

# Supplier Guide: Registration and Profile Management

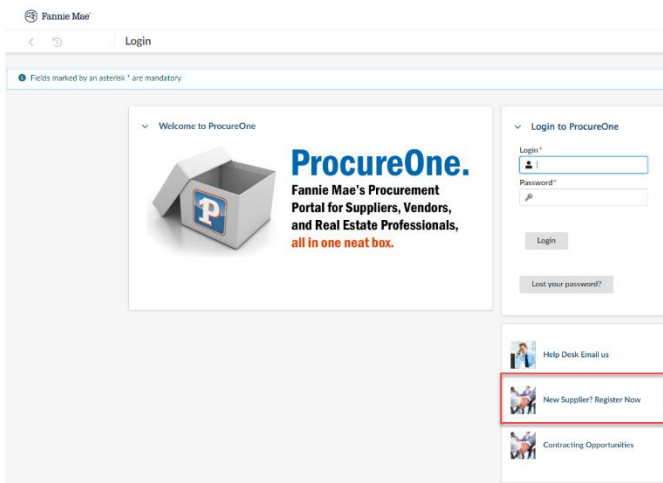
This Systems guide is intended to help new and existing suppliers register and manage their company profile in ProcureOne.

Recommended browsers that are compatible with ProcureOne are as follows:

- Microsoft Edge, Google Chrome, & Mozilla Firefox

## How to Register as a Supplier in ProcureOne:

1. Navigate your browser to <http://procureone.fanniemae.com> and once on the site click **New Supplier? Register Now**.



2. Complete all required fields. When completed click **Register** at the top of the page.

Required fields are marked with an asterisk \*

**Note: Google Maps will verify the address that is used during the registration process.** You will also see a confirmation on the screen to let you know that the information has been saved.

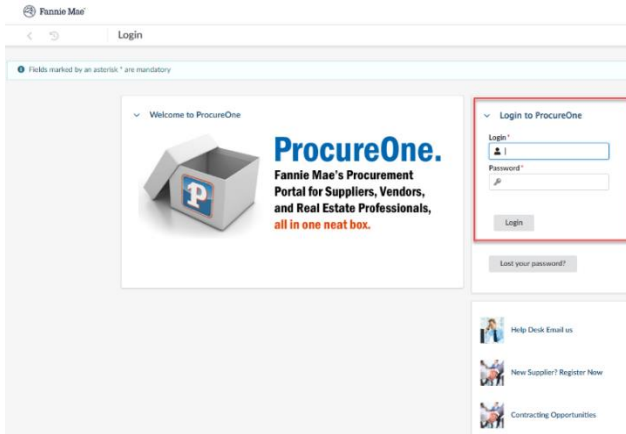


## Email Confirmation and Instructions:

- You will receive an email from [ProcureOne@fanniemae.com](mailto:ProcureOne@fanniemae.com). Follow the instructions in the email to complete your login and registration set up process. Do not respond to the email as the email address does not receive replies.

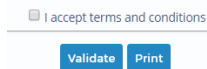
## Log in to ProcureOne:

- Navigate your browser to <http://procureone.fanniemae.com>, once on the site enter your email address and password that you entered during the registration. The ProcureOne login page can also be reached by going to Fanniemae.com and selecting *Suppliers* from the bottom of the page.



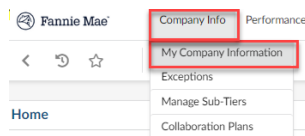
## Accepting Terms and Conditions:

- Review the terms and conditions and if applicable check the box next to **I accept terms and conditions** and click **Validate**.



## Updating your supplier information:

- Once you are logged into ProcureOne, update your profile by clicking on **Company Info** and then **My Company Information**.



- Verify and or update your company information within the **Company Information** tab. Make sure you **Save** any updates made to your profile.

## Company Information tab

### Corporate Settings:

- Select the Primary Category (limit your selection to no more than 10 categories)



## Basic Company Info:

### Legal Information:

9. Enter the Federal Tax ID (TIN) (Follow this format: XXXXXXXXXX where X is a number. Do not include any hyphens or dashes)
10. Supplier legal Form
11. DUN's
12. **Year** of incorporation (This is not how many years)
13. Government Supplier Number

### Supplier Supplemental Document:

14. Open and review the document

### Additional Information:

15. Answer the questions under the **Additional Information** section, making sure to address all fields.

- a. How did you hear about us?
- b. Opt-In: Thank you for your registration. From time to time, contracted suppliers may request contact information for suppliers that have registered in our system. If you do not wish to be contacted by third parties who may be interested in obtaining your services, please choose **No** here.
- c. Question 1: Is your company aware of a pre-existing relationship (e.g., spouse, family member, extended family member, partner, friend, business colleague, etc.) that exists between your employee or board member and a Fannie Mae employee or board member? Comment: This space is provided for you to comment on your answer to this question.
- d. Question 2: Is your company aware of a pre-existing professional relationship that exists between your employee or board member and a Fannie Mae employee or board member that arose out of a prior professional engagement?

▼ Additional Information

How did you hear about us?

Opt-In ⓘ  
Yes

Comment

Hover Over i To Answer Question 1 ⓘ

Comment

Hover Over i To Answer Question 2 ⓘ

Comment

### Main Supplier Address:

16. Review and or update the information as necessary

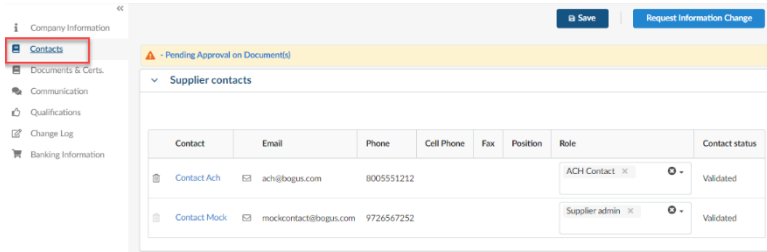
## Contacts tab

### Supplier contacts:

17. Add all the suppliers point of contacts within this page, you will need to add the following fields:

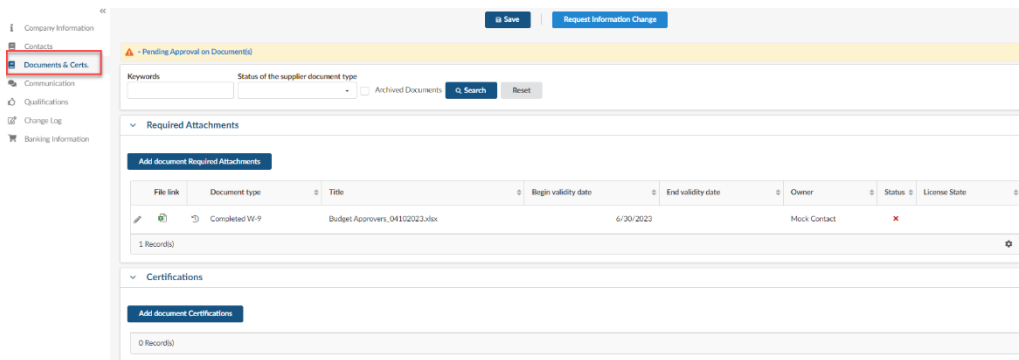


- a. Contact name
- b. Email
- c. Phone
- d. Cell phone
- e. Fax
- f. Position (title)
- g. Role (assign a role)



## Documents & Certs.:

- 18. On the **Documents & Certs.** tab upload any required attachments, certifications, diversity credentials or other attachments by clicking on the button for each attachment type.
- 19. A list of required documents by supplier type can be found on [www.fanniemae.com/suppliers](http://www.fanniemae.com/suppliers) and is also listed below within this document.



- 20. When uploading attachments, be sure to select the proper **Document type** and **Document validity** date range. This will enable the system to send you reminders to update before the documents expire.
- 21. When uploading required documents, indicate the document type: (Only the W9 is needed at registration)
  - a. Completed W-9

## Diverse Supplier:

### Diverse Credentials

- 22. If you are a Diverse Supplier, please attach your Diversity Certificate(s) in the **Diversity Credentials** section. This will flag your diversity type in the system.
- 23. To self-certify with Fannie Mae, please go to [www.fanniemae.com/suppliers](http://www.fanniemae.com/suppliers) and find the self-certification document in the diversity section. Complete the required fields and upload the document by clicking **Add document Diversity Credentials**.
- 24. Scroll down to the Diversity Credentials section and click on **Add document Diversity Credentials**.



▼ Diversity Credentials

Fannie Mae recognizes the following diversity business ownership categories:

- Minority-owned
- Women-owned
- Disabled-owned
- LGBTQ-owned
- Veteran-owned
- SBA 8(a)-certified
- HUBZone-certified
- Small business

You must provide valid documentation as evidence of your diversity status. You can attach all valid certifications to your supplier profile, including the Fannie Mae Self-Certification that can be accessed via this link document.

Refer to our [website](#) for eligibility criteria.

To attach your supporting documentation use the "Add document diversity credentials" below.

**Add document Diversity Credentials**

25. A new page will display called **Edit document: Diversity Credentials**. This is where you will be uploading your initial or updated Diversity Certificate(s). **NOTE:** You may have required fields that you have to populate before being able to add any documents. If so, accurately populate these fields and click **Save**. Then go back to Legal Documents -> Diversity Credentials and click on **Add Diversity Credentials**.

Edit document : Diversity Credentials

[Save](#) [Save & close](#) [Close](#) [Archive](#)

Document

▼ Description

Document types\* Compliance  
 Drafted

Document Name Validity begin date of the supplier document\*

Document\* Validity end date of the supplier document  
 Click or Drag to add a file

Link to external document

Document's owner  
 CONTACT Mock Validity

▼ Comments

Documents Comment  
 Add a comment here

▼ Follow up

Alert date of the supplier document



It is important to select the correct **Document type** and **Document validity** date range when uploading attachments as this will flag your diversity type in the system.

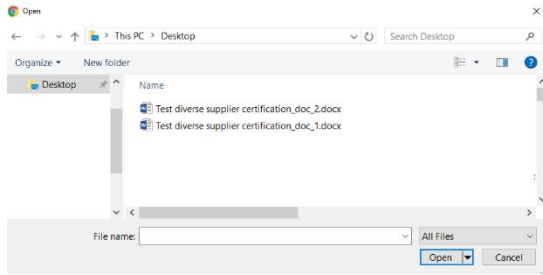


If more than one diverse ownership classification applies to your company, you must repeat the steps to upload your documentation as many times as needed. For example, if you are women-owned and a small business, you must add two diversity credential documents to your ProcureOne for women-owned and one for small business.

26. Enter the certificate name in the **Document name** field. If completing a Fannie Mae Self-Certification form, name the form "**Fannie Mae Self-Cert**". For other certification documents, follow these naming convention(s):

- "WBENC Cert" (Women-owned certified by WBENC)
- "NMSDC Cert" (Minority-owned certified by NMSDC)
- "Disability:IN Cert" (Disable-owned certified by Disability: IN)
- "NGLCC Cert" (LGBT-owned certified by NGLCC)
- "SBA Cert" (Small Business Administration)
- "Other 3<sup>rd</sup> Party Cert" (Any other third-party certification)

27. Upload a copy of the certification on the **Document** field. You can *click and drag* the document, or you can click in the field and a new screen will display. Select your document and click **Open**. Your document will now display under the **Document** field.



28. Enter the **Document validity from the and to the** dates field:

- a. For Fannie Mae Self Certification documents, the **document validity from the** date should be the signature date and **the to** date should be 2 years later, as self-certifications are valid for 2 years.
- b. For other certification documents, use the expiration date as found on the certificate.

29. Select from the drop down the **Document Types** – select the correct classification to correspond with the diversity credentials. For example, if you have a self-certification form that says you are women owned, select the document type as “*Diversity Credentials/HERA-Women*”.

Different Document Type: (Select the proper type)

- a. Diversity Credentials/ African American
- c. Diversity Credentials/ Asian Pacific American
- d. Diversity Credentials/ Disabled
- e. Diversity Credentials/ GBLT
- f. Diversity Credentials/ Hispanic American
- g. Diversity Credentials/ Historically Black or Minority University or Institution
- h. Diversity Credentials/ HUBzone
- i. Diversity Credentials/ Native American
- j. Diversity Credentials/ Small Business
- k. Diversity Credentials/ Subcontinent Asian American
- l. Diversity Credentials/ Veteran
- m. Diversity Credentials/ Women

30. Once this is all completed, click **Save & close**.

Make sure to repeat these steps for each diverse ownership classification that applies to your company. See **Important Notes** on step 25.

## Banking Information:

31. Click the **Banking Info** tab. Go to the Supplier email address for ACH payment confirmation field and enter an email address to receive your payment information.



32. Click on the **Add banking info.** button and complete all required fields (those with a red asterisk), click **Save and close.**

**Note:**

Make sure to enter a valid ABA/ routing number. If you do not, an error message will appear, and you will be unable to save the bank information.