**Supplier Portal User Guide:
Registration & Account Management Instructions**

SUPPLIER PORTAL USER GUIDE - REGISTRATION & ACCOUNT MANAGEMENT INSTRUCTIONS

SECTION 1 - Welcome to the RTS Supplier Portal!

The Rochester Genesee Regional Transportation Authority is pleased to provide an online portal to streamline and simplify doing business with suppliers. Through the portal, suppliers can receive notifications of sourcing events, bid on those events, and view contracts. To be eligible to respond to events, you must create a user account and register your company.

1.1   *Getting to the Supplier Portal*

A. Navigate to the Supplier Portal at https://supplierportal.myrts.com
B. From here, you can:
   a. Register as a supplier.
   b. Login with your username and password.
   c. Browse and search procurement events.
   d. View RTS policies and contacts.
   e. Have your username sent to your email address (if you have set up security questions).

1.2   *Contact Us*

A. For technical questions regarding the portal, click contact us at the top of the page.

SECTION 2 - Supplier Portal Registration (New Users)

Note: any items with an asterisk are required.

2.1   *Begin the Registration Process*

A. You will need the following information and documents on hand when you register:
   a. Federal Tax ID Number or Social Security Number
   b. Electronic copy of W-9.
   c. Company name, address, and phone number
   d. Business Type
   e. Commodity Code(s) pertaining to your business
   f. Electronic copy(ies) of all Diversity Certifications (DBE, MBE, WBE, SDVOB), if applicable.
B. Click the Register link top left-hand corner of the page.

2.2   *Accept the Terms and Conditions for Use of the Supplier Portal*

A. Review and check the box labeled Accept Terms and Conditions and click the Continue button.

2.3   *Enter Contact Information*

A. In the Create An Account section:
   a. Enter a User Name.
   b. Enter a Password and re-type it in the Confirm Password box.
B. Enter information in the Enter Information About Yourself section.
   a. The items with an asterisk are required.
C. Once completed, click the Continue button to move to the next step.

2.4   *Enter Company Information*

SUPPLIER PORTAL USER GUIDE - REGISTRATION & ACCOUNT MANAGEMENT INSTRUCTIONS

A. Complete the Company Information section (required fields are noted with an asterisk).

   a. Note: If system alerts you that tax ID cannot be used, contact Sara Farr at sfarr@myrts.com. This alert means someone has already registered your firm.

B. Complete the Address Information section (required fields are noted with an asterisk.

   a. You may either enter a Remit To Address or check the box labeled "Check If Remit to Address Is The Same As Mailing Address".

C. Click the Continue button to move to the next step.

2.5 *Assign Diversity Codes*

A. Click the Add button to display the list of Active Diversity Codes.

B. Click each check box that applies.

   a. You can select more than one code at a time.

   b. You can use the arrows at the bottom to get from one page to the next.

C. Click the Attach to Supplier button and click the Continue button to move to the next step.

2.6 *Answer Questions Posed by RTS*

A. Review each question and answer each to the best of your ability. Each questions may have different requirements than the others so read the italicized words under the question.

B. When answering a question, you may need to perform one of these actions.

   a. Select an answer from a list

      i. Click the arrow icon and then select the appropriate answer.

   b. Attach a document to a question

      i. Click the Browse button, and then find and select the appropriate file.

   c. Add comments

      i. Click in the text box and type your comments.

C. When all questions have been answered, click the Continue button to move to the next step.

2.7 *Link Commodity Codes to Vendor Profile*

* Note: This step is required to complete registration. Commodity codes are the mechanism RTS staff will use to notify Suppliers of Events. Suppliers with incomplete profiles cannot receive notifications.

A. Click the Add button to display the Available Commodity Codes window.

B. Enter text in the Search tool to find commodities by part of the Code or Description if desired.

C. Select the check box for the desired categories.

D. Click the Attach to Contact button and then click the Continue button to move to the next page.

E. You can use the arrows at the bottom to get from one page to the next.

F. When all applicable codes have been attached, click the Continue button to move to the next step.

2.8 *Set Proxy Notifications*

In this optional step, you can designate one or more additional people to receive notifications regarding bidding events. A proxy contact does not need to be registered on the portal to receive notifications. Note: Proxy's are not additional contacts. They can receive notifications of Events, but will not be able to submit a response. If you would like to set up additional contacts with their own username and password please see Section 3 – Managing Your Account.

A. Click the Add button to display the Proxy Notifications window.

B. Enter the First Name, Last Name, and Email Address of the proxy contact.

C. If multiple proxies are being added, click Save and New. Otherwise, click Save.

D. Click the Continue button to move to the next step.

2.9 *Finalize Registration*

When registration is completed with no errors, the Status page displays Registration status: Complete.

A. Click the Done button.

2.10 *Set Up Security Questions*

A. Immediately after registering, click the Logout link at the top of the page, and then Login using your new user name and password. The portal will then prompt you to set up your password reset security questions.
    i. If you ever need to reset your password, you will need to answer a security question.
    ii. Failure to complete this step will result in you not being able to reset your password without procurement staff assistance.

B. Answer the three questions and click Save to return to the Home page.

SECTION 3 - Managing Your Account

3.1 *Adding Additional Users from Your Company*

A. Suppliers can have as many additional users as desired, however they will have to be added by RTS Staff. To add a user, please email Sara Farr, sfarr@myrts.com, with the following information:
    a. First and Last name
    b. Phone number
    c. Email address
    d. Whether they wish to receive email notifications regarding future events

B. Each new contact will receive an email with their new username and temporary password, at which point they can login to create their security question, create a new password, and update their commodity codes..

3.2 *Replacing outdated contacts or former employees*

A. If this situation arises, please contact email Sara Farr at sfarr@myrts.com.

3.3 *Resetting a Password*

A. On the main page, click Login

B. Click "Forgot your password?" link to display the Reset Password page.

C. Enter your username in the field provided and click the arrow.

D. Answer the Security Question you set up for your account and click the arrow.

E. In the Reset Password window, enter your new password

F. Confirm your new password and click the Save button.

G. Note: If you have not completed your profile with security questions, this process may not operate correctly. Please contact Procurement Staff if this occurs.

3.4 *Forgot User Name*

A. On the main page, click the "Forgot User Name?" link to display the Forgot User Name page.

B. Enter your Email Address and confirm, then click the OK button.

C. You will receive an email with your username.