


How to Register & Complete your Supplier Profile

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Step 1: Create a Supplier Account

Step	Description
1	<ul style="list-style-type: none"> 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 <div data-bbox="266 321 1318 831" style="border: 1px solid black; padding: 10px;"> <p>The American Heart Association requests that you register in our Supplier Portal.</p> <p>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:</p> <ol style="list-style-type: none"> 1. Create an Account 2. Activate your Account 3. Complete your Supplier Profile (Note: Required to Receive Payment) 4. Save your completed Supplier Profile <p>Please immediately complete all registration steps.</p> <hr/> <p>INSTRUCTIONS:</p> <p>STEP 1 Access the Account Creation Form to Complete & Submit the following details:</p> </div>
2	<ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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 <div data-bbox="253 1087 1427 1375" style="border: 1px solid black; padding: 10px;">  <p>Hi Gary Jones ,</p> <p>You have been invited by American Heart Association to be a supplier and represent Technology Partners LLC</p> <p>Register Now I have a SMART by GEP account</p> <p>Thanks, SMART by GEP Team</p> </div>
3	<ul style="list-style-type: none"> A registration form will display with 4 sections to complete The 1st section is Account Credentials where you will need to complete the following: <ul style="list-style-type: none"> 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 <div data-bbox="258 1562 1424 1923" style="border: 1px solid black; padding: 10px;"> <p>Account Credentials</p> <p>Username * <input type="text"/> ⓘ</p> <p>User Email * ahageptest+garyjones@gmail.com</p> <p>Password* <input type="password"/> Password strength: Too short ⓘ</p> <p>Confirm Password* <input type="password"/> ⓘ</p> <p>Mobile Number <input type="text"/> Select ISD Code ▾ <input type="text"/></p> </div>

Step	Description
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- | | |
|---|--|
| 4 | <ul style="list-style-type: none"> The 2nd section is Company Information where you will need to complete the following: <ul style="list-style-type: none"> 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 |
|---|--|

Company Information

Legal Company Name * Technology Partners LLC ⓘ

Invoice Payment Name * _____ ⓘ

Company Website _____ ⓘ

Headquarter* Select Country ▾ ⓘ

Address Line 1 * Suite, Street, Locality _____ ⓘ

Address Line 2 Suite, Street, Locality _____ ⓘ

City* _____ ⓘ

State/Province * _____ ⓘ

Zip/Postal Code * _____ ⓘ

Company Phone * _____ ⓘ


Fax _____ ⓘ

Business Regions * National Center 🌐 ⓘ

Category * Consulting - Informatio 🏢 ⓘ

D-U-N-S Number * 9 Digit D-U-N-S _____ ⓘ

Company Identification * Select identification type ▾ Identification Nur + ⓘ


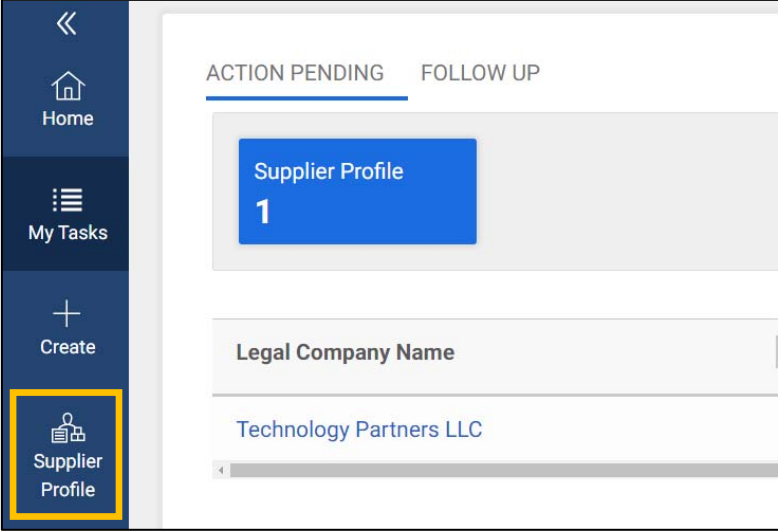

Step	Description
5	<ul style="list-style-type: none"> The 3rd section is Primary Contact Information where you will complete the following: <ul style="list-style-type: none"> Primary Business Phone Number: The phone number you primarily use, enter numbers only without any special characters (ie: dashes, parenthesis, spaces) Time Zone: Select the time zone you are located in <div data-bbox="256 306 1424 835" style="border: 1px solid black; padding: 10px;"> <p>Primary Contact Information</p> <p>First Name* Gary ⓘ</p> <p>Last Name* Jones ⓘ</p> <p>Company Email * ahageptest+garyjones@gmail.cor ⓘ</p> <p>Primary Business Phone Number* ⓘ Extension ⓘ</p> <p>Contact's Business Region ⓘ</p> <p>Contact's Category Consulting - IT, ⓘ</p> <p>Time Zone (UTC-06:00) Central Time (US & Canada) ⓘ</p> </div>
6	<ul style="list-style-type: none"> The final section you will need to agree to GEP's Terms & Conditions and Privacy Policy <ul style="list-style-type: none"> Click on the checkbox to left of the statement Click on the Submit button when you are ready to submit the form <div data-bbox="263 955 1419 1274" style="border: 1px solid black; padding: 10px;"> <p><input type="checkbox"/> I have read and agree to GEP Terms & Conditions & Privacy Policy. *</p> <p style="text-align: right;">Submit</p> </div>
7	<ul style="list-style-type: none"> An on-screen message will display instructing you to check your email for a message to activate your account. <div data-bbox="263 1362 1419 1629" style="border: 1px solid black; padding: 10px;"> <div style="display: flex; align-items: flex-start;"> <div style="flex: 1;">  </div> <div style="flex: 2;"> <p>1 more step</p> <p>A verification link has been sent to the registered email ID, please use the same to verify the account. If already done please ignore.</p> <p>You have successfully submitted the registration form. If you have any questions, please Click Here to find helpful information to get started.</p> <p>Thanks, SMART by GEP Team</p> </div> </div> </div>

Step 2: Activate your Account

Step	Description
1	<ul style="list-style-type: none"> 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. <div data-bbox="256 367 1425 667" style="border: 1px solid black; padding: 5px;"> <p>Dear Gary Jones,</p> <p>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.</p> <p style="text-align: center;">Click to Activate Your Account</p> <p>Please note, you must complete this step in order to access our Supplier Portal. This step only needs to be performed once.</p> </div>
2	<ul style="list-style-type: none"> 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 <div data-bbox="243 787 1437 1066" style="border: 1px solid black; padding: 10px;"> <div style="display: flex; align-items: flex-start;"> <div style="background-color: #009682; color: white; padding: 10px; text-align: center; width: 150px; height: 100px; display: flex; flex-direction: column; justify-content: center; align-items: center;"> <p style="margin: 0;">Action Required</p> </div> <div style="margin-left: 10px;"> <p style="color: #009682; font-weight: bold; margin: 0;">Action Required!</p> <p>You have successfully activated your account.</p> <p>To finish the registration process, you must fill in ALL mandatory information on your supplier profile.</p> <p>Click Here to login to the GEP SMART system and complete your supplier profile.</p> <p><small>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.</small></p> </div> </div> </div> <ul style="list-style-type: none"> Note: You can access the supplier portal at any time by going to https://smart.gep.com.


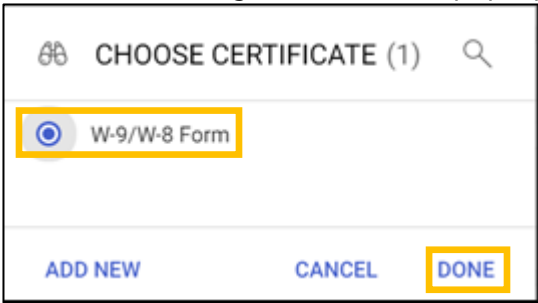
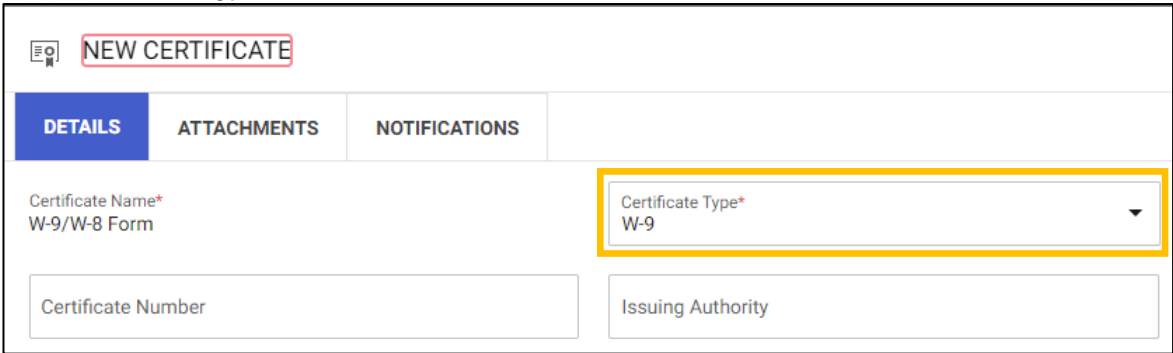
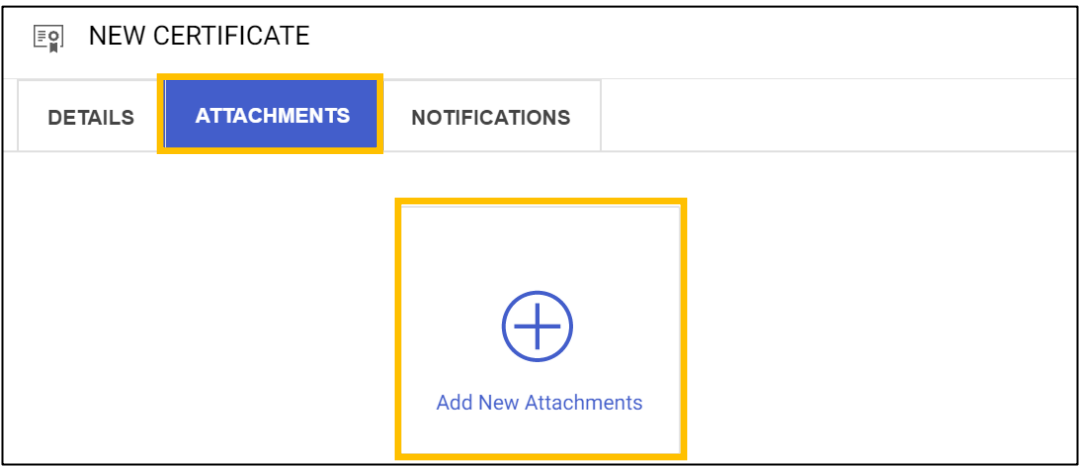
Step 3: Complete your Supplier Profile

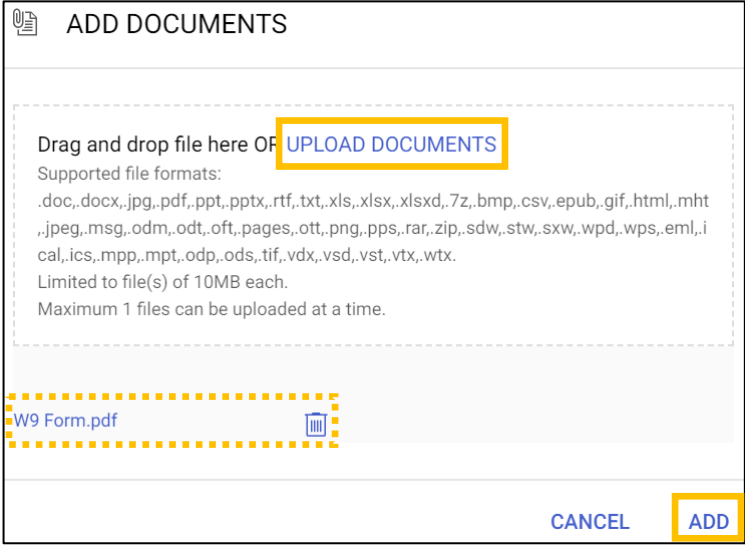
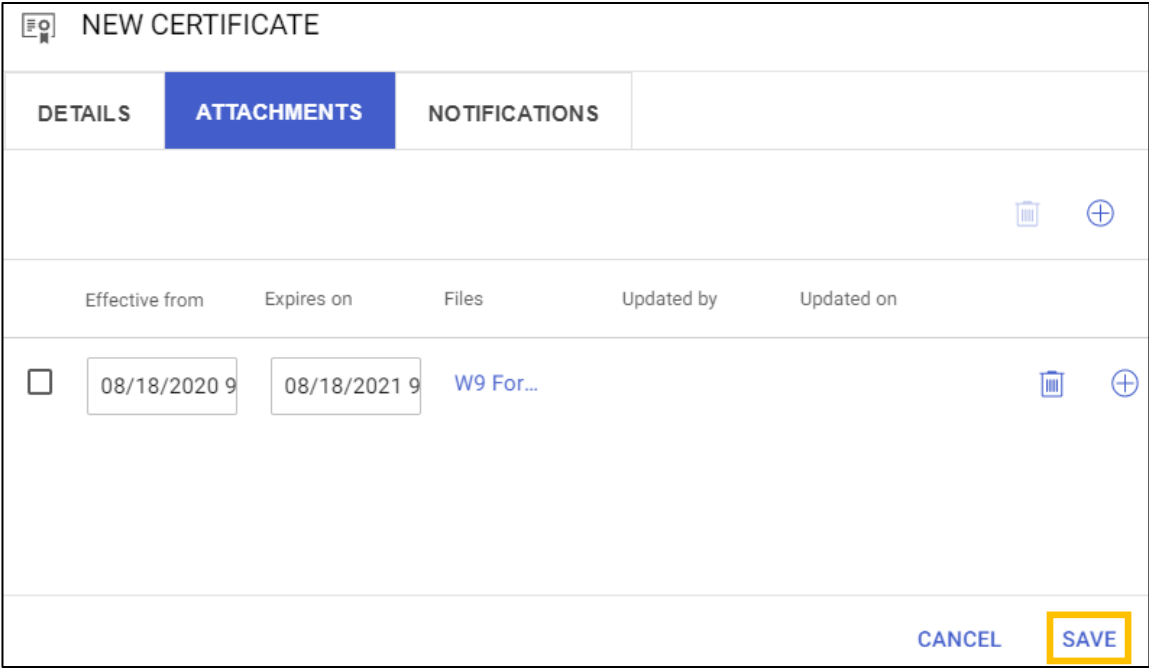
Login and Access your Supplier Profile

Step	Description
1	<ul style="list-style-type: none">You will be taken to a login screen where you will enter your Username and Password.Press the LOGIN button 
2	<ul style="list-style-type: none">Once logged in, click on the Supplier Profile icon on the left navigation bar 
3	<ul style="list-style-type: none">You will be taken to your company's supplier profile 


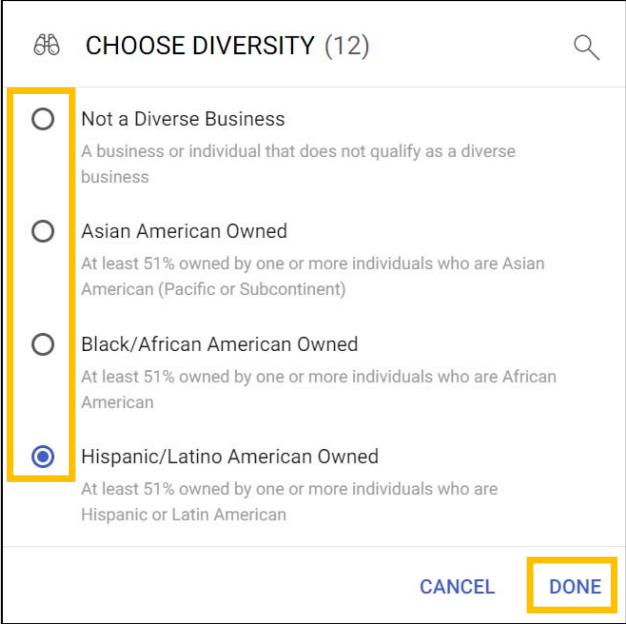
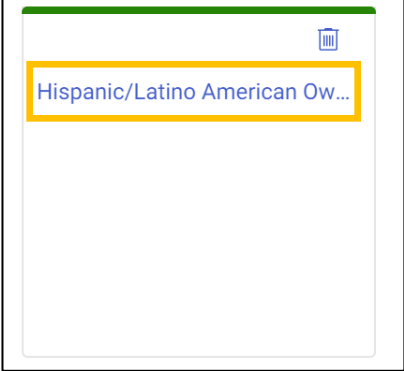
Attach your W-9/W-8 Tax Form

AHA requires you attach a signed (physical or digital) copy of your W-9/W-8 form.

Step	Description
1	<ul style="list-style-type: none"> Scroll down to the CERTIFICATES section Click on the (+) Add New Certificate button at the right side of the section 
2	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Select/Enter the following information: <ul style="list-style-type: none"> Certificate Type: Select the type of W-9/W-8 form you plan to upload 
4	<ul style="list-style-type: none"> 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 

Step	Description
5	<ul style="list-style-type: none"> 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 
6	<ul style="list-style-type: none"> Click on the SAVE button at the bottom right of the window 


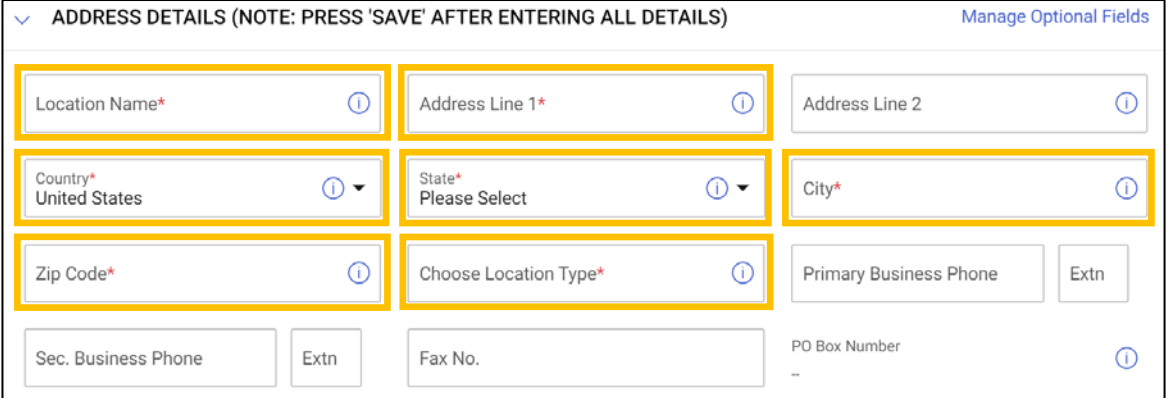

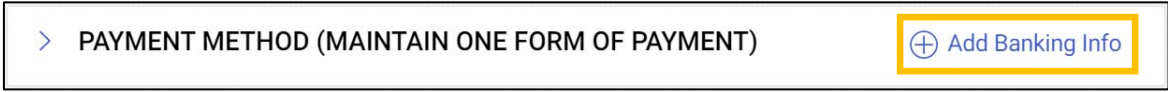
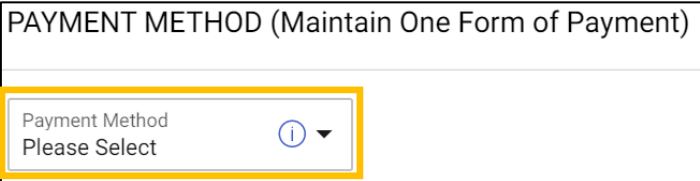
Select a Diversity Status

Step	Description
1	<ul style="list-style-type: none"> • Scroll to the DIVERSITY STATUS section • Click on the (+) Add New Diversity Status button at the right side of the section 
2	<ul style="list-style-type: none"> • 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 
3	<ul style="list-style-type: none"> • 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:

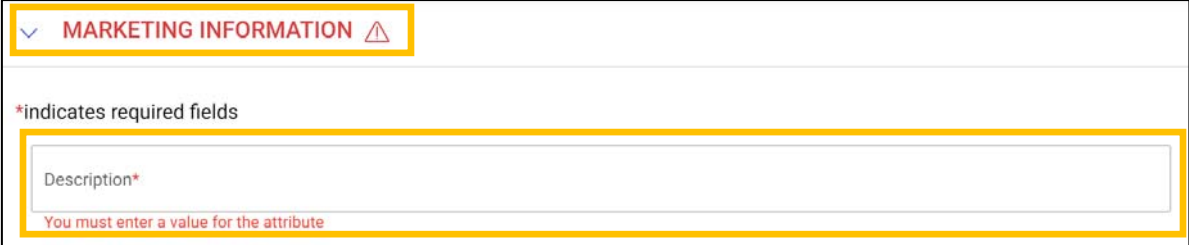
- ✓ Payment Address
- ✓ Preferred Payment Method (Check, ACH or Wire)
- ✓ Bank Account Information if you select ACH or Wire Transfer as your preferred payment method

Step	Description
1	<ul style="list-style-type: none"> • Scroll down to the ADDRESS & PAYMENT INFO section • Click on the (+) Add New Location button at the right side of the section 
2	<ul style="list-style-type: none"> • A screen will open where you will enter/select the following information: <ul style="list-style-type: none"> • 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"  <ul style="list-style-type: none"> • Press the SAVE button at the bottom right of the page. (Note: Do Not press SAVE & CLOSE) 
3	<ul style="list-style-type: none"> • Scroll down to the PAYMENT METHOD section • Click on the (+) Banking Info button at the right side of the section 
4	<ul style="list-style-type: none"> • A pop-up window will appear • Click on the Payment Method field to select your preferred method to receive payment <ul style="list-style-type: none"> - 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 

Step	Description																
5	<ul style="list-style-type: none"> Depending on the Payment Method selected, additional information may be required Check: No additional information needed <div data-bbox="311 239 1365 340" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> Payment Method Check ▼ </div> </div> <ul style="list-style-type: none"> EFT/ACH: Enter/Select the following bank account information: <ul style="list-style-type: none"> 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 <div data-bbox="311 527 1365 751" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> Bank Name* i </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> Country* Please Select ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> BankKey / ABA* i </div> </div> <div style="display: flex; justify-content: space-between; border-top: 1px solid #ccc; padding-top: 5px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%; display: flex; align-items: center;"> Bank Account Number* i </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%; display: flex; align-items: center;"> Verify Bank Account Number* </div> </div> </div> Wire Transfer: Enter/Select the following bank account information: <ul style="list-style-type: none"> 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 <div data-bbox="311 1005 1365 1373" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> Bank Name* i </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> Country* Please Select ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> Swift/BIC* i </div> </div> <div style="display: flex; justify-content: space-between; border-top: 1px solid #ccc; padding-top: 5px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> BankKey / ABA* i </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> IBAN* i </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; display: flex; align-items: center;"> Bank Account Number* i </div> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%; margin-top: 5px; display: flex; align-items: center;"> Verify Bank Account Number* </div> </div> Click the DONE button at the bottom right of the pop-up window <div data-bbox="263 1419 1365 1482" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: flex-end; align-items: center; border-top: 1px solid #ccc; padding-top: 5px;"> CANCEL DONE </div> </div>																
6	<ul style="list-style-type: none"> Click on the SAVE & CLOSE button at the bottom right of the screen <div data-bbox="263 1535 1419 1871" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> ▼ PAYMENT METHOD (MAINTAIN ONE FORM OF PAYMENT) </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 20%;">Payment Method</th> <th style="width: 20%;">Bank Name</th> <th style="width: 10%;">Branch</th> <th style="width: 10%;">Country</th> <th style="width: 10%;">Account Type</th> <th style="width: 25%;">Account Number</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>EFT/ACH (US ...</td> <td>Bank of America</td> <td>--</td> <td>United St...</td> <td>--</td> <td>XXXXX6789</td> <td style="text-align: right;"> ✎ ✕ </td> </tr> </tbody> </table> <div style="display: flex; justify-content: flex-end; align-items: center; border-top: 1px solid #ccc; padding-top: 5px; margin-top: 5px;"> CANCEL SAVE SAVE & CLOSE </div> </div>		Payment Method	Bank Name	Branch	Country	Account Type	Account Number		<input type="checkbox"/>	EFT/ACH (US ...	Bank of America	--	United St...	--	XXXXX6789	✎ ✕
	Payment Method	Bank Name	Branch	Country	Account Type	Account Number											
<input type="checkbox"/>	EFT/ACH (US ...	Bank of America	--	United St...	--	XXXXX6789	✎ ✕										

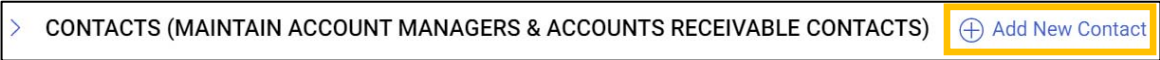
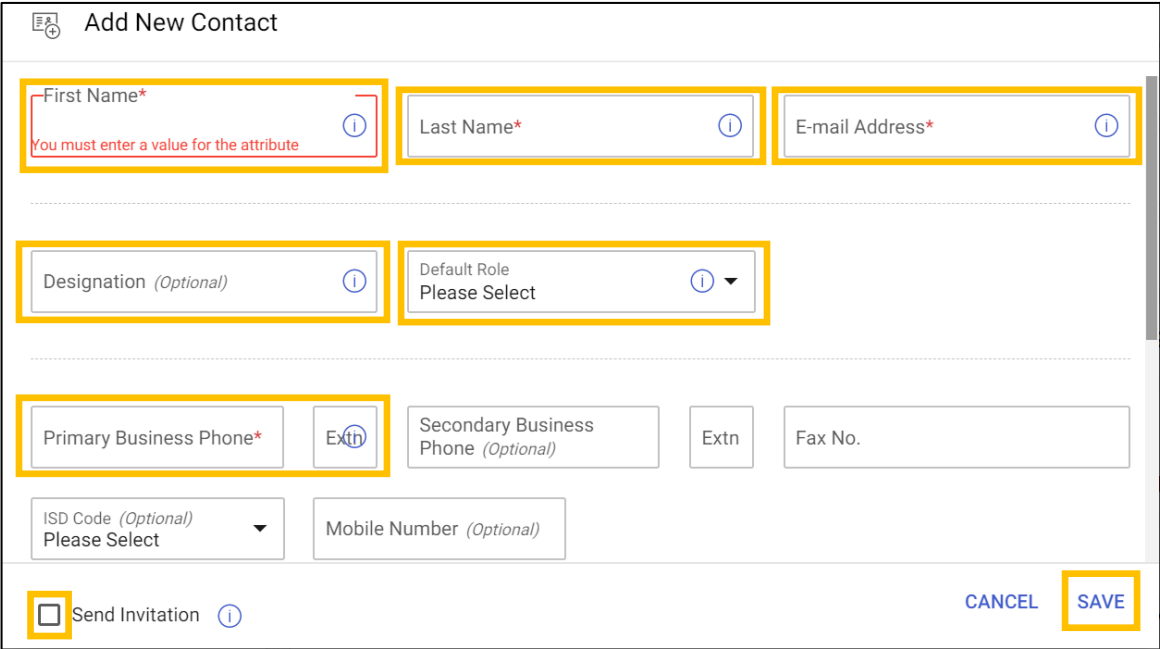
Enter a Description of your Organization

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.

Step	Description
1	<ul style="list-style-type: none"> • 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.

Step	Description
1	<ul style="list-style-type: none"> • Scroll down to the CONTACTS section • Click on the (+) Add New Contact button at the right side of the section 
2	<ul style="list-style-type: none"> • A pop-up will open where you will enter/select the following information: <ul style="list-style-type: none"> - 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

Step	Description
1	<ul style="list-style-type: none"> Be sure all section on your Supplier Profile are no longer highlighted in red. <div data-bbox="397 348 1284 947" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <ul style="list-style-type: none"> > COMPANY NAME & OVERVIEW > TAX ID & DUNS NUMBER > CERTIFICATES (MAINTAIN A W-9/W-8 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 </div>
2	<ul style="list-style-type: none"> Press the SAVE button at the bottom right of the screen. <div data-bbox="264 999 1446 1146" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <ul style="list-style-type: none"> > MARKETING INFORMATION <div style="display: flex; justify-content: space-between; align-items: center; background-color: #333; color: white; padding: 5px;"> % <div style="text-align: center;"> <p>PROFILE COMPLETENESS</p> </div> <div style="text-align: right;"> CLOSE SAVE </div> </div> </div>
3	<ul style="list-style-type: none"> Wait for your profile status to change from INVITED to REGISTERED. <div data-bbox="264 1199 1024 1287" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; align-items: center; justify-content: space-between;"> TECHNOLOGY PARTNERS LLC (PC-2020.000217) </div> <div style="text-align: center; margin-top: 5px;"> REGISTERED </div> </div>