

**Miami-Dade County** 

Convert a Bidder to a Supplier

Version 1.0



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### **PURPOSE AND DESCRIPTION**

### <u>Purpose</u>

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.	C / flace/c / Supplier Administration   Supplier Administration   Profile Questions   Profile Questions   Supplier Administration   Supplier Administrations   Supplier Administrations   Question ID   Objectivy   Applicable for   Question ID   Objectivy   Applicable for   Question ID   Objectivy   Namage Invations   Question ID   Objectivy   Administrations   Question ID   Objectivy   Namage Invations   Question ID   Objectivy   Namage Invations   Question ID   Objectivy   Administrations   Question ID   Objectivy   Namage Invations   Question ID   Namage Invations   Question ID								
4.	Supplier Administration C: * « Main Reports/Queries My Work C: Alerts Alerts SLA Compliance Notice Spend Threshold Notice Contract Threshold Notice								



	Reports/Processes	с :						
	<ul> <li>Ad Hoc Reports</li> <li>Query Viewer</li> </ul>							
5.	Schedule Query							
	Monitor							
	Process Monitor							
	Report Manager							
	• Select Query Viewer.							
				Sup	plier Adm	inistration Ce	nter	
	Query Viewer							
6	Enter any information you have and click Search	. Leave fields blank	for a list of all value	es.				
0.	-Search By Query Nar	ne 🗸	begins with	M	D_SP_BIDDE	R_SUPPLIER_VERI	FY	
	Search Advanced Search							
	• Enter MD_SP_BIDDER_SU	PPLIER_VER	IFY in the <b>b</b>	egins v	<b>vith</b> field	l.		
	• Select Search.							
	Query Viewer							
	Enter any information you have and click Search. Leave fields blank for a list of all values.							
	Search     Query Name     begins with     MD_SP_BIDDER_SUPPLIER_VERIFY       Search     Advanced Search							
	Search Results							
7.	*Folder View All Folders V							
	Query						1	
	Exp Q	Owner	Folder Run to	Run to tur	n to Schedule	Definitional References	Add to	
	MD_SP_BIDDER_SUPPLIER_VERIFY	Public	HTML	Excel (MI	L Schedule	Lookup References	Favorite	
	Select Run to Excel.							
0	Vew Results Kow Bidder	Company	1	5	Status		Review Status	
δ.	• Select Verified – Awaiting	Approval fr	om the <b>Revi</b>	iew Sta	<b>atus</b> drop	o-down.		
	• Select View Results.							
9.	MD_SP_BIDDER_Sxlsx	^						
	Open the Excel document the	it is created						



	A		В	С	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			
10	5	B000008862	SLM ENGINEERING INC	Active	Verified - Awaiting Approval			
10.	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.						
	< Supply Chain Operations						
	Manage Sourcing Events	Maintain Bidder					
	Maintain Bidder	Enter any information you have and click Search. Leave fields blank for a list of all values.					
	Requisitions ~	Find an Existing Value         Add a New Value					
	Purchase Orders ~	▼ Search Criteria					
	🧔 Receipts 🗸 🗸	SetID begins with V MDC Q					
	🖙 Payments 🗸 🗸	Bidder ID begins with 🗸					
	Buyer WorkCenter	Status as of Effective Date =					
3.		Approval Status = V					
		Bidder Type =					
		Company Name begins with ~					
		Search Clear Basic Search 📽 Save Search Criteria					
		Find an Existing Value   Add a New Value					
	• Enter <b>MDC</b> in	the <b>SetID</b> field.					
	• Enter the <b>Bidd</b>	der ID and/or Company Name.					
	• Select <b>Search</b> .						



	Main <u>A</u> ddresses	Contacts Identifications				
			Affidavits Ad	ditional Informat	ion	
	SetID M	IDC Bidde	er ID B000006904			
	Company A	RCHITECTS INTERNATIONAL INC	2			
	Company LIPI			1		
	Company OKL					
	Bidder Status	0.0-441-0	Bidder Type	Duraimana		
		D Inactive		<ul> <li>Business</li> <li>Individual</li> </ul>		
	Bidders ready	/ to convert disp	olay as Activ	ve.		
	Select the	Additional Info	ormation ta	b.		
	1149 824					
	Main Addresses Q	ontacts Identifications Affidavite	s Additional Information			
	Additional Information					
	SetID MDC	Bidder ID B00000690	04 Status	All Verifications Co	mplete	~
	Company ARCHITECTS	INTERNATIONAL INC				
	THE MIAMI-DADE COUNTY		D CODE OF ETHICS ORDIN	ANCE 2-11.1		
	requires all Miami-Dade Cour submittal of a bid, response of	nty employees, board members and ele or application of any type to contract with	cted officials to seek a conflic h Miami-Dade County by the	t of interest opinio person or any mer	n prior to nber of his or	
	her immediate family. Immed Pursuant to the ordinance, M ethics opinion or a waiver fro	late family is defined as spouse, domest iami-Dade County may not award a con m the Board of County Commissioners.	tic partner, parents, steppare stract to any covered person v	nts, children and s who has not receiv	tepchildren. ed a written	
	If you answer yes to question	is A or B below, you are required to obta	ain a Conflict of Interest Opini	on from the Miami	Dade County	(
	Commission on Ethics and P official, to the officers or princ	ublic Trust (COE) concerning the relation spals of your firm. An opinion from the C	nship of the County employer OE is required prior to the re	e, board member a ceipt or approval o	and/or elected of the vendor	i
	Conflict of Interest Opinion to Miami, Florida, 33130 or fax 1	e County, Internal Services Department Miami-Dade County Commission on E to (305) 579-0273, Please contact the C	thics and Public Trust, 19 We COE at 1-800-829-4933 for fu	est Flagler Street, ther information.	Suite #820, t is the	n
	responsibility of the vendo information for processing	r to upload the written Conflict of Inte	rest Opinion from the COE	along with all ot	her required	
	A. ARE ANY OF THE OWNE	RS/PRINCIPALS IN THE FIRM, A MIAN	/II-DADE COUNTY ELECTED	OFFICIAL, BOAR	RD MEMBER	
	◯ 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 independ on example detection accords the difference and detectivities.						
	Immediate family is defined as s ○ Yes ● No	ouse, domestic partner, parents, stepparer	nts, children, and stepchildren.			
	Attached File					
		Attachment Description	Upload	View		
	1 A.IW9_form.pdf	Attachment Description A. I. W-9 form	Upload	View View	+	-
	1 A.IW9_form.pdf	Attachment Description A. I. W-9 form	Upload	View	+	-
	AI_W9_form.pdf     Submit copy of IRS letter 1 identifying your business name	Attachment Description A. L. W-9 form IV- IV-9 form IV-	Upload Upload FEIN or any other pre-printe	View View d IRS form issued	+ by the IRS	-
	1 A.I_W0_form.pdf 4. Submit copy of IRS letter 1 identifying your business name	Attachment Description A L W-9 form I47C, verifying your business name and rEIN.	Upload Upload	View View d IRS form issued	+ by the IRS	-
	1 A.I_W0_form.pdf 4. Submit copy of IRS letter 1 identifying your business name 同 Q Attached File	Attachment Description A. L. W-9 form 47C, verifying your business name and and FEIN. Attachment Description	FEIN or any other pre-printe	View View d IRS form issued	t-1 of 1 ~	-
	1 A.I_W0_form.pdf 4. Submit copy of IRS letter 1 identifying your business name 同 Q Attached File 1 TARCHITECTS_IRS pdf	Attachment Description A. I. W-9 form I47C, verifying your business name and and FEIN. Attachment Description	FEIN or any other pre-printe	View View d IRS form issued View View	+ by the IRS	
	A I_W0_form.pdf      Automatic copy of IRS letter 1      dentifying your business name      Q      Attached File      1 1ARCHITECTS_IRS.pdf      S. Other Documents	Attachment Description A. L. W-9 form I47C, verifying your business name and and FEIN. Attachment Description	FEIN or any other pre-printe	View View d IRS form Issued View View	by the IRS	
	Al_W0_form.pdf      Al_W0_form.pdf      Assubilit copy of IRS letter 1      Identifying your business name      Q      Attached File      IARCHITECTS_IRS.pdf      S. Other Documents	Attachment Description A. I. W-9 form I47C, verifying your business name and and FEIN. Attachment Description	I FEIN or any other pre-printe	View View d IRS form issued View View	by the IRS	
	Al_W0_form.pdf      Al_W0_form.pdf      Assubmit copy of IRS letter 1 identifying your business name      Q      Attached File      Intracted File      S. Other Documents      Q      Attached File      Attached File	Attachment Description A. L.W-9 form I47C, verifying your business name and rand FEIN. Attachment Description	Upload Upload IFEIN or any other pre-printe Upload Upload	View View d IRS form issued d IRS form issued View View	+ by the IRS	
	1       A1_W0_form.pdf         4. Submit copy of IRS letter 1         identifying your business name         IF       Q         Attached File         5. Other Documents         IF       Q         Attached File         1       Attached File	Attachment Description          Attachment Description         Attachment Description	I FEIN or any other pre-printe Upload Upload Upload Upload Upload Upload Upload	View View d IRS form issued d IRS form issued View View View	+ by the IRS i-1 of 1 ~ + i-1 of 1 ~	
	1       A1_W8_form.pdf         4. Submit copy of IRS letter 1         identifying your business name         IM       Q         Attached File         1       1ARCHITECTS_IRS.pdf         5. Other Documents         IM       Q         Attached File         1       ALTACHETECTS_IRS.pdf	Attachment Description          Attachment Description         Attachment Description	Upload       Upload       Upload	View View d IRS form issued d IRS form issued View View View View	+ by the IRS I-1 of 1 ~ +	
	1       A1_W0_form.pdf         4. Submit copy of IRS letter 1         identifying your business name         ID         Attached File         1         1         ARCHITECTS_IRS.pdf         5. Other Documents         ID         Attached File         1         Attached File         2         Attached File         3         Attached File         1         Attache	Attachment Description A. L.W-9 form HTC, verifying your business name and and FEIN. Attachment Description Attachment Description Itics on the Summary button at the botts if a piplication (Required to complete the		View View d IRS form issued View View View View View View	+ by the IRS -1 of 1 ~ + + e notarized age must	
	1       A1_W0_form.pdf         4. Submit copy of IRS letter 1         identifying your business name         III       Attached File         1       1.ARCHITECTS_IRS.pdf         5. Other Documents         III       Attached File         1       A.Attached File         6. Notarized Summary page         summary page must be attached be attached to the online vendor         IIII       Q	Attachment Description         A L W-9 form         147C, verifying your business name and relin.         Attachment Description         Attachment Description         Attachment Description         Silck on the Summary button at the bott at in this section to complete the registrix r application (Required to complete the registrix r application (Required to complete the registric)	I FEIN or any other pre-printe Upload	View View View View View View View View	by the IRS	
	1       A1_W8_form.pdf         4. Submit copy of IRS letter 1         identifying your business name         IM       Q         Attached File         1       1 ARCHITECTS_IRS.pdf         5. Other Documents         IM       Q         Attached File         1       Altached File         3       Alt_I_Inc.pdf         6. Notarized Summary page must be attache be attached to the online vendor         IM       Q         Attached File         4. Attached Tile         5. Notarized Summary page         Summary page must be attached to the online vendor         IM       Q         Attached File	Attachment Description         A L W-9 form         IATC, verifying your business name and relin.         Attachment Description         Attachment Description         Zilck on the Summary button at the botts of in this section to complete the registry ir application (Required to complete the registry ir application (Required to complete the registry in application (Required to comp		View View d IRS form issued d IRS form issued View View View View View View	+ by the IRS	
	1       A1_W0_form.pdf         4. Submit copy of IRS letter 1         identifying your business name         IM       Q         Attached File         1       1 ARCHITECTS_IRS pdf         5. Other Documents         IM       Q         Attached File         1       A.L.I.nc.pdf         6. Notarized Summary page must be attached to the online vendor         IM       Q         Attached File         1       Summary page         1       Summary page         1       Summary page	Attachment Description         A L W-9 form         147C, verifying your business name and relin.         Attachment Description         Attachment Description         Zilck on the Summary button at the botts of in this section to complete the registry or application (Required to complete the registry or application (Required to complete the registry)         Attachment Description		View View d IRS form issued d IRS form issued view View View View View View View View V	+ by the IRS -1 of 1 ~ + -1 of 1 ~ + + e notarized vage must	
	1       A1_W8_form.pdf         4. Submit copy of IRS letter 1         identifying your business name         IM       Q         Attached File         1       1ARCHITECTS_IRS.pdf         5. Other Documents         IM       Q         Attached File         1       AIInc.pdf         6. Notarized Summary page must be attache be attached to the online vendor         IM       Q         Attached File       1         Summary page       Summary page         IM       Q         Attached File       1         Summary page must be attache be attache be attached to the online vendor         IM       Q         Attached File       1         Summary page       1         Summary page       1         Attached File       1         Summary page       1         Summary pag	Attachment Description         A L W-9 form         H47C, verifying your business name and rand FEIN.         Attachment Description         Attachment Description         Zilck on the Summary button at the botts of in this section to complete the registry application (Required to complete the registry and paper)         Attachment Description		View View d IRS form issued d IRS form issued view View View View View View View View V	+ by the IRS i-1 of 1 ~ + i-1 of 1 ~ + e notarized vage must	
	1       A1_W8_form.pdf         4. Submit copy of IRS letter 1         identifying your business name         IM       Q         Attached File         1       1 ARCHITECTS_IRS pdf         5. Other Documents         IM       Q         Attached File         1       A.I_Inc.pdf         6. Notarized Summary page must be attache be attached to the online vendo         IM       Q         Attached File       1         Summary page       Summary page         Summary page       Summary page         Save       Summ	Attachment Description         A L W-9 form         147C, verifying your business name and rand FEIN.         Attachment Description         Attachment Description         Dick on the Summary button at the botts of in this section to complete the registry application (Required to complete the registry application (Required to complete the registry application (Section Description         Attachment Description         Submit		View View d IRS form issued d IRS form issued view View View View View View View View V	+ by the IRS	



	<ul> <li>Select View and verify the attached files.</li> <li>Change the Status field to All Verfications Complete.</li> <li>Select Save.</li> </ul>
	<ul> <li><u>NOTE:</u> the drop-down menu has various statuses to select:         <ul> <li><u>Not Submitted</u> – Bidder is reviewing profile</li> <li><u>Submitted</u> – Bidder has submitted profile information</li> <li><u>Verified-Awaiting Approval</u> – Procurement staff has reviewed</li> <li><u>All Verification Complete</u> – Finance staff has reviewed</li> </ul> </li> <li>This Bidder is now ready to be <u>CONVERTED</u> to a Supplier.</li> </ul>
6.	End of Process.

## **CONVERT BIDDER TO SUPPLIER**

Step	Action					
12.	Log in to the INFORMS.					
10	Navigate to the Convert Bidder to Supplier page: Finance / Supply Chain (FSCM) >					
13.	Supplier Administration > Maintain Suppliers > Convert Bidder to Supplier.					
	< Finance / Supply Chain (FSCM) Supplier Administration					
	Manage Invitations					
	Manage Registrations					
	Search Search					
	W Maintain Suppliers					
	Convert Bidder to Supplier Search Clear					
	Maintain Supplier					
	Initiate Supplier Change					
1.4	Supplier Audit Inquiry					
14.	Conversations					
	Supplier Performance Mgmt V					
	Supplier Administration Center					
	• Enter MDC in the SetID field.					
	• Enter information in any of the following fields.					
	• Bidder ID					
	• Name					
	<ul> <li>Company Name</li> </ul>					
	Select Search.					



	Search Results						1-1 of 1	✓ ► ► View All
45	SetID Bidder I	ID Contact Name	Company Name	Main Address		Creation Datetime	Supplier ID	Convert
15.	1 MDC B00000	6904 JUAN A CRESPI	ARCHITECTS INTERNATIONAL INC	227 NE 26TH TERRACE	MIAMI FL 33137	02/24/2021 3:59PM		Convert
	Select Cor	nvert.						
	The system Gener	rated Supplier ID is 00	00015815 (1032	0,298)				
	Su	upplier Created Succe	ssfully.					
		ок						
16	At this time, t	he system will	provide yo	u with the <u>S</u>	Supplier ID	) numbei	assigne	d to the
10.	bidder							
	NOTE: Once a	Bidder is a su	oplier, they	can no long	ger be a Bl	DDER ag	ain. The	y will
	remain in the	Bidder File bu	t with the s	tatus of Ina	ctive.			
	• Select OK							
					Supplier Adr	ninistration		
	Summary Identify	ying Information	Contacts	_ocation Affidavits	Additional Info	rmation C <u>u</u> st	om	
	SetID	MDC						
	Supplier ID	0000015815						
	Supplier Short Name Supplier Name	ARCHITECTS AF	NAL INC					
	Order	ARCHITECTS-002						
		MIAMI, FL 33137-4519						
	Remit To	ARCHITECTS-002						
17.		MIAMI, FL 33137-4519						
	Status	Unapproved Approval H Regular	listory	Last Modified B Last modified dat	by E303675 te 06/10/2021 11:2:	5AM		
	Classification	Outside Party		Created B	By E303675			
	HCM Class Open for Ordering	No		Created Date/tim Last Activity Dat	te 06/10/2021 11:2: te 06/10/2021	5AM		
	Withholding	No No						
	Save Return to S	Search Notify			Add Update	/Display Inc	ude History	
	Summary   Identifying Info	ormation   Address   Conta	cts   Location   Affi	davits   Additional Inform	mation   Custom			
	The supplier v	vill now be in I	NFORMS a	s a supplier	with the s	tatus of <b>I</b>	Jnappro	ved.

Γ



	<ul> <li>The Supplier needs to be 'completed' by Central Finance Staff. The following are the fields that MUST be VERIFED and UPDATED:</li> <li>Update IRS classification per W-9</li> <li>Select Withholding for IG/UAP fees and if applicable IRS 1099 reporting</li> <li>Select Open for Ordering</li> <li>Verify TIN information to W-9</li> <li>Verify LBT License populated IF company resides within Miami Dade County</li> <li>Enter Address Description per address converted from bidder file <ul> <li>1 address ID MUST state 'remit to address'</li> <li>Add DBA if applicable</li> </ul> </li> </ul>				
18.	<ul> <li>Verify contact information is populated with email address</li> <li>Update Location Description</li> <li>Select remitting address from Address tab within the Accounts Payable option</li> <li>Update Payment Profile – all Suppliers when converted will be paid via System Check</li> <li>Update 1099 Withholding as applicable within the Global/1099 Withholding option</li> </ul>				
	Once the Supplier is created in INFORMS and reviewed/updated for completeness it can be <u>SAVED</u> .				
	This will set off the supplier approval flow to a Finance Approver to make the final review and <b>SAVE</b> the supplier updates as entered by the PROCESSOR.				
	The supplier is now in Approved Status and ready to transact with Miami Dade County				
19.	End of Process.				