



Fannie Mae™

Supplier Guide: Registration and Profile Management

September 2016





Steps to Register as a Supplier

- Go to the ProcureOne login page: <https://procureone.fanniemae.com>
- Click the **New Supplier?/Register Now** button

Welcome to ProcureOne

ProcureOne.
Fannie Mae's Procurement
Portal for Suppliers, Vendors,
and Real Estate Professionals,
all in one neat box.

Welcome to ProcureOne

Username

Password

Login

Lost your password?
(suppliers only)

Help Desk
Email us

**New Supplier?
Register Now**

Contracting Opportunities



Register as a Supplier

- On the page that opens, complete all required fields (those with a red vertical bar)
- Submit the form by clicking the **Registration Request** button at the bottom of the screen

 **Fannie Mae**

Register ▾

Secure field ⓘ : BF4R

Please enter information about your company in the fields below

Company information ▾

| | | | |
|--------------------------|----------------------|-------------------|---------------------------------|
| Corporate name ⓘ : | <input type="text"/> | Supplier Type ⓘ : | <input type="text" value=""/> ▾ |
| Doing business as : | <input type="text"/> | DUN'S # ⓘ : | <input type="text"/> |
| Federal Tax ID (TIN) ⓘ : | <input type="text"/> | | |





Supplier Email Confirmation and Validation

- You will receive an email confirmation

Dear {First name/Last name},

Thank you for registering as a potential supplier in Fannie Mae ProcureOne. Registration in ProcureOne does not guarantee assignment of work. You will receive a separate message that includes your user account information.

Your registration number is "{reg_id}"

Best regards,

Fannie Mae
Corporate Procurement

Please note: This is an system generated email and does not receive replies. If you have any questions regarding this email, please email vendor_desk@fanniemae.com.



Supplier Registration

- Return to the ProcureOne log in page <https://procureone.fanniemae.com>
- Enter your User ID (email address) and the password you created during registration

Welcome to ProcureOne

ProcureOne.
Fannie Mae's Procurement
Portal for Suppliers, Vendors,
and Real Estate Professionals,
all in one neat box.

Welcome to ProcureOne

User ID

Password

Login

Lost your password?
(suppliers only)

Help Desk
Email us

New Supplier?
Register Now

Contracting Opportunities



Accept Fannie Mae Terms and Conditions

- On the page that opens, check the box next to “**I accept terms and conditions**” then click the **Validate** box

You have to accept terms and conditions in order to continue.

Non-Fannie Mae Users: use of the ProcureOne application is subject to the general terms and conditions set forth in fanniemae.com Legal Disclosure. Use and protection by Fannie Mae of the confidential information you submit through ProcureOne are subject to the confidentiality provisions and other written agreements in place between your company and Fannie Mae, as applicable.

Please note that the ProcureOne application and related data are hosted by a third party services provider; although Fannie Mae has provided all commercially reasonable efforts to validate the information security controls, resiliency, and the operations of the third party service provider in connection with ProcureOne, and consistent with the fanniemae.com terms and conditions, FANNIE MAE MAKES NO REPRESENTATIONS OR WARRANTIES OF ANY KIND WHATSOEVER FOR, AND DISCLAIMS ANY EXPRESS OR IMPLIED WARRANTIES RELATED TO SUCH THIRD PARTY WEB SITE OR FOR ANY PRODUCTS OR SERVICES MENTIONED OR OFFERED IN THIRD PARTY WEB SITES INCLUDING, WITHOUT LIMITATION, WARRANTIES OF MERCHANTABILITY, SUITABILITY, NON-INFRINGEMENT, OR FITNESS FOR ANY PARTICULAR PURPOSE.

I accept terms and conditions

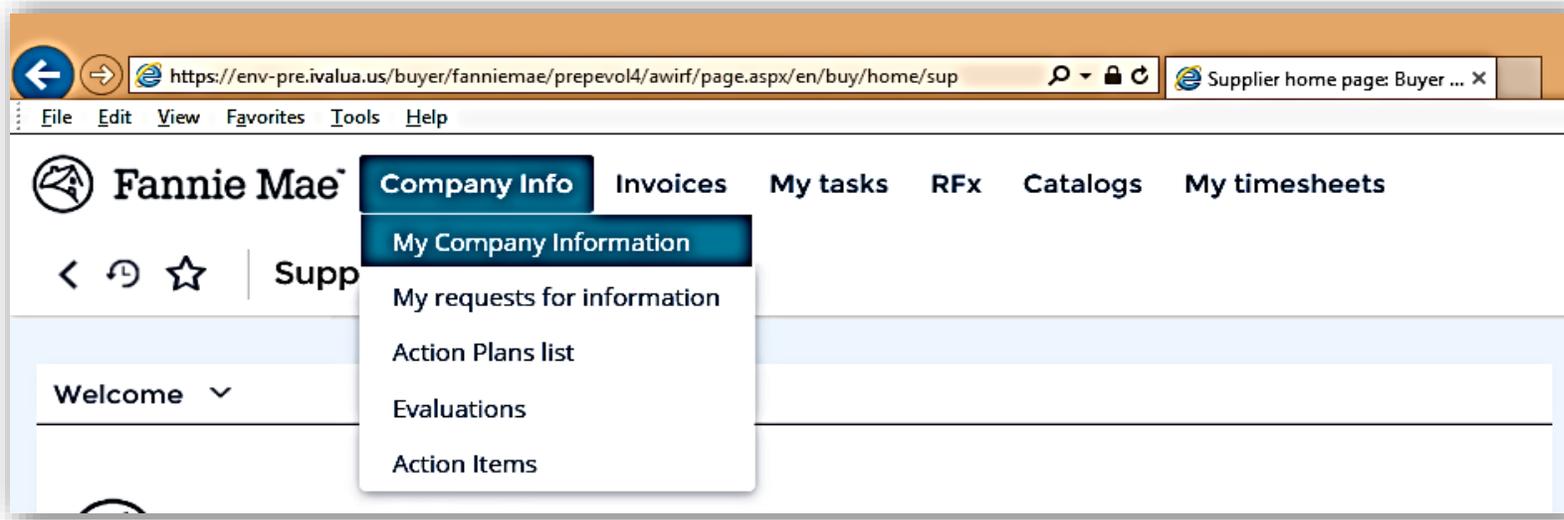
Validate **Print**



Update Your Supplier Information

To update the information in your supplier record in ProcureOne, first log in to ProcureOne

- 1) On the first page that opens, your Home Page, click **Company Info** and then **My Company Information** from the top menu





Update Your Supplier Information

- 3) In the page that opens click the **Main Info** tab
- 4) Verify or update the information on this tab and click the **Save** button at the bottom right corner of the page

Supplier ID : 24433

Legal Name : FM Mock10

Doing Business As (DBA) : (en) ▶

Supplier Type : Corporate

Web site ⓘ :

Supplier Overview : (en) ▶

Customer references ▼

Add a reference

Additional Information ▼

Opt-In ⓘ : Yes ▼

Meets Minimum Supplier Qualification Certification ⓘ : Yes ▼

Access to catalog :

Main Supplier Address ▼

Address 1 :

Address 2 :

City :

Country :

Country : UNITED STATES ▼

State : ▼

Zip Code :

Save



Update Your Supplier Information

5) On the **Additional Info** tab, verify or update your information and click **Save**

Main Info **Additional Info** Contacts Banking Info Legal Documents Communication

Year of incorporation :

DUNS # (i) :

Federal Tax ID (TIN) (i) :

Primary Category : ... Limit your selection to no more than 10 categories as only the first 10 categories will be considered

Payment address ▾

Address 1 :

Address 2 :

City :

County :

Country : UNITED STATES ▾

State : ▾

Zip Code :

Order address ▾

Address 1 :

Address 2 :

City :

County :

Country : UNITED STATES ▾

State : ▾

Zip Code :



Update Your Supplier Information

6) On the **Contacts** tab, click a contact's name to verify or update the information. You can also create new contacts by clicking **Add a contact**.

Note: To facilitate your company's participation in RFXs, assign one of the contacts as the "Main RFX contact." This person will receive RFX invitations by default. Do not assign more than one person to this role.

Main Info Additional Info **Contacts** Banking Info Legal Documents Communication

Supplier contacts ▾

Add a contact

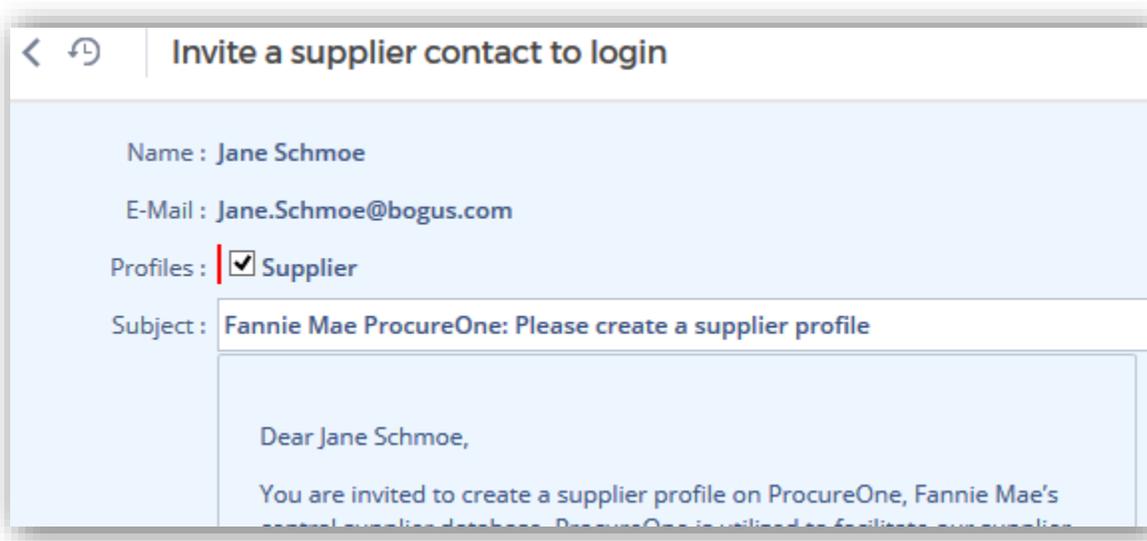
| | Name | Email | Phone Number | Cell Phone | Fax | Title / Role | Role | Profile | Status |
|---|-------------|------------------------|--------------|------------|-----|--------------|--|----------|-----------|
| | MOCK10 FM | fmmock10@fanniemae.com | 833-2000 | | | | <input type="text"/> ▾ x Supplier admin | Supplier | Validated |
| x | SCHMOE Jane | Jane.Schmoe@bogus.com | 703-833-2222 | | | | <input type="text"/> ▾ x Main RFX contact | | Validated |



Update Your Supplier Information

- 7) After you add a contact to your Supplier record, click the key icon  next to the contact name to create a new user log in.
- 8) A window will pop up with an email invitation and a log-in link. Click **Send Invitation** to send the email.

Note: The new contact must click the link and log in before accessing ProcureOne.



< ↻ Invite a supplier contact to login

Name : Jane Schmoe

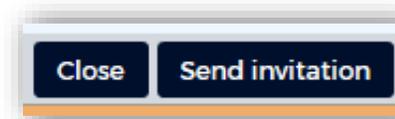
E-Mail : Jane.Schmoe@bogus.com

Profiles : Supplier

Subject : Fannie Mae ProcureOne: Please create a supplier profile

Dear Jane Schmoe,

You are invited to create a supplier profile on ProcureOne, Fannie Mae's central supplier database. ProcureOne is utilized to facilitate our supplier





Update Your Supplier Information- Banking Information

- 9) 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.
- 10) Click the **Add banking information** button.
- 11) Complete all required fields (those with a red bar) then click **Save and close**.

Note: Make sure to enter a valid ABA/routing number. If you don't, an error message will appear and you will be unable to save the bank information.

The screenshot shows a navigation menu with tabs: Main Info, Additional Info, Contacts, **Banking Info**, Legal Documents, and Communication. Below the tabs, there is a search bar with '0 Result(s)'. A dropdown menu labeled 'Supplier Banking info.' is open, showing an 'Add banking information' button and another search bar with '0 Result(s)'. At the bottom, there is a text input field labeled 'Supplier email address for ACH payment confirmation:'.

The screenshot shows a form titled 'Bank information' with a close button (X) in the top right corner. The form contains a dropdown menu labeled 'Banking information'. Below it are four input fields, each with a red bar on the left side indicating a required field: 'Bank name (i):', 'Bank City, State (i):', 'ABA/Routing Number (i):', and 'Bank Account Number:'. To the right of the 'Bank name' field is a 'Default:' checkbox which is checked. At the bottom of the form, there is a red 'Pre-Prod Staging' label and three buttons: 'Save', 'Save and close', and 'Close'.



Update Your Supplier Information

12) Go to the **Legal Documents** tab. Upload *Required Attachments, Certifications, Diversity Credentials* or other attachments by clicking on the button for each attachment type. A list of required documents is on Slide 15.

The screenshot shows the 'Legal Documents' tab in a web application. At the top, there are navigation tabs: 'Main Info', 'Additional Info', 'Contacts', 'Legal Documents' (selected), and 'Communication'. Below the tabs, there are input fields for 'Broker License #', 'New Broker License #', and 'Expiration Date'. A 'Filter' section includes a 'Keywords' field, a 'State to date' field set to '9/16/2016', and a 'Display archived documents' checkbox. There are 'Search' and 'Reset' buttons. The main content area is divided into four sections: 'Required Attachments', 'Certifications', 'Other', and 'Diversity Credentials'. Each section has a dropdown arrow and a button to 'Add document'. Below the 'Diversity Credentials' section, there is a paragraph of text explaining Fannie Mae's recognition of diverse categories and a button to 'Add document diversity credentials'.

Main Info Additional Info Contacts **Legal Documents** Communication

Broker License # ①: New Broker License #:

Expiration Date:

Filter ▾

Keywords: State to date: 9/16/2016 Display archived documents: Search Reset

Required Attachments ▾

Add document required attachments

0 Result(s)

Certifications ▾

Add document certifications

0 Result(s)

Other ▾

Add document other

0 Result(s)

Diversity Credentials ▾

Fannie Mae recognizes the following diverse categories consistent with HERA Regulations: minority, women, individuals with disabilities AND minority-, women- and disabled-owned businesses. You may self certify for the HERA diversity classifications by downloading this document.

Fannie Mae also recognizes other diverse categories including Lesbian, Gay, Bisexual, Transgender Owned Business (LGBT); Historically Black Colleges, Universities & Minority Institutions; Small Business; Veteran; 8(a) Business and HUBZone. If your company meets the eligibility criteria for one or more of the non-HERA listed classifications, you are required to attach a valid third party authorized certification for each classification type you claim. Refer to our website for eligibility criteria.

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

Add document diversity credentials



Update Your Supplier Information

- 13) When uploading attachments, be sure to select the proper **Document Type** and **Document Validity** range. The ProcureOne system will send update reminders before the documents expire.
- 14) 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.
- 15) If you have previously self-certified with Fannie Mae, please go to:
<http://www.fanniemae.com/resources/file/aboutus/pdf/self-certification.pdf>
and download the self-certification document. Complete the required fields then upload the document to your Supplier record.



List of Required Documents by Supplier Type

| Required Document | Corporate Suppliers | Brokers | Agents | Contractor Suppliers | Appraisers |
|---|---------------------|-------------------------------------|--------|----------------------|------------|
| Completed W9 form | ✓ | ✓ | | ✓ | ✓ |
| Insurance Certificate(s) | ✓ | ✓ Liability, Worker Comp, E&O | | ✓ | |
| Third Party Diversity Certification or self-certification form, if applicable | ✓ | ✓ | ✓ | ✓ | ✓ |
| Broker License | | ✓ | | | |
| Broker/Agent License(s) | | | ✓ | | |
| Contractor License | | | | ✓ | |
| Appraiser License | | | | | ✓ |
| Direct Deposit Form | ✓ | ✓ | | ✓ | ✓ |
| Sample Invoice | ✓ | | | | |
| Voided Check / Bank Letter | ✓ | | | | |
| MLA | | ✓ | | | |