State of Ohio

Supplier Portal
User Instructions for IT and Non-IT Contracts
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Introduction
The State of Ohio Supplier Portal is intended to provide all the functionality a State Contractor will need to report both State Agency and Local government generated revenue on a quarterly basis. Information Technology suppliers use this site to upload the most current contract price list and report revenue share. If you are a non-IT Supplier, do NOT upload your price list on this web portal. If you experience any issues with this online application, contact your contract analyst or the one of the bullets listed below.

- IT Contracts: Rose Perkins at 614-466-3605 or Rose.Perkins@das.ohio.gov
- Non-IT Contracts: Bid Desk at 614-466-5090 or das.statepurchasing@das.ohio.gov

1.0 Logging into Supplier Portal
1.1 Navigate to https://cm.ohio.gov. The login dialog is shown in figure 1. Your Supplier portal password is set up when a contract is awarded. Input your Username (email address) and Password. If you forgot your password or your login fails then proceed to Section 1.3 (Forgot Password)

The form validation requires that the password is filled in and correct for the user as shown in Figures 1 and 2. Once you have entered the correct credentials the browser will show the Supplier Portal page as shown in figure 3.

![State of Ohio Vendor Portal Login Dialog](image)

Figure 1- Supplier Portal Login Dialog
1.2 The screen shot below appears when the incorrect password is entered.

![Figure 2 - Login Wrong Password](image)

1.3 Forgot Password

In the event you forgot your password or cannot access the portal, use the *Forgot Password* function. Click the Forgot Password link as seen in Figure 2. The Portal will display the Reset Password screen seen in Figure 2.1. Enter your email address and click the Submit Button. An email will be sent to you. If your email address is not valid then contact your analyst for assistance.

![Figure 2.1 – Reset Password Part 1](image)

1.4 Reset Password

When you receive your email click the link. This will direct your browser to reset your password (See Figure 2.2). Input your email address and new password (twice to confirm). After you successfully reset your password, the portal will direct you to the login page. Please login with your new password.

![Figure 2.2 – Reset Password Part 2](image)
Once successfully logged into the portal, you will be directed to the screen (below) displaying your organization information. **Upload New Price List** is only for IT Suppliers and their relevant price list. If you are not an IT Supplier, please do NOT upload your price list.

![Supplier Portal Page]

*Figure 3 - Supplier Portal Page*

Clicking on a tab will expand or collapse them.
2.0 Page Features – Overview

2.1 On the left-hand side of the screen is the list of suppliers this person is a contact for.

Figure 4 - List of Suppliers this person is a contact for.

In the center is core company information.

Figure 5 - Core Company information
2.2 Click on the Contract tab at the bottom of the Supplier Portal landing page to view the contract information as shown in Figure 6 below.

![Figure 6 - Previously Reported Revenue & Contract information](image1)

2.3 Click on the Uploaded Price Lists tab at the bottom of the Supplier Portal landing page to view the previously uploaded price list files as shown in Figure 7 below.

![Figure 7 - Previously uploaded price list files](image2)
3.0 Reporting Revenue

3.1 Click on the “Report Revenue” button shown in Figure 8 to open the Report Revenue Dialog box.

![Figure 8 - Button to Show the Report Revenue Dialog](image)

![Figure 9 - Report Revenue Dialog](image)
3.2 Navigate to “Reporting Period” dropdown menu on the Report Revenue Dialog box, as shown in Figure 10 below. Click on the “Reporting Period” dropdown menu. Select the appropriate “Reporting Period” from the options available from the list.

![Figure 10 - Financial Year & Quarter Selection](image)

Once the Reporting period is selected, the Report Revenue Dialog box will look like the image below.

![Figure 3.2 - Reporting Period Selection](image)

3.3 Navigate to “Total Payments Received from State Agencies” textbox on the Report Revenue pop up page. Enter the appropriate amount in the “Total Payments Received from State Agencies” textbox. The Total Payments Received from State Agencies is entered. These amounts are whole amounts only. There are no decimals used for cents.

![Figure 3.3 - Total Payments Received](image)
3.4 Navigate to "Total Payments Received from Local Governments" textbox on the Report Revenue pop up page. Enter the appropriate amount in the "Total Payments Received from Local Governments" textbox. The Total Payments Received from Local Governments is entered.

![Image of Total Payments Received from Local Governments](image1.jpg)

3.5 Navigate to "Save" Button on the Report Revenue pop up page. Click on the "Save" Button.

![Image of Save Button](image2.jpg)

The information entered will be saved and displayed under the "Contract" tab.

![Image of Contract Tab](image3.jpg)

*Figure 11 - Expected outcome*
4.0 Quarterly Sales Report

4.1 Click on the “Report” icon to open the Quarterly Sales Report.

![Figure 12 - Price List Report Button]

4.2 Once the “Report” icon is selected, the screen below will appear. Print the report in order to add to remittance.

![Figure 13 - Remittance Report]
5.0 Downloading price list template for IT Contracts only

5.1 Click on the “Price List Template” button as seen in Figure 12 below. You will get a pop up asking “Do you want to open or save the template?” Click “Open” to view the price list and click “Save” to save the file to your computer. (Note: Only for IT-Price Lists Only)

![Figure 14 - Download Price List Template](image)

6.0 Uploading price lists for IT Contracts only


![Figure 15 - Price List Upload button](image)
6.2 Navigate to “Contract ID” dropdown menu on the Upload New Price List pop up page. Click on the “Contract ID” dropdown menu. Select the appropriate “Contract ID” from the options available from the list. The Contract ID is selected.

![Figure 16 - Price List Upload dialog](image)

6.3 Navigate to “Valid From” Date Picker on the Upload New Price List pop up page. Click on the “Valid From” Date Picker. Select the appropriate “Date” from the Date Picker. The Valid from Date is selected.

![Figure 17 - Price List Date picker](image)
6.4 Navigate to “Select a file” Button on the Upload New Price List pop up page. Click on the “Select a File” Button.

6.5 The Windows browser will be displayed. Navigate to select the appropriate price list for upload.
6.6 The Price List will be saved and displayed under the “Uploaded Price Lists” tab with the status of “Imported”. Once the pricelist is uploaded successfully, it will show an Upload status for the Supplier. If the pricelist has errors detected by the system, the status will show Failed. The Supplier will receive an email indicating where there are errors in the pricelist. If the Supplier cannot fix the errors in their pricelist, they should contact their contract analyst or Jim Sutton via email jim.sutton@das.ohio.gov. The email to the analyst should include the error message from the system email.
7.0 Uploading your IT-Price List Certification Letter

7.1 To upload a new certification which guarantees your current IT-price list, scroll down and click on the “Upload Certification” button shown in Figure 20.

![Figure 20 - Certification File upload Button](image-url)