

Vendor Portal – Registration tips for Design Professional and Consultants

Please download the Vendor Portal User Guide: [Vendor Portal User Guide \(PDF\)](#)

REGISTERING- If you already have a login username and password, you need to create a vendor profile. If not, please use the user guide in conjunction with these tips.

- If you choose the contractor or both types of options, you will need to click YES to be included on the rotating bid list.
- If you only choose Design/Consultant, click **NO** for the rotating bid list.

RFQ NOTIFICATIONS- For projects advertised as Requests for Qualifications over \$100,000 or more, please check that notification option in your Vendor profile to receive notice when advertisements post.

DIR- The system was created with BOTH contractors and Design professionals/ Consultants in mind. With that being addressed, the DIR and CA License sections are for contractors to fill in. Design Professionals/Consultants can write in NA. For DIR Start/Expiry Date, they can input today's date.

CA LICENSE- CA # field is for firms with a "Construction or Architectural" license. If you don't have one, they can enter NA. There is an "Other License" field in the Profile tab where you can specify a license that is not listed.

SPECIALTIES- If you cannot locate your specialty, in the Profile tab, there is an "Other License" field where you can specify a license that is not listed.

WORK EXPERIENCE- If you are a **new company**, there is no need to add anything to your work experience. Instead, when you add your company profiles, create a comprehensive profile that highlights your specialties and introduces your team.

Although you can and should submit project information in your company profile, you can utilize the work experience section to provide in-depth information on specific projects that are important in your company's experience

MULTIPLE USERS – You can have multiple registered users under a single company profile. You can add multiple users under the "Users" tab (Steps 12-15 of the attached user guide).

PRIMARY CONTACT – Please note that the Primary Contact listed in your profile will be the person receiving notifications and updates regarding the UCLA Portal. We recommend that the Primary contact be the person administering the portal. We also recommend that you check

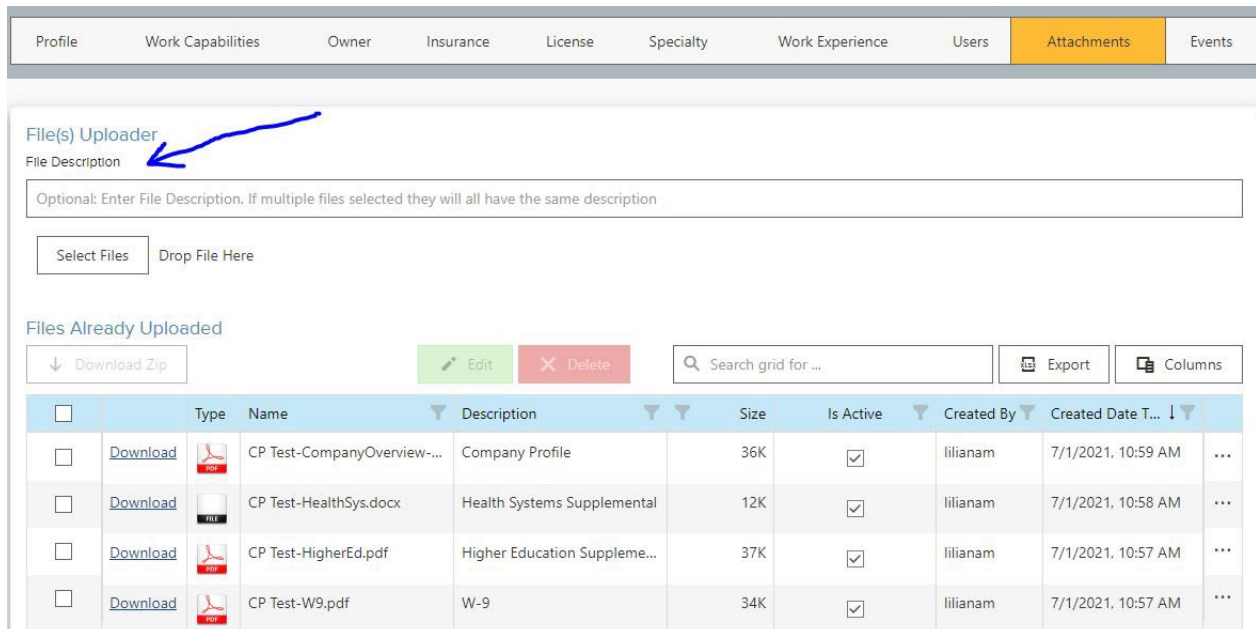
your junk email for updates before informing us that you have not received notices from the UCLA Vendor portal.

COMPANY PROFILE-

You are REQUIRED to attach a short company profile (listing supplemental services, specialties, highlights of projects, staff, and accomplishments) in the attachment portion of the profile. The brief profile should be **no more than five pages/10MB**. I suggest you add the title "Company Profile" in the DESCRIPTION section of the Company profile attachment. Every company adds attachments with various titles in the names section. Listing "Company Profile" in the description will allow project managers to easily identify the profile attachment and check your information.

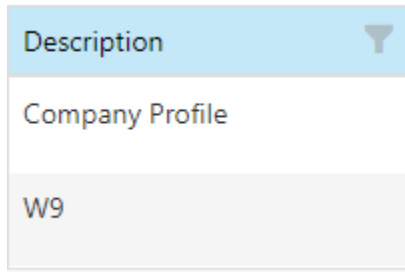
You will not be able to finalize your registration without this attachment

added various names such as "Quals, Brochure, overview, SOQ, and Qualifications." Some firms have added many profiles according to type (i.e., Higher Education, Health, laboratory, etc.)



The screenshot displays the 'Attachments' tab in the Vendor Portal. At the top, a navigation bar includes tabs for Profile, Work Capabilities, Owner, Insurance, License, Specialty, Work Experience, Users, Attachments (highlighted), and Events. Below this is the 'File(s) Uploader' section, which includes a 'File Description' field with a blue arrow pointing to it and a note: 'Optional: Enter File Description. If multiple files selected they will all have the same description'. There are 'Select Files' and 'Drop File Here' buttons. Below the uploader is a 'Files Already Uploaded' section with a 'Download Zip' button, 'Edit' and 'Delete' buttons, a search bar, and 'Export' and 'Columns' buttons. A table lists the uploaded files with columns for checkboxes, Type, Name, Description, Size, Is Active, Created By, and Created Date.

<input type="checkbox"/>	Type	Name	Description	Size	Is Active	Created By	Created Date T...	
<input type="checkbox"/>	Download	CP Test-CompanyOverview-...	Company Profile	36K	<input checked="" type="checkbox"/>	lilianam	7/1/2021, 10:59 AM	...
<input type="checkbox"/>	Download	CP Test-HealthSys.docx	Health Systems Supplemental	12K	<input checked="" type="checkbox"/>	lilianam	7/1/2021, 10:58 AM	...
<input type="checkbox"/>	Download	CP Test-HigherEd.pdf	Higher Education Suppleme...	37K	<input checked="" type="checkbox"/>	lilianam	7/1/2021, 10:57 AM	...
<input type="checkbox"/>	Download	CP Test-W9.pdf	W-9	34K	<input checked="" type="checkbox"/>	lilianam	7/1/2021, 10:57 AM	...



Please note that if you have already uploaded documents without a description or would like to update the description, you will need to delete that specific upload and re-upload the document to open the description window, allowing you to label the description of the document correctly.

PRIMARY CONTACT – The primary Contact listed in your profile will be the person receiving notifications and updates regarding the UCLA Portal. We recommend that the Primary contact be the person administering the portal. We also recommend that you check your junk email for updates before informing us that you have not received notices from the UCLA Vendor portal.

Lastly, you are all able to make updates to your profiles at any given point in time to provide us with your most accurate information. Save your username and password.

SUBMIT- Once you complete all segments, you need to click on Submit. Otherwise, your registration will remain in DRAFT mode, and we will not be able to confirm your registration. Once your registration is reviewed and approved, it will prompt our Accounting department to send you then an invitation to register with purchasing. This invitation may take several weeks to receive.

DISPLAY MISSING INFORMATION- To display missing information, click the "Show Missing Info" button on the Profile tab. Once all required information is entered, click the "Submit" button. Otherwise, your company profile status will remain in **DRAFT** mode, and we will not be able to confirm your company's vendor profile.

Questions regarding design professional or consultant registration, please email

Submittaladministration@capnet.ucla.edu