How to Register & Complete your Supplier Profile

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Step 1: Create a Supplier Account

**Step 1**
- **Click on the Access the Account Creation Form link within the email you received from AHA.Supplier.Portal@heart.org inviting you register in the Supplier Portal**

The American Heart Association requests that you register in our Supplier Portal.

You must register in order to do business with the AHA, receive payment, and bid on new business opportunities. The registration process consists of 4 simple steps:

1. Create an Account
2. Activate your Account
3. Complete your Supplier Profile (Note: Required to Receive Payment)
4. Save your completed Supplier Profile

Please immediately complete all registration steps.

**INSTRUCTIONS:**

**STEP 1** [Access the Account Creation Form](#)  Complete & Submit the following details:

**Step 2**
- A web page should open with an on-screen message, similar to the one below, giving you two options to register into the Supplier Portal:
  - **Register Now:** Click on this button if this is the first time you or your organization is registering on the SMART by GEP platform
  - **I have a SMART by GEP Account:** Click on this button if you or your organization is already registered on the SMART by GEP platform for another customer and you want to use your existing account credentials

**Step 3**
- A registration form will display with 4 sections to complete
- The **1st section** is **Account Credentials** where you will need to complete the following:
  - **Username:** Enter a Username you would like to use as your Login Credential
  - **Password:** Enter a Password for you would like to use for your credential
  - **Confirm Password:** Re-enter the Password entered above
Step 4

- The 2nd section is **Company Information** where you will need to complete the following:
  - **Legal Company Name**: Enter the Legal Name of your organization
  - **Invoice Payment Name**: Enter the name of your organization that is displayed/printed on your organization’s Invoices. (e.g.: The name your organization receives payment under)
  - **Headquarter**: Select the Country where your organization headquarters is located
  - **Address Line 1**: Enter the Physical Address where your organization is located
  - **City**: Enter the City where your organization is located
  - **State/Province**: Select the State/Province where your organization is located
  - **Zip/Postal Code**: Enter the Zip Code where your organization is located
  - **Company Identification**: Select the appropriate type of US Tax ID (EIN or SSN) or Foreign Registration ID your organization is registered under & enter the associated ID number
5. The **3rd section** is **Primary Contact Information** where you will complete the following:
   - **Primary Business Phone Number**: The phone number you primarily use, enter numbers only without any special characters (ie: dashes, parenthesis, spaces)
   - **Time Zone**: Select the time zone you are located in

6. The **final section** you will need to **agree** to GEP’s Terms & Conditions and Privacy Policy
   - **Click** on the checkbox to left of the statement
   - **Click** on the **Submit** button when you are ready to submit the form

7. An on-screen message will display instructing you to check your email for a message to activate your account.
# Step 2: Activate your Account

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| 1    | - Go into your email and find a new message from AHA.Supplier.Portal@heart.org with instructions to activate your account for the Supplier Portal.  
  - **Click** on the **Activate Your Account** link within the email.  
    
    Dear Gary Jones,  
    
    Thank you for completing your registration for the American Heart Association's Supplier Portal. Before you can access AHA’s Supplier Portal, you need to activate your account by clicking on the link below.  
    
    **Click to Activate Your Account**  
    
    Please note, you must complete this step in order to access our Supplier Portal. This step only needs to be performed once.  
    |
| 2    | - An on-screen message will display confirming your account activation and instructing you log into the Supplier Portal to complete your Supplier Profile  
  - **Click** on the **Click Here** link to log into the Supplier Portal  
    
    **Action Required!**  
    
    You have successfully activated your account.  
    
    To finish the registration process, you must fill in ALL mandatory information on your supplier profile.  
    
    **Click Here** to login to the GEP SMART system and complete your supplier profile.  
    
    **Please Note:** The registration process will NOT be complete until ALL mandatory information is completed on your supplier profile. If you forgot your password, click the ‘forgot password’ link on the login page to generate a new password.  
    |

- **Note:** You can access the supplier portal at any time by going to [https://smart.gep.com](https://smart.gep.com).
### Step 3: Complete your Supplier Profile

#### Login and Access your Supplier Profile

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| 1    | • You will be taken to a login screen where you will enter your **Username** and **Password**.  
• Press the **LOGIN** button |
| 2    | • Once logged in, **click** on the **Supplier Profile** icon on the left navigation bar |
| 3    | • You will be taken to your company’s supplier profile |
Attach your W-9/W-8 Tax Form
AHA requires you attach a signed (physical or digital) copy of your W-9/W-8 form.

<table>
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<tr>
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| 1    | • Scroll down to the CERTIFICATES section  
• Click on the (+) Add New Certificate button at the right side of the section |
| 2    | • A pop-up window will appear  
• Click on the W-9/W-8 Form option  
• Click on the DONE button in the bottom right corner of the pop-up window |
| 3    | • Select/Enter the following information:  
- Certificate Type: Select the type of W-9/W-8 form you plan to upload |
| 4    | • Click on the ATTACHMENTS tab at the top of pop-up window  
• Click on the Add New Attachments tile in the middle of the section |
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| 5    | - Click on the **UPLOAD DOCUMENTS** link to find the W-9/W-8 Form you would like to upload  
- Once the upload is complete, the document will appear towards the bottom of the window  
- Click on the **ADD** button at the bottom right of the window |

### ADD DOCUMENTS

Drag and drop file here or click to upload...

Supported file formats:

Limited to file(s) of 10MB each.
Maximum 1 files can be uploaded at a time.

- W9 Form.pdf

### NEW CERTIFICATE

<table>
<thead>
<tr>
<th>DETAILS</th>
<th>ATTACHMENTS</th>
<th>NOTIFICATIONS</th>
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</thead>
<tbody>
<tr>
<td>Effective from</td>
<td>Expires on</td>
<td>Files</td>
</tr>
<tr>
<td>08/18/2020</td>
<td>08/18/2021</td>
<td>W9 For...</td>
</tr>
</tbody>
</table>

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<tr>
<th>CANCEL</th>
<th>ADD</th>
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<table>
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<tr>
<th>CANCEL</th>
<th>SAVE</th>
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- Click on the **SAVE** button at the bottom right of the window
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| 1    | • Scroll to the **DIVERSITY STATUS** section  
• **Click** on the (+) **Add New Diversity Status** button at the right side of the section |
|      | ![Add New Diversity Status](image) |
| 2    | • A pop-up window will appear  
• **Scroll** through the list and **Click** on the classification you are certified under  
• **Click** on the **DONE** button in the bottom right corner of the pop-up window |
|      | ![Choose Diversity](image) |
| 3    | • The selected status should appear in the **DIVERSITY STATUS** section.  
• If you selected a status other than “Not a Diverse Business”, **Click** the tile to add your certificate. |
Add your Payment Information (Payment Address & Preferred Payment Method)

You must add a 2nd location to your profile containing for your payment information including:

- Payment Address
- Preferred Payment Method (Check, ACH or Wire)
- Bank Account Information if you select ACH or Wire Transfer as your preferred payment method

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| 1    | Scroll down to the ADDRESS & PAYMENT INFO section  
      | Click on the (+) Add New Location button at the right side of the section |
| 2    | A screen will open where you will enter/select the following information:  
      | Location Name: Enter “Payment Information”  
      | Address Line 1: Enter the Street Address that matches the address on your invoice.  
      | Country: Select the Country where this address is located  
      | State: Select the State/Province where this address is located  
      | City: Enter the City where this address is located  
      | Zip Code: Enter the Zip Code where this address is located  
      | Choose Location Type: Click on “Show Lookup” then select “Payment/Billing Location”  
      | Press the SAVE button at the bottom right of the page. (Note: Do Not press SAVE & CLOSE) |
| 3    | Scroll down to the PAYMENT METHOD section  
      | Click on the (+) Banking Info button at the right side of the section |
| 4    | A pop-up window will appear  
      | Click on the Payment Method field to select your preferred method to receive payment  
      | - EFT/ACH: Electronic payment method directly to a US bank account ONLY  
      | - Wire Transfer: Electronic payment method to non-US bank account ONLY  
      | - Check: AHA will send a physical Check to the Payment Address you previously entered  
      | Payment Method (Maintain One Form of Payment) |

AHA Supplier Portal Page | 10  
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### Description

#### Step 5
- Depending on the Payment Method selected, additional information may be required
- **Check**: No additional information needed
  
  ![Payment Method Dropdown](image)

- **EFT/ACH**: Enter/Select the following **bank account** information:
  - **Bank Name**: Enter the name of the banking institution
  - **Country**: Select the Country where the banking institution is located
  - **Bank Key/ABA**: Enter the 9-digit ABA Routing Number associated with the bank account
  - **Bank Account Number & Verify Bank Account Number**: Enter the bank account number

  ![Bank Information Fields](image)

- **Wire Transfer**: Enter/Select the following **bank account** information:
  - **Bank Name**: Enter the name of the banking institution
  - **Country**: Select the Country where the banking institution is located
  - **SWIFT/BIC**: Enter the Swift or BIC making Wire Transfer Payments with this bank account
  - **Bank Key/ABA**: Enter the 9-digit ABA Routing Number associated with the bank account
  - **IBAN**: Enter the IBAN associated for Wire Transfer Payments. Enter a “0” if no IBAN exists
  - **Bank Account Number & Verify Bank Account Number**: Enter the bank account number

  ![Bank Information Fields](image)

- **Click** the **DONE** button at the bottom right of the pop-up window
  
  ![Done Button](image)

#### Step 6
- **Click** on the **SAVE & CLOSE** button at the bottom right of the screen

![Payment Method Form](image)
Enter a Description of your Organization
Enter a description of your organization including the products/services you offer. This helps AHA identify future business opportunities to potentially extend to you/your organization.

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| 1    | **Scroll to the MARKETING INFORMATION section & Click** on the title to open the section.  
      **In the DESCRIPTION field, enter a brief description of the products &/or services you provide.** |

Add Additional Contacts
Please add your Account Receivable contact or Account Representatives who could engage with the AHA.

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</table>
| 1    | **Scroll down to the CONTACTS section**  
      **Click** on the (+) Add New Contact button at the right side of the section |
| 2    | **A pop-up will open where you will enter/select** the following information:  
      - First Name: Enter the contact’s First Name  
      - Last Name: Enter the contact’s Last Name  
      - E-mail Address: Enter the contact’s Email  
      - Designation: Enter the individual’s job title (ie: A/R Manager)  
      - Default Role: Select the role that most closely aligns with the individuals job function  
      - Primary Business Phone: Enter the contact’s phone number. Enter numbers only.  
      - Send Invitation (Optional): Select this option to invite the contact to register  
      **Click** on the SAVE button at the bottom right of the window |
### Step 4: Save your Supplier Profile

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| 1    | • Be sure all section on your Supplier Profile are no longer highlighted in red.  
|      | - COMPANY NAME & OVERVIEW  
|      | - TAX ID & DUNS NUMBER  
|      | - CERTIFICATES (MAINTAIN A W-9/W-9 FORM) (1 Active)  
|      | - DIVERSITY STATUS (MAINTAIN A STATUS, IF CERTIFIED AS A DIVERSE BUSINESS)  
|      | - ADDRESS & PAYMENT INFO (2 LOCATIONS REQUIRED: HEADQUARTER & REMIT-TO)  
|      | - CONTACTS (2 CONTACTS REQUIRED: ACCOUNT MANAGER & ACCOUNTS RECEIVABLE)  
|      | - BUSINESS INFORMATION  
|      | - MARKETING INFORMATION  
| 2    | • Press the SAVE button at the bottom right of the screen.  
|      | - MARKETING INFORMATION  
| 3    | • Wait for your profile status to change from INVITED to REGISTERED.  
|      | - TECHNOLOGY PARTNERS LLC (PC-2020.000217) 🌟 REGISTERED |