

Department	
Responsibility/Role	
File Name	Adding W9 and ACH Form_SPD
Revision	
Document Generation Date	4/30/2012 3:51:00 PM
Date Modified	5/21/2012 7:06:00 AM
Last Changed by	
Status	

Adding W9 and ACH Form
Trigger:

Required Field(s)	Comments

Output - Result(s)	Comments

Additional Information

Procedure

Step	Action
1.	<p>When registering your company as a vendor, you will need to provide Metro with a current W9 and a completed ACH form.</p> <p>Note: You will need to save both forms on your desktop or in a file in order to attach them</p>

Business Classifications

Classification	Applicable	Ownership Type	Certificate Number	Certifying Agency	Expiration Date
Blind	<input type="checkbox"/>				
Federal DBE	<input type="checkbox"/>				
Minority/Woman Owned	<input type="checkbox"/>				
Service-disabled Veteran Owned	<input type="checkbox"/>				
Small Business	<input type="checkbox"/>				

TIP Date format: example: 21-Mar-2012

Products and Services

At least one entry is required.

Code	Products and Services	Delete
No results found.		

Attribute Pages

Profile Attributes

Supplier Profile Attributes

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
ACH Form	File	Attached you will find the completed ACH form	Miscellaneous	GUEST	21-Mar-2012	One-Time	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
W9 Form	File	Attached you will find the completed W9 form	Miscellaneous	GUEST	21-Mar-2012	One-Time	<input type="button" value="Update"/>	<input type="button" value="Delete"/>

Close Preferences

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Step	Action
2.	<p>Click Add Attachment</p> <p><input type="button" value="Add Attachment..."/></p>
3.	<p>Click Title</p> <p><input type="text"/></p>
4.	<p>You will need to Title your attachment</p> <p>Example: Enter "W9 Form"</p>
5.	<p>Click in the Attachment Description field.</p>

Step	Action
6.	Enter a description of your attachment. Example: Enter " Attached you will find the completed W9 form "
7.	Click Browse to find your saved document 
8.	Locate your document
9.	Click Open 
10.	To add additional attachments Click in the Add Another field 
11.	Title your attachment <input data-bbox="391 873 857 919" type="text"/>
12.	Example: Enter " ACH Form "
13.	Click in the Attachment Description field.
14.	Describe your attachment Example: Enter " Attached you will find the completed ACH form "
15.	To search for your saved document, click Browse 
16.	Locate and highlight your document
17.	Click Open 
18.	Click Apply 
19.	End of Procedure.