Change the Status field to All Verifications Complete. • Select Save. <p>NOTE: the drop-down menu has various statuses to select:</p> <ul style="list-style-type: none"> ○ <u>Not Submitted</u> – Bidder is reviewing profile ○ <u>Submitted</u> – Bidder has submitted profile information ○ <u>Verified-Awaiting Approval</u> – Procurement staff has reviewed ○ <u>All Verification Complete</u> – Finance staff has reviewed <p>This Bidder is now ready to be <u>CONVERTED</u> to a Supplier.</p>
6.	End of Process.

CONVERT BIDDER TO SUPPLIER

Step	Action
12.	Log in to the INFORMS.
13.	Navigate to the Convert Bidder to Supplier page: Finance / Supply Chain (FSCM) > Supplier Administration > Maintain Suppliers > Convert Bidder to Supplier.
14.	 <ul style="list-style-type: none"> • Enter MDC in the SetID field. • Enter information in any of the following fields. <ul style="list-style-type: none"> ○ Bidder ID ○ Name ○ Company Name • Select Search.

15.	<div> <div> <div>Search Results</div> <div> <div> <div> <div> <div>1-1 of 1</div> <div>View All</div> </div> </div> </div> </div> <table> <tr> <th>SetID</th><th>Bidder ID</th><th>Contact Name</th><th>Company Name</th><th>Main Address</th><th>Creation Datetime</th><th>Supplier ID</th><th>Convert</th></tr> <tr> <td>1</td><td>MDC</td><td>B000006904</td><td>JUAN A CRESPI</td><td>ARCHITECTS INTERNATIONAL INC</td><td>227 NE 26TH TERRACE MIAMI FL 33137</td><td>02/24/2021 3:59PM</td><td> <div> <div></div> <div>Convert</div> </div> </td></tr> </table> </div> </div>	SetID	Bidder ID	Contact Name	Company Name	Main Address	Creation Datetime	Supplier ID	Convert	1	MDC	B000006904	JUAN A CRESPI	ARCHITECTS INTERNATIONAL INC	227 NE 26TH TERRACE MIAMI FL 33137	02/24/2021 3:59PM	<div> <div></div> <div>Convert</div> </div>
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16.	<div> <div> <div> <div> <div>Select Convert.</div> </div> </div> <div> <div> <div>The system Generated Supplier ID is 0000015815 (10320,298)</div> <div>Supplier Created Successfully.</div> <div>OK</div> </div> </div> </div> <p>At this time, the system will provide you with the Supplier ID number assigned to the bidder</p> <p>NOTE: Once a Bidder is a supplier, they can no longer be a BIDDER again. They will remain in the Bidder File but with the status of Inactive.</p> <div> <div>Select OK.</div> </div> </div>
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17.	<div> <div> <div>Supplier Administration</div> <div> <div>Summary</div> <div>Identifying Information</div> <div>Address</div> <div>Contacts</div> <div>Location</div> <div>Affidavits</div> <div>Additional Information</div> <div>Custom</div> </div> </div> <div> <div> <div>SetID</div> <div>MDC</div> </div> <div> <div>Supplier ID</div> <div>0000015815</div> </div> <div> <div>Supplier Short Name</div> <div>ARCHITECTS</div> <div>ARCHITECTS-002</div> </div> <div> <div>Supplier Name</div> <div>ARCHITECTS INTERNATIONAL INC</div> </div> <div> <div>Order</div> <div>ARCHITECTS-002</div> <div>227 NE 26 TER</div> <div>MIAMI, FL 33137-4519</div> </div> <div> <div>Remit To</div> <div>ARCHITECTS-002</div> <div>227 NE 26 TER</div> <div>MIAMI, FL 33137-4519</div> </div> <div> <div>Status</div> <div>Unapproved</div> <div>Approval History</div> </div> <div> <div>Last Modified By</div> <div>E303675</div> </div> <div> <div>Persistence</div> <div>Regular</div> </div> <div> <div>Last modified date</div> <div>06/10/2021 11:25AM</div> </div> <div> <div>Classification</div> <div>Outside Party</div> </div> <div> <div>Created By</div> <div>E303675</div> </div> <div> <div>HCM Class</div> <div></div> </div> <div> <div>Created Date/time</div> <div>06/10/2021 11:25AM</div> </div> <div> <div>Open for Ordering</div> <div>No</div> </div> <div> <div>Last Activity Date</div> <div>06/10/2021</div> </div> <div> <div>Withholding</div> <div>No</div> </div> <div> <div>VAT</div> <div>No</div> </div> </div> <div> <div>Save</div> <div>Return to Search</div> <div>Notify</div> <div>Add</div> <div>Update/Display</div> <div>Include History</div> </div> <div> <div>Summary</div> <div>Identifying Information</div> <div>Address</div> <div>Contacts</div> <div>Location</div> <div>Affidavits</div> <div>Additional Information</div> <div>Custom</div> </div> </div>
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The supplier will now be in INFORMS as a supplier with the status of **Unapproved**.

18.	<p>The Supplier needs to be 'completed' by Central Finance Staff. The following are the fields that MUST be VERIFIED and UPDATED:</p> <ul style="list-style-type: none"> • Update IRS classification per W-9 • Select Withholding for IG/UAP fees and if applicable IRS 1099 reporting • Select Open for Ordering • Verify TIN information to W-9 • Verify LBT License populated IF company resides within Miami Dade County • Enter Address Description per address converted from bidder file <ul style="list-style-type: none"> ○ 1 address ID MUST state 'remit to address' • Add DBA if applicable • Verify contact information is populated with email address • Update Location Description • Select remitting address from Address tab within the Accounts Payable option • Update Payment Profile – all Suppliers when converted will be paid via System Check • Update 1099 Withholding as applicable within the Global/1099 Withholding option <p>Once the Supplier is created in INFORMS and reviewed/updated for completeness it can be <u>SAVED</u>.</p> <p>This will set off the supplier approval flow to a Finance Approver to make the final review and SAVE the supplier updates as entered by the PROCESSOR.</p> <p>The supplier is now in Approved Status and ready to transact with Miami Dade County</p>
19.	<ul style="list-style-type: none"> • End of Process.