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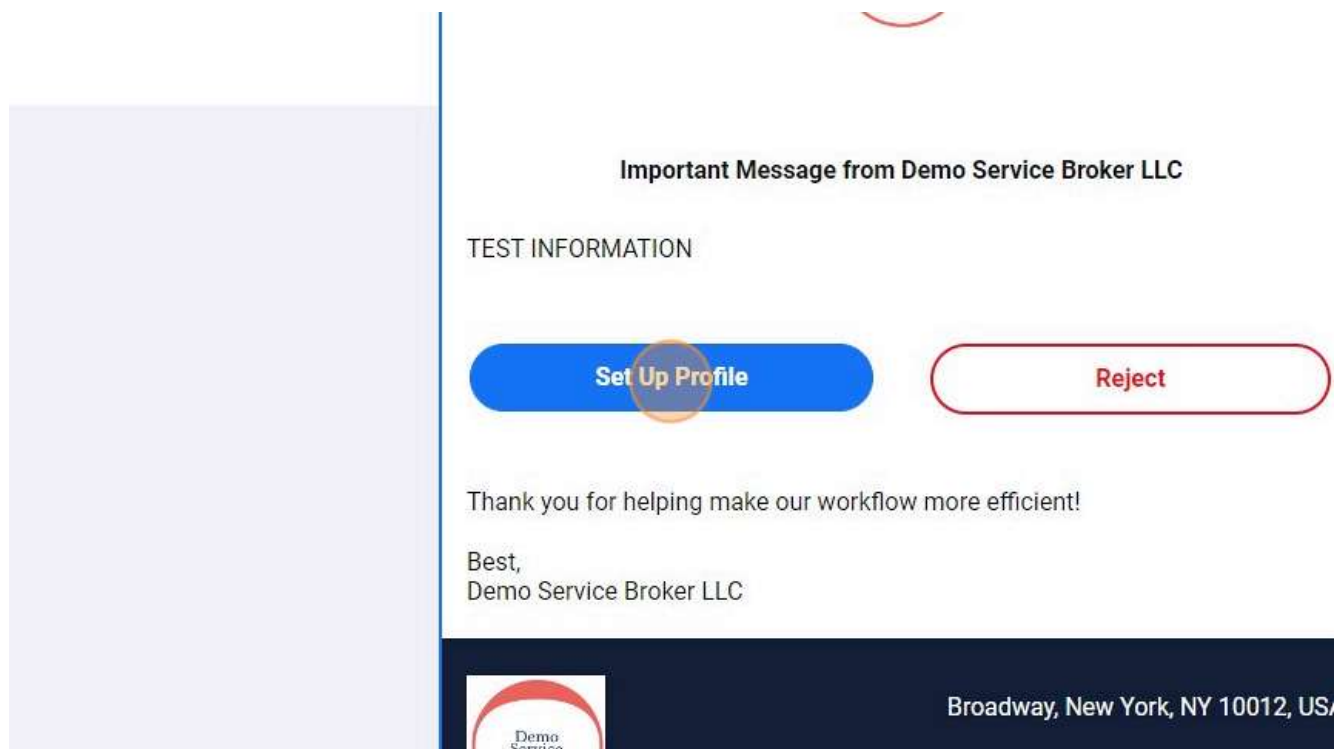
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Vendor Portal - How to Set up your Company Profile

Vendors can easily setup their profile in UtilizeCore by following these steps and access their dashboard in UtilizeCore

Updated over 8 months ago




1. You will receive an email invite and want to Click "Set Up Profile"



2. Fill Out the Required fields with the "*"

- Enter your First and Last Name
- Enter your Email/Phone Number
- Enter your Password
- Click on *Accept Terms and Conditions*

Welcome!
First, let's get you setup with an account.

First Name*
Rashmi

Last Name*
Bora

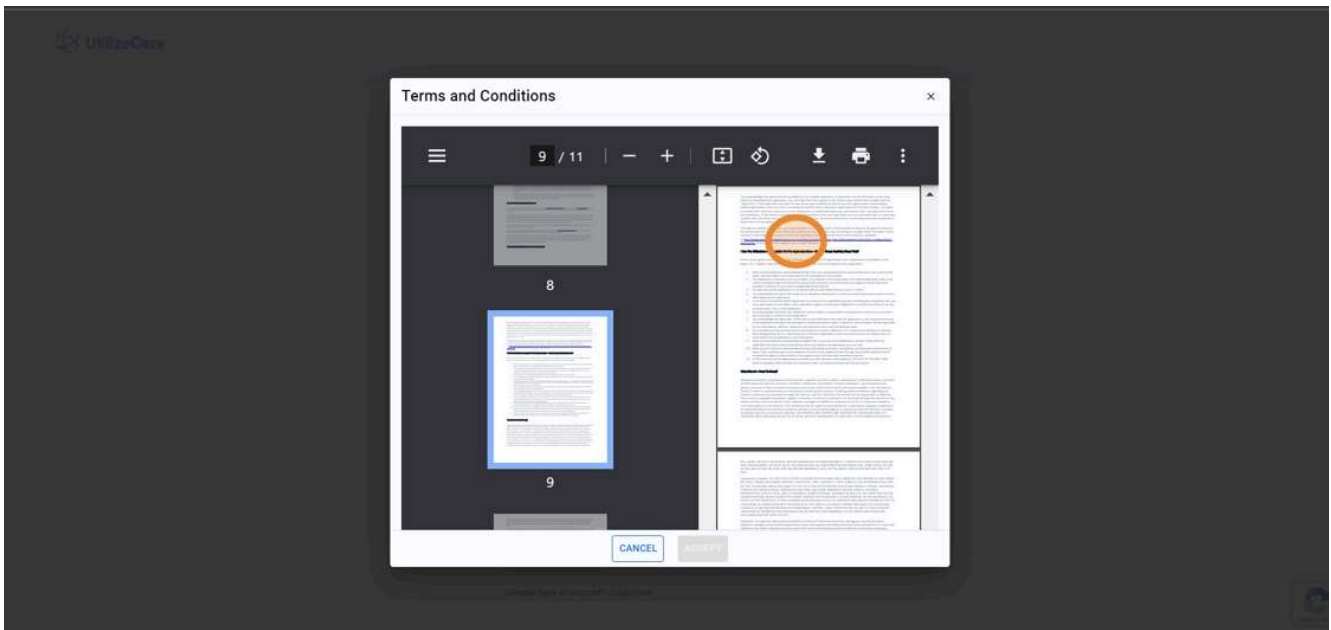
Email or Phone*
rashmi.bora87@utilizecore.com

Password*

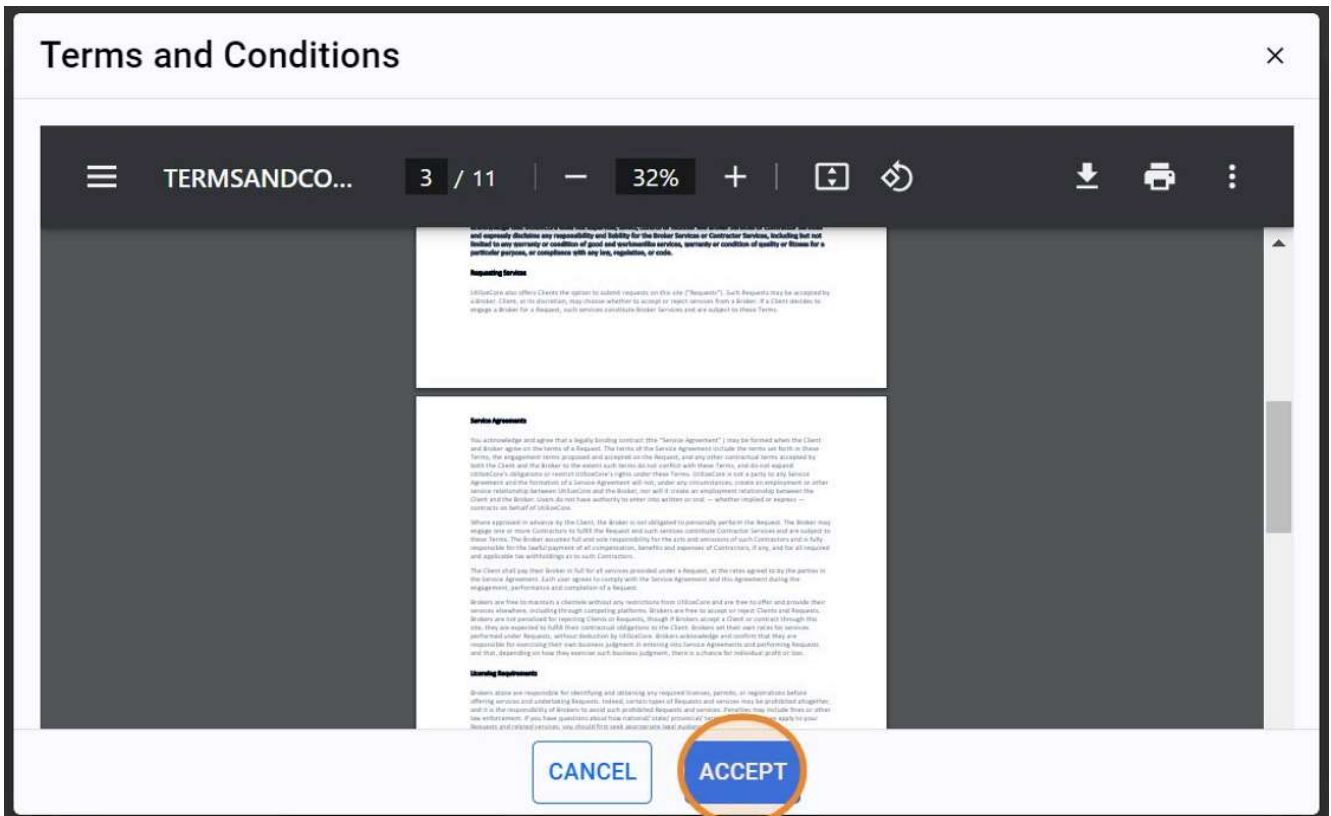
Confirm Password*

ACCEPT TERMS AND CONDITIONS

3. A Terms and conditions page will come up.
Go to the 9th Page, click on the link and then click back again.



4. The *Accept* Button will turn blue.
Click on it.



5. Step 5: Enter your company details in the *Create Company Profile* page
Please note all tabs which has a asterisks(*) sign must be filled and cannot be left blank.

1
Create
Company

2
Select Trades

3
W9

4
Compliance

5
Invite Team

Create Company Profile

*Legal Company Name Rashmi Bora- test vendor 17th Aug ✓	*Phone Number 🇺🇸 (516) 788-8444
*Company Email Address rashmi.bora+87@utilizecore.com ✓	Legal Address 1345 North Montebello Boulevard, Soutl ✓
*Doing Business as (DBA) <input type="text"/>	*State of Company Registration States ▾
EIN Number 0 1 - 2 3 4 5 6 7 8	Legal Tax Classification Tax Classification ▾
Authorized Signer Name <input type="text"/>	Authorized Signer Email Eg. example@gmail.com



6. Click "Next"

rtl ✓	
▾	
▾	
<input type="text"/>	

Next

7. *Name Your Workspace* page has your company URL that you will use when you want to login to your company profile in UtilizeCore
Click "Next"

UtilizeCore

1 Create Company — 2 Select Trades — 3 W9 — 4 Compliance — 5 Invite Team

Name Your Workspace

Assign your company a Workspace where your data will be hosted.

https:// rashmiboratestvendor17thaug .utilizecore.com ✓

This Workspace is Available!

Next

8. Step 6: Select the *Trade* that you preform service for.
You may select more then 1 Trade

UtilizeCore

✓ Create Company — 2 Select Trades — 3 W9 — 4 Compliance — 5 Invite Team

Select a Trade

Please select one trade to continue.

General R&M Handyman HVAC Landscaping

Plumbing Powerwashing Snow Removal Janitorial

Security Sweeping Pest Control Other

9. Click "Next"

A screenshot of a trade selection interface. On the left, there are three partial circular icons. In the center, there are six rounded rectangular buttons arranged in two columns. The left column contains 'HVAC' (highlighted in blue), 'Snow Removal', and 'Pest Control'. The right column contains 'Landscaping', 'Janitorial', and 'Other'. At the bottom right, there is a blue 'Next' button with a circular highlight around it, and a small 'Terms' link next to it.

10. Step 7: Now you will come to the W9 form

A screenshot of the UtilizeCore W9 form. At the top left is the UtilizeCore logo. Below it is a progress bar with five steps: 'Create Company' (green checkmark), 'Select Trades' (green checkmark), 'W9' (blue circle with '3'), 'Compliance' (grey circle with '4'), and 'Invite Team' (grey circle with '5'). The form fields include: 'Rashmi Bora- test vendor 17th Aug' (checked), '*Legal Tax Classification' (dropdown menu with 'Tax Classification' selected and highlighted with an orange circle), '*Legal Address' (1345 North Montebello Boulevard, South Montebello, CA 90640, checked), '*Date' (MM/DD/YYYY), and '*EIN Number' (input fields for 1, 2, -, 3, 4, 5, 6, 7, 8, 0). At the bottom, there is a '*Signature' field with a 'Sign' button highlighted in blue. A link at the bottom reads 'Need a Blank W9 Template? Already Have a Completed W9? Click Here'. The bottom right corner has a 'Skip' button.

11. Please fill out the W9 information and click *Generate*

If you do not have the details handy then Click "Skip" and fill it later after your Company Profile is created

UtilizeCore

Progress: Create Company (✓) — Select Trades (✓) — **W9** — Compliance (4) — Invite Team (5)

Rashmi Bora- test vendor 17th Aug ✓

*Legal Tax Classification: Limited Liability Company ⚠
Legal Tax Classification is required

*Legal Address: 1345 North Montebello Boulevard, South Montebello, CA 90640 ✓

*Date: 08/17/2023 ✓

*EIN Number: 1 2 - 3 4 5 6 7 8 0

*Signature:

Need a Blank W9 Template? Already Have a Completed W9? [Click Here](#)

Skip

12. Step 8: Please fill the information in the *Compliance* Page and click *Next*

If you do not have the details, Click "Skip" and fill it later after your create your *Company Profile*

UtilizeCore

Progress: Create Company (✓) — Select Trades (✓) — W9 (✓) — **Compliance** (4) — Invite Team (5)

General Info
Please upload at least one form of insurance to continue. If you don't have your forms ready, you can skip and do this at a later time, however you will not be able to transact until you are compliant.

*Insured: Rashmi Bora- test vendor 17th Aug ✓

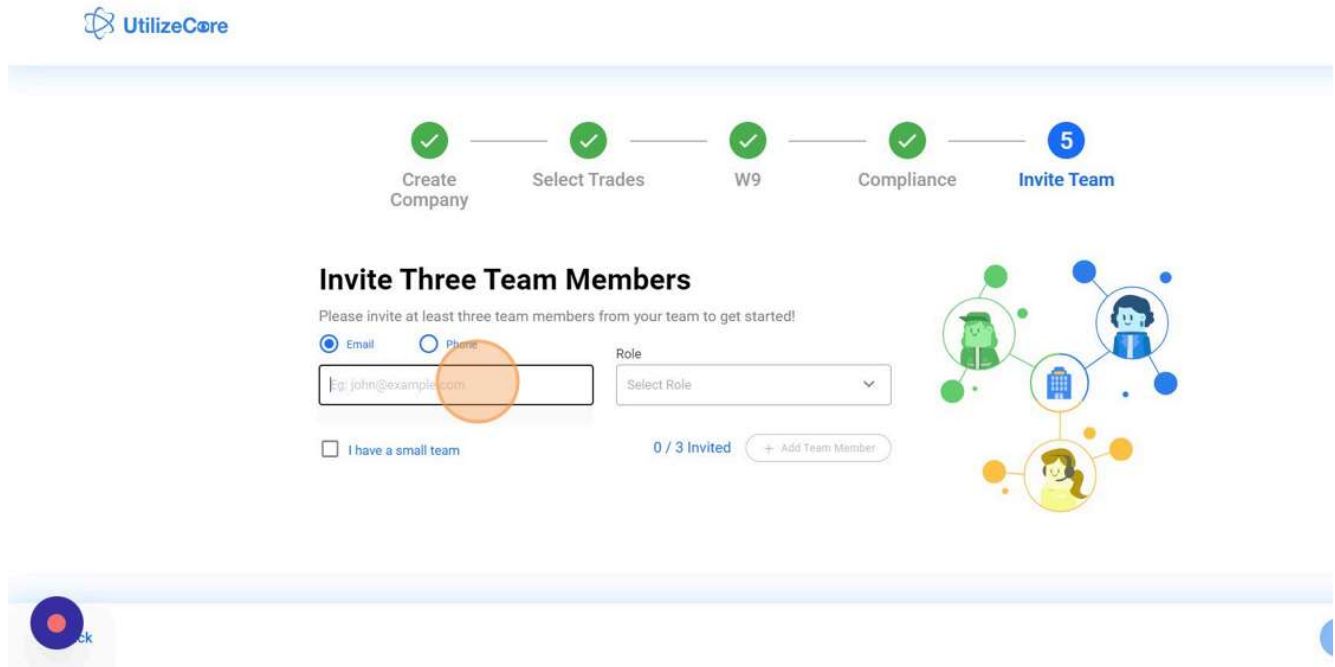
*Address: 1345 North Montebello Boulevard, South Montebello, CA 90640, US ✓

*Email Address: rashmi.bora+87@utilizecore.com ✓

*Phone Number: +1 516 788 8444 ✓

Skip

13. Step 9: You will now see the *Invite Team* page
You may invite your team member via email or via Phone Number
if you do not have a team then you can select * I have a small team*



14. Step 10: Click "Finish"

n to get started!

ed

nvited

+ Add Team Member



Finish

- Terms

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Did this answer your question?



UtilizeCore Help Center

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