



# Vendor Profile Management

[Vendor / Supplier Portal](#)

(Updated October 12, 2020)

WebProcure™ powered by  PERFECT COMMERCE a  proactis Company

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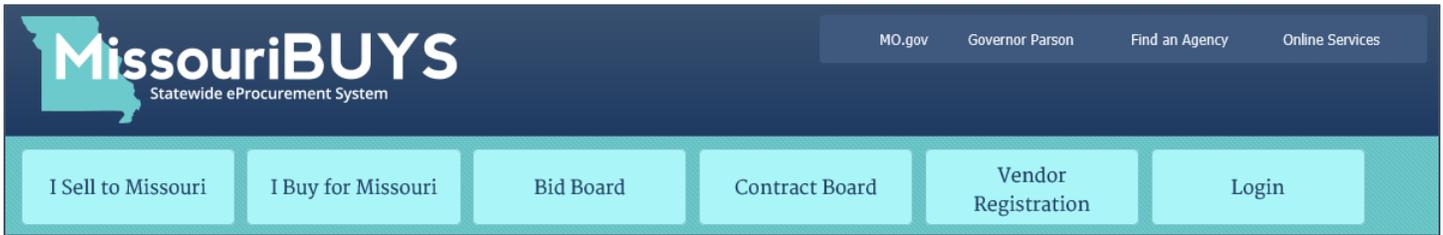
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To edit your company's vendor profile in **MissouriBUYS**, go to the **MissouriBUYS** website (<https://missouribuy.com>) and click **Login**.



Enter your established **Username** and **Password** and click **Login**. **MissouriBUYS** is powered by **WebProcure**, through the state's partner, Perfect Commerce (a Proactis Company).

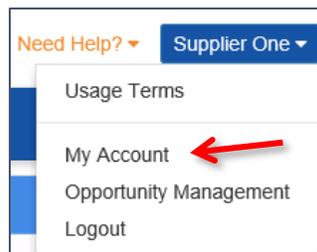


If you login through the **WebProcure** application (<https://webprocure.perfect.com/Login>), you will enter your **Username / Email Address** and **Password** and click **Log In**.

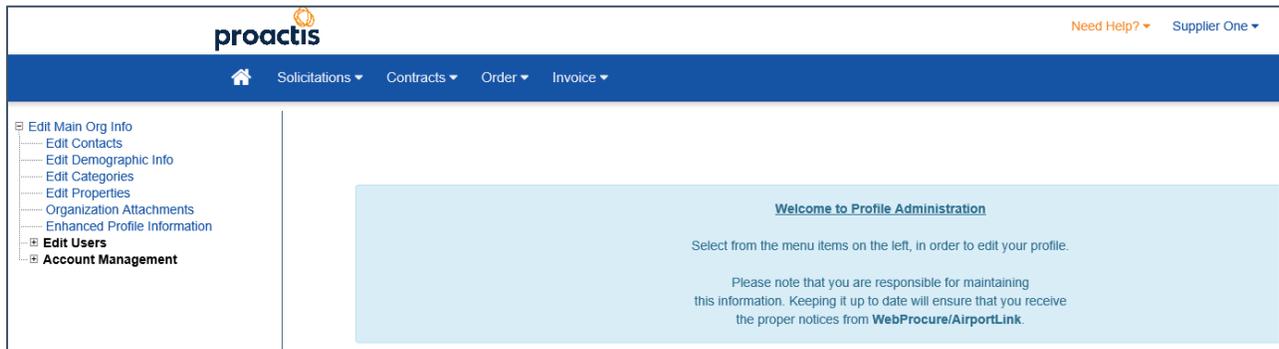


From the **Home** page, select the User Menu dropdown (located on your name at top right corner) to add or edit user and organization information.

Select the **My Account** option.



The Profile Administration page will display.



## Edit Main Organization Info

Select the **Edit Main Org Info** option from the menu tree on the left and the **Main Information** page will display.



On the **Main Information** page you can view all of your organization’s contact information, make updates, and/or verify your organization’s general information. Required information is noted with an asterisk (\*). Enter any updated or additional information regarding your organization in the desired field and click **Save**.

**Company Name:** This field contains the information that was entered during your initial registration in the 'Legal Name of Entity/Individual or DBA Name (if registering as a Branch or a DBA)' field. If this vendor record is for the Parent/Holding Company, the Legal Name of the entity/individual must match, excluding punctuation, the entity/individual name on record with the IRS for your Tax Identification Number. If you file with a Social Security Number, you must enter your Legal Name, excluding punctuation, exactly as you enter it on your Federal Tax Return.

If your company has a DBA and you are editing your DBA record (i.e. not your legal name vendor record), this field will contain the DBA Name that was entered when registering as a Branch/DBA. If your DBA Name contains punctuation, the punctuation must be excluded.

**Doing Business As Name (DBA):** The State of Missouri buying organization does not use this field in WebProcure. If your organization has a DBA, and your organization will only be doing business with the State of Missouri under your DBA name, you will only need to register once in **MissouriBUYS**. Originally, the state required a vendor registration record in **MissouriBUYS** for the DBA's parent/legal entity name and then a separate vendor registration record for the DBA name which should be registered as a 'branch' office. A second registration under your legal entity name is no longer required. However, the legal name and the DBA name must both be listed on the W-9 with the correct tax ID associated with the legal name. In addition, the DBA name must be registered using that same tax ID number.

**Change of Address:** If you are editing your main address in **MissouriBUYS**, you will also need to edit the address for your **Main Contact, Purchase Order Contact, Solicitation Contact, Contract Contact, and Remittance Contact** if the change of address is applicable to those contacts as well. Any address change made on the **Main Organization Information** page will not automatically update the addresses on the **Contacts** page of your vendor profile. Please see the **Edit Contacts** section on how to update these fields.

*Please also note that changing your main address in **MissouriBUYS** on the **Main Organization Information** screen will not automatically change the address where your payments are received. To change the Remit To/Payment Address associated with your vendor record for the State of Missouri, you need to update your **Remittance Address in MissouriBUYS**. To update your Payment/Remittance address, select **Edit Contacts** in the menu tree and scroll down to the **Remittance Contact Information** section. Update the information and click **Save**.*

The following **Main Information** fields cannot be changed via Profile Management:

- DUNS Number
- Federal Tax ID Number (FEIN)
- Social Security Number

To make modifications to a DUNS number, FEIN, or Social Security Number, contact Perfect Commerce's WebProcure Technical Support at (866) 889-8533 or WebProcure.Support@perfect.com.

In the upper right corner, two links are available: **Bid Notification** and **Permissions**. Clicking on either link will take you directly to that section of the **Main Information** page.

[Bid Notification Permissions](#)

## Bid Notification

The **Bid Notification** section allows the vendor to select a contact(s) who will receive bid submission email notifications.

**Note: Vendors responding to bids electronically through MissouriBUYS need to edit this section of their vendor profile in order to receive an automated confirmation that their electronic bid response was successfully submitted to the state. There are four contacts who can be chosen to receive notifications; i.e. Main Contact, Solicitation Contact, Purchase Order Contact and Remittance Contact.**

**Bid Notification**

Receive notifications for bid response submission

Main Contact User Name/ID
  Purchase Order Contact
  Solicitation Contact
  Remittance Contact

## Permissions

All Permissions for the vendor organization will be enabled by default during your company's initial registration. Additional information on Permissions that can be assigned to users, including who can receive new bid opportunity notifications and acknowledgment of submitted bid responses, can be found under the 'Edit Users / Add New Users' section of this document.

**Permissions**

<p><b>Bids/Quotes</b></p> <ul style="list-style-type: none"> <li>* Create/Edit Item Reminders</li> <li>* Respond to Bids/Quotes</li> <li>* View Past Bids/Quotes</li> </ul> <p><b>Contract Management</b></p> <ul style="list-style-type: none"> <li>* Access to Contract Management</li> </ul> <p><b>Invoice</b></p> <ul style="list-style-type: none"> <li>* Invoice Creation</li> <li>* View Invoice</li> </ul>	<p><b>Collaboration</b></p> <ul style="list-style-type: none"> <li>* Manage Collaboration</li> <li>* View Collaboration</li> </ul> <p><b>General</b></p> <ul style="list-style-type: none"> <li>* Access to Account Management</li> <li>* Access to Edit Organization's Information</li> </ul> <p><b>Order Management</b></p> <ul style="list-style-type: none"> <li>* Access to Order Management</li> <li>* Acknowledge Orders</li> </ul>
--	--

Save
Reset

Click **Save** to apply the modifications to the Vendor Account/Profile before leaving the **Main Information** page. The **Reset** button will return changes to the previously saved information.

## Edit Contacts

Click the **Edit Contacts** option from the menu tree.



The four **Contact Information** sections will display:

- Main Contact Information** section
- Purchase Order Contact Information** section
- Solicitation Contact Information** section
- Contract Contact Information** section
- Remittance Contact Information** section

**Main Contact Information**

Main Contact User Name/ID

*Note: by editing the Main Contact, you are also editing the information of the user that is designated as the Main Contact. If you wish to specify a different user as the Main Contact, you can select it from the dropdown above, and click Save. To add a user, click on Add New User, located under Edit Users in the menu bar on the left.*

Main Contact User Name/ID  \*

Salutation  - Please Select -

First Name  \*

Middle Initial

Last Name  \*

Phone Number  Ext.

Email Address  @oa.mo. \* Email address and/or Fax

Fax Number  \*

*Note: E-mail takes precedence over fax, so if you provide both, Solicitation notices will be sent via e-mail only.*

Main Address

Address  300 W High \*

(optional)

(optional)

City  Jefferson City \*

Country  United States \*

State  Missouri \*

Other Region

ZIP/Postal Code  65101 \*

Required information for each section is indicated with an asterisk (\*). Enter/edit the organization’s contact information in the appropriate section(s).

If the **Purchase Order, Solicitation, Contract, and/or Remittance Contact** is the same as the **Main Contact**, simply click the **Copy Main Contact** button and **Copy Main Address** button in each section respectively. This transfers the **Main Contact** and **Main Address** information into that section.

**Change of Address:** If you are editing an address in the **Edit Contacts** section of your vendor profile, you will also need to edit the Company Address on the **Main Organization Information** page if the change of address is

applicable to your main contact. Any address change made on the **Edit Contacts** page **will not** automatically update the address on the **Main Organization Information** page of your vendor profile.

**Note: If you change your Remittance Address in MissouriBUYS, your change(s) WILL automatically update the 'Payment/Remit To' address associated with your vendor record for the State of Missouri.**

When all modifications have been made for the **Edit Contacts** page, click **Save** to maintain the changes. Clicking **Reset** will return the changes to the previously saved information.

## Edit Demographic Information

Each Buying Organization in WebProcure has the ability to collect customized information from their vendor community. Missouri does not currently require vendors to answer the questions that will appear on the **Company Information** screen when you click on **Edit Demographic Info**.

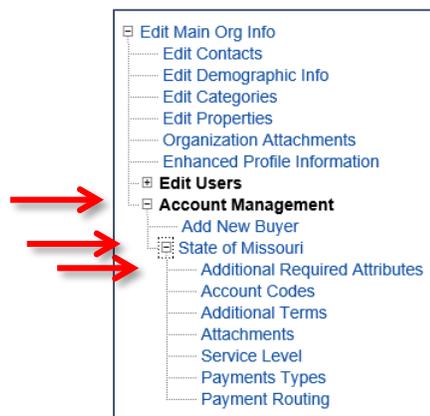


**The demographic information used by the State of Missouri is located on the 'Additional Required Attributes' screen which is located under 'Account Management.'** The **Additional Required Attributes** screen can be accessed via the following path:

Expand **Account Management** (click on + sign)

Expand **State of Missouri** (click on + sign)

Click on **Additional Required Attributes**



Review and complete the required fields in the **Additional Required Attributes for "State of Missouri"** screen. During initial registration, a Missouri map was visible and vendors had the ability to select regions in which they provide products and services. Once registered, vendors can edit their service territory by clicking (or

unclicking) the counties in which they operate. Vendors are encouraged to complete these **Additional Required Attributes for "State of Missouri."**

**Additional Required Attributes for "State of Missouri"**

Agency Specific Information  
Notes

Vendor Notes (Shared with Vendors):

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**Emergency Vendor**

Would you like your company to be included on the State of Missouri's 24 hour Emergency Vendor List?

If Yes, enter 24 hour emergency contact name(s) and number(s):

Emergency Contact Name:

Emergency Contact Phone Number:

Emergency Contact Email:

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**Diversity Information**

Woman Business Enterprise (WBE)

Minority Business Enterprise (MBE)

Both

---

Missouri Service-Disabled Veteran Business Enterprise (SDVE)

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Disadvantaged Business Enterprise (DBE)

---

Airport Concessions Disadvantaged Business Enterprise (ACDBE)

---

Small Business Enterprise (SBE)

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Select counties below

<input type="checkbox"/> Adair	<input type="checkbox"/> Andrew	<input type="checkbox"/> Atchison	<input type="checkbox"/> Audrain	<input type="checkbox"/> Barry	<input type="checkbox"/> Barton	<input type="checkbox"/> Bates	<input type="checkbox"/> Benton
<input type="checkbox"/> Bollinger	<input type="checkbox"/> Boone	<input type="checkbox"/> Buchanan	<input type="checkbox"/> Butler	<input type="checkbox"/> Caldwell	<input type="checkbox"/> Callaway	<input type="checkbox"/> Camden	<input type="checkbox"/> Cape Girardeau
<input type="checkbox"/> Carroll	<input type="checkbox"/> Carter	<input type="checkbox"/> Cass	<input type="checkbox"/> Cedar	<input type="checkbox"/> Chariton	<input type="checkbox"/> Christian	<input type="checkbox"/> Clark	<input type="checkbox"/> Clay
<input type="checkbox"/> Clinton	<input type="checkbox"/> Cole	<input type="checkbox"/> Cooper	<input type="checkbox"/> Crawford	<input type="checkbox"/> Dade	<input type="checkbox"/> Dallas	<input type="checkbox"/> Davies	<input type="checkbox"/> DeKalb
<input type="checkbox"/> Dent	<input type="checkbox"/> Douglas	<input type="checkbox"/> Dunklin	<input type="checkbox"/> Franklin	<input type="checkbox"/> Gasconade	<input type="checkbox"/> Gentry	<input type="checkbox"/> Greene	<input type="checkbox"/> Grundy
<input type="checkbox"/> Harrison	<input type="checkbox"/> Henry	<input type="checkbox"/> Hickory	<input type="checkbox"/> Holt	<input type="checkbox"/> Howard	<input type="checkbox"/> Howell	<input type="checkbox"/> Iron	<input type="checkbox"/> Jackson
<input type="checkbox"/> Jasper	<input type="checkbox"/> Jefferson	<input type="checkbox"/> Johnson	<input type="checkbox"/> Knox	<input type="checkbox"/> Laclede	<input type="checkbox"/> Lafayette	<input type="checkbox"/> Lawrence	<input type="checkbox"/> Lewis
<input type="checkbox"/> Lincoln	<input type="checkbox"/> Linn	<input type="checkbox"/> Livingston	<input type="checkbox"/> McDonald	<input type="checkbox"/> Macon	<input type="checkbox"/> Madison	<input type="checkbox"/> Marion	<input type="checkbox"/> Marion
<input type="checkbox"/> Mercer	<input type="checkbox"/> Miller	<input type="checkbox"/> Mississippi	<input type="checkbox"/> Moniteau	<input type="checkbox"/> Monroe	<input type="checkbox"/> Montgomery	<input type="checkbox"/> Morgan	<input type="checkbox"/> New Madrid
<input type="checkbox"/> Newton	<input type="checkbox"/> Nodaway	<input type="checkbox"/> Oregon	<input type="checkbox"/> Osage	<input type="checkbox"/> Ozark	<input type="checkbox"/> Pemiscot	<input type="checkbox"/> Perry	<input type="checkbox"/> Pettis
<input type="checkbox"/> Phelps	<input type="checkbox"/> Pike	<input type="checkbox"/> Platte	<input type="checkbox"/> Polk	<input type="checkbox"/> Pulaski	<input type="checkbox"/> Putnam	<input type="checkbox"/> Ralls	<input type="checkbox"/> Randolph
<input type="checkbox"/> Ray	<input type="checkbox"/> Reynolds	<input type="checkbox"/> Ripley	<input type="checkbox"/> St. Charles	<input type="checkbox"/> St. Clair	<input type="checkbox"/> Ste. Genevieve	<input type="checkbox"/> St. Francois	<input type="checkbox"/> St. Louis
<input type="checkbox"/> St. Louis City	<input type="checkbox"/> Saline	<input type="checkbox"/> Schuyler	<input type="checkbox"/> Scotland	<input type="checkbox"/> Scott	<input type="checkbox"/> Shannon	<input type="checkbox"/> Shelby	<input type="checkbox"/> Stoddard
<input type="checkbox"/> Stone	<input type="checkbox"/> Sullivan	<input type="checkbox"/> Taney	<input type="checkbox"/> Texas	<input type="checkbox"/> Vernon	<input type="checkbox"/> Warren	<input type="checkbox"/> Washington	<input type="checkbox"/> Wayne
<input type="checkbox"/> Webster	<input type="checkbox"/> Worth	<input type="checkbox"/> Wright					

Click **Save** to maintain changes. Click the **Reset** button to return changes to the previously saved information.

### Edit Categories (Commodity/Service Codes)

Buying organizations use commodity classification codes to identify suppliers for specific items or services and to provide notices of new solicitations. **If you do not select the commodity/service categories applicable to what your organization provides, you WILL NOT receive automated notices of new solicitations through MissouriBUYS.**

Select the **Edit Categories** option from the menu tree. The **Select Categories** page will display.



The WebProcure system defaults to the NIGP standard (denoted by the open NIGP tab).

As noted in the **Instructions** (i.e. link located next to the **Search** button), *the State of Missouri utilizes the UNSPSC commodity code classification.*

**Vendor Category Selection:**

Enter a search word that describes the kind of product or service your organization supplies and click on SEARCH. Then select the categories that apply to your organization by highlighting the category and click on ADD. If you supply products or services in multiple categories, you can search more than once. Choose the categories that fit your organization and then click ADD. **Be sure to click SAVE when you are done.** Make sure you choose categories for all the categorization types.

**Note: Please be sure to select the appropriate commodity classification tab (NAICS, NIGP , or UNSPSC) and specify your commodity categories for the buying organization(s) for which you are registered. Key buying organizations in the WebProcure and their commodity classifications are listed below. If you are registered for multiple key buying organizations in WebProcure that use different commodity classifications (NAICS, NIGP , or UNSPSC), be sure to specify your commodity categories for each key buying organization. Doing so will help maximize your opportunities with all of WebProcure's buying organizations.**

**Some Key buying organizations and their commodity classifications:**

- City of Grand Rapids: NIGP
- City and Country of San Francisco: NIGP
- eCityGov Shared Procurement Portal: NIGP
- Greater Orlando Aviation Authority: UNSPSC/NIGP
- Nassau Country: NIGP
- State of Idaho: NIGP
- State of Missouri: UNSPSC

**Helpful hint for the search:**

- Type a keyword in the Category Search field that best describes the products and services that your organization provides.

To select UNSPSC commodity/service code(s) in **MissouriBUYS**, click on the **UNSPSC** tab (highlighted in the next screen shot). Any UNSPSC code(s) selected during initial registration will automatically populate on the screen under **Selected Categories**.

The screenshot displays a web interface for selecting UNSPSC categories. At the top, there are tabs for 'OBSOLETE', 'NAICS', 'NIGP', and 'UNSPSC', with 'UNSPSC' being the active tab. Below the tabs is a 'Select Categories' section. It includes a 'Category Search:' field with an empty input box and an orange 'Search' button. To the right of the search button is a link for 'Instructions'. Below the search field is a 'Search Results:' area, which is currently empty. To the right of the search results is a 'Selected Categories:' area. This area contains a list of categories with checkboxes: 'Editorial and Design and Graphic and Fine Art Services (82000)', 'Writing and translations (82110000)', 'Editorial and support services (82111800)', and 'Proofreading services (82111803)'. The 'Proofreading services' checkbox is currently unchecked. Below the 'Selected Categories' list are 'Add' and 'Remove' buttons. At the bottom center of the interface is a 'Save' button.

The UNSPSC commodity classification structure includes four levels of hierarchy. In **MissouriBUYS**, you can select the top level commodity category or related sub level categories to associate with your vendor profile based on the products/services you provide.

Selecting applicable UNSPSC code(s) will enable your organization to receive automated email notification of bid opportunities posted by State of Missouri agencies and entities based on commodity code matches. It will also make your organization easier to find when Missouri's entities are preparing to make a purchase. It is recommended that you select at least one UNSPSC code. If you do not wish to receive solicitation notifications, enter 'Unknown' in the search box, click **Search**, click on one of the 'Unknown' check boxes, click **Add**, and click **Save**.

To search for an UNSPSC code, enter a Keyword into the **Category Search** field that best describes the commodity and/or service(s) that your organization provides and click **Search**. The search results will include all categories that contain your search entry.

Select the applicable category or categories from the **Search Results** section by putting a check next to the appropriate commodity code(s) and clicking **Add**. Click **Save**.

OBSOLETE NAICS NIGP UNSPSC

### Select Categories

Category Search:  
  [Instructions](#)

Search Results:

- Office Equipment and Accessories and Supplies (44000000)
  - Office machines and their supplies and accessories (44100000)
    - Office machine accessories (44102900)
      - Computer or office equipment cleaning kit (44102906)
      - Cleaning solutions for office equipment (44102912)
  - Building and Facility Construction and Maintenance Services (72000000)
    - Specialized trade construction and maintenance services (72150000)
      - Specialty building and trades services (72154000)
      - General office equipment maintenance (72154066)
  - Management and Business Professionals and Administrative Services (80000000)
    - Business administration services (80160000)
    - Office equipment rental or leasing services (80161800)

Selected Categories:



The selected category/categories will now appear in the **Selected Categories** section of the page.

The screenshot displays the 'Select Categories' interface. At the top, there are tabs for 'OBSOLETE', 'NAICS', 'NIGP', and 'UNSPSC'. Below the tabs, the 'Category Search' field contains the text 'office equipment'. To the right of the search field is an orange 'Search' button and a link for 'Instructions'. The 'Search Results' section on the left lists several commodity categories with checkboxes, including 'Office Equipment and Accessories and Supplies (44000000)', 'Management and Business Professionals and Administrative Services (80000000)', and 'Office equipment rental or leasing services (80161800)'. The 'Selected Categories' section on the right shows the categories that have been selected, with a red arrow pointing to it. At the bottom of the interface, there are three orange buttons: 'Add', 'Remove', and 'Save'. To the right of these buttons is a box labeled 'Expanded View' with a red arrow pointing to it.

Please note that when selecting a top level Commodity Category in the **Search Results** field, you will be unable to individually select any sub level subcategories appearing under the top category level. When you select and save a top Commodity Category to your vendor profile, you will receive automated bid notifications for any bid solicitation(s) that matches the top commodity category and any of the sub level categories appearing under the top category. If you select a sub level category, the higher level commodity category name(s) will appear in gray in the **Selected Categories** section above the subcategory selected (as shown above).

Repeat the above Commodity Category selection process until all appropriate categories appear in the **Selected Categories** section for your organization. Scroll bars in the **Search Results** and **Selected Categories** sections will enable you to scroll up and down to help you review and select commodity categories.

To remove a currently selected commodity code, click on the commodity category and click **Remove**. The removal process happens instantly without confirmation. Click the **Save** button located at the bottom to maintain changes.

Clicking on **Expanded View**  will enable you to more easily view a complete listing of all the commodity and service codes that are currently selected for your organization. In order to use **Expanded View**, you must first

save any changes or additions that were made to the **Selected Categories** list. Click on the  in the upper right hand corner to close the **Expanded View** screen.

You can also search for your appropriate commodity/service code(s) by going to <https://www.unspsc.org>. In the 'Search the Code' box, enter a keyword in the Code Name field. You can also click on the **Search-Code** tab, and enter a keyword in the **Search Title** field. When searching for an UNSPSC code(s), you may need to consider a hierarchical index to find your code(s); i.e. to find 'canned tuna' you may need to enter the word 'fish' first.

**Please note:** The State of Missouri utilizes Version 17 of the UNSPSC commodity/service code set in MissouriBUYS. The current UNSPSC commodity code set available on UNSPSC'S website (<https://www.unspsc.org>) is Version 22. This means that some codes found when conducting a search on the UNSPSC website may not be available for selection in MissouriBUYS. Additional information about the UNSPSC Commodity Code Set can be found on the MissouriBUYS website (<https://missouribuys.mo.gov/>) under Resources.

## Edit Properties

For State of Missouri business, the state does not currently require vendors to complete the **Edit Properties** section in their profile in **WebProcure**; however, vendors can complete this information for other buying organizations. This section enables a vendor to identify properties owned by the organization for tax payment verification purposes. Vendors can provide the appropriate parcel identification of all their properties.

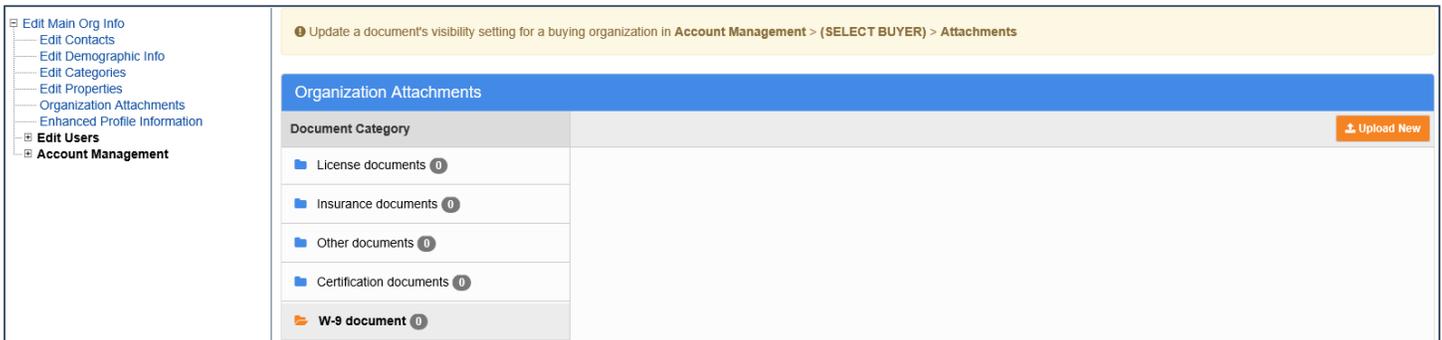


## Organization Attachments

All types of documents may be uploaded to your vendor profile from this page. Click on **Organization Attachments**.



The following document categories will appear: License documents, Insurance documents, Other documents, Certification documents, and W-9 document. The number of documents attached in each category will appear in the circle. Click on the Document Category for the document you wish to upload.



**License documents** - Multiple licensure documents may be loaded to this category.

**Insurance documents** - Multiple insurance documents may be loaded to this category.

**Other documents** - Multiple miscellaneous documents may be loaded to this category that don't necessarily belong in the other categories.

**Certification documents** - Multiple certification documents may be loaded to this category.

**W-9 document** - This is a single document category. Only one W-9 form may be on file in this category. **W-9 forms cannot be moved or deleted; they can only be replaced.**

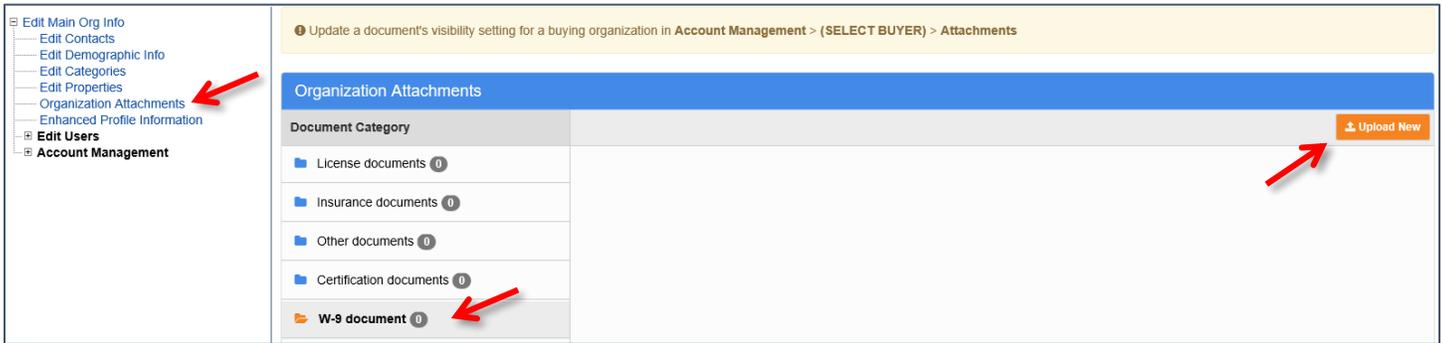
*Please Note: A W-9 Form for your organization must be uploaded into MissouriBUYS on the **Organization Attachments** page before the ACH Information screen is available in the **Payment Routing** section under **Account Management**. The following message will appear if a W-9 form is not on file and you try to Enter or Edit your ACH Information on the **Payment Routing** screen.*

A completed W-9 form is required before you may enter your Payment Routing / Direct Payment information. Please upload your completed W-9 form by selecting "Organization Attachments" in the navigation menu.

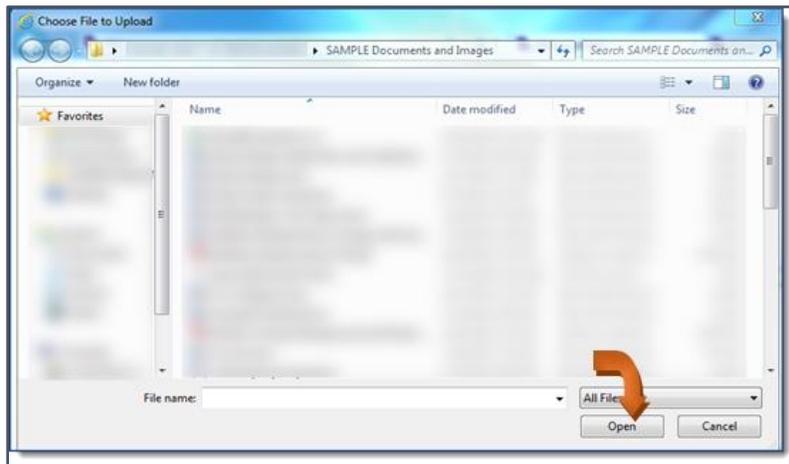
*If you need an IRS W-9 Form to complete and upload to **MissouriBUYS**, the form can be found on the IRS website at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>.*

## W-9 Form (Add/Edit)

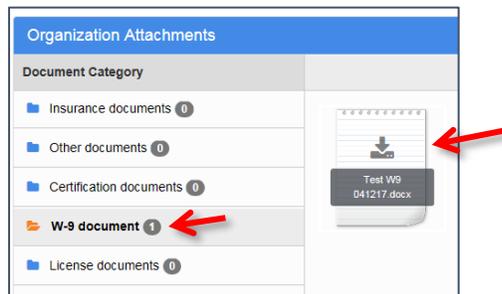
To attach a W-9 Form to your profile, click on **Organization Attachments** in the menu tree. Click on **W-9 document**. Click on the **Upload New** button to navigate to the local or network location of your completed and signed W-9 form.



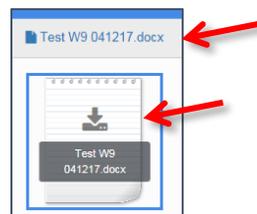
The **Choose File to Upload** window opens. Select the file and click **Open**.



The **Choose File to Upload** window will close and the selected file will display on the **Organization Attachments** screen. A **1** will appear next to W-9 document.

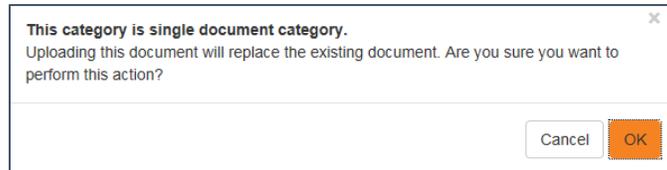


Clicking on the uploaded file icon will populate the file name. Clicking on the file name or file icon will populate a dialog box. Click **Open** to view the document that was attached.

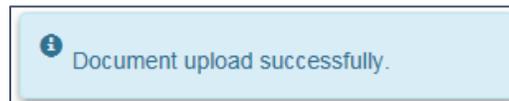




If the W-9 form attached is incorrect or no longer current, click on the **Upload New** button and go through the same process above to attach a new W-9 form. You will not be able to delete a W-9 document that is attached to your profile. An updated or revised W-9 form uploaded will supersede a W-9 document previously attached. The following message will appear. Hit **OK** to continue or **Cancel** to retain the existing W-9 Form on file.



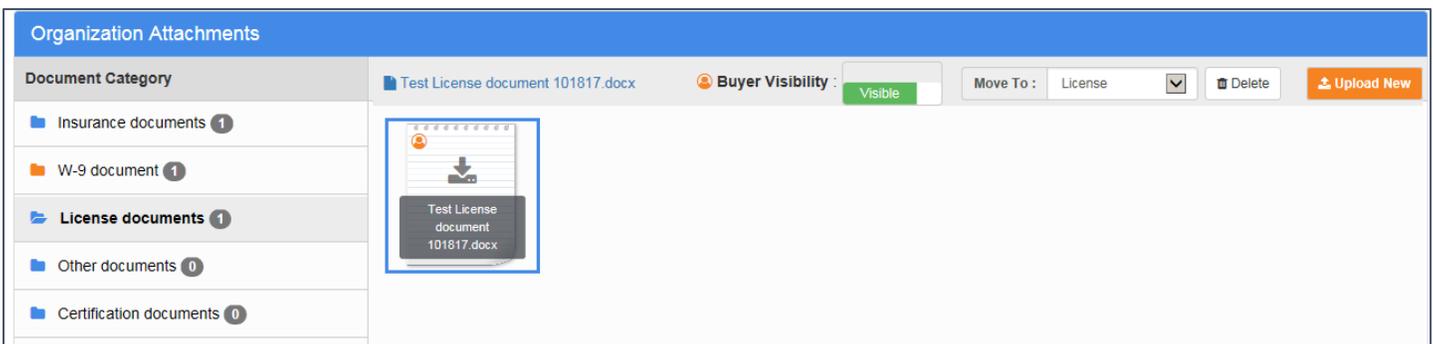
When a new W-9 form, or another document, is uploaded, the following message will appear.



Once a completed W-9 is on file, you can complete the available fields to establish the ACH Information in the **Payment Routing** section under **Account Management/Buying Organization**.

Click **Save** at the bottom of the page to save any changes made before leaving the page. **Reset** clears information and discards any unsaved data entry or changes.

By default, all uploaded documents are automatically visible to all buying organizations. You can manage visibility of these documents to buying organizations by clicking on **Account Management** from the menu tree. Select the name of the Buying Organization you want to edit and click on **Attachments**. Find the document you wish to edit in the appropriate Document Category. Click on the document icon and the Buyer Visibility header will appear. You can change Visible to Buyer to Not Visible for a buying organization by clicking on the Yes/No toggle. You can also move a document (except for a W-9 Form) from one Document Category to another category. The Delete button will delete a document that has been attached with the exception of the W-9 Form.



## Enhanced Profile Information

The State of Missouri does not require vendors to provide information on the **Enhanced Profile Information** screen. Vendors can **Create/Edit Your Promotional Page** to provide customer-focused information to buying organizations through your profile. The information will be displayed to buyers when they select your

**Supplier (Vendor) Name** or the **Supplier Information**  icon within the WebProcure system.



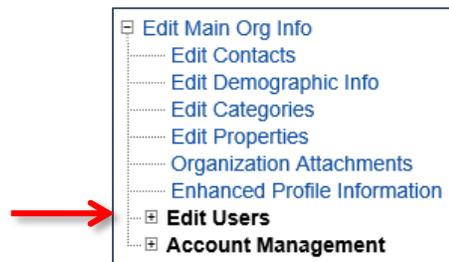
The **Create/Edit Your Promotional Page** will populate on the screen.

The screenshot shows the 'Create/Edit Your Promotional Page' form. At the top, there is a blue header with the title 'Create/Edit Your Promotional Page' and a sub-header 'Information'. Below the header, there is a message: 'Click "Save" when you are finished.' The form contains several sections: 'Name of Company' with a text input field containing 'Testing'; 'Contact Information' with a large text area; 'Company General Information' with a large text area; 'Specials or Unique Offerings' with a large text area; 'Products and Services' with a large text area; 'Logo' with a 'Browse...' button; and 'Company URL' with a text input field. At the bottom right, there are five buttons: 'Preview', 'Save', 'Publish', 'Un-Publish', and 'Reset'.

Vendors can customize the information, upload a company logo and add the company's URL. Click **Save** to retain changes without pushing the promotional page out to the WebProcure system. The vendor must click **Publish** to submit the information on the promotional page in the WebProcure system. Once published, it will be visible to buyers in all buying organizations in the WebProcure system. Click **Preview** to see how the information entered will appear to buying organizations. Click **Un-Publish** to make edits to the entered information. Click **Reset** to clear any edits without saving.

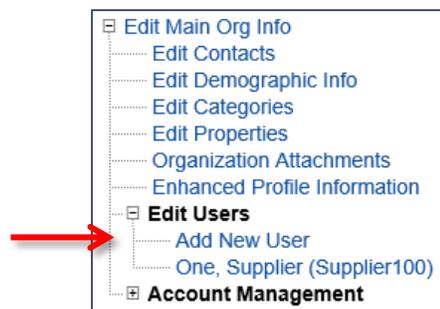
## Edit Users (and Add Users)

An existing user(s) may be edited and/or a new user created under Edit Users in the menu by clicking on the plus sign to expand the **Edit Users** options.



## Add New User

To add a new user to your vendor profile, click on **Add New User** under **Edit Users** in the menu. The **User Information** page will open.



[Password](#) | [Permissions](#)

**User Information**

First Name  \*  
 Middle Initial   
 Last Name  \*  
 Country  \*  
 Address  \*  
  
  
 City  \*  
 State  \*  
 Other Region (NON US/Canada/Mexico only)   
 ZIP  \*  
 Phone  \*  
 Fax Number  \* Fax: and/or email address  
 Email   
 Confirm Email   
 Require Password Change on Next Login   
 Locked Out  Unlocked  
 Suspended / Authorized  Authorized

This user will receive notices of Solicitations at the e-mail address or fax number provided. An email address is required if your Fax Number is the same as your Phone Number. Email is also required for international addresses. You can obtain a free e-mail address and account by [clicking here](#).

\* Denotes a required field

Please Note : Passwords must be at least 8 characters in length, must be a mix of upper-case letters, lower-case letters, numbers, and special characters, and must not be the same as any password used within the past five (5) generations.

**Password**

User Name   
 Password  \*  
 Verify Password  \*

Top

**Permissions**

<p><b>Bids/Quotes</b></p> <input type="checkbox"/> Create/Edit Item Reminders <a href="#">?</a> <input type="checkbox"/> Respond to Bids/Quotes <a href="#">?</a> <input type="checkbox"/> View Past Bids/Quotes <a href="#">?</a>	<p><b>Collaboration</b></p> <input type="checkbox"/> Manage Collaboration <a href="#">?</a> <input type="checkbox"/> View Collaboration <a href="#">?</a>
<p><b>Contract Management</b></p> <input type="checkbox"/> Access to Contract Management <a href="#">?</a>	<p><b>General</b></p> <input type="checkbox"/> Access to Account Management <a href="#">?</a> <input type="checkbox"/> Access to Edit Organization's Information <a href="#">?</a>
<p><b>Invoice</b></p> <input type="checkbox"/> Invoice Creation <a href="#">?</a> <input type="checkbox"/> View Invoice <a href="#">?</a>	<p><b>Order Management</b></p> <input type="checkbox"/> Access to Order Management <a href="#">?</a> <input type="checkbox"/> Acknowledge Orders <a href="#">?</a>

The required information fields are noted with an asterisk (\*). Enter all of the contact information for the user. Be aware that the user will receive notices of solicitations at the email address or fax number entered provided the company's profile contains commodity/service code(s) and the user has been given permission to receive notifications of solicitations (see Permissions section for more information). An email address is required if the Fax Number is the same as the Phone Number. The email field is also required for international addresses.

The **Require Password Change on Next Login**, **Locked Out** and **Suspended / Authorized** fields relate to the user's access and status.

Require Password Change on Next Login	<input checked="" type="checkbox"/>
Locked Out	<input type="checkbox"/> Unlocked
Suspended / Authorized	<input type="checkbox"/> Authorized

**Required Password Change on Next Login** – By default, this box has a check mark to force the user to change their password when they log into MissouriBUYS/WebProcure for the first time.

**Locked Out** – This toggle switch (Unlocked / Locked Out) identifies whether the user is currently locked out of the system. If the user has been locked out, you can toggle the setting to allow the user to login again.

**Suspended / Authorized** – This toggle switch (Authorized / Suspended) controls whether the user is authorized to use the system or if the user has been suspended by an Administrator. You can change a user's profile to Suspended should their access to WebProcure be placed on hold or removed. A 'Suspended' status will also occur automatically if a user locks their account due to five (5) unsuccessful log in attempts.

Additional information regarding a user's status, including assisting a user who has been locked out due to unsuccessful log in attempts, can be found in the 'Edit Existing User' section.

### Password - User Credentials (User Name and Password)

Create the **User Name** for the new user. The **User Name** is not case sensitive; however, **User Names** must be unique in the WebProcure system. It is recommended to use the person's *first initial and last* name (i.e. jsmith). If the **User Name** entered is not unique, an error message will be displayed at the top of the page in red.

Please Note : Passwords must be at least 8 characters in length, must be a mix of upper-case letters, lower-case letters, numbers, and special characters, and must not be the same as any password used within the past five (5) generations.

**Password**

User Name	<input type="text"/>
Password	<input type="password"/> *
Verify Password	<input type="password"/> *

Please check your data. The following errors occurred:

- User name is not unique. Please enter a different one.

Type in a **Password**. The **Password** field is case sensitive. Passwords must be at least eight (8) characters in length; cannot contain the User Name or the word 'password;' and must contain a mix of upper and lower case letters, numbers, and special characters. Passwords cannot be the same as any of the five previous passwords. When a user logs in the first time, they will use the temporary password you create. Upon a successful login, the user will be prompted to create a new password that is meaningful to them.

### Permissions

Select the required permissions for the user profile being created. The following permissions are available for assignment to a new user's profile:

### Bid/Quotes

- **Create/Edit Item Reminders** – Allows users to create and edit line item reminders.
- **Respond to Bids/Quotes** – Allows users to respond to Formal (Bids) and Informal (Quotes) Solicitations. Please note: When the permission to Respond to Bids/Quotes is assigned to a new user or added to an existing user, an advisory message will display:

This permission should only be granted to actual persons, not "generic" users or accounts. This permission grants the user the ability to respond on behalf of your organization, legally binding your company to the response. The user's unique login serves as an electronic signature to for such transactions in the system.

Click "Continue" to verify your understanding and grant the user this permission. Otherwise, click "Cancel".

- **By selecting 'Continue,' your organization is acknowledging that this user has permission to respond to a solicitation on your behalf. Those solicitation responses will be considered 'electronically signed' by your organization.**
- **View Past Bids/Quotes** – Allows users to view finalized or closed solicitations.

### Contract Management

- **Access to Contract Management** – Users with this permission will have access to the company's contracts. A 'Contracts' drop down will be visible for the user and they will be able to view all the contracts the state has awarded to your company. They will also be able to download any contract documents after clicking on the contract number in the Number column on the Contracts landing page.

Users with this assigned permission will also have visibility into the same listing of contracts that appear on the MissouriBUYS Contract Board.

### Invoice

- **Invoice Creation** – Enables the vendor portal user to create/submit invoices on behalf of the vendor organization.
- **View Invoice** – Grants the vendor portal user access to view existing invoices for the vendor organization.

### Collaboration

- **Manage Collaboration** - Allows users to post questions to the Questions & Answers section of the Collaborate page. It also allows users to view the Bulletin Board topics.
- **View Collaboration** - Allows users to view the Questions & Answers as posted by suppliers and buying organizations for a solicitation.

### General

- **Access to Account Management** - Allows users to access the Account Management area to manage buying organization relationships which includes being able to update the 'Additional Required Attributes' for the State of Missouri.
- **Access to Edit Organization's Information** - Allows users to access Profile Management and perform edits to the organization's main profile and the user profiles.

### Order Management

- **Access to Order Management** – Users with this permission will see the Orders section on the landing page as well as have access to the Orders listing page.
- **Acknowledge Orders** – Users with this permission can acknowledge an order or flag the order as pending.

Simply check the box next to the permission that should be assigned to the new user.



To assign all displayed permissions to the new user, click **Select All**.

To remove all assigned permissions from the new user, click **De-Select All**.

**Reset All** clears assigned permissions and reverts to last saved settings.

**Reset** clears all entered data and assigned permissions without saving.

Click **Save** to complete the process of adding a new user. Once a new user is saved, the page will refresh to display a **Status** field. By default, when you create a new user, the **Status** is **Active** and the **Require Password Change on Next Login** is checked. When the new user logs into MissouriBUYS successfully for the first time, the user will be prompted to create a new password that is meaningful to them.

Require Password Change on Next Login

Locked Out  Unlocked

Suspended / Authorized  Authorized

Status: Active

Once the new user is added, their name will appear inside the **Edit Users** section of the menu tree.

### Edit Existing User

Expand the **Edit Users** option in the menu and click on the User's name under **Edit User**. The User's profile will populate. All fields are available for modification except the Login Name. The Login Name is permanent and is tied to historical activities for the profile and solicitation transactions.

In the upper right corner, two links are available: **Permissions** and **Status**.

**Permissions:** The user's currently assigned permissions are displayed. Make edits as needed. To remove an assigned permission, simply check the box to the left of the permission name to clear the check mark. Click **Save** to maintain the changes. (Refer to the **Permissions** section under 'Add New User' for additional information.)

### Status Section:

Require Password Change on Next Login

Locked Out  Unlocked

Suspended / Authorized  Authorized

Status: Active

Activation Date:

Create Date: Dec 02, 2019

Last Login Date: Dec 02, 2019

Last Password Change Date: Dec 02, 2019

Login Name: NSeller1

This user will receive notices of Solicitations at the e-mail address or fax number provided. An email address is required if your Fax Number is the same as your Phone Number. Email is also required for international addresses. You can obtain a free e-mail address and account by [clicking here](#).

\* Denotes a required field

Change Password Save Delete User Reset

- **Require Password Change on Next Login** – A check mark means the user profile is active. Upon a successful login, the user will be required to create a new password that is meaningful to them.
- **Locked Out** – This toggle switch identifies whether the user is currently locked out of the system (e.g. **Unlocked / Locked Out**). If a user exceeds a limit of five (5) consecutive login attempts, their account status will become 'Locked out.' If this occurs, the following message will appear:

Your login attempt was not successful, try again.  
Reason: The number of unsuccessful login attempts have exceeded the maximum number allowed. You have been locked out

The user can click on the **Forgot password?** Link on the MissouriBUYS login screen OR click on the **Trouble Logging In?** link on the WebProcure login screen, enter their **Username** and follow the prompts to reset their own password.

If further assistance is needed, the company’s administrator/main contact can change the user’s **Locked Out** status to **Unlocked** by using the toggle and clicking **Save**. The administrator also reset the user’s password by clicking on the **Change Password** button, assigning a new password, and clicking **Save**. If the main contact resets the user’s password, the user will be required to change their password when they successfully log in.

If a user is still unable to successfully log in, assistance can be requested by sending an email to [WebProcure.Support@perfect.com](mailto:WebProcure.Support@perfect.com) or by calling (866) 889-8533.

- **Suspended / Authorized - Authorized** means the user is currently allowed access to the system. A user’s profile can be changed to **Suspended** should their access to WebProcure be placed on hold or

removed. **Suspended** will also occur automatically if a user locks their account due to a number of unsuccessful log in attempts.

- **Status** – This field identifies the user’s current status of **Active** or **Inactive**.

Additional attributes are read-only:

**Activation Date** - If the user is **Inactive**, a new **Activate** button will be visible, otherwise, this field remains blank.

You may select this button to set the user as **Active** and this action will populate the **Activation Date** field.

**Create Date** - Date the user account was created.

**Last Login Date** - Date the user last logged into the application.

**Last Password Change Date** - Date the user last changed their password.

**Login Name** - The user's username to access WebProcure.

Click **Save** to maintain changes.

## Delete User

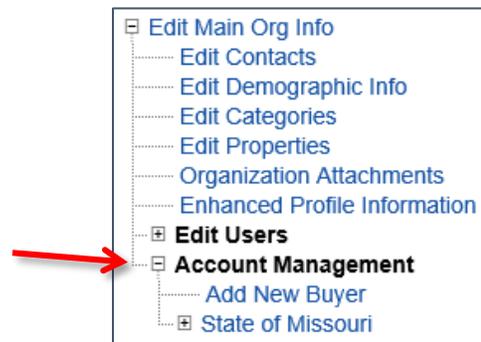
A company’s administrator can suspend a user rather than delete the user when staffing changes occur. If you wish to remove a user for your organization, click on the user’s name under **Edit Users**. Scroll to the bottom of the **User Information** screen that populates and click **Delete User**. A confirmation message will display:



To proceed with removing the user from the WebProcure system, click **Confirm Deletion**. A ‘Successfully deleted user’ message will appear on the screen. To cancel the deletion process and keep the user's profile in the system, click **Cancel**.

## Account Management

Expand the **Account Management** option from the menu tree.

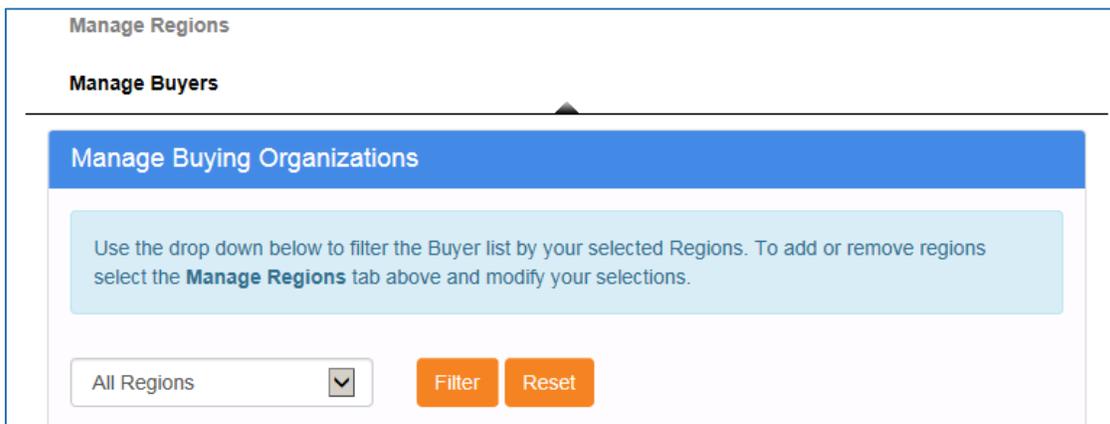


## Add New Buyer (Adding Missouri as a Buying Organization in WebProcure)

If you registered as a vendor in WebProcure through the MissouriBUYS website, you will not need to add Missouri as a Buying Organization. The State of Missouri should already appear under **Account Management** in the expanded menu.

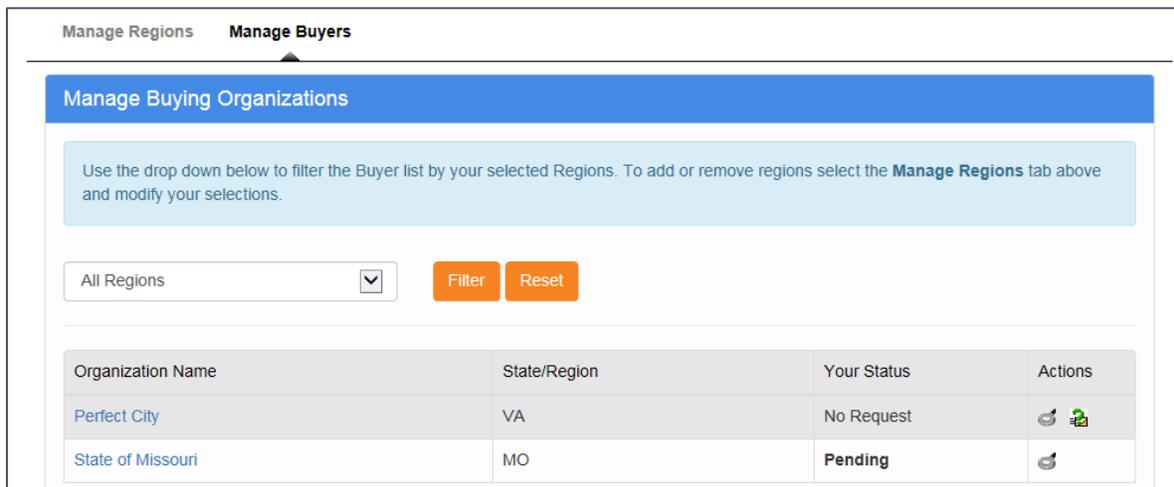
If your organization is already a registered vendor for a different buying organization in WebProcure and you need to add the State of Missouri to your profile, a new Buyer Account can be added by a user(s) with the appropriate permissions.

Click **Add New Buyer** under **Account Management**, and the **Manage Buying Organizations** window will open to the **Manage Buyers** view.



Click on the **Manage Regions** tab at the top. All states will populate. Check the box next to **Missouri** and hit **Save** at the bottom of the screen.

Click on the **Manage Buyers** tab at the top. If 'State of Missouri' does not automatically appear in the **Organization Name** column, click on **Filter**, and Missouri should appear with all of your available **Buying Organizations**.



Click on the green question mark  in the **Actions** column for the State of Missouri. For Missouri, this will open the state's **Terms and Conditions**. Once you click to **Accept** the State of Missouri's Terms and Conditions, an approval request will be sent to the buyer that your organization would like to conduct business. The **Your Status** column will automatically update to **Pending** and the **Send Approval Request to Buyer** icon () will no longer be visible in the **Actions** column. Your status as a vendor for Missouri will appear as **Pending** until **Approved** by the state.

State of Missouri	MO	Approved	
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Once **Approved**, your organization can interact with the buying organizations' solicitation opportunities and Order transactions.

With a **Pending** status, your vendor organization can interact with the Buying Organizations solicitations but not Order transactions.

If your status is **Denied**, your vendor organization has been declined by the buying organization. No interaction with the specific Buying Organization is available within the system.

## State of Missouri

### Additional Required Attributes

Information on the **Additional Required Attributes for "State of Missouri"** can be found previously in this document in the **'Edit Demographic Information'** section.

### Account Codes

The State of Missouri does not currently use this field.

### Additional Terms

Missouri's Specific Terms and Conditions can be viewed on this page.

### Attachments

Information on **Organization Attachments** can be found previously in this document in the **'Organization Attachments'** section.

## Service Level

If a Buying Organization has established specific service levels to manage their vendors, the Service Level page will detail the specific terms. The State of Missouri does not require subscription service level selection by its vendors.

## Payments Types

The default setting for the State of Missouri is 'Invoice' for the Payment Type and 'Net 45' for the Payment Term. The default settings will automatically populate.

## Payment Routing (Adding ACH-EFT Payment Information)

*Note: A W-9 must be attached for your organization on the **Organization Attachments** page before the **Payment Routing Information** screen is available in **Payment Routing**. A message will appear if a W-9 form is not on file and you are trying to Enter or Edit your ACH Information.*

**A completed W-9 form is required before you may enter your Payment Routing / Direct Payment information. Please upload your completed W-9 form by selecting "Organization Attachments" in the navigation menu.**

*To upload your completed W-9 form, select "Organization Attachments" in the navigation menu. If you need an IRS W-9 Form to complete and upload to **MissouriBUYS**, the form can be found on the IRS website at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>.*

Additional information pertaining on W-9 Forms can be found in the **Organization Attachments** section.

Once a W-9 form is on file (in Organization Attachments), click on **Payment Routing** in the menu tree. ACH will populate for the **Select Routing Type**.

Payment Routing Information

Select Routing Type\* ACH ▼

Name of Financial Institution\*

Address of Financial Institution\*

County

City\*

Country\* -Select One- ▼

State\*   ▼

Postal/ZIP Code\*

Depositor Routing Number\*  Re-enter Depositor Routing Number\*

Depositor Account Number\*  Re-enter Depositor Account Number\*

Name on Account\*

Type of Account  
 Checking  Savings

YOUR NAME 123  
 1234 Main Street  
 Anywhere, OH 00000 DATE \_\_\_\_\_

PAY TO THE ORDER OF \_\_\_\_\_ \$

\_\_\_\_\_ DOLLARS

ROUTING NUMBER
ACCOUNT NUMBER
CHECK NUMBER

**Verification of Accurate Information**  
 I (We) acknowledge that the Payment Routing information provided above is correct.

**Authorization of Credit**

**I (We) hereby authorize the State of Missouri to initiate credit entries to my (our) account at the depository financial institution named and to credit the same such account. I (We) acknowledge that the origination of Payment Routing transactions to my (our) account must comply with the provision of U.S. law.**

This authorization is to remain in full force and effect until the State of Missouri, Office of Administration, has received written notification from me (us) of its termination in such time and in such manner as to afford the State of Missouri and the financial institution a reasonable opportunity to act on it.

Save
Reset

All fields marked with a red asterisk (\*) are required. Complete this page as follows:

**Name of Financial (Banking) Institution\*** – Enter the name of your banking institution.

**Address of Financial (Banking) Institution\*** – Use these two lines to enter the complete street address or post office box information of your banking institution.

**County** (optional) – Enter the county where your banking institution is located, if known.

**City\*** – Enter the city where your banking institution is located.

**Country\*** -- Use the drop-down menu to select the country of your banking institution.

**State\*** -- Use the drop-down menu to select the state location of your banking institution.

**Postal/Zip Code\*** – Enter the postal code or zip code with extension, if known, for your banking institution.

**Depositor Routing Number\*** – Enter the 9 digit routing number for your banking institution.

**Re-enter Depositor Routing Number\*** – Enter the 9 digit routing number a second time to ensure accuracy. The first and second routing number fields must match.

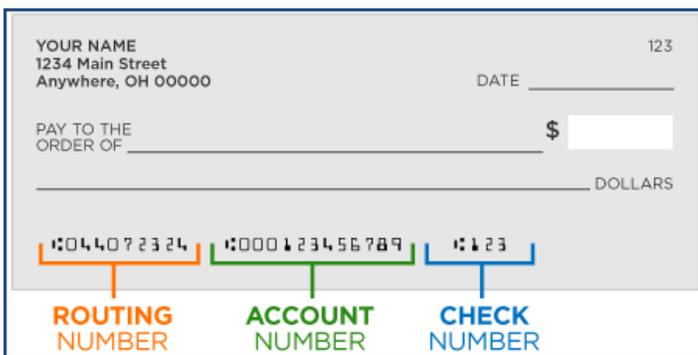
**Depositor Account Number\*** – Enter the 4-17 digit number of the account into which you wish to have the monies deposited.

**Re-enter Depositor Account Number\*** – Enter the 4-17 digit number of the account a second time to ensure accuracy. The first and second account number fields must match.

**Name on Account\*** – Enter the name on the account as it appears on your banking institution’s paperwork and statements.

**Type of Account** – Use the radio buttons to specify the type of account it is. Options are **Checking** or **Savings**. The default is **Checking**.

The image shown on the page represents a sample check to assist you in identifying which numbers designate routing and which represent the account.



**Verification of Accurate Information** – Check the box to acknowledge the following statement: *‘I (We) acknowledge that the Payment Routing information provided above is correct.’*

**Authorization of Credit** – Check the box to provide authorization for the following statement: *‘I (We) hereby authorize the State of Missouri to initiate credit entries to my (our) account at the depository financial institution named and to*

*credit the same such account. I (We) acknowledge that the origination of Payment Routing transactions to my (our) account must comply with the provision of U.S. law.*

This authorization is to remain in full force and effect until the State of Missouri, Office of Administration, has received written notification from me (us) of its termination in such time and in such manner as to afford the State of Missouri and the financial institution a reasonable opportunity to act on it.'

Click **Save**.

[Editing ACH Information](#)

To update your existing ACH information in **MissouriBUYS**, you will first be required to enter in the previously saved routing and account information. This provides an additional layer of security to ensure the information is sufficiently protected.

Providing your Payment Routing information will make you eligible to receive electronic payments from Buyers who participate in ACH-EFT/WIRE payments. Note that not all Buyers currently participate in the program. Please contact the Buyer's point of contact for more information on how their organization handles payment distribution.

Click the button below to update your banking information.

**ACH Information**

**Name of Financial Institution :** Bank

**Address of Financial Institution**

Main Street  
Jefferson City, MO 65101 United States

**Depositor Routing Number :** xxxxxxxxx

**Depositor Account Number :** xxxxxxxxx

**Name on Account :** xxxxxxxxxxxx

**Type of Account :** Checking

Update

Delete

Click **Update** and the following window will open:

**To update your ACH-EFT payment information, you must provide your currently saved banking information data**

---

**Depositor Routing Number**

**Depositor Account Number**

**Submit**

Enter your currently saved banking information (i.e. **Depositor Routing Number** and **Depositor Account Number**.) Click **Submit**. If the information does not match what is currently saved in the system, an error message will display, advising you of the incorrect information.

Sample images of possible error messages are shown below:

The routing number you entered was not valid. Please try again.

The account number you entered was not valid. Please try again.

Both the routing and account numbers you entered were not valid. Please try again.

Re-enter your currently saved banking information again. Once it matches what is on file, you will be able to edit your ACH information. If you are unable to enter matching information, please ask for assistance by sending an email to [MissouriBUYS@mo.gov](mailto:MissouriBUYS@mo.gov). Do not include any of your banking information in the email.

Click **Save** at the bottom of the page to save any changes made before leaving the page. **Reset** clears information and discards any unsaved data entry or changes.

#### Delete ACH Information

If necessary, ACH Information may be completely removed from the system. Click **Delete** on the ACH Information screen. The following window opens:

The screenshot shows a dialog box with a grey background and a white border. At the top, in blue text, it reads: "To update your ACH-EFT payment information, you must provide your currently saved banking information data". Below this, there are two input fields. The first is labeled "Depositor Routing Number" and the second is labeled "Depositor Account Number". At the bottom right of the dialog box is an orange button labeled "Submit".

As an added layer of security, you will be asked to re-enter your saved **Depositor Routing Number** and **Depositor Account Number** to proceed with deletion. Click **Submit**.

If the information does not match what is currently saved in the system, an error message will display, advising you that invalid details were entered.

Unable to remove the Payment Routing Information due to invalid details.

If the currently saved information is entered correctly, the following success message will display:

Payment Routing Information has been removed successfully.