




WebProcure™  
Supplier Registration and  
Portal User Guide

WebProcure™ powered by  PERFECT COMMERCE  
A PROACTIS COMPANY

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## Introduction

The State of Connecticut has implemented a web-based, statewide e-sourcing solution called, **CTsource**. CTsource is a web-based sourcing solution that utilizes WebProcure software through our partnership with Perfect Commerce, LLC, and replaces our current homegrown Biznet Solution. **CTsource** helps suppliers enhance their business relationships by streamlining the solicitation process (bids/proposals) and improving communication about business opportunities. By registering with **CTsource**, suppliers will automatically receive notification of business opportunities from the State of Connecticut. Suppliers will also receive solicitation notifications from other buying organizations (public sector entities) that also use the WebProcure software for their sourcing needs. Once registered within **CTsource**, your organization has the ability to self-register with other buying organizations.

## Required Registration

All suppliers who currently (or potentially) sell products and/or services to the State will be required to register their business with **CTsource**. The supplier registration portal for registering your business is accessible from the **CTsource** website at:

<https://portal.ct.gov/DAS/CTSource/Registration>

This document serves as a guide on how to quickly register your organization and maintain your supplier account in the **CTsource** solution after establishing your username and password.

# Supplier Self-Registration

**CTsource** provides suppliers with the ability to self-register. This is a multi-step process to establish company and contact information and United Nations Standard Products and Services Codes (UNSPSC) commodity classifications.

## Getting Started

It is suggested that you have the following information on hand to complete the required sections of the supplier registration process:

- Organization Information
- Organization's Taxpayer ID Number (TIN/FEIN/SSN)
- Business Type (Corporation, LLC, Sole Proprietorship, etc.)
- Main Contact Information including Email Address (to receive solicitation notifications)
- Commodity / Service Code Selection (UNSPSC)

You will also have the opportunity to enter and maintain supplemental information after establishing a username and password for the **CTsource Supplier Portal**: <https://portal.ct.gov/DAS/CTSource>



CTsource Bid Board

[CTsource Bid Board](#)

CTsource Contract Board

[CTsource Contract Board](#)

CTsource Registration

[CTsource Registration](#)

After gathering the necessary information, access the **CTsource Supplier Portal**:

<https://portal.ct.gov/DAS/CTSource/Registration>

The **CTsource Supplier Portal** opens to the required **Registration** pages.

## Step 1 - Collect Information and General Disclaimer

The first step in the registration process is to collect the information that will be necessary to complete your registration and obtain a user name and password. This includes, the previously mentioned, taxpayer information, contacts, and commodity classifications.

Located at the bottom of this first step, is the **General Disclaimer** for the **State of Connecticut**.

[CT.GOV HOME](#) / [DEPARTMENT OF ADMINISTRATIVE SERVICES](#) / [CTSOURCE REGISTRATION](#)

# CTSource Registration

[Instructions](#)

[Organization Information](#)

[Contact Information](#)

[Commodity/Service Codes](#)

## Supplier Registration

Welcome to the State of Connecticut's Supplier Registration Process. This registration will quickly allow you to create a username and password in order to view and respond to business opportunities issued by the State of Connecticut. Suppliers are a person or an organization looking to provide something needed to the State of Connecticut, including products and/or services. Examples of Suppliers include: Vendors, contractors, architects, engineers, consultants, service providers, manufacturers, distributors, and any others who are interested in doing business with the State of Connecticut.

Quick registration to be notified, view and respond to solicitation opportunities will require the following information:

- Organization Information and Main Contact Information including Email Address
- Organization's Taxpayer ID Number (TIN/FEIN/SSN)
- Business Type (Corporation, LLC, Sole Proprietorship, etc.)
- Commodity/Service Code Selection (UNSPSC)

Additional required attributes will need to be submitted in the CTsource Vendor Portal after registration.

General Disclaimer:

The State of Connecticut is not responsible for and accepts no liability for any technical problems that result from using this website. In addition, the State of Connecticut is not responsible for problems related to the transmission of data to and from this site.

I agree with the terms.

Yes, I agree.\*

\*Denotes required fields

[Save and Return Later](#)

[Next →](#)

The disclaimer states: '*The **State of Connecticut** is not responsible for and accepts no liability for any technical problems that result from using this website. In addition, the **State of Connecticut** is not responsible for problems related to the transmission of data to and from this site.*'

Agreeing to the **General Disclaimer** is a requirement as indicated by the red asterisk (\*). To proceed with the registration, check the **Yes, I agree** check box. Click **Next** to advance to Step 2.

## Step 2 - Organization Information

In step two, you will begin entering the information that was collected in step one. A red asterisk (\*) indicates that a field is required and must be completed to proceed to the next step in the registration.

[Instructions](#)      **[Organization Information](#)**      [Contact Information](#)      [Commodity/Service Codes](#)

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*If you need assistance at any time during the registration process, please contact Proactis Vendor Care support. Phone: 866-889-8533 Email: [WebProcure-Support@proactis.com](mailto:WebProcure-Support@proactis.com).*

### Organization Information

Please enter the information requested below:  
\* denotes a required field

**Country**

**Legal Name of Entity/Individual (As shown on your income tax return) \***

**DBA Business Name**

**Type of Business \***

**Address Line 1 \***      **City \***  
     

**Address Line 2**      **State/Province \***  
     

**Postal / Zip Code \***

Please specify whether you are registering as a Parent/Holding Company or a Branch.  
If you are an individual or sole proprietor, select "Parent/Holding Company". If you are a Branch, you will be required to enter your unique nine-digit Data Universal Numbering System (DUNS) identification number in the DUNS Number/Unique 9-digit Identifier field.

Parent/Holding Company     Branch      --OR--

**Federal Employer Identification Number \***       -  -  [Clear](#)      **Social Security Number \***       -  -  [Clear](#)

**Confirm Federal Employer Identification Number \***       -       **Confirm Social Security Number \***       -  -

**DUNS Number/Unique 9-digit Identifier**

**Confirm DUNS Number/Unique 9-digit Identifier**

*If you need assistance at any time during the registration process, please contact Proactis Vendor Care support. Phone: 866-889-8533 Email: [WebProcure-Support@proactis.com](mailto:WebProcure-Support@proactis.com).*

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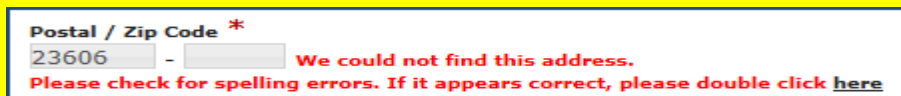
[Save and Return Later](#)    [← Prev](#)    [Next →](#)

### Complete the above fields as follows:

- **Legal Name of Entity / Individual\*** – Your organization’s legal name must match the company name on record with the IRS for your **Tax Identification Number**. If you file with a **Social Security Number**, you must enter your name exactly as it shows on your **Federal Tax Return**. This field accepts up to 50 alphanumeric characters.

- **Address\*** – Use the two lines to enter street address or post office box information in full. Each of the **Address** and **Address Line 2** fields accept up to 30 characters.
- **City\*** – Enter the city where your organization is located. This field accepts up to 50 characters.
- **State / Province \*** – Use the drop-down menu to select the state where your organization is located. If your organization is located outside of the continental United States, choose the last option, listed as **Other** from the listing of available choices.
  - If **Other** is selected from the **State / Province** menu, a new, required **Other Region\*** field will display. Enter the appropriate region in this field.
- **Postal / Zip Code\*** – Enter the postal code or zip code with extension, if known, for your organization.

**Application Note:** The application will perform an address validation. If the address cannot be located, you have the option of correcting any errors that may exist or you may acknowledge that the entered address is correct by clicking the *here* link.



The screenshot shows a form field labeled "Postal / Zip Code \*". The field contains the text "23606 - [redacted]". Below the field, a red error message reads: "We could not find this address. Please check for spelling errors. If it appears correct, please double click [here](#)".

- **Type of Business\*** – Use the drop-down menu to identify the type of enterprise that best represents your organization. Options include:
  - Benefit Corporation (B Corp)
  - C Corporation
  - Individual/Sole Proprietor
  - Limited Liability Company – C Corporation
  - Limited Liability Company – Partnership
  - Limited Liability Company – S Corporation
  - Other: Federal Tax Exempt / Non-Profit
  - Other: Government Entity
  - Partnership
  - S Corporation
  - Trust / Estate
- Choose the appropriate designation for your organization:
  - **Parent / Holding Company** – This is the default designation and applies to your organization if it is the parent or headquarters location of your organization.
  - **Branch** – If your organization is a child company or branch location of another entity, select this option.

**NOTE:** If your organization has a **DBA**, please register the **DBA** separately as a '**Branch**'

- **Federal Employer Identification Number\*** - OR – **Social Security Number\*** – During your

initial registration, either a **Federal Employer Identification Number** (FEIN), or a **Social Security Number** (SSN), needs to be entered to identify your organization. The **State of Connecticut** may use this information to associate your WebProcure registration with their accounting and payment systems for Federal tax reporting.

**Application Note:** The **Clear** link, located to the right of the **Federal Employer Identification Number** and **Social Security Number** text entry fields, allows you to empty those fields and re-enter numbers as needed.

- **DUNS Number** – Enter the DUNS number issued by Dunn & Bradstreet, which provides unique identifiers of single business entities, while linking corporate family structures together. This field must contain 9 digits. It cannot contain letters or symbols.

**NOTE:** This field is required when registering as a **'Branch'**.

Click **Next** to advance to Step 3.



## Step 3 - Contact Information

In step three, you will enter the Main point of contact information for your organization and create login credentials. The main contact will be allowed to manage your organization’s account profile, add users to the system, identifies who will be allowed to receive notifications, who is authorized to submit and commit solicitation responses on behalf of your organization. The email address entered here will receive all UNSPSC notifications. A red asterisk (\*) indicates that a field is required and must be completed to proceed to the next step in the registration.

[Instructions](#)

[Organization Information](#)

**[Contact Information](#)**

[Commodity/Service Codes](#)

If you need assistance at any time during the registration process, please contact Proactis Vendor Care support. Phone: 866-889-8533 Email: [WebProcure-Support@proactis.com](mailto:WebProcure-Support@proactis.com).

### Contact Information

#### Main Contact

Please enter the information for your organization's main point of contact. The email address entered here will receive all notifications based upon the UNSPC codes selected in the next section.

Salutation

First Name \*

Last Name \*

Job Title

Main Phone Number \*

Fax Number

Email Address \*

UserName\*

Password \*

Confirm Password \*

Address Line 1 \*

City \*

Address Line 2

Country

State/Province \*

Postal / Zip Code \*

#### Additional Contacts

Additional contacts can be added now or at a later time via the Vendor Portal. If additional contact information is not provided at this time, all other contact details will default to the Main Contact provided above.

Solicitation Notification Contact

Contract Notification Contact

If you need assistance at any time during the registration process, please contact Proactis Vendor Care support. Phone: 866-889-8533 Email: [WebProcure-Support@proactis.com](mailto:WebProcure-Support@proactis.com).

[Save and Return Later](#) [← Prev](#) [Next →](#)

Complete this page as follows:

- **Salutation** – Use the drop-down menu to choose the appropriate salutation for the main contact. This selection is optional.
- **First Name\*** – Enter the first name of the main contact. This field is required.
- **Last Name\*** – Enter the last name of the main contact. This field is required.
- **Job Title** – If desired, enter the job title of the main contact. This field is optional.
  
- **Main Phone Number\*** – Enter an area code, prefix, and phone number for the main contact. Use digits only, no spaces or hyphens. If applicable, enter a direct extension number.
- **Fax Number** – If applicable, enter a fax number for the main contact. Enter area code, prefix and fax number.
  
- **Email Address\*** – Enter a valid email address for the main contact. A confirmation email will be sent to the email address entered here.
  
- **User Name\*** – Enter a unique user name that you will use to access the WebProcure application. The application will perform a validation to ensure the User Name is unique.
- **Password\*** – Passwords must be at least 8 characters in length, must be a mix of upper-case and lower-case letters, numbers and special characters.
  
- **Confirm Password\*** – Enter the password a second time in this field to ensure accuracy.
  
- **Address\*** – Use the two lines to enter street address or post office box information in full. Each of the Address and Address Line 2 fields accept up to 30 characters.
  
- **City\*** – Enter the city where your organization is located. This field accepts up to 50 characters.
  
- **State / Province \*** – Use the drop-down menu to select the state where your organization is located.
  
- **Postal / Zip Code\*** – Enter the postal code or zip code with extension, if known, for your organization.

## Additional Contacts

The additional contacts section can be completed during this registration or later once you are logged in to **CTsource**. If additional contact information is not provided, the main point of contact will be designated for each of the specific contacts: Solicitation Notification and Contract Notification. To enter the information during registration, click the Now button. The page will refresh to display additional contact entry fields.

Click **Next** to advance to Step 4.

## Step 4 – Commodity/Service Code Selection

In step four, select the UNSPSC (United Nations Standard Products and Services Codes) commodity and service code(s) which best apply to your organization’s business. The UNSPSC selection will subscribe which solicitation notifications will be sent to the Main contact email. If you do not want to receive notification emails select, “Unknown”.

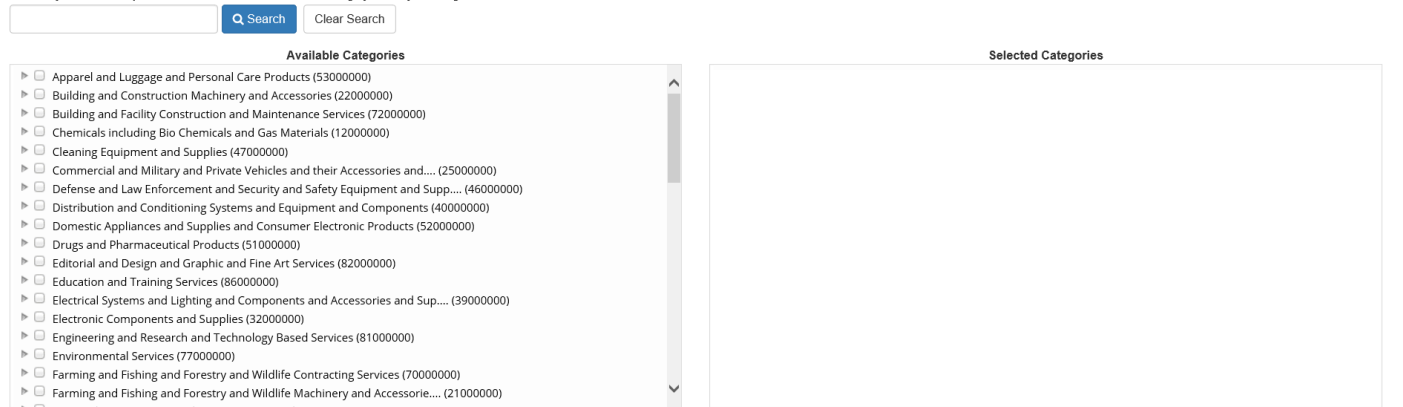


*If you need assistance at any time during the registration process, please contact Proactis Vendor Care support. Phone: 866-889-8533 Email: WebProcure-Support@proactis.com.*

### Commodity/Service Code Selection\*

Select the commodity and service UNSPSC codes below which best apply to your organization’s business. Selecting these codes will subscribe you to receive email notifications about solicitations posted on the CTSource website. Selecting higher level codes allow you to receive notifications of all sub-categories below. If you do not wish to receive solicitation notifications, please select the code “Unknown”.

Enter a keyword or search phrase and click Search. Check/Select the category to save your changes.



Please Select any commodity

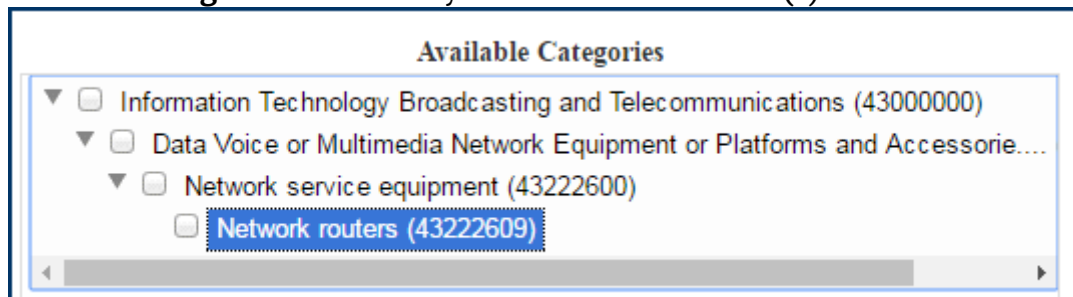
*If you need assistance at any time during the registration process, please contact Proactis Vendor Care support. Phone: 866-889-8533 Email: WebProcure-Support@proactis.com.*



To locate a commodity category or code, enter a full or partial code or a keyword in the **Search** field.

### Available Categories

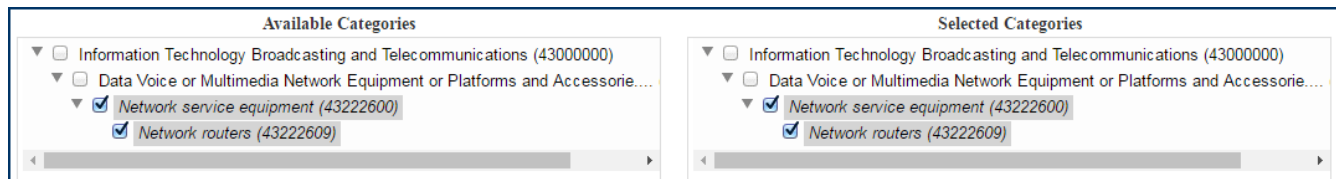
**Available Categories** that match your entered search term(s) are listed on the left panel of the page.



## Select Categories

Check the box of one or more categories that are applicable to your organization.

Once a top-level or sub-level category is selected, the system automatically displays them in the **Selected Categories** section to the right.



## Remove Selected Categories

To remove a category from the **Selected Categories** section, simply click the box to the left of the category name to clear the check mark. Repeat this process for each category to be removed.

Category selection is the final step in registration.

## Submit My Registration

When finished with all four steps of your **CTsource** registration, simply click the **Submit** button to finalize the registration process.

Upon successful and completed registration, a registration confirmation page will display. See sample image below:

### Sample Vendor - Registration Confirmation

Thank You **Jane**, you are DONE!

Your registration to become a certified bidder for the **State of Connecticut** is complete. You can login to the system by clicking on the button below and navigate through the business opportunities available in the system. If the **State of Connecticut** publishes any opportunities for the categories of **UNSPSC commodity** codes you have chosen to provide, you will receive an email alert in your email address, **jane.doe@ct.gov** A confirmation email of this registration will also be sent to you.

Please print or note the following:

Your username : **JaneDoe**

You will receive an email with confirmation of this registration. It will be sent to your email address, **jane.doe@ct.gov**

[Take me to WebProcure Now](#)

Disclaimer: It is the responsibility of the subscriber to keep vendor information accurate for notification purposes. The **State of Connecticut** is not responsible for failure to notify any applicant of solicitation opportunities if the contact information in WebProcure is not accurate.

For further assistance, please contact WebProcure Technical support using the information below. Support is available Monday through Friday 8:00am to 8:00pm (Eastern Standard Time).

Email : [WebProcure.Support@perfect.com](mailto:WebProcure.Support@perfect.com)  
Phone : 866.889.8533

An email confirmation will be sent to the email address of the main contact identified in step three of your registration.

This page acknowledges your registration as complete. You may log into the system by clicking the **Take me to WebProcure Now** link or by selecting the link that will be included in your confirmation email.

If the State of Connecticut publishes any opportunities for the categories of the UNSPSC commodity codes you have chosen to provide, you will receive an automated email alert to the main contact email address shown on this page. You may identify other individuals to be notified of opportunities within the Supplier Portal; for example, an additional contact email may be identified under Solicitation Contact or by establishing another user profile for someone in your organization.

**NOTE:** Please know that you are responsible for maintaining the accuracy of this account's profile information. After completing the registration, it is recommended that you login to **CTsource** periodically to verify information. This will ensure that you receive any applicable communications.

For further assistance with registration, please contact via e-mail [webprocure.support@perfect.com](mailto:webprocure.support@perfect.com) or by phone, 866-889-8533.

## Log into WebProcure

At the successful completion and confirmation of your registration, you may select the **Take Me to WebProcure** hyperlink or select the link that will be included in your confirmation email. Either path will take you to the login page displayed below:

# WebProcure

**Username / Email Address**

**Password**

**Log In** [Trouble Logging In?](#)

**Vendors**

Need an account? [Register Here](#)

Enter your chosen **Username**.

Enter the **Password** that you created during registration.

Click **Login**.

## WebProcure Usage Terms and Conditions

The **State of Connecticut** has partnered with Perfect Commerce, LLC to provide the WebProcure solution of **CTsource**. Upon your initial login, you will be presented with the WebProcure **Terms and Conditions**. Use the vertical scroll bar to view the terms and conditions in their entirety. Once reviewed, click **Accept** to continue into the application.

**PERFECT COMMERCE**

**DECLINE**      **ACCEPT**

WebProcure Usage Terms and Conditions  
Please read the terms and conditions before continuing.  
**THE FOLLOWING SHOULD BE READ CAREFULLY BECAUSE IT AFFECTS  
YOUR RIGHTS IN REGARDS TO THE USE OF THE SYSTEM.**

**ON-LINE SUPPLIER AGREEMENT**

This Agreement (the "Agreement") is between Perfect Commerce LLC. ("Perfect"), you, and, if you are registering on behalf of an entity, the entity. You and any entity you are registering on behalf of shall collectively be referred to as the "Supplier".

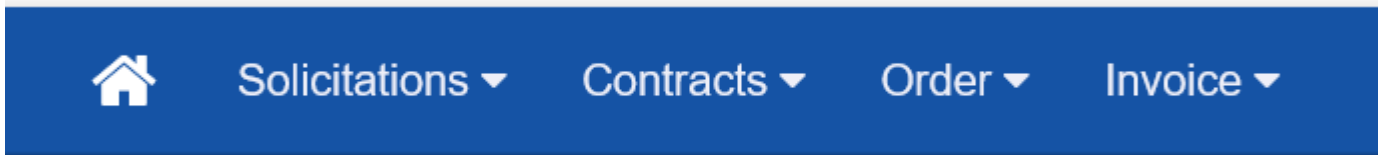
IF YOU ARE REGISTERING AS A BUSINESS ENTITY,  
YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND THE  
ENTITY TO THIS AGREEMENT.

**DECLINE**      **ACCEPT**

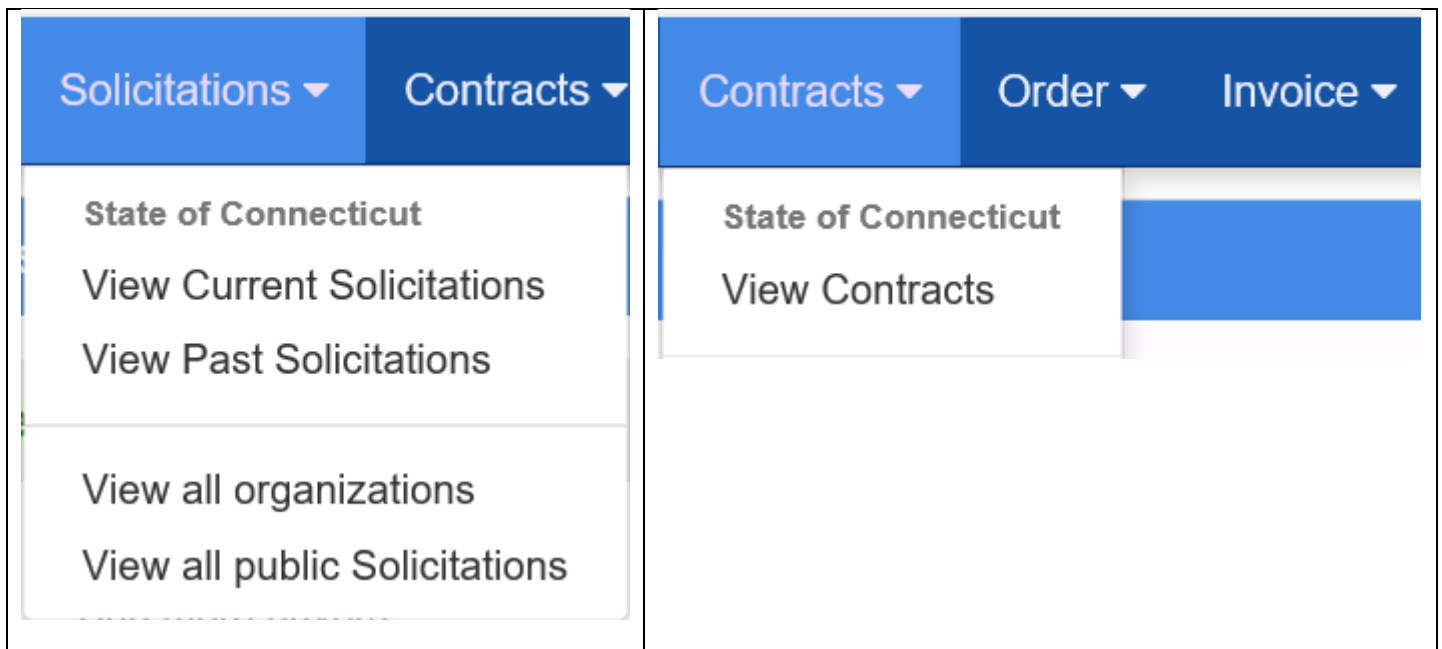
If you choose to **Decline** these usage terms and conditions, you will not be able to successfully login to the application or participate in State of Connecticut business opportunities.

## WebProcure Home Page

Once the terms are accepted, the home page displays a dashboard of information for the buyers your organization is affiliated with in the application (e.g. State of Connecticut, State of Rhode Island, City of Pittsburg, etc.). The following breaks down an explanation of the menu options and links within the dashboard:



- **Home Icon** once clicked will always bring you back to the WebProcure Home Page.
- **Solicitations** drop-down menu enables you to view current and past solicitations for the State of Connecticut or any other buying organization partnered with the WebProcure System.
- **Contracts** drop-down menu provides quick access to view contracts.
- The State of Connecticut does not utilize WebProcure for **Order** and **Invoice** tracking; drop-down menus are *Not Applicable* for the State of Connecticut.



The following section describes the links within the center of the dashboard:



Message Board

Reminders

- Please make sure your profile is up to date.
- Add more buyers
- Add more regions for wider geographical business offerings
- Please fill in any additional required information for your selected buyers.
- Please add @perfect.com and @proactis.com domains to the "Do-Not-Block" list on your email account.

Documents

Organization	Solicitations		Order	Contracts	Invoice
	Formal	Informal			
State of Connecticut	2	0			

Performance Assessment Data

Organization	Overall Performance Score
State of Connecticut	

- Message Board** section includes news about the CTsource WebProcure software.
- Reminders** section contains prompts advising suppliers to update their account profile with current information and other miscellaneous information.
- Documents** section identifies the number of **Formal** and **Informal Solicitations** available for review and response, as well as, the number of **Contracts** available for view. Formal Solicitations within CTsource support the sealed-bid process and are open to all suppliers within a category code. Informal Solicitations are for invitation only sourcing opportunities within a category.
- Performance Assessment Data** allows information will be provided in the future.
- User Menu** (click drop down arrow next to your user name in the top right corner of the Home Page) This menu provides access to **Usage Terms**, **My Account** (to manage your organization’s profile for the State of Connecticut) and **Opportunity Management** (where you can apply to do business with other buyers utilizing WebProcure).

Need Help? ▼

Jane Doe ▼

Usage Terms

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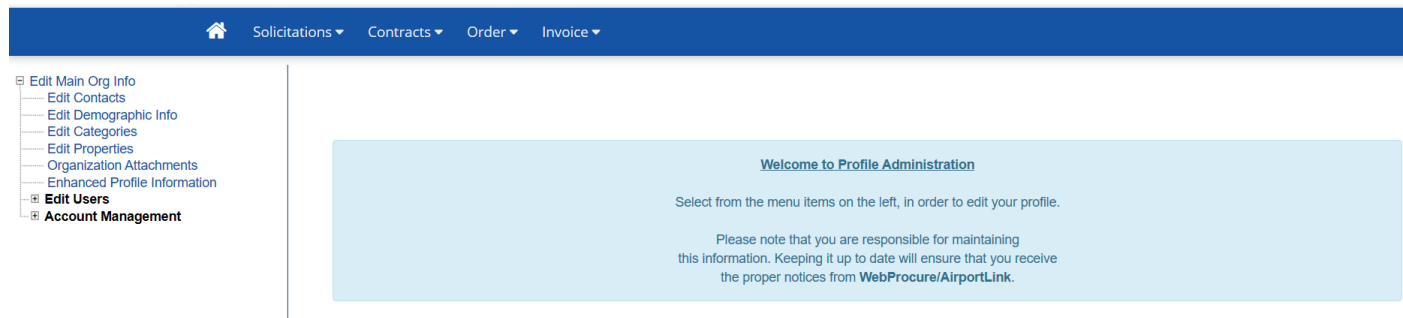
My Account

Opportunity Management

Logout

## My Account

**My Account** opens the administration functionality to manage your organization’s details including the information entered during the registration steps. This information may be edited and updated as needed.



The links listed under [Edit Main Org Info](#) may be selected to:

- [Edit Contacts](#) – add or change contact information for your organization.
- [Edit Demographic Info](#) – not applicable.
- [Edit Categories](#) – add or change UNSPSC commodity codes only.
- [Edit Properties](#) – not applicable.
- [Organization Attachments](#) – all documents can be seen and managed here.
- [Enhanced Profile Information](#) – not applicable.

**Edit Users** - this is where additional users for your company are added to the system, passwords are reset, and permissions are assigned.

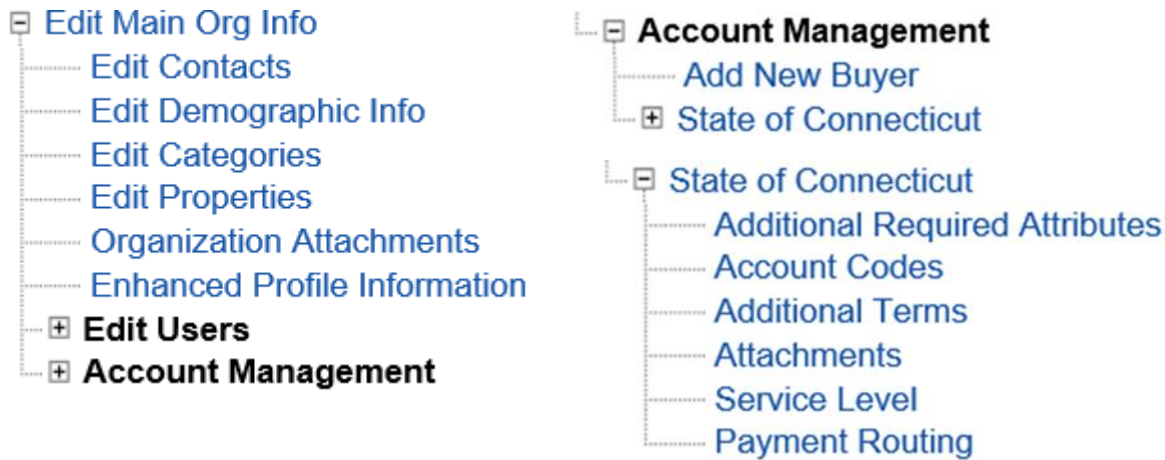
**Account Management** – this is where suppliers will add specific information for each Buyer(s) with whom they do business with in the WebProcure application. The State of Connecticut is one of the Buyers available for suppliers to potentially contract with in WebProcure.

The State of Connecticut requires suppliers to enter and maintain important organizational information in their supplier profile including current Certificates of Insurance, W-9 Form, Diversity Certifications and annual upload of several Statutory Affidavits/Certifications.

## Contract Award Supplier Requirements

Prior to contract award, a supplier will be required to update specific information under the User Menu, My Account, **Account Management** menu option. The supplier will expand this menu option, expand the [State of Connecticut](#) menu option and click on either the [Additional Required Attributes](#) or [Attachments](#) links to enter or maintain requirements.

Follow the navigation path **Account Management** → [State of Connecticut](#) → [Additional Required Attributes](#) menu option:



**NOTE:** The options [Account Codes](#), [Additional Terms](#), [Service Level](#) and [Payment Routing](#) are standard options made available. The State of Connecticut does not require or monitor information entered within these pages.

The solicitation will detail contract requirements the supplier is expected to maintain throughout the term of the contract; for example, insurance requirements. Suppliers will be directed to submit the following information within the [Additional Required Attributes](#) and [Attachments](#) links where applicable:

- General Proof of Insurance
- Connecticut Economic Impact Form
- Additional Company Information
- Small/Minority Business Enterprise Certification (SBE/SMBE)
- Disadvantaged Business Enterprise (DBE)
- Prequalification Documents for Construction Services
- Commission on Human Rights and Opportunities (CHRO)
- Current Certificate of Insurance Document(s)
- Statutory Affidavits/Certifications

The following section is a snapshot of the data necessary to complete within the [Additional Required Attributes](#) menu option upon contract award in WebProcure for the State of Connecticut:

## **Additional Required Attributes for "State of Connecticut"**

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**Please fill out all applicable areas below. These are custom fields specific to the State of Connecticut's supplier registration and approval processes.**

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### **Supplier Insurance Information**

**Suppliers are responsible for maintaining this profile with new and/or updated insurance information.**

#### **General Proof of Insurance**

- Insurance Declaration
- Certificate of Insurance (Acord Form)
- Endorsement of Policy

**Attachment path: Account Management>State of Connecticut>Attachments>Insurance documents folder.**

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### **Connecticut Economic Impact Form**

**Data collected here is intended to gather General Connecticut Economic Impact information from prospective suppliers. Response is for informational gathering purposes only and will not be used in the evaluation of a prospective supplier's qualifications.**

Number of Connecticut Locations:

Number of Connecticut Employees:

Annual Payroll Paid to Connecticut Resident Employees:

Annual Taxes, Licenses, Fees Paid to Connecticut (to include franchise, service taxes, etc.):

Annual Rent/Mortgage Paid within Connecticut or Value of Real Property:

Annual Utilities Paid within Connecticut (to include gas/oil, electricity, water and sewage):

Amount Paid to Major Partners or Suppliers in Connecticut:

What percentage of your workforce is made up of veterans?:

What outreach techniques are you using to attract and hire veterans?:

---

### Additional Company Information

Incorporating State (2-character State abbreviation only):

Web Address (enter your company's website):

Registered with the Secretary of the State:

<https://portal.ct.gov/SOTS/Commercial-Recording/Business-Services---Home-Page>

US DOT Number (if applicable):

CT Tax Registration Number:

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### Small/Minority Business Enterprise Certification

Please upload current State of Connecticut certification. Eligibility requirements can be found [here](#).

Small Business Enterprise (SBE) Election

SBE Active Date: Month:  Day:  Year:

SBE Expiration Date: Month:  Day:  Year:

Small/Minority Business Enterprise (SMBE) Election

SMBE Active Date: Month:  Day:  Year:

SMBE Expiration Date: Month:  Day:  Year:

Attachment path: Account Management>State of Connecticut>Attachments>Certification documents folder.

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### U.S. Small Business Administration (SBA) Certification

Please upload current U.S. Small Business Administration Certification. Eligibility requirements can be found [here](#).

U.S. Small Business Administration (SBA) Election

SBA Active Date: Month:  Day:  Year:

SBA Expiration Date: Month:  Day:  Year:

**Attachment path: Account Management>State of Connecticut>Attachments>Certification documents folder.**

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### Disadvantaged Business Enterprise (DBE)

**Please upload current Disadvantaged Business Enterprise (DBE) Certification. Eligibility requirements can be found [here](#).**

Disadvantaged Business Enterprise (DBE) Election

DBE Active Date: Month:  Day:  Year:

DBE Expiration Date: Month:  Day:  Year:

**Attachment path: Account Management>State of Connecticut>Attachments>Certification documents folder.**

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### Prequalification Document(s) for Construction Services

**The DAS Contractor Prequalification Program requires all contractors to prequalify before they can bid on a construction project estimated to cost more than \$500,000. Additional information regarding this program can be found [here](#).**

Prequalification Documents for Construction Services

Prequal Certification Active Date: Month:  Day:  Year:

Prequal Certification Expiration Date: Month:  Day:  Year:

**Attachment path: Account Management>State of Connecticut>Attachments>Certification documents folder.**

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### Employee Information for State of Connecticut, Commission on Human Rights and Opportunities (CHRO)

**Data collected here is for informational gathering purposes only and will not be used in the evaluation of a prospective supplier's qualifications. Additional information regarding this program can be found [here](#).**

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### Statutory Affidavits/Certifications

**The following documents are required to be complete and uploaded prior to submission of your solicitation response and/or contract award. These documents must be maintained and uploaded annually. Additional information can be found [here](#).**

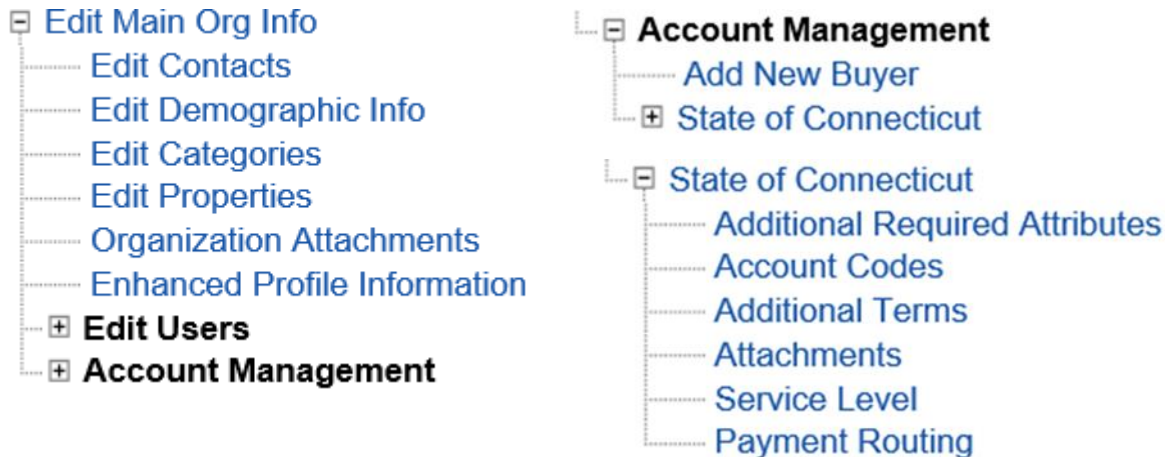
- Affirmation of Receipt of State Ethics Law Summary (OPM Ethics Form 6)
- Gift and Campaign Contribution Certification (OPM Ethics Form 1)
- Consulting Agreement Affidavit (OPM Ethics Form 5)
- NonDiscrimination Certification (B - Representation by Entity) - For contracts valued at less than \$50,000
- NonDiscrimination Certification (C - Affidavit by Entity) - For contracts valued at more than \$50,000 (Recommended)
- NonDiscrimination Certification (D - New Resolution by Entity)
- NonDiscrimination Certification (E - Prior Resolution by Entity)
- OPM Form 7 - Iran Certification

**Attachment path: Account Management>State of Connecticut>Attachments>Other documents folder.**

Don't forget to click **Save** after completing your entries.

## Attaching Documents

The following section details how to attach (upload) documents into WebProcure. Follow the navigation path **Account Management** → **State of Connecticut** → **Attachments** menu option:



Suppliers awarded a State contract will be required to upload and maintain the following documents in their appropriate Document Category folders:

- Current Certificate of Insurance Document(s) – Upload to the Insurance Documents folder
- Statutory Affidavits/Certifications – Upload to the Other Documents folder

Suppliers may be requested to upload information in the other available document categories as directed by the solicitation or contract documents.

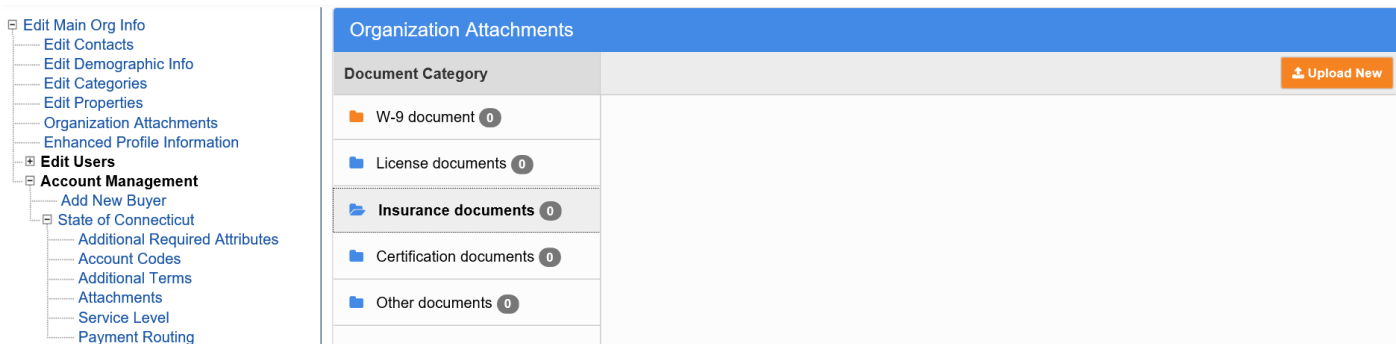
The same steps apply for all attachments requested by the State of Connecticut. It is important to upload your documents in the appropriate folders. Below is a detailed example of how to upload insurance documents.

### Supplier Insurance Information

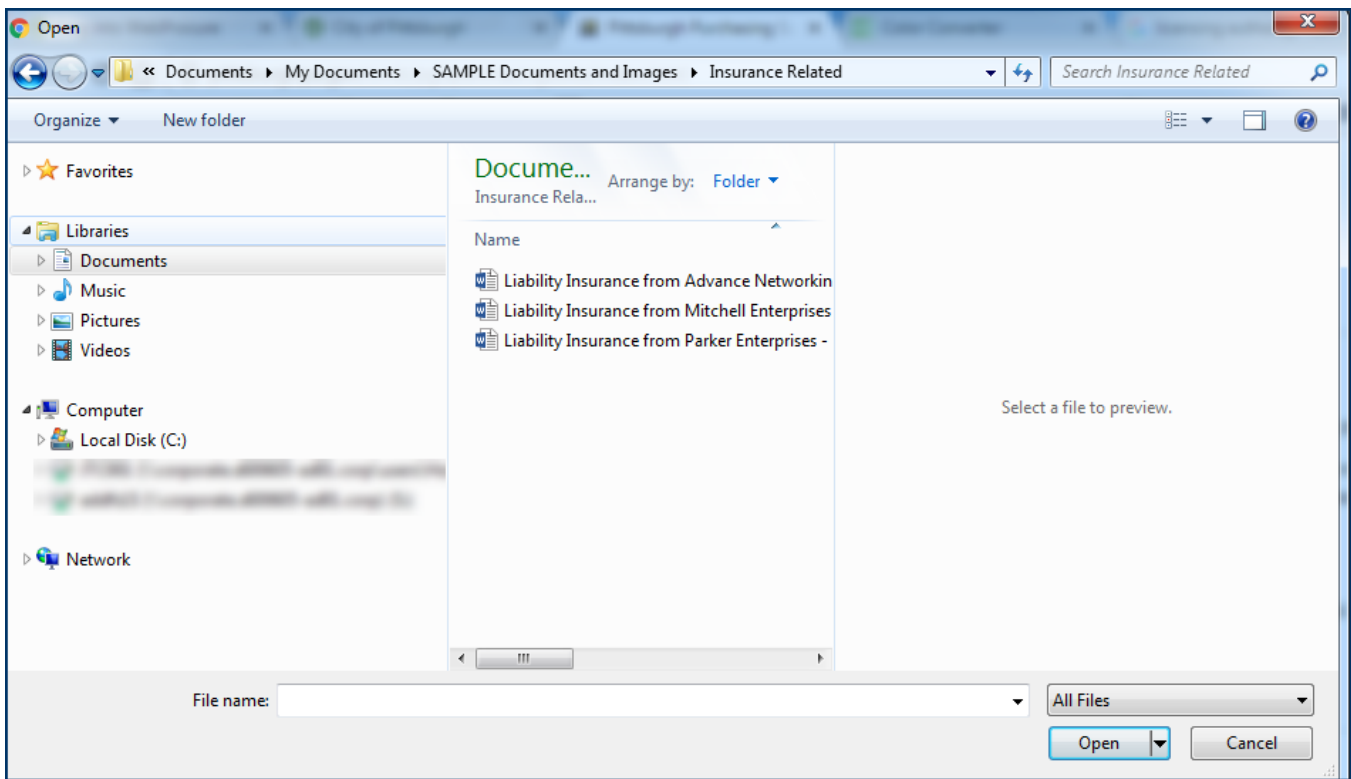
Suppliers are required to upload and maintain current insurance documents prior to an award and throughout the duration for any State Contract awarded. Insurance types and limits are identified in the specific contract document.



**To upload documents go to: Account Management → State of Connecticut → Attachments → click Insurance documents folder and click the Upload New button located in the top right corner.**



Navigate to the local or network location of your insurance document(s), select the file by either double clicking on it to automatically upload or click on it once and click **Open** to upload. The document will upload and the file will display inside the **Insurance documents** folder. Multiple insurance documents can be entered into this folder; repeat the above steps for each insurance document to be uploaded.

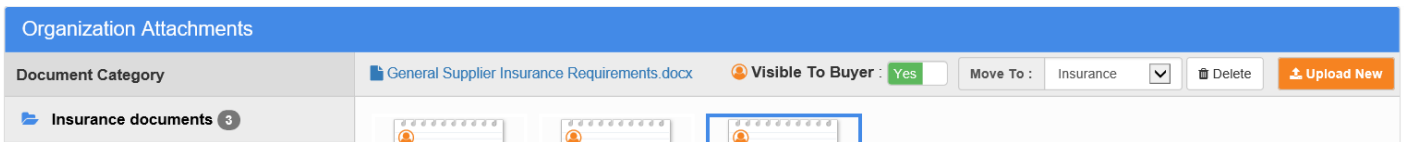


If a mistake is made, it can be rectified by following the steps below:

## Maintaining Attachments

When you click on an attachment action items appear:

- Visible to Buyer: You can determine whether or not the Buyer (State of Connecticut) can see the documents.
- Move To: If you upload a document to the wrong Document Category you can change it.
- Delete: Click the Delete button to remove a document.



## Add / Edit / Delete Users

The main contact for your organization has the ability to add additional users with their own Login credentials and permissions. The new user can be set up to receive solicitation notifications based upon the UNSPSC codes entered for the organization and other permissions related to responding to solicitations, etc. The main contact can also edit or delete a user when necessary.

To [Add New User](#) follow the navigation path below and enter the required fields:

- [-] Edit Main Org Info
  - [-] Edit Contacts
  - [-] Edit Demographic Info
  - [-] Edit Categories
  - [-] Edit Properties
  - [-] Organization Attachments
  - [-] Enhanced Profile Information
- [-] **Edit Users**
  - [-] Add New User
  - [-] Doe, Jane (JaneDoe)
- [-] **Account Management**

### New User under Sample Vendor

Password | Permissions

**User Information**

First Name  \*

Middle Initial

Last Name  \*

Country  \*

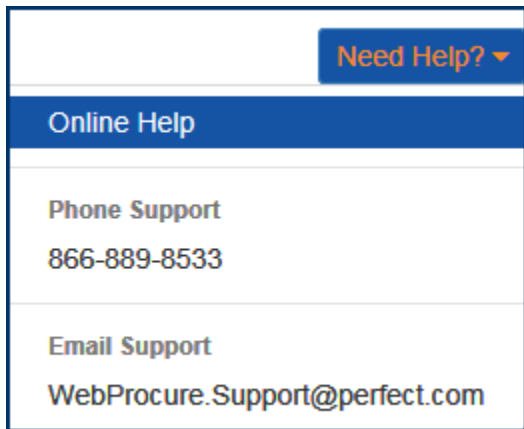
Address  \*

To edit or delete a user, select the user name under Edit Users. This is also where the main contact will maintain password information for users whether they are locked out and need a reset or require login suspension for the system.

Use the asterisk (\*) in any field to search for information in the system.

## Online Help

This topic and more is covered in online help inside of WebProcure. There are also video simulations available to guide you through responding to a solicitation and maintaining your organization's information.



**NOTE:** For questions relating specifically to **State of Connecticut** solicitations, please email the Contract Specialist listed on the solicitation directly.