

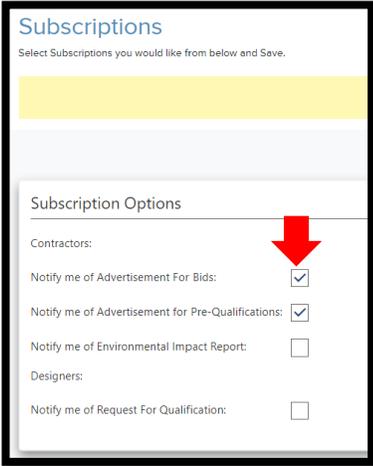
UCLA Capital Programs

Vendor Portal User Guide: ****Must be a registered user****

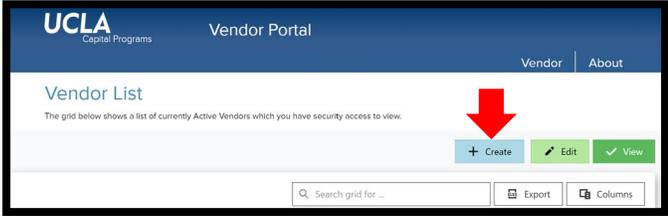
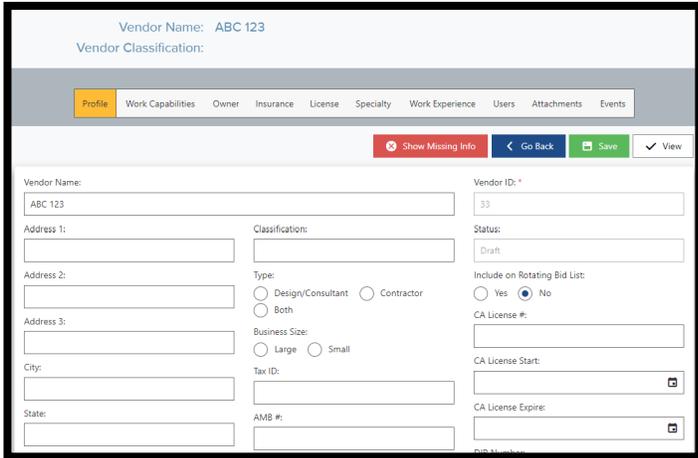
Section 1: How to Login to Vendor Portal

<p>1. Login to Vendor Portal application.</p> <p>**If you have an existing account, skip the registration process**</p> <ul style="list-style-type: none">• If you have not registered, visit the link below and fill out the registration form.• User Registration: https://sso.capnet.ucla.edu/Account/Register/Index	<p>Vendor Portal Site: https://vendorportal.capnet.ucla.edu/</p> 
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Section 2: How to Subscribe to Email Notifications

<p>1. Under "Vendor," select the "Subscribe" option</p> <p>2. Place the checkbox next to the subscription notifications you would like and click SAVE.</p>	<p>Subscribe to Email Notifications</p>  
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Section 3: How to Create a Vendor Profile

<p>1. Under "Vendor," select the "Vendor List" option</p>	<p style="text-align: center;">Create Vendor Profile</p> <p style="text-align: center;"><i>Create your company profile, and enter the contractor information that specifically applies to your company.</i></p> 
<p>2. Click "Create"</p> <ul style="list-style-type: none"> If Vendor already exists, highlight the row and click the "Edit" button <p>3. Enter Vendor Name and click "Create."</p>	 
<p>*At any point in filling out your profile, you may click "Save" and continue at a later time.*</p> <p>4. Complete the profile.</p> <p>Required Profile Fields:</p> <p>CA License # - if it doesn't apply, enter NA</p> <p>CA License Start - if it doesn't apply, enter today's date</p> <p>CA License Expire - if it doesn't apply, enter today's date</p> <p>DIR Number - if it doesn't apply, enter NA</p> <p>DIR Start - if it doesn't apply, enter today's date</p> <p>DIR Expire - if it doesn't apply, enter today's date</p>	<p style="text-align: center;">Fill out Vendor Profile</p> 

Show Missing Info Button

- **Show Missing Info Button:** provides a list of items that are required to be entered in order to “Submit” your Vendor Profile.

Vendor Profile - No Certification of Insurance Required
 Note: Name and Address must match with IRS W-9 Form Info (upload W-9 to attachment tab)
 To see definitions of Large and Small business Types: [Business Size Definitions](#)
 If you have any questions please contact us at procurement@calnet.edu or [916.487.2222](tel:9164872222) for information about Contracts

Vendor Name: **Abc 456**

Profile | Work Capabilities | Owner | Insurance | **Show Missing Info** | Specialty | Work Experience | Users | Attachments | Events

Vendor Name: Vendor ID:
 Address 1: Company Email: Status:

Vendor Missing Info

Tab: Data:

- Vendor Profile: DIRNumber is blank.
- Vendor Profile: DIR Start Date is blank.
- Vendor Profile: DIRExpireDate is blank.
- Vendor Profile: Address 1 is blank.
- Vendor Profile: City is blank.
- Vendor Profile: State is blank.
- Vendor Profile: Zip Code is blank.

Work Capabilities ***Must select one from each section***

5. Select the dollar range of projects you would be interested in. **(select all applicable amounts)**
6. Select the capabilities you are willing and/or qualified to perform

Work Capabilities

Vendor Name: **ABC 123**
 Vendor Classification:

Profile | **Work Capabilities** | Owner | Insurance | License | Specialty

Select dollar range of projects you would be interested in

<input type="checkbox"/>	Vendor Bid Range Type Lk
<input type="checkbox"/>	1,000,000-\$5,000,000
<input checked="" type="checkbox"/>	250,000-\$500,000
<input type="checkbox"/>	50,000-\$250,000
<input checked="" type="checkbox"/>	500,000-\$1,000,000
<input type="checkbox"/>	Over \$5,000,000
<input type="checkbox"/>	Up to \$50,000

Select capabilities for which you are willing and/or qualified to perform

<input type="checkbox"/>	Description
<input checked="" type="checkbox"/>	Night Work
<input type="checkbox"/>	Weekend Work
<input checked="" type="checkbox"/>	OSHPD Work
<input checked="" type="checkbox"/>	Medical Facility Work
<input type="checkbox"/>	Occupied Facility Work
<input type="checkbox"/>	Work under Infection Control Requirements

* list the company's business categories that apply to your company

7. Select ownership type(s)

Owner Type *Must select at least one Owner Type*

Owner Type

To see definitions of each ownership type: [Ownership Definitions](#)

Vendor Name: ABC 123
Vendor Classification:

Profile Work Capabilities **Owner** Insurance License

Select owner types that apply

<input type="checkbox"/>	Display Description
<input type="checkbox"/>	DBE Disadvantaged Business Enterprise
<input checked="" type="checkbox"/>	DVBE Disabled Veteran Business Enterprise
<input checked="" type="checkbox"/>	SBE Small Business Enterprise
<input type="checkbox"/>	WBE Women-Owned Business Enterprise
<input type="checkbox"/>	None None of the Above

*This tab will provide you with a link to the minimum insurance requirements necessary to do business with UCLA.

Insurance: Designer/Consultant Minimum Insurance Requirements

- Insurance Certificates are not needed at this time. Insurance Certificates will be requested on contracts/agreements during execution.

8. Select the licenses that apply

License *Must select at least one License if Contractor*

Licenses

Vendor Name: ABC 123
Vendor Classification:

Profile Work Capabilities Owner Insurance **License** Specialty

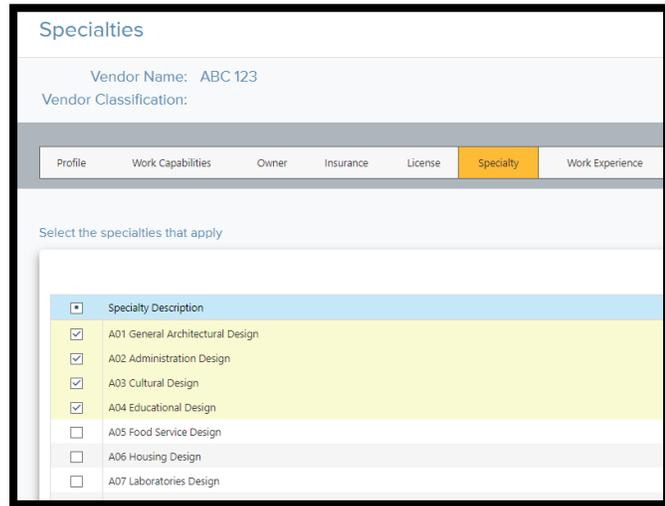
Select the licenses that apply

<input type="checkbox"/>	License Description
<input checked="" type="checkbox"/>	A General Engineering
<input type="checkbox"/>	ASB Asbestos Certification
<input type="checkbox"/>	B General Building
<input checked="" type="checkbox"/>	C-02 Insulation & Acoustical
<input checked="" type="checkbox"/>	C-04 Boiler, Hot Water Heating & Steam Fitting
<input type="checkbox"/>	C-05 Framing and Rough Carpentry
<input type="checkbox"/>	C-06 Cabinet, Millwork & Finish Carpentry

* list all specialties that apply to your firm's capacity. Be as thorough as possible

9. Select the specialties that apply

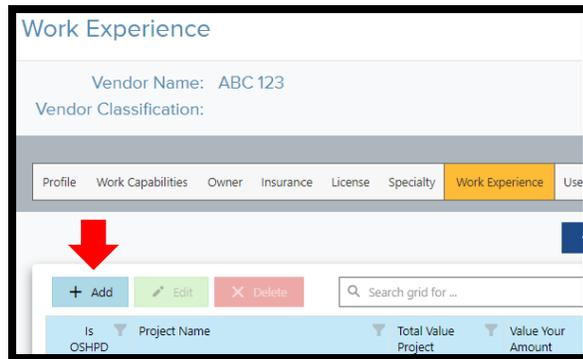
Specialty *Must select at least one Specialty if Designer/Consultant*



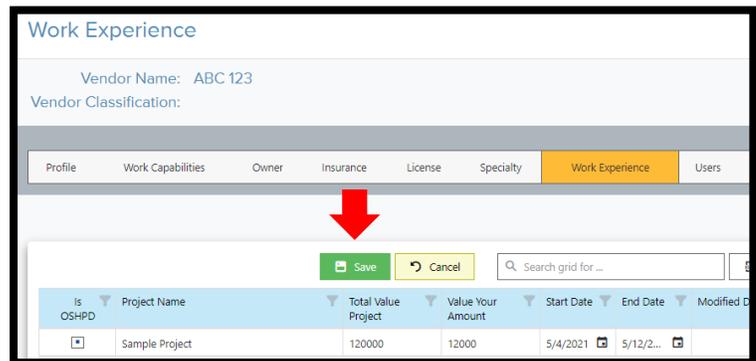
* You can utilize the work experience section to provide in-depth information on specific projects that are important in your companies experience

10. Click Add

Work Experience: Enter the jobs you have performed in the past



11. Enter the jobs you have performed in the past. Click Save



***Must add at minimum the following five user Roles:**

- 12. Primary Contact**
- 13. Authorized Signer**
- 14. Insurance Contact**
- 15. Billing Contact**
- 16. Certified Payroll Contact**

17. Click Add button

18. Enter Name & Email

19. Select the Role:

Must add at minimum the following five user Roles:

- Primary Contact
- Authorized Signer
- Insurance Contact
- Billing Contact
- Certified Payroll Contact

20. Click Save

*** You are REQUIRED to attach a W-9 Form and a short company profile (listing supplemental services, specialties, highlights of projects, staff, accomplishments, please include a brief company profile no more than five pages/10MB. Please be concise. The Project managers will evaluate your work and experience based on your profile.**

21. Click Select File -> choose the attachment

22. Enter File Description (i.e. "W-9")

23. Click Upload

Users: Specify the user roles

Users

Users marked "Is Admin" will be able to add and edit other user info.

Vendor Name: ABC 123

Vendor Classification:

Profile Work Capabilities Owner Insurance License Specialty Work Experience **Users** Attachments

Go Back

+ Add Edit Delete Search grid for ... Export

Select User	Name	Email	Role	CC ...
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Go to Vendor List View

Save Cancel Search grid for ... Export Columns

Registered User (Editors)	Name	Email	Contact Role
	Jane Doe	jane@ucla.edu	Primary Contact

Role

Select...

- Admin
- Authorized Signer
- Bidding Opportunities
- Contracts
- EIR Notifications
- Insurance Contact
- Project Manager
- Website Admin

Attachments: (Upload W-9 & additional relevant documents)

Attachments

Vendor Name: ABC 123

Profile Work Capabilities Owner Insurance License Specialty Work Experience Users **Attachments** Events

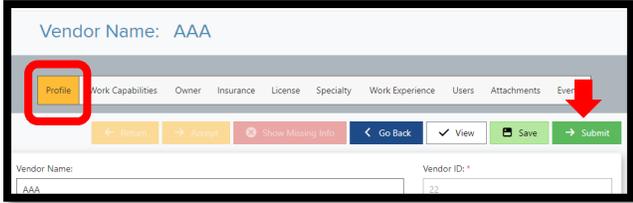
File(s) Uploader

W-9

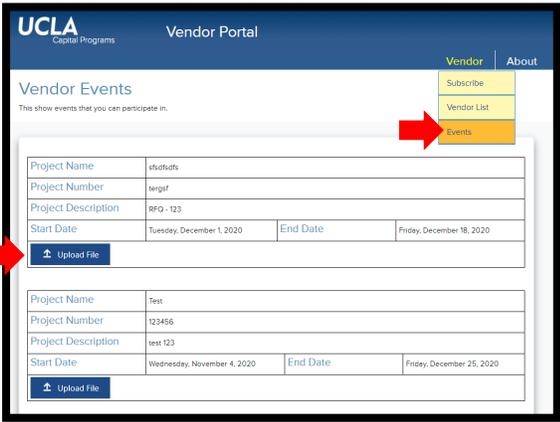
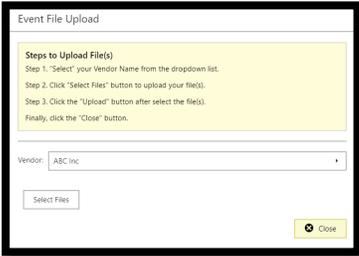
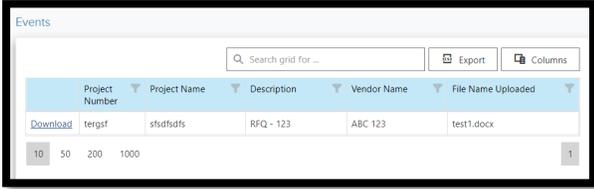
Select Files Drop File Here

Upload

w9.pdf 177 kb Ready to upload

<p>24. To view a list of your uploaded attachments, go to your Vendor profile, and you will see them under the "Attachments" section.</p>	
<p>25. Go to the Profile Tab and click the “Submit” button</p> <p>**“Submit” button will only be available if all fields have been entered. To review missing fields click the “Show Missing Info” button.</p>	

Section 4: Vendor Events: *(Not required for the registration process)*

<ol style="list-style-type: none"> Under the "Vendor" menu, select "Events." Click the "Upload File" button on the event you would like to participate in Follow the steps to upload files related to the "Event." (Once you've completed the "Event File Upload." To view the events you've submitted to, go to your Vendor profile, and you will see them under the "Events" section. 	<p style="text-align: center;">Vendor Events: <i>A list documents you have uploaded for Events</i></p>   
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