Bidder and Supplier Learner Guide
Getting Started in OhioBuys

Audience: Bidders and Suppliers

Published: October 2026
V5.12

OhioBuys

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If you have questions or need additional assistance, please contact the OBM Contact Center via email (OBM.ContactCenter@obm.ohio.gov) or phone (877-644-6771).

In This Document:

Overview: Welcome to the State of Ohio's new eProcurement solution, OhioBuys. OhioBuys is the State of Ohio's online purchasing solution that empowers both government buyers and interested Bidders and Suppliers. OhioBuys leverages innovative technologies to increase efficiency, opportunities, and participation with businesses in Ohio. This guide provides you with step-by-step instructions for accessing and navigating OhioBuys, as well as managing your company profile.

Definition of Terms Used Throughout This Guide:

Bidder: A company which is not currently doing business with the State. Bidders can view and respond to solicitations.

Supplier: A company which is currently doing business with the State. Suppliers can view and respond to solicitations, receive and fulfill purchase orders, and create advanced shipping notifications.

Functionality Covered:

1) **Registering as a New Bidder:** Suppliers who are not currently doing business with the State are still able to bid on solicitations posted on the OhioBuys public portal. In order to bid, a Bidder will need to create an OHID and complete a brief Bidder Registration Request.

2) **Accessing OhioBuys as an Existing Supplier:** Suppliers who are currently doing business with the State do not need to re-register in order to access OhioBuys. Each Supplier user will need to have their own OHID and be listed as a contact with an assigned role.

In This Document (continued):

Functionality Covered:

3) **General Navigation:** Explains the structure and content of OhioBuys including the homepage, navigational icons, main menu, action buttons, functional tabs and other navigational options.

4) **Manage Contacts:** Supplier Admins can add or delete contacts for their company within OhioBuys, as well as assign each contact a role aligning to the actions that they will be taking.

5) **Select Commodities:** Supplier Admins can add or delete commodities in their company profile, indicating to State users which commodities they are capable of supplying. When a solicitation is created for a certain commodity, State users are able to quickly notify all Suppliers who have indicated that they are capable of supplying that commodity.

6) **Accessing Additional Training Resources and Support:** Instructions for accessing additional training and support resources including videos, job aids and the Ohio Shared Services help desk team.

REGISTERING AS A NEW BIDDER

Overview:

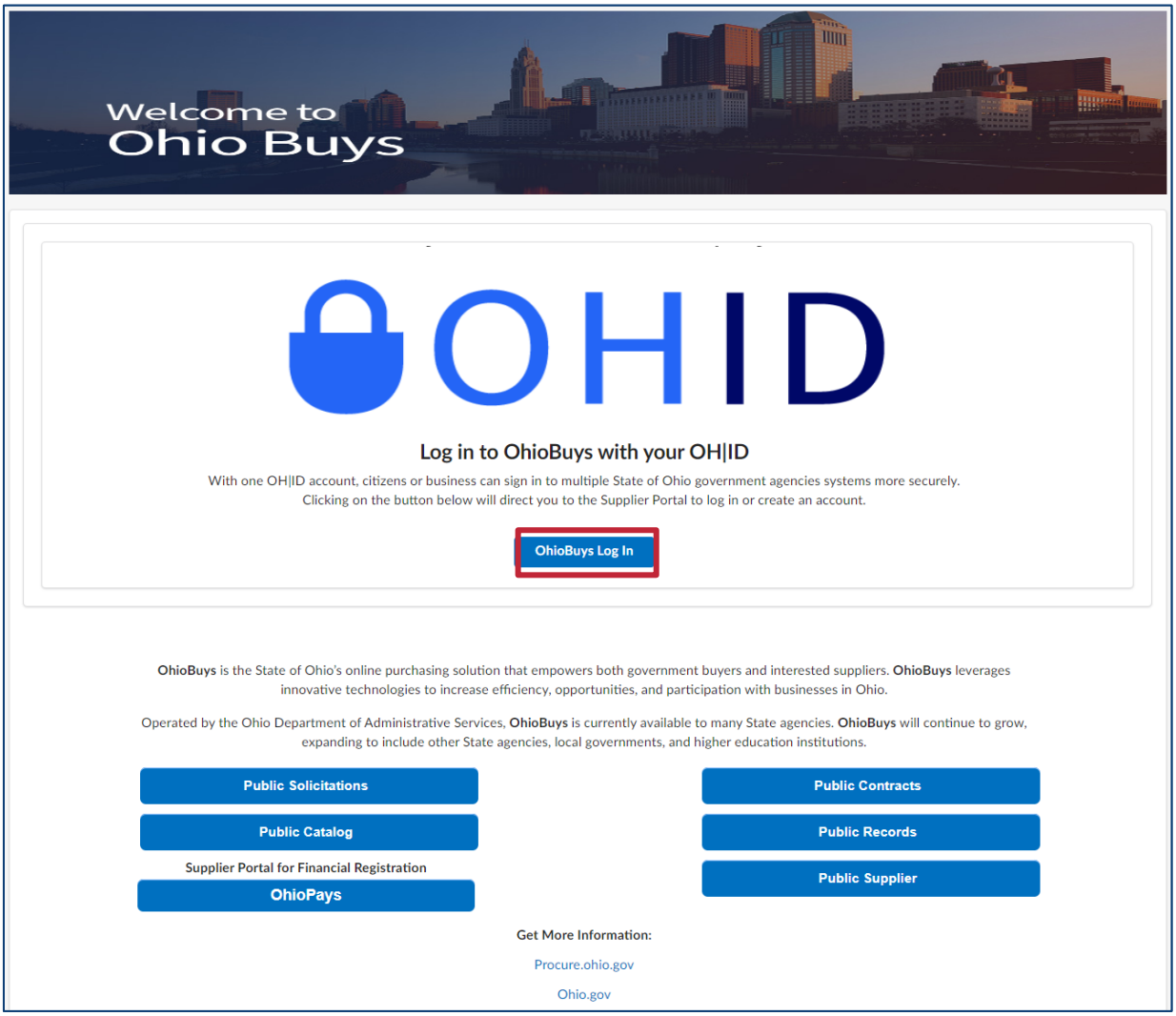
- What's Covered: How to register your company to access OhioBuys
- When to Reference This Section: If your company is not currently doing business with the State, and is not already registered to view and respond to solicitations.

Step-by-Step Instructions for Registering as a New Bidder

1

- New Bidders should register and access OhioBuys prior to a bid's due date. Registering an OhioBuys account for your organization will ensure your company has access to, is familiar with, and is readily prepared to bid within OhioBuys when the time comes.

To begin this process, navigate to https://ohiobuys.ohio.gov/ and click **OhioBuys Log In.**



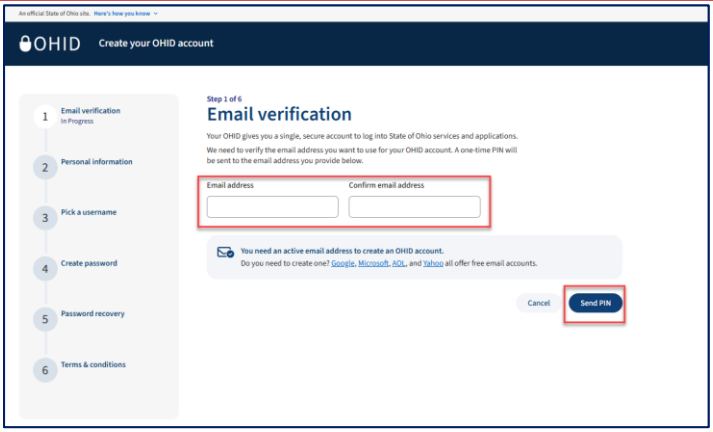
2

If you do not currently have an OHID, navigate to https://ohid.ohio.gov/home and click **Create Account**, otherwise enter your login credentials and click **Log In.**

- An OHID is a secure, single sign-on that provides users access to online services for multiple State of Ohio systems. A valid OHID is required for each OhioBuys user.
- If you already have an OHID, proceed to the next section of this guide.

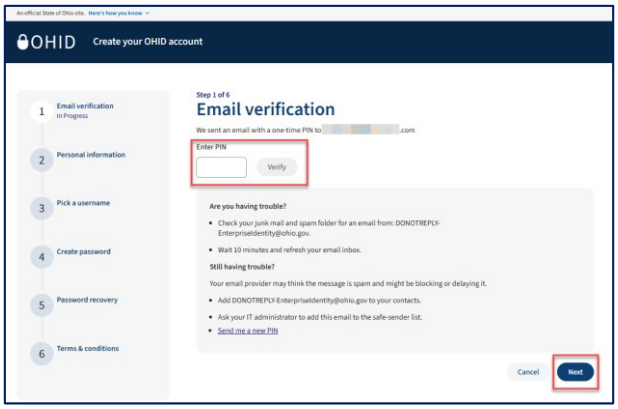
Step-by-Step Instructions for Registering as a New Bidder

3



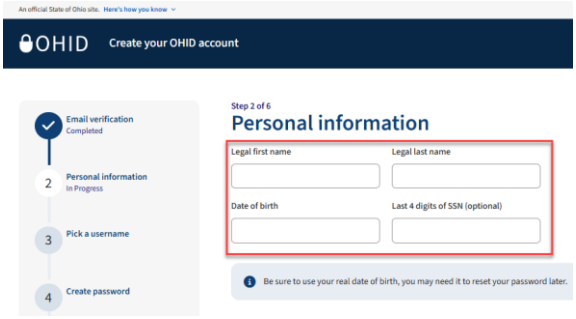
First, enter your email address in the **Email address** field and then again in the **Confirm email address** field and then click the **Send PIN** button. A one-time code will be sent to your email address.

4



Input the code in the **Enter PIN** field, click **Verify,** and then click **Next.**

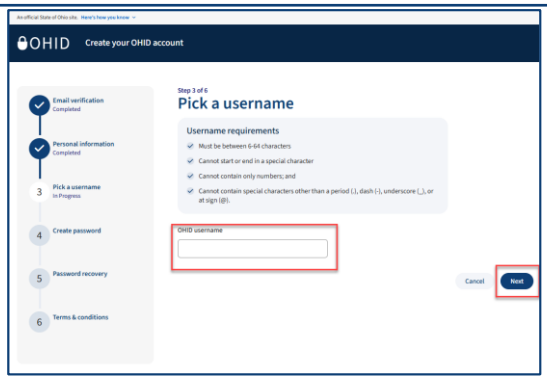
5



Insert your Personal information including **First Name**, **Last Name**, and **Date of Birth.** Then click **Submit.**

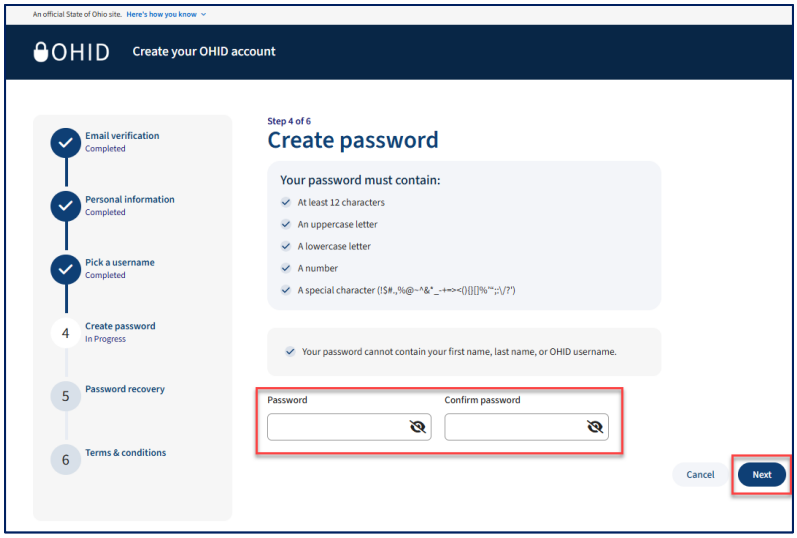
Step-by-Step Instructions for Registering as a New Bidder

6



Enter your desired **Username**. Your Username must be at least 6 and no more than 64 characters in length. It cannot contain only numbers and must not start or end with a special character. The only allowable special characters are a period (.), dash (-), underscore (_), or at sign (@). Then click **Next.**

7



Enter and confirm your password. Then click **Next.**

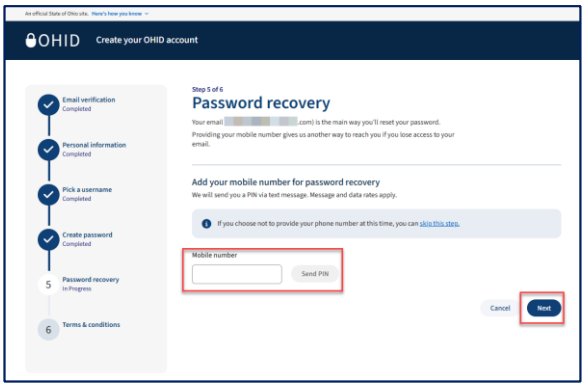
⚠ Your password must have at least 12 and no more than 30 characters in length and contain 1 character from each of the following categories:

- Upper case letters (A-Z)
- Lower case letter (a-z)
- Numbers (0-9)
- Special characters (!$#.,%@~^&*_-+=><(){}[]%'";:\/?`)

⚠ Your password cannot include your first name, last name, or OHIO username.

Step-by-Step Instructions for Registering as a New Bidder

8



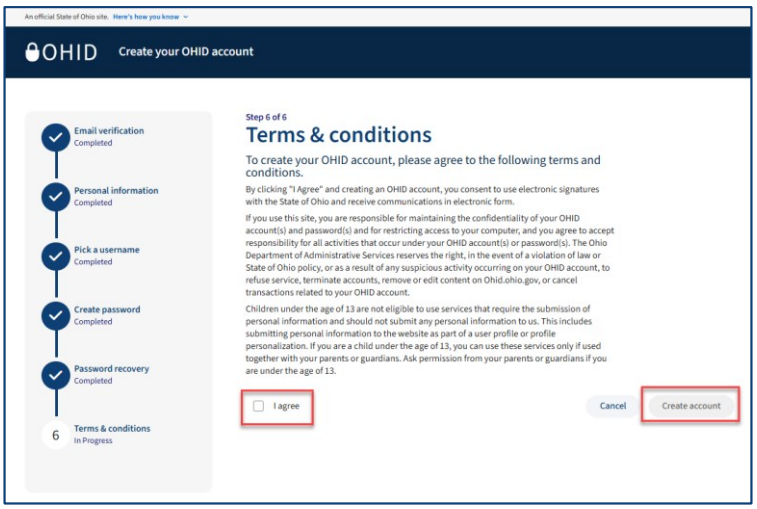
For account recovery, you are given the option to either:

a) Insert a phone number in the **Mobile Number** field and click **Send PIN.**

a) Bypass this step by clicking **skip this step.**

If you have completed the account recovery steps, click **Next** to continue.

9



a) Click the **I agree** checkbox

b) Click **Create Account** to finish creating your OHID

▲You will receive a confirmation email once your OHID has been created.

Click **Continue.** Enter your OHID credentials and click **Log In.**

Step-by-Step Instructions for Registering as a New Bidder

10

The Bidder Registration Request form is displayed. The individual who submits their company's Bidder Registration Request will automatically become the Supplier Administrator for the company's account when the Bidder Registration Request is approved. It is recommended that the person whom the company wishes to be their Administrator completes the registration.

Complete the following mandatory fields (any fields with a red asterisk are mandatory):

a) **Tax ID Number:** your unique tax identifier such as Taxpayer Identification Number (TIN)/Employer Identification Number (EIN).

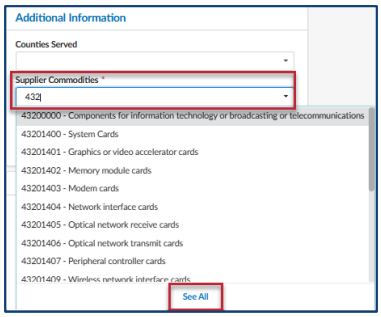
⚠ You will be required to indicate if you are using your Social Security Number as your TIN.

b) **Company Legal Name:** legal name as shown on your income tax return.

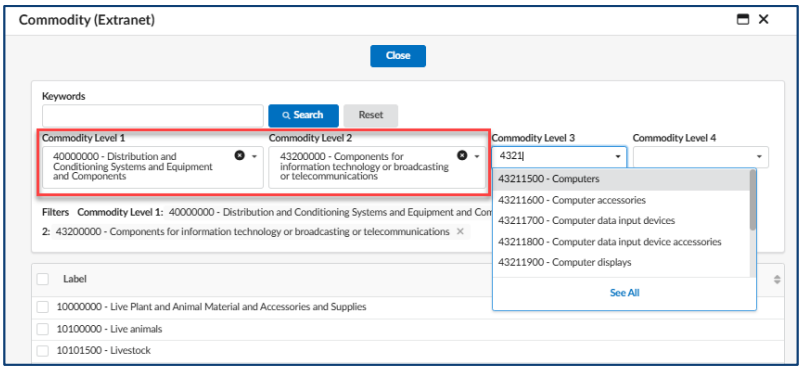
c) **Secretary of State Charter/Entity Number:** please note if your organization is exempt, you can indicate this on this field.

d) **Address Information**, including: **Address Line 1, State/Province, City, Zip Code,** and **County.** You are able to update the **Country** field as needed.

e) **Commodities:** Select the commodities your organization provides. You will be notified of solicitations containing the commodities which you select here. Select the Supplier Commodities field. You can search for commodity codes by typing directly into the **Supplier Commodities** field and selecting an option from the search results. To select many commodities and/or multiple levels of commodities, click See All.



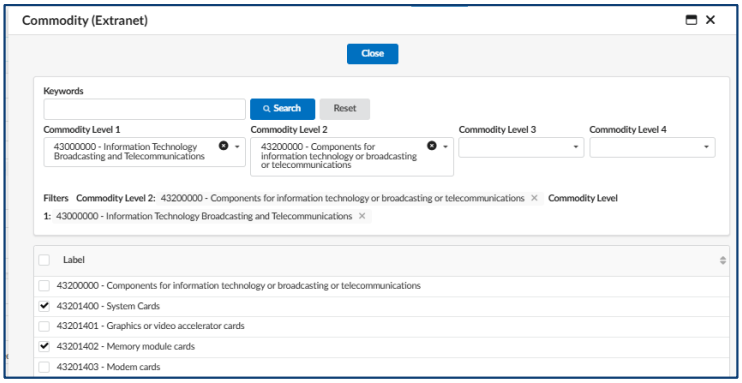
From the resulting pop-up, use the **Keywords** filters or add up to four **Commodity Levels** to your filters and click **Search.**



Step-by-Step Instructions for Registering as a New Bidder

10

Use the checkboxes to select each commodity your organization provides. Click **Close**.



f) Security Control (similar to a CAPTCHA)

In addition to the aforementioned required fields, Bidders can also indicate:

- **State of Ohio Certification** (EDGE, MBE,WBE, and/or VBE) Any State of Ohio Certifications will be reviewed and validated with the State; and Bidders have to complete the formal certification process in the Ohio Business Gateway at business.ohio.gov beforehand in order for their information to be validated.

11

After you have completed the required fields and added any supplementary information such as any State of Ohio Certifications and/or commodities. Click **Register** at the top of the page to submit your Bidder Registration Request.

- You will receive an email notification when the State of Ohio has reviewed and taken action on your request. If your request is approved, you will be able to click the confirmation link from the body of the email you received to log in and access OhioBuys.
- Once the Supplier Administrator logs in to their company's account, they will be able to add additional users to their account on the Contacts tab of their Supplier Profile. Please refer to the Manage Contacts section in this guide for details.

You have now completed the guide for this section. After your Bidder Registration Request is approved, please refer to the General Navigation section in the guide for details on how to navigate OhioBuys.

ACCESSING OHIOBUYS AS AN EXISTING SUPPLIER

Overview:

- What's Covered: How to access OhioBuys as an existing Supplier
- When to Reference This Section: If your company is currently doing business with the State, and you are a new or existing user for your company.

How to Access OhioBuys as an Existing Supplier (Page 1 of 3)

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

- An existing Supplier is a business or organization that is fully registered to do business with the State, while a Bidder is a business or organization that wants to respond to an opportunity to do business with the State and is not currently a fully-registered State Supplier. New Bidders need to complete the Bidder Registration process in order to log in to OhioBuys. Please refer to Registering as a New Bidder in this guide for details.
- If you are a Requisite Program Supplier, please refer to the Requisite Program Supplier Log in job aid for details on how to log in.
- Users will be deactivated if they have not logged into the system in the last 365 days.

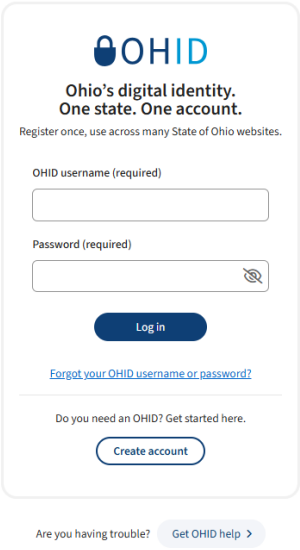
1

To begin this process, navigate to https://ohiobuys.ohio.gov/ and click **OhioBuys Log In.**

2

Enter your OHID username and password and click **Log in**.

If you do not currently have an OHID, complete steps 2-11 in the previous section of this guide to create an OHID. An OHID is a secure, single sign-on that provides users access to online services for multiple State of Ohio systems. A valid OHID is required for each OhioBuys user.

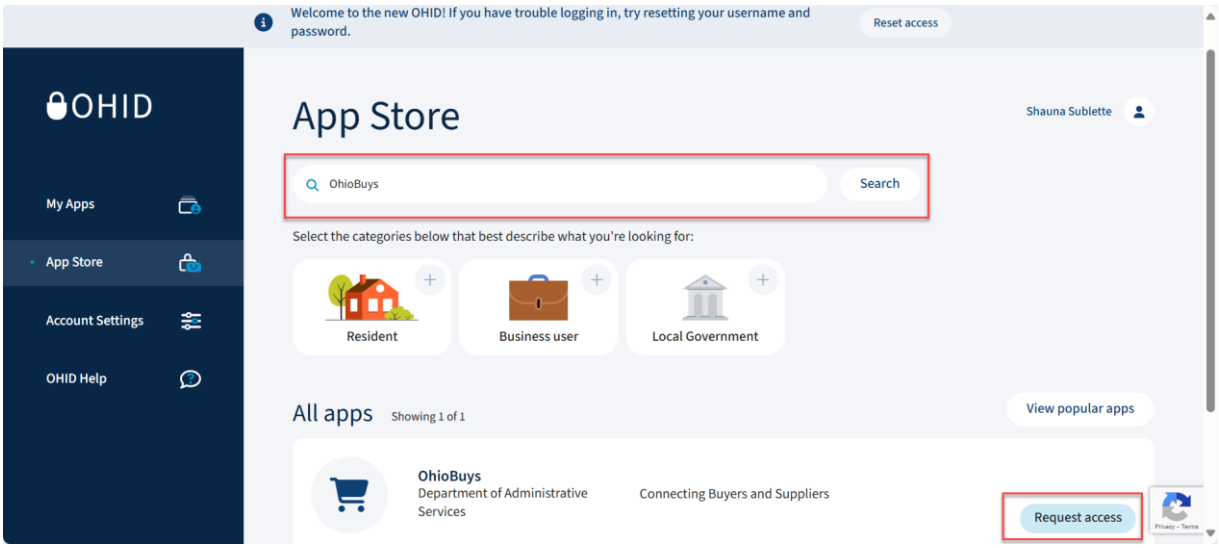


How to Access OhioBuys as an Existing Supplier (Page 2 of 3)

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

Once your OHID is entered, you will be routed to the My Apps page at https://ohid.ohio.gov/manage-account/my-apps. From this page, find the **OhioBuys** tile and click **Open App.**

- If you do not see the OhioBuys tile, click on the **App Store** header, search for "OhioBuys", and then click **Request Access.** You will receive an email notification when access has been granted and then will see the OhioBuys tile under My Apps.
- If you see the Bidder Registration Request form after clicking Open App, your OHID has not been added as a Supplier Contact to any active Supplier accounts. If you need access to an active Supplier account, please reach out to your organization's Account Administrator to be added or email the helpdesk for assistance (*OBM.ContactCenter@obm.ohio.gov).*
- When working in OhioBuys, please ensure you have only one window of OhioBuys open at a time. Multiple windows can create errors such as a time-out or data not saved errors. If a user is logged out of one browser/window/tab, they will be logged out of all OhioBuys sessions. When this occurs, the user must close all open windows/tabs in all browsers. Next, they should clear their cache/history (also noted as clear browsing data) and open a single browser window for OhioBuys. These steps should prevent the error from occurring during their session.



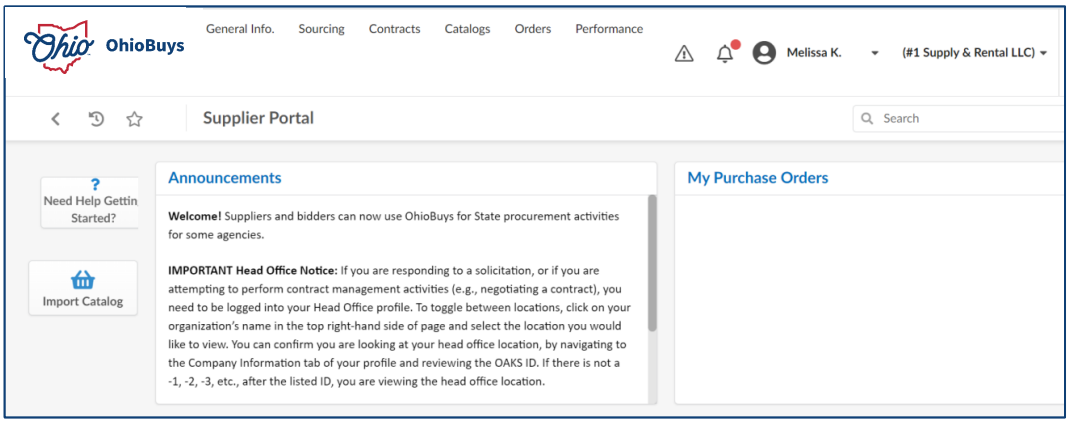
3

How to Access OhioBuys as an Existing Supplier (Page 3 of 3)

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

4

You will be navigated to the OhioBuys homepage. For details navigating OhioBuys and managing your contacts and profile, please refer to General Navigation, Managing Contacts and Selecting Commodities in this guide for details.



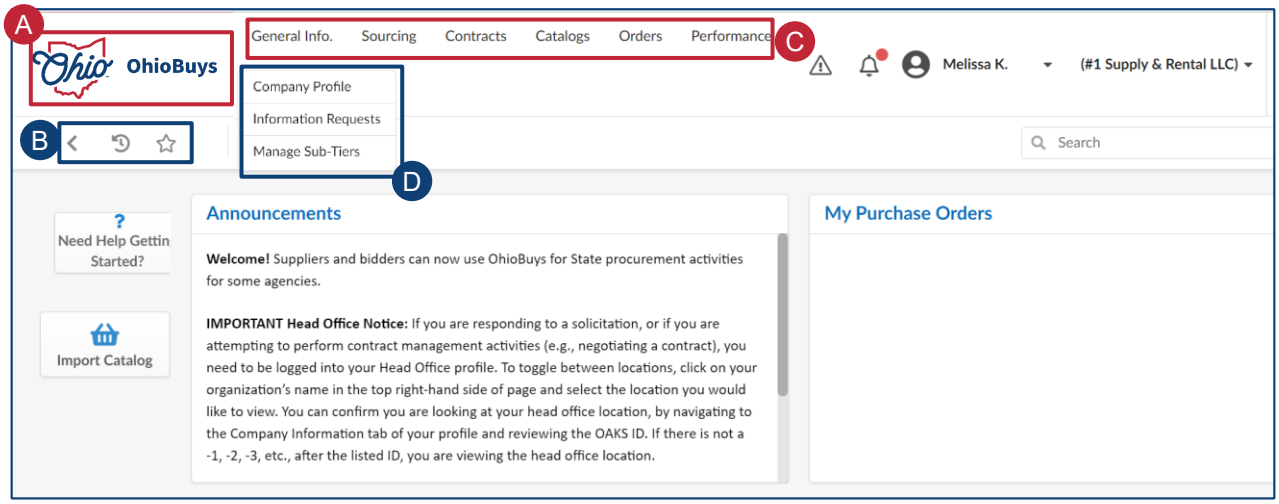
GENERAL NAVIGATION

Overview:

- What's Covered: Explains the structure and content of OhioBuys.
- When to Reference This Section: To become familiar with navigating OhioBuys.

Supplier General Navigation (Page 1 of 5)

Overview of Navigation Options (1/3)



A

Clicking on the **OhioBuys** logo at any time will take you back to the homepage.

B

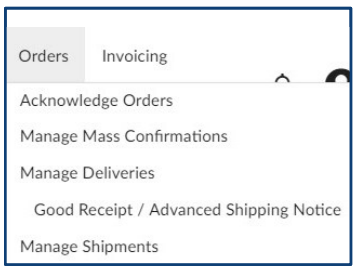
Using the **Navigational Icons** will take you back a page (‹ , let you view your history (↺ , or save the current page as a favorite (☆).

C

The **Main Menu Navigation Bar** at the top of the page includes options available and applicable to you. Click on a main menu option (e.g., General Info., Sourcing, Catalogs, Orders, Invoicing, Performance) to display its associated drop-down menu.

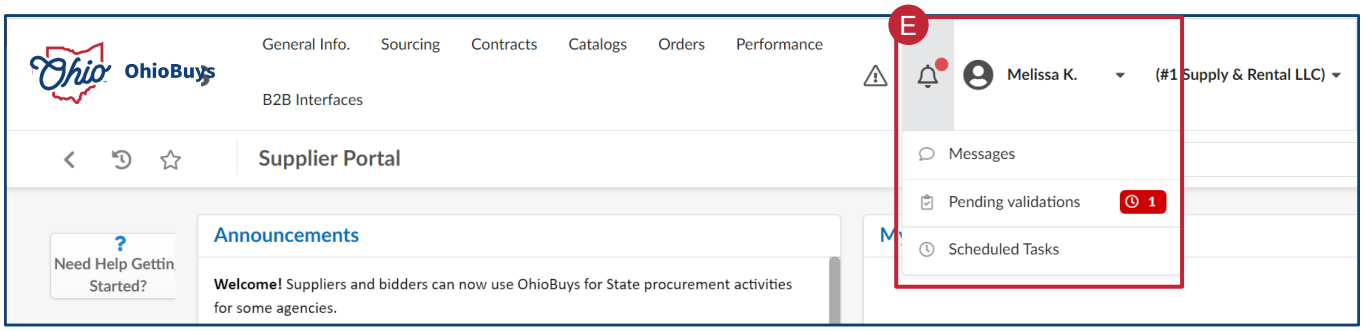
D

Selecting any option within a **Drop-Down Menu** will navigate you to the corresponding page.



Supplier General Navigation (Page 2 of 5)

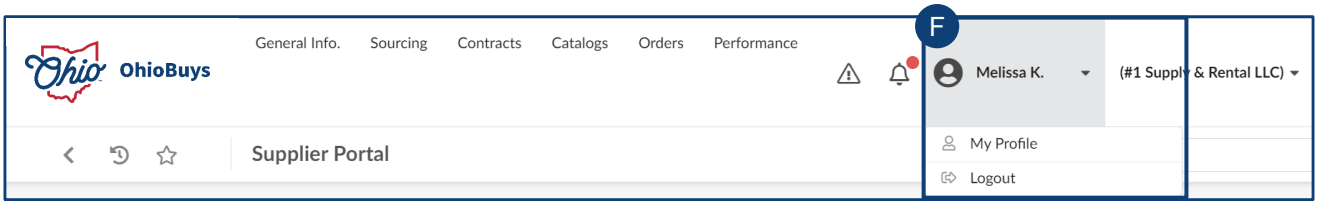
Overview of Navigation Options (2/3)



E

Clicking on the **Notification Bell** (icon displays the following options:

- **Messages**: Displays communications with the State on certain objects in OhioBuys, such as purchase orders or receipts. For more information, please refer to the Messaging for Suppliers Job Aid.
- **Pending validations**: Contains anything assigned to you for action, such as acknowledging orders. In addition, you will receive an email whenever you have been invited to participate in a solicitation or have received a new order.
- **Scheduled Tasks**: Displays open scheduled tasks assigned to you, such as tasks from an improvement plan.



F

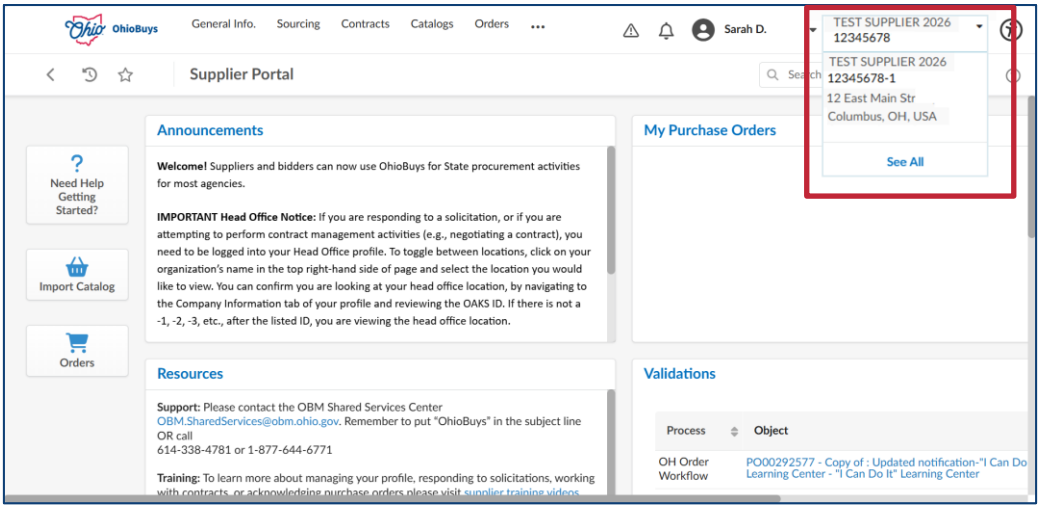
Clicking on your **User Name** displays the following options:

- **My Profile**: Displays your account profile, and enables you to update your personal information default settings and preferences.
- **Unsubscribe from RFP MBE Notifications** (i.e., those notifications sent to MBEs not invited to the solicitation but registered under the commodity code that the solicitation is for when an MBE set-aside solicitation is posted) and **Unsubscribe from New Public RFx Notifications** (i.e., those sent to suppliers not invited to the solicitation but registered under the commodity code that the solicitation is for) by engaging in the associated checkbox(s).

- **Logout**: It is recommended that you do not use the Logout option to log out of OhioBuys. If you would like to log out, close your browser window. In addition, you will also be logged out after 30 minutes of inactivity.

Supplier General Navigation (Page 3 of 5)

Overview of Navigation Options (3/3)



G

If you are a listed as a contact for multiple Supplier locations, you will see a drop-down menu next to your organization's name which will allow you to toggle between the various company locations with which you are associated.

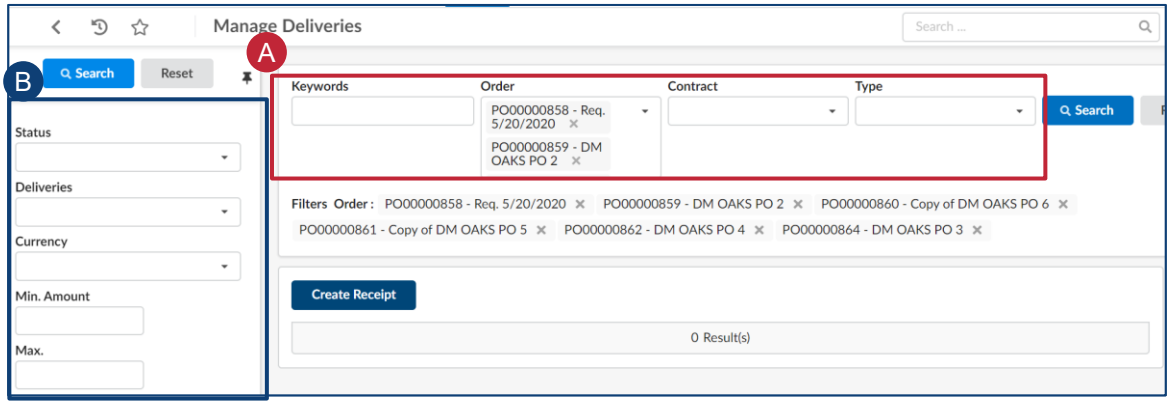
▲ If you are responding to a solicitation, or if you are attempting to perform contract management activities (e.g., negotiating a contract), you need to be logged into your Head Office profile.

To toggle between your company's locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within OhioPays: https://ohiopays.ohio.gov/.

Please note, contacts, orders, and solicitations are managed at the location level, not the Supplier level, so it is recommended you routinely verify activity in all of the locations to which you have access.

Supplier General Navigation (Page 4 of 5)

Overview of Search Functionality



A

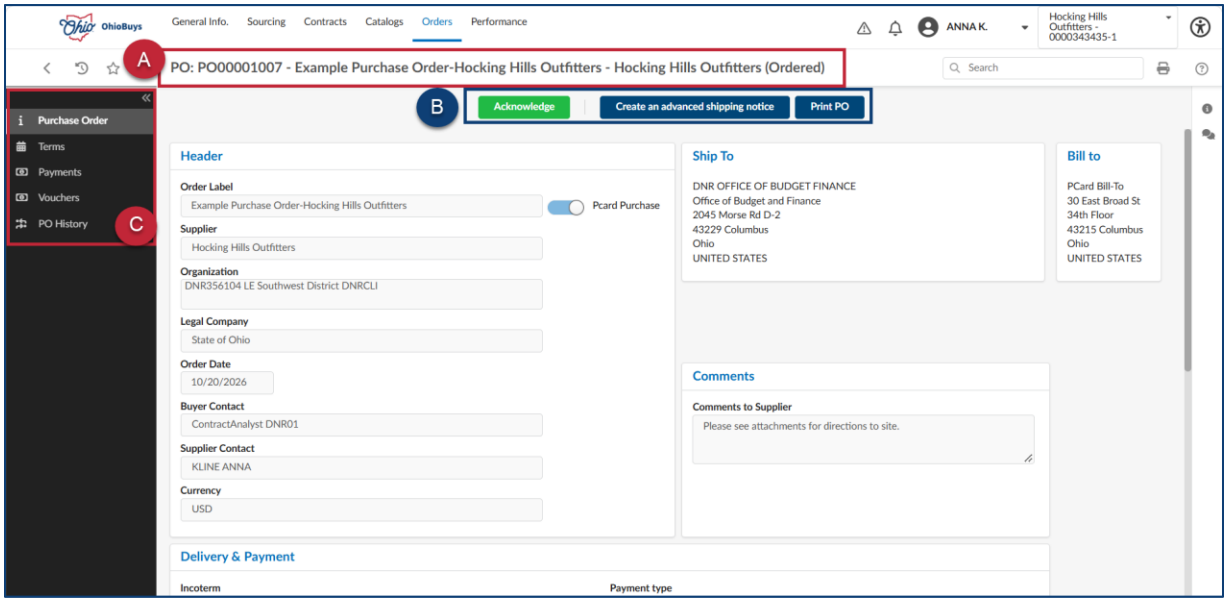
- Users can search for documents on any of the *Browse* pages.
- When searching within OhioBuys, you will be able to search for multiple values at once. For example, searching for more than one order at a time.

B

- The advanced search pane that is indicated by the funnel (▼) icon allows the user to search based on additional criteria related to the document.

Supplier General Navigation (Page 5 of 5)

Page Navigation Overview: Purchase Order Example



A

The Page Name is the name of the page you are on and it is displayed in the top left corner of the page.

PO: PO00001007 - Example Purchase Order-Hocking Hills Outfitters - Hocking Hills Outfitters (Ordered)

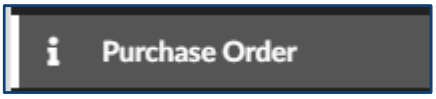
B

The wording of **Action Buttons** will vary by user role and the task being completed and are sometimes unavailable to certain users on specific pages. Use these buttons to take action on a particular task:

- *Green Buttons*: Submitting an action.
- *Red Buttons*: Canceling or rejecting an action.
- *Light Blue Buttons*: Saving an action.
- *Dark Blue Buttons:* Performing an optional or additional action.

C

The **Functional Tabs** are located on the left side of a page. Major tasks are organized by functional tabs. Clicking on these enable you to see additional information related to a specific task (e.g. Purchase Order).



You have now completed the guide for this section. Now that you are familiar with navigating with navigating OhioBuys, refer to the Managing Contacts section of this guide.

MANAGING CONTACTS

Overview:

- What's Covered: Adding or deleting company contacts, as well as assigning each contact a role aligning to the actions that they will be taking in OhioBuys.
- When to Reference This Section: When you want to manage contacts for your company.

How to Manage Bidder and Supplier Contacts (Page 1 of 5)

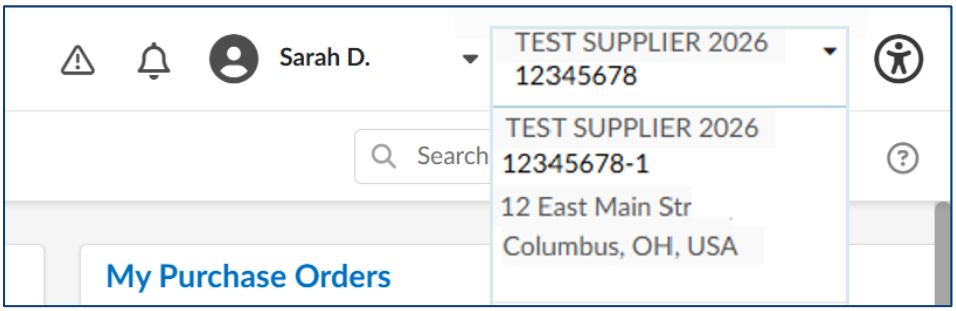
Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

1

- Your organizations should get their contacts registered as soon as possible and each contact should verify their OhioBuys access.

- Please note, contacts are managed at the location (i.e., address) level, not the Supplier level. This means that a contact needs to be associated with each location in order to access information and perform actions for that location. If you add or remove a contact for a particular location and would also like to make this change at another location, go to the Company Profile for the other location and repeat the steps contained in this guide.

When adding contacts, please start with adding them to your head office location as these are the contacts that can be invited to solicitations. To toggle between your company's locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within OhioPays: https://ohiopays.ohio.gov/.



Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.

Navigate to the **Company Information** tab where your company's information is displayed.

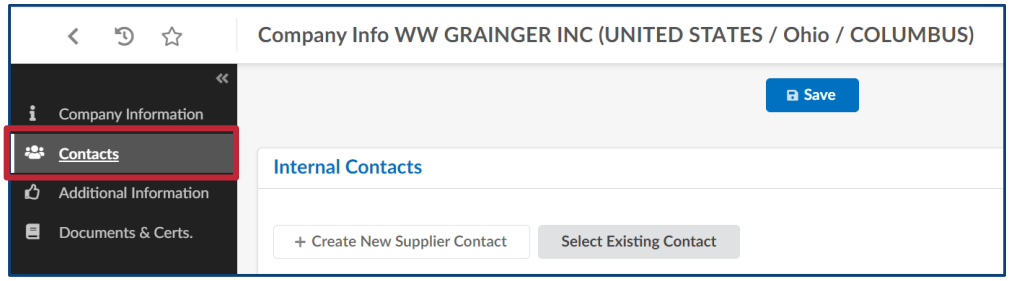
- On the right side of the page, you can see the address associated with the location you are viewing. To view a different location, click on your organization's name in the upper right-hand corner of the screen and select an option from the displayed drop-down menu

How to Manage Bidder and Supplier Contacts (Page 2 of 5)

Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

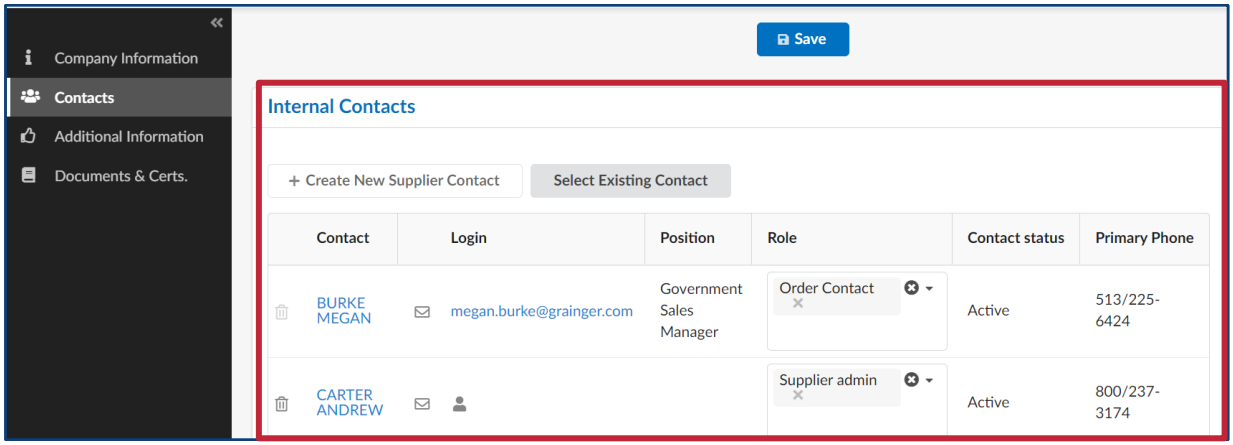
2

Navigate to the **Contacts** tab.



3

From the Contacts page, you are able to revise (i.e., add, edit, or delete) contacts for your company (from the box titled Internal Contacts) and review contacts for the State of Ohio (from the box titled Client Contacts).



▲ Users should contact their Supplier Admin if they feel that roles or locations are missing.

▲ Contact information should be kept up to date with the most accurate data at all times. Please ensure all internal contacts listed on the supplier record are current and remove/update any outdated, obsolete, or erroneous information.

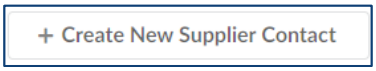
Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

4

While on the Contacts tab, navigate to the box titled Internal Contacts to complete the following contact management options for your company:

a) Add a New Company Contact

1) Toward the top of the Internal Contacts box, click the **Create New Supplier Contact** button to add a new company contact.

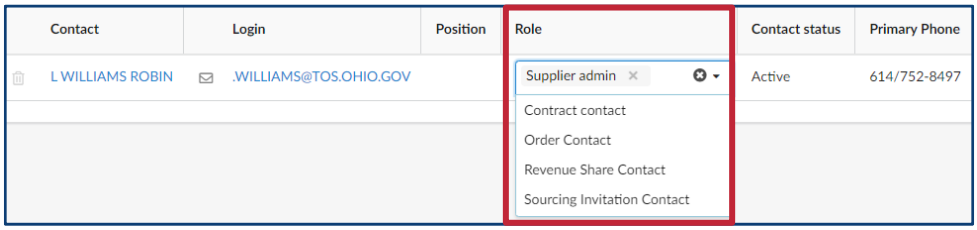


2) Within the pop-up titled Supplier Contact Management, complete the mandatory and (if applicable) optional information in the Identity box (e.g., last name, first name, email, phone) and the Address box.

3) Click the **Save & Close** button.

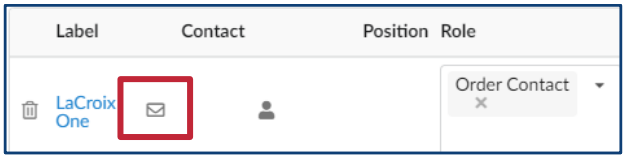
4) Although you have added a company contact, they must have an OHID in order to access OhioBuys. In addition, the email address entered for the new contact must match the email address the contact used to set up their OHID.
   - ▲ OHIDs can created by navigating to https://ohid.ohio.gov/ and clicking **Create OHID Account.**

5) Click the **Role** field and select a role or roles from the drop-down list. If contacts are not assigned a profile, they will not be able to take actions in the system (e.g., review and acknowledge orders, respond to quick quotes, etc.).
   - ▲ Assign the **Contract Contact** role to any user who will need to be notified about a solicitation or responsible for a contract. In order for the State to notify them through OhioBuys, the user must have this role.
   - ▲ Assign the **Order Contact** role to any user who will be responsible for reviewing and acknowledging purchase orders.
   - ▲ Assign the **Supplier Admin** role to any user who will be responsible for managing contact and company profile information.
   - ▲ Assign the **Revenue Share** role to any user who will be responsible for reviewing and reporting revenue share information for a contract.
   - ▲ Assign the **Sourcing Invitation Contact** role to any user who should be notified about OhioBuys Solicitations. While the State of Ohio can invite any supplier contact to a solicitation, suppliers not invited are still notified if the solicitation's commodity code(s) matches those listed on a supplier's profile. OhioBuys will only send these notifications to non-invited supplier contacts having the "Sourcing Invitation Contact" role assigned to them. Note: If a supplier has been invited, only the main contact selected by the State will be notified. Their "Sourcing Invitation Contacts" are not currently invited. An enhancement is planned for the upcoming OhioBuys Upgrade to ensure that all Sourcing Invitation Contacts associated with invited and non-invited suppliers are notified about publicly-posted solicitations.



6) Click **Save**.

7) Click the **Mail** icon to send the user an invitation to log in. The user who has been added as a contact must then create an OHID with the email address that was entered in OhioBuys.



▲ Once you have added a contact to a particular location, you can add that contact to another location by toggling over to the desired location, navigating to the Contacts tab of your company profile, and clicking the Select Existing Contact button.

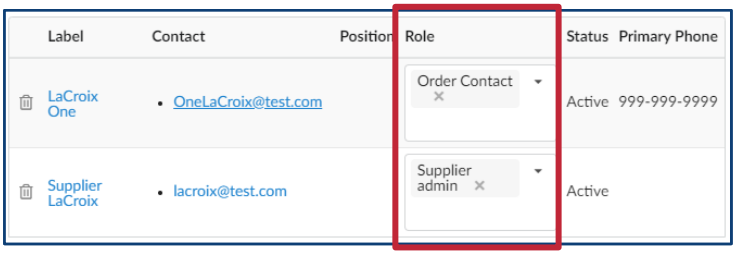
▲ If any contact displays a status of **Invalid**, review the email address. If the email address is correct, reach to the contact and have them validate their email address using the following steps.

4

1. Login to OhioBuys
2. Select **My Settings** from the dropdown by their User Name.
3. Navigate to the **Profile** tab and click the **Validate** button.

b) <u>Change a User Role</u> :

- To change a user's role, navigate to the column for **Role**, click the drop-down menu, and select the applicable role(s). The available roles are Supplier Admin, Order Contact, and Contract Contact. After you have made the necessary updates, click **Save.**



▲ You should assign users the Order Contact role if they are responsible for order processing. Users assigned this role will be shown to State buyers as Supplier contacts when they are submitting orders.

▲ It is also recommended that each company's account have at least two Supplier Admins. Supplier Admins have the ability to manage contact and company profile information (e.g. select commodities which they can provide) in OhioBuys.

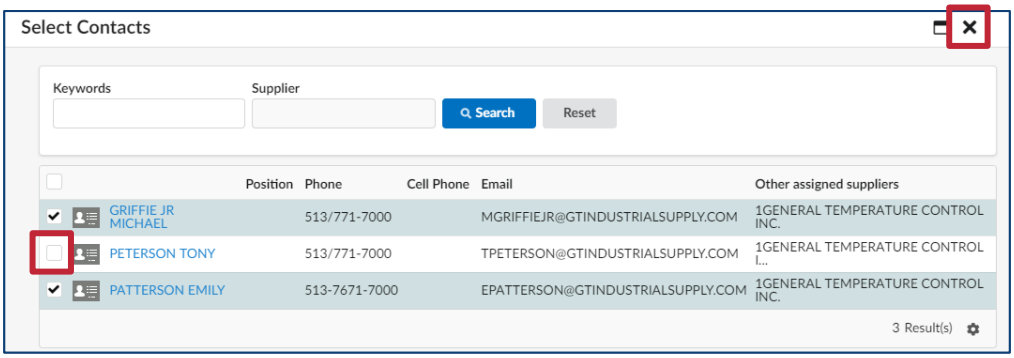
4

b) Remove a Company Contact: Find the company contact you want to remove and click on the **Trash Can** ( ) icon next to their name. Once completed, click **Save**.

c) Add an Existing Company Contact In OhioBuys:

1) Toward the top of the Internal Contacts box, click the **Select Existing Contact** button to find and add a company contact that is already listed as a contact for another location.

2) Within the pop-up titled Select Contacts, either utilize the search functionalities toward the top or scroll through the automatically generated list of company contacts associated with your company. Once you find the company contact you want to add, click the **Checkbox** (icon next to the individual's name.



3) Once you have clicked the Checkbox icon next to each company contact you want to add, navigate to the top of the pop-up and click the **Close** (icon. The contact is now listed within the Internal Contacts box on the Contacts page. Once the contact has been added, select the applicable role(s) for the contact and click **Save**.

You have now completed the guide for this section. For next steps in managing your company profile please refer to the Selecting Commodities section in this guide.

SELECTING COMMODITIES, COUNTIES SERVED, AND PROVIDING SUPPLIER DEMOGRAPHICS

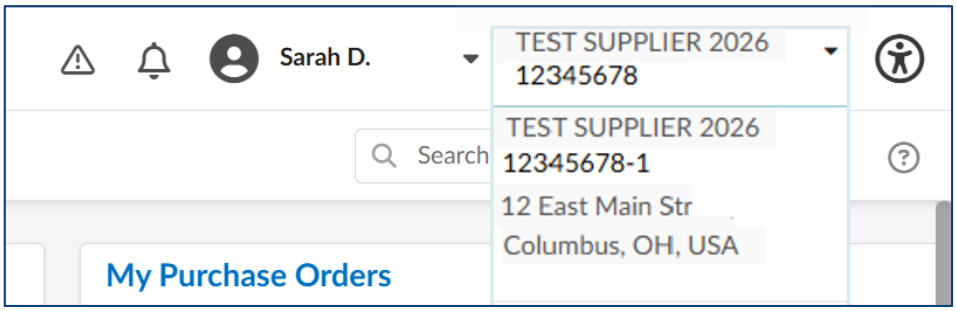
Overview:

- What's Covered: Adding or deleting the commodities which your company can supply.
- When to Reference This Section: When you want to update the list of commodities your company can supply. Selecting commodities in OhioBuys allows your company to receive automated notifications for relevant solicitations.

How to Select Commodities (Page 1 of 3)

Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

▲ Please note, commodities are managed at the location (i.e., address) level, not the Supplier level. When managing commodities, please add them to your head office location as this is the location that is invited to solicitations. To toggle between locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within OhioPays: https://ohiopays.ohio.gov/.

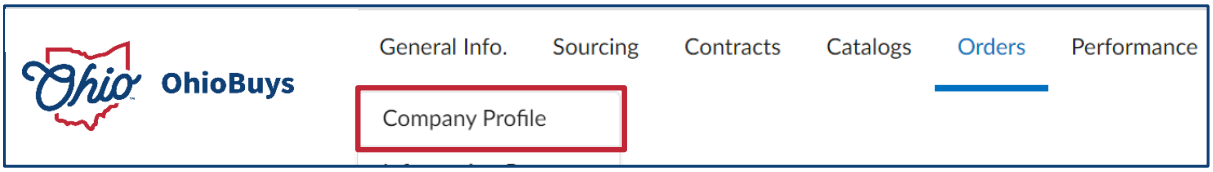


How to Select Commodities (Page 2 of 3)

Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

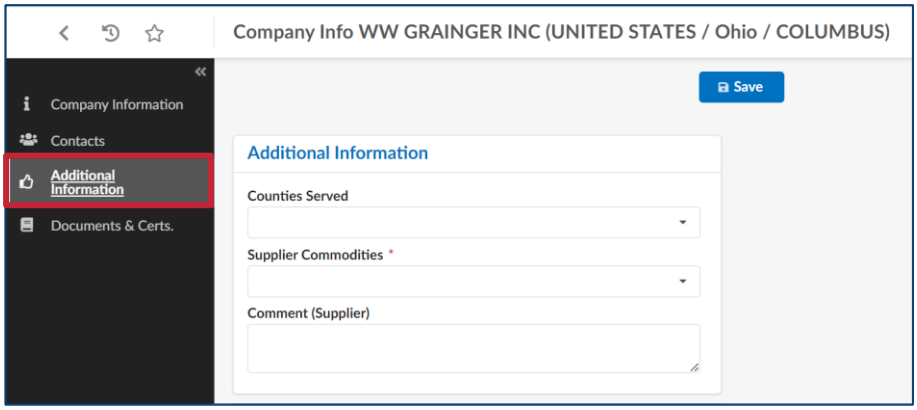
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



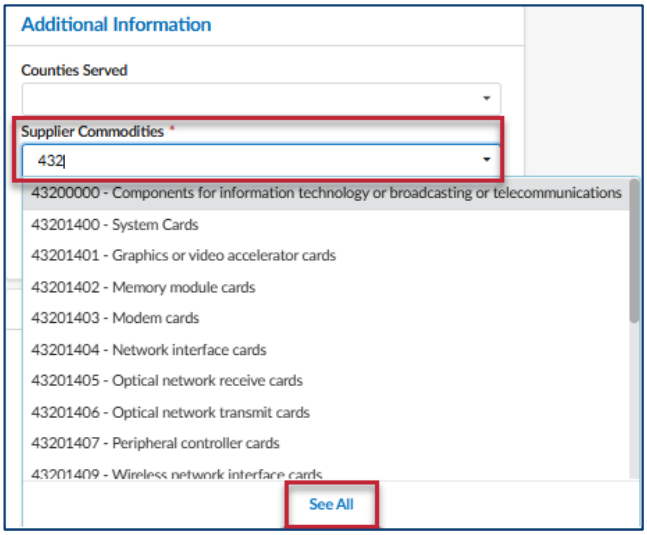
2

Your company's profile is displayed. Navigate to the **Additional Information** tab.



3

b) **Commodities:** Select the commodities your organization provides. You will be notified of solicitations containing the commodities which you select here. Select the Supplier Commodities field. You can search for commodity codes by typing directly into the **Supplier Commodities** field and selecting an option from the search results. To select many commodities and/or multiple levels of commodities, click **See All.**

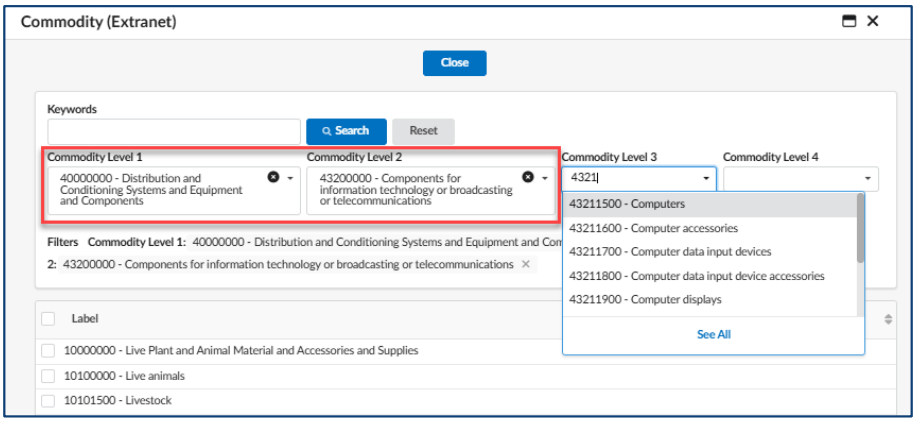


How to Select Commodities (Page 3 of 3)

Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

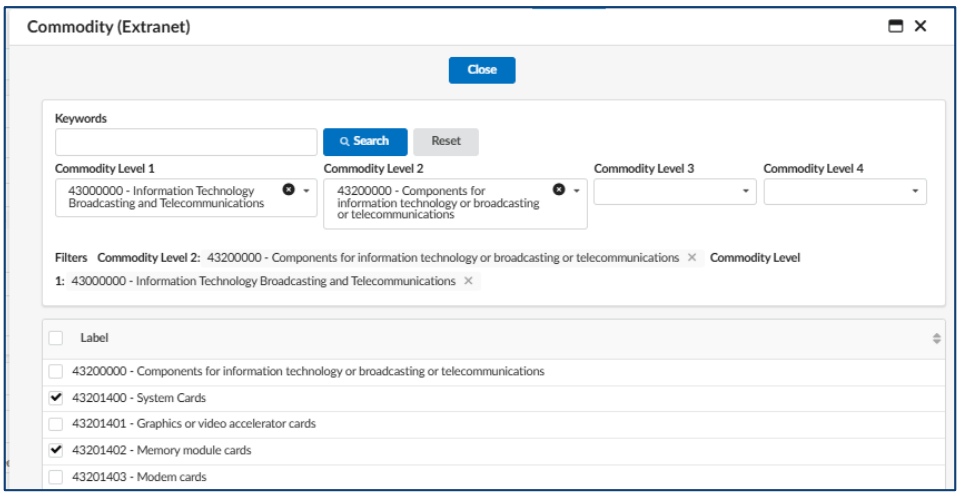
4

From the resulting pop-up, use the **Keywords** filters or add up to four **Commodity Levels** to your filters and click **Search.**



5

Use the checkboxes (☐) to select each commodity your organization provides. Click **Close**.



▲ If you are having trouble finding the correct commodity in OhioBuys, you can also visit the UNSPSC website to search for a commodity. Once you have located the commodity on this site, enter the commodity code in the OhioBuys **Keywords** field and then **Search** and select it from the results.

6

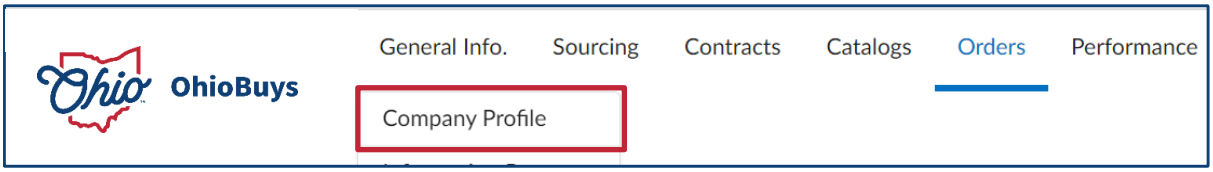
Click **Save** to save the updates to your company profile. Please note, selecting applicable commodities allows the State of Ohio to easily identify relevant Bidders and Suppliers for solicitations, so it is recommended that your organization maintains accurate selections.

How to Select Counties Served (Page 1 of 2)

Step-by-Step Instructions for Selecting Counties Served as a Bidder/Supplier

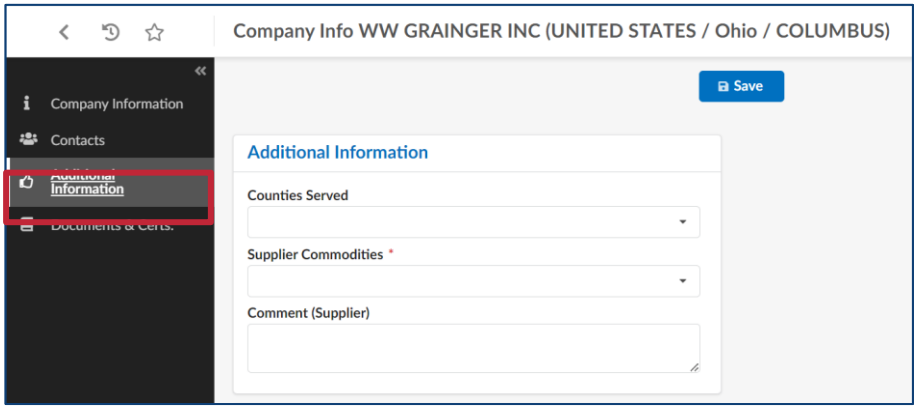
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



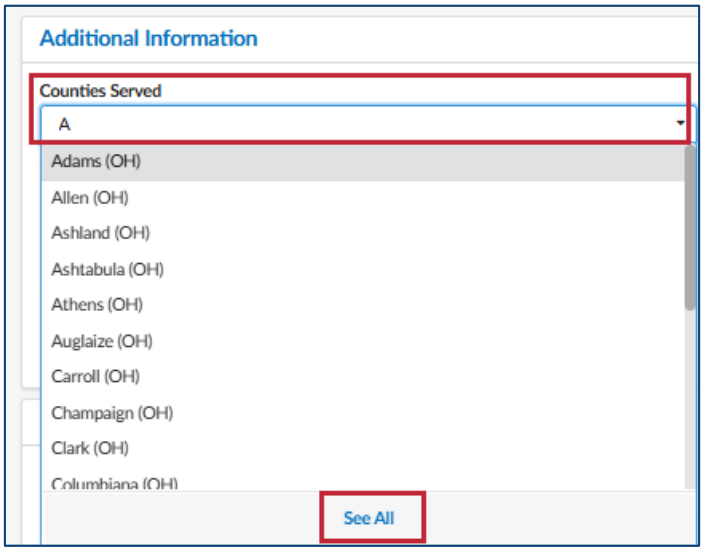
2

Your company's profile is displayed. Navigate to the **Additional Information** tab.



3

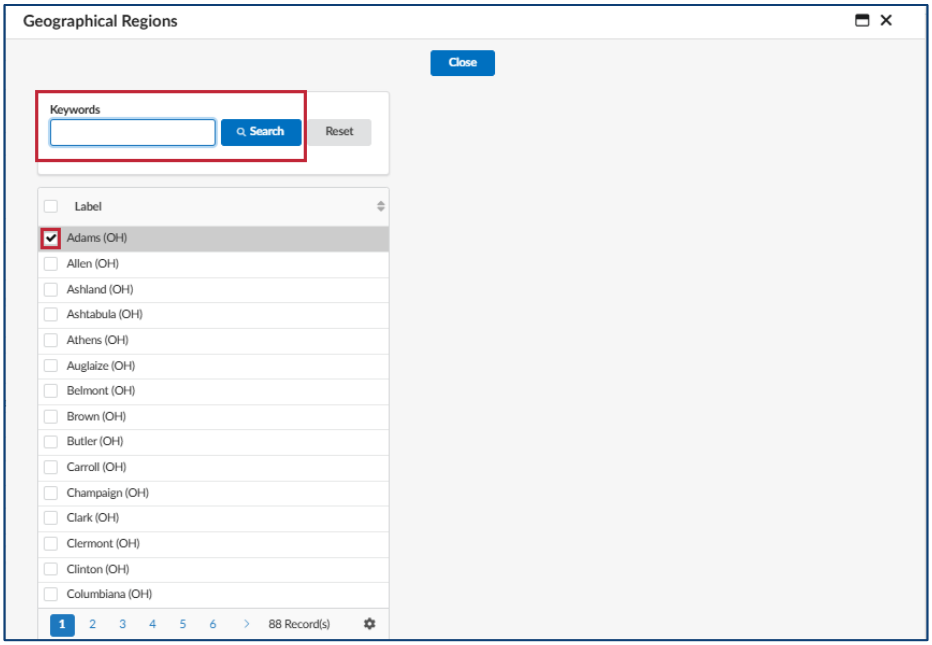
On this tab, you can update the counties that your organization serves. You will be notified of solicitations for the counties which you select here. Select the **Counties Served** field. You can search for counties by typing directly into the **Counties Served** field and selecting an option from the search results. To select many counties, click **See All.**



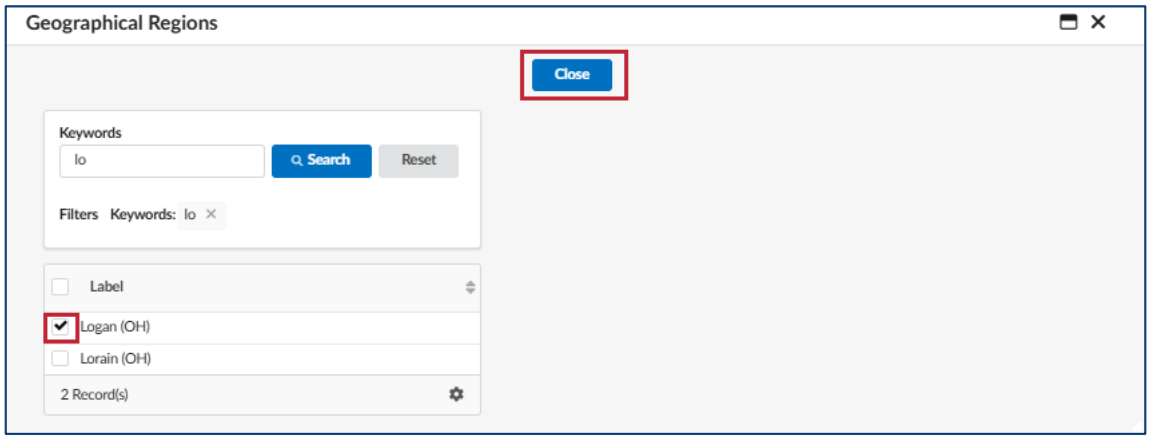
How to Select Counties Served (Page 2 of 2)

Step-by-Step Instructions for Selecting Counties as a Bidder/Supplier

4 From the resulting pop-up, use the checkboxes (☐) to select each county, or use the **Keywords** filters and click **Search.**



5 From the resulting pop-up window, select the checkboxes (☐) to select each county your organization provides goods or services for. Click **Close**.



6 Click **Save** to save the updates to your company profile. Please note, selecting applicable counties served allows the State of Ohio to easily identify relevant Bidders and Suppliers for solicitations, so it is recommended that your organization maintains accurate selections.

How to Provide Supplier Demographics

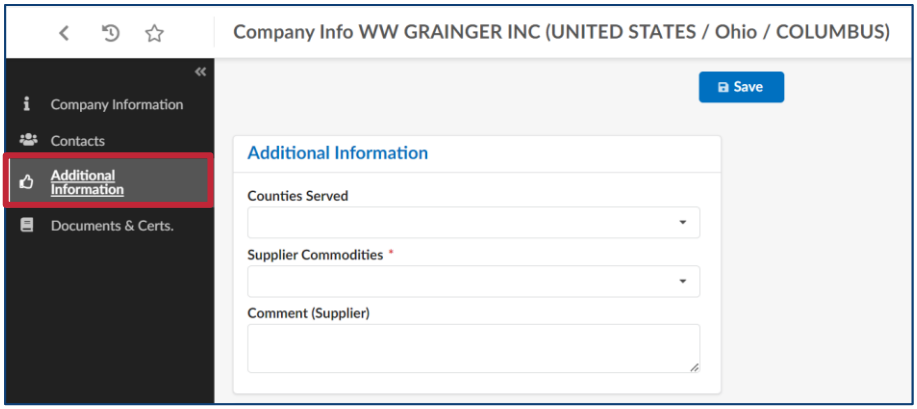
Step-by-Step Instructions for Providing Demographics as a Bidder/Supplier

1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.

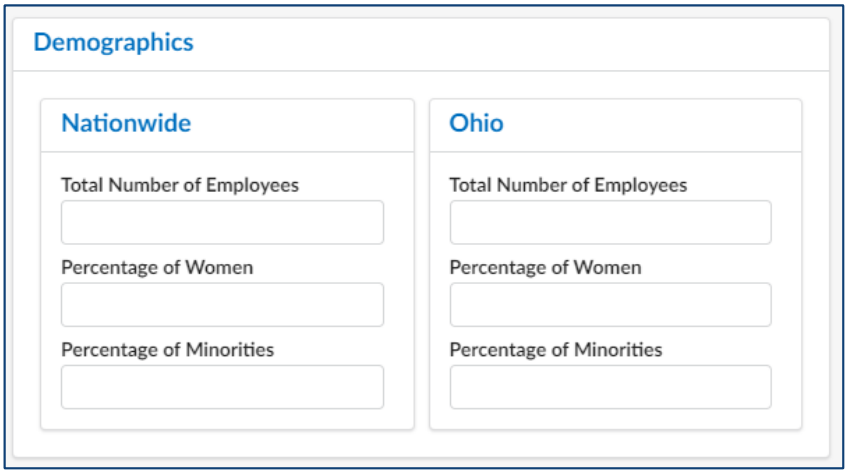
2

Your company's profile is displayed. Navigate to the **Additional Information** tab.



3

On this tab, under the Demographics section you can add the Nationwide and state of Ohio demographic breakdown for your organization. Click **Save** once finished.



You have now completed the guide for this section. For next steps in managing your company profile please refer to the Uploading Documents section in this guide.

UPLOADING DOCUMENTS

Overview:

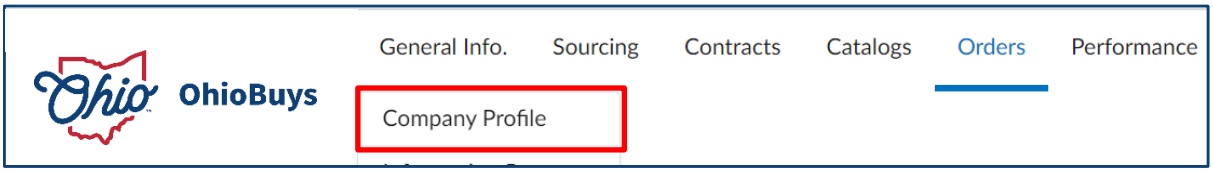
- What's Covered: Uploading documents and certifications to your Company Profile
- When to Reference This Section: When you would like upload legal documents, licenses and, and/or other documents (e.g., Insurance, Workers Comp, Affirmative Action Plans, etc.) to your Company Profile in OhioBuys.

How to Upload Documents and Certifications (Page 1 of 2)

Step-by-Step Instructions for Uploading Documents and Certifications

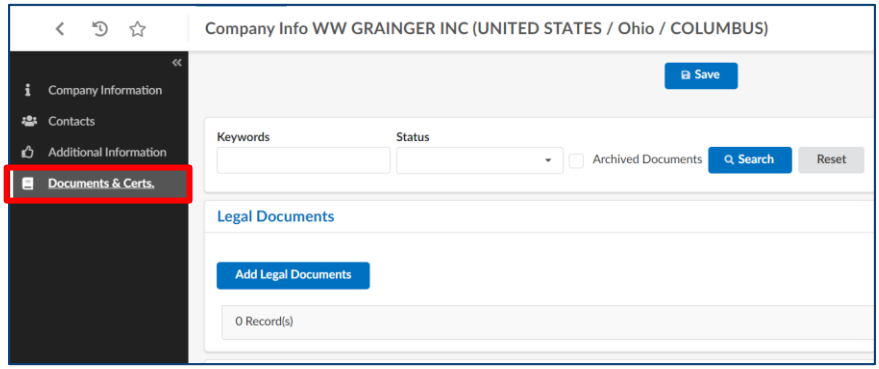
1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



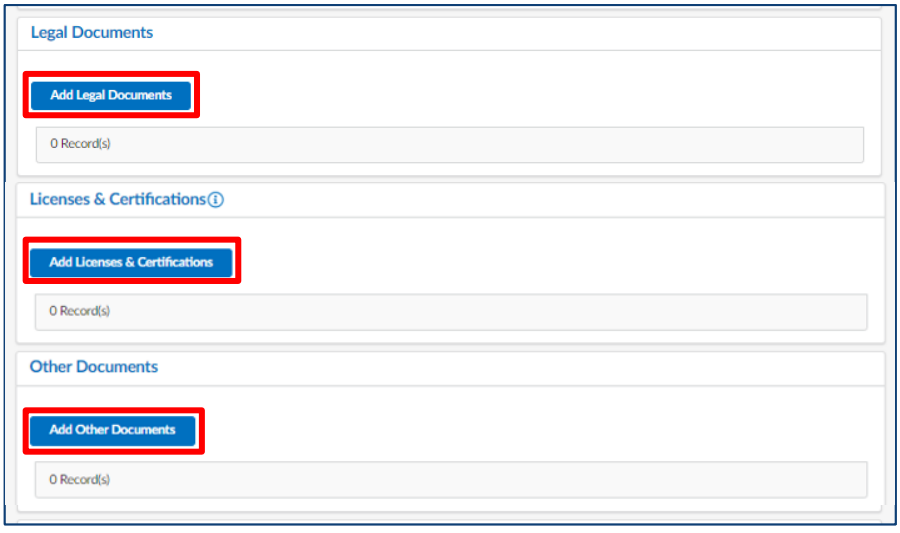
2

Your company's profile is displayed. Navigate to the **Documents & Certs.** tab.



3

On this tab, you can upload legal documents, licenses and certifications, and/or other documents (e.g., Insurance, Workers Comp, Affirmative Action Plans, etc.). Depending on the type of document you wish to upload, click **Add Legal Documents**, **Add Licenses & Certifications,** or **Add Other Documents.**



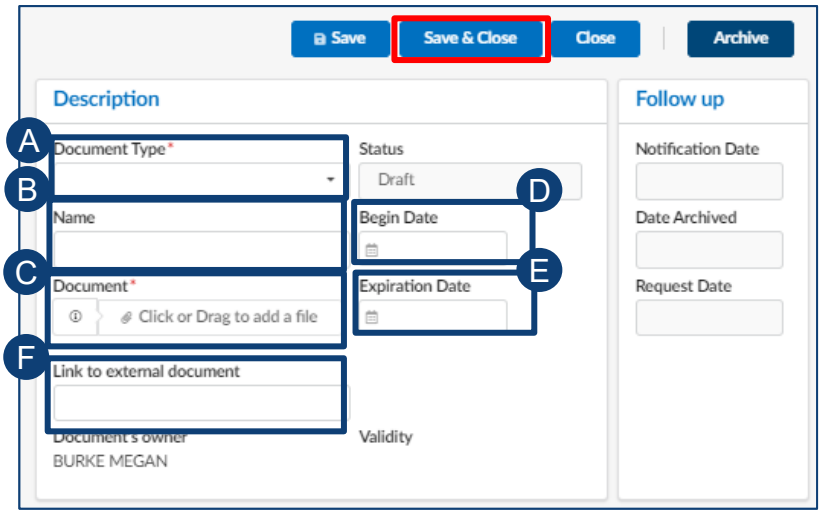
Step-by-Step Instructions for Uploading Documents and Certifications

4

Complete the following fields:

a) **Document Type** (e.g., Affirmation Action Program ccation, Certificate of Insurance, etc.)
b) **Name** (a summary of what the document is)
c) **Document** (click the **Click or Drag to add a file** button to search for and select the document you would like to upload)
d) **Begin Date** (the starting date the document is valid)
e) **Expiration Date** (the expiration date for the document)
f) **Link to external document** (A link to an external website with a copy of the document, if applicable)

After these fields have been populated, click **Save & Close.**



5

The document has been added to your Company Profile. Continue to add documents as needed.

▲ You will receive email notifications 60 days prior to the expiration date of any documents you upload.

You have now completed the guide for this section. For details on how to submit Bidder change requests to update your address or add State of Ohio Certifications, please refer to the Submitting Bidder Change Requests section in this guide.

SUBMITTING BIDDER CHANGE REQUESTS

Overview:

- What's Covered: Creating and submitting Bidder change requests
- When to Reference This Section: When you are a new Bidder (i.e., not an existing Supplier) and you would like to update your company information (e.g., add any State of Ohio Certifications, change your address, etc.)

How to Submit Bidder Change Requests

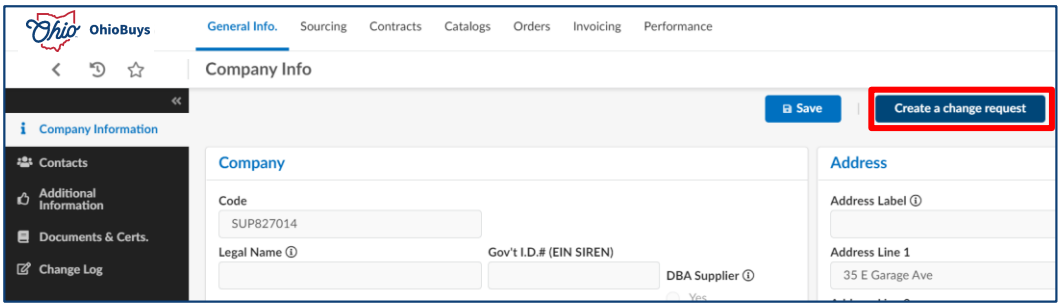
Step-by-Step Instructions for Submitting Bidder Change Requests

1

Log in to OhioBuys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.

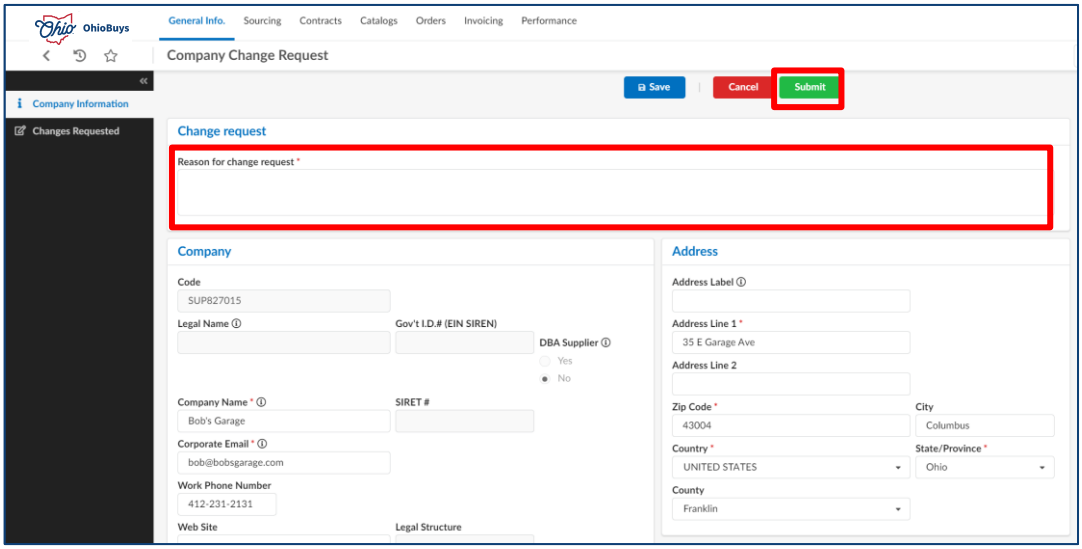
2

Your company's profile is displayed. Click **Create a change request.**



3

Enter the **Reason for change request** and make any requested updates (e.g., update your Address, add any State of Ohio Certifications, etc.). After you have made your requested updates, click **Submit.** You will receive email notifications as your change request is reviewed and approved by the State.



You have now completed the guide for this section. For additional OhioBuys training resources and support, please refer to the Accessing Additional Training Resources and Support section in this guide.

ACCESSING ADDITIONAL TRAINING RESOURCES AND SUPPORT

Overview:

- What's Covered: Instructions for accessing additional OhioBuys training materials and support.
- When to Reference This Section: When you need additional information or support.

OhioBuys

How to Access Additional Training Resources and Support

Step-by-Step Instructions for Accessing Additional Training Resources and Support

Suppliers and Bidders are strongly urged to complete training to begin successfully working in OhioBuys. Training beyond this guide includes step-by-step microlearning video and job aids. The job aids are available on the OhioBuys website. Additionally, several **Guides** are accessible from within OhioBuys by clicking the question mark icon (?) near the upper-right hand corner of the screen.

Microlearning Video	Description of Content
Using OhioBuys on a Mobile Device	Walks through how to access and log in to OhioBuys on a mobile device.

Guides (OhioBuys)	Description of Content
Navigating OhioBuys	Walks through how to navigate the key pages and elements of OhioBuys.
Viewing and Responding to Solicitations	Walks through how to respond to solicitations in OhioBuys.

You have now completed the guide for this section.
Need Help?
Contact OBM Financial Support Services to create a help desk ticket for OhioBuys 614-338-4781 or 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov. Remember to put "OhioBuys" in the subject line.

Microlearning Videos And Guides

Job Aids

Help Desk Support

Version Control (Page 1 of 4)

Version	Publish Date	Summary of Updates	Pages Updated
1.0	4/24/20	Initial draft	ALL
1.1	5/27/20	Updates around search functionality using multi-selector fields	19
1.2	6/8/20	Updates to Supplier view when selecting multiple locations	18, 22
1.3	6/23/20	Added revised OhioBuys landing page	6,11
1.4	7/10/20	Added phone number extension field	26
2.2	2/19/21	Updated OH|ID screens, noted mandatory fields on Bidder Registration Form, Added additional contacts clarification, Added Uploading Documents section	7-17, 24, 32-34
2.3	3/1/21	Added a note referencing that OAKS will be importing UNUSPSC codes into OhioBuys	7, 30
2.4	3/15/21	Added WBE status option. Added new OhioBuys homepage screenshots	1, 8, 11
3.0	4/8/21	Added details on Bidder change requests	36, 37
3.1	5/10/21	Removed expired Job Aid links	40
3.4	6/7/21	Added additional role clarification information	26, 27

Version Control (Page 2 of 4)

Version	Publish Date	Summary of Updates	Pages Updated
3.5	7/8/21	Added details on how to easily see a location's OAKS ID	21, 27, 28
3.6	7/19/21	Added a note at the beginning of the Managing Contacts section. Also correct the typo at the end of Page 24	24, 25
3.7	9/20/21	Updated all supplier URLs and updated the OH|ID login screens	6, 7, 8, 11, 12
3.8	10/4/21	Updated OhioBuys logos and wording	All
3.9	11/4/21	Updated new OHID account creation steps	7,8,12,13-17
4.0	1/20/2022	Minor language updates	17
4.1	3/15/22	Inform suppliers to keep the contacts information current and not to have erroneous or obsolete data there.	26
4.2	5/19/2022	Replaced mentions and screenshots of EOD with MBDD	10, 11, 36, 37, 38
~~4.3~~	~~7/14/2022~~	~~Added note for Suppliers using their SSN as their TIN.~~	~~10~~
4.4	7/26/2022	Updated OH|ID Logins screenshot	13
4.5	8/22/2022	Restored note for Suppliers using their SSN as their TIN.	10
4.6	11/14/022	Updated Supplier Portal references to OhioPays.	21, 25, 31

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Version	Publish Date	Summary of Updates	Pages Updated
4.7	12/7/22	Added details on how to add supplier demographics	2, 32 - 36
4.8	01/17/23	Added a note regarding multiple OhioBuys windows and errors that can come as a result	17
5.0	05/08/23	Upgrade updates	All
5.1	01/31/24	Updated references to Legal Names to Company Legal Name, MBDD Designation to State Of Ohio Certification, OH|ID to OHID	10-11,40-42, and All
5.2	03/06/24	Updated to include enhancement to unsubscribe from notifications from My Preferences Added noted around deactivation	13, 21
5.3	03/08/24	Updated Branding	All
5.4	04/04/24	Added a new Supplier role around solicitations	28
5.5	5/23/2024	13, 28, 44	Hyperlink updates
5.6	3/19/2025	The letter V of the word Verification was bolded.	16
5.6	3/19/2025	Updated the language for the pages first caution note, in last sentence of the first paragraph.	26
5.6	3/19/2025	The contact language for the new OBM Contact Center was updated.	10 and 44

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Version	Publish Date	Summary of Updates	Pages Updated
5.7	9/11/2025	Updated OHID screenshots and instructions, removed repeat steps for OHID registration, added steps between OHID registration and OhioBuys login.	6-9, 13-17
5.8	11/3/2025	Introduced new Sourcing Invitation Contact role.	28
5.9	3/16/2026	Replaced screenshots of toggling between different supplier locations. Updated Resources.	22, 26, 32, 44
5.10	4/2/2026	Updated Commodity and Counties screenshots and instructions	10, 11, 33, 34
5.11	8/5/2026	Added instructions for resolving suppler contact status = invalid.	25
5.12	10/20/2026	Updated Screenshot of PO to include new PO History tab	21