

# Vertikal Subcontractor User Guide

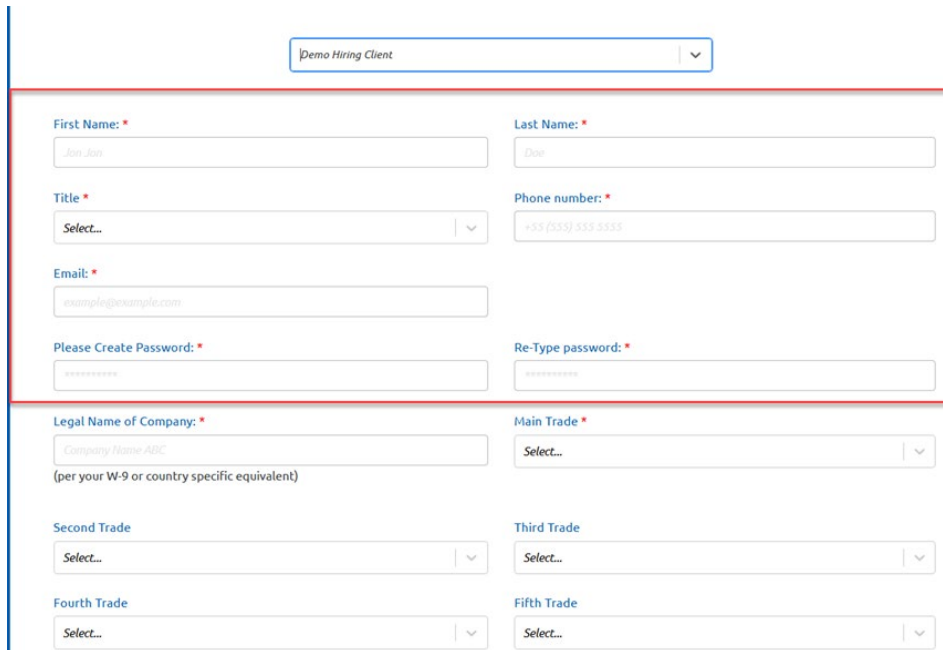
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## Application Form

### Create Account

1. Go to the application link sent to you in the email from the Hiring Client.
2. Create a user account by entering First Name, Last Name, Title, Phone number, Email and Password. This user will have access to the prequalification form with this Hiring Client.



The screenshot shows a web form for account creation. At the top, there is a dropdown menu for "Demo Hiring Client". Below it, a red rectangular box highlights the account creation fields. These fields include: "First Name:" with a text input containing "Jan Jan"; "Last Name:" with a text input containing "Doe"; "Title:" with a dropdown menu showing "Select..."; "Phone number:" with a text input containing "+33 (555) 555 5555"; "Email:" with a text input containing "example@example.com"; "Please Create Password:" with a text input containing "\*\*\*\*\*"; and "Re-Type password:" with a text input containing "\*\*\*\*\*". Below the red box, there are additional fields for company information: "Legal Name of Company:" with a text input containing "Company Name ABC" and a note "(per your W-9 or country specific equivalent)"; "Main Trade:" with a dropdown menu showing "Select..."; "Second Trade:" with a dropdown menu showing "Select..."; "Third Trade:" with a dropdown menu showing "Select..."; "Fourth Trade:" with a dropdown menu showing "Select..."; and "Fifth Trade:" with a dropdown menu showing "Select...".

3. Enter the information for the company you want to prequalify.
  - a. Enter the legal name of your company as it appears on your W-9 or country specific equivalent.
  - b. Select the main trade and up to four additional trades your company is doing business in.
  - c. Enter your company's headquarter address. First confirm the country, then select the state / province.
  - d. Enter your 9 digit Federal Employment Identification Number (FEIN) if your company is based in the United States. The dash "-" will fill in automatically.
  - e. You may check that you have previously worked for this Hiring Client.

Email: \*

Please Create Password: \*  Re-Type password: \*

Legal Name of Company: \*  
  
(per your W-9 or country specific equivalent)

Main Trade \*

Second Trade

Third Trade

Fourth Trade

Fifth Trade

State / Province: \*

Country: \*

City: \*

Address: \*

Postal Code: \*

Tax ID \*

Previously worked for Demo Hiring Client

f. If your company is based in Canada, please enter your Sales Tax Registration Number (GST). The format must be 000000000RT0000.

State / Province: \*

Country: \*

City: \*

Address: \*

Postal Code: \*

Sales Tax Reg. Number (GST) \*  Required

Previously worked for Demo Hiring Client

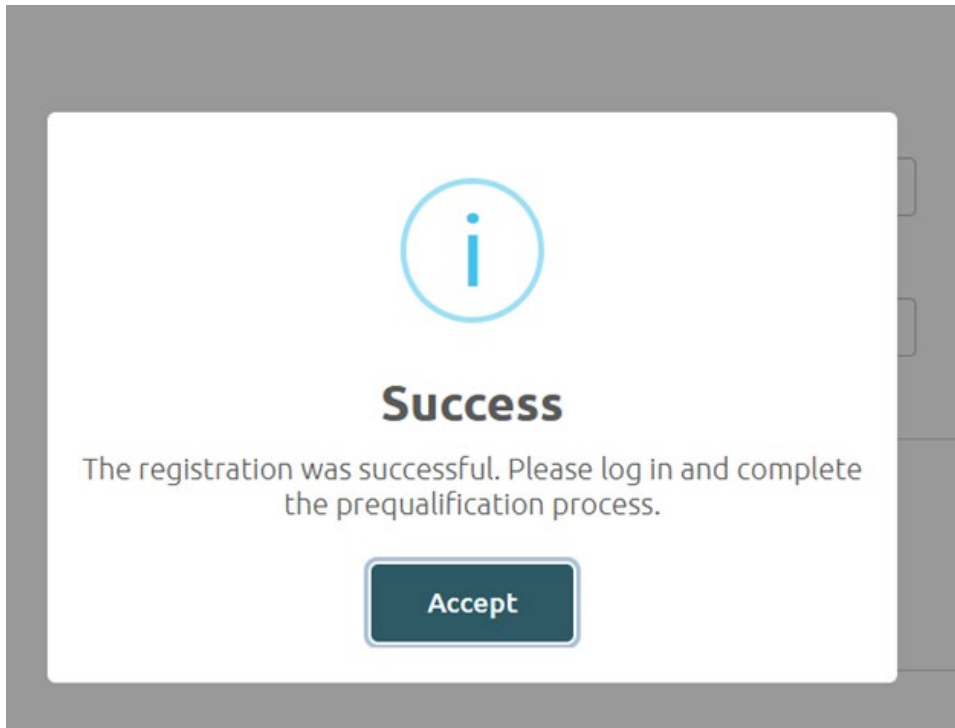
Enter GST number if your company is based in Canada

4. Check the "I agree to the User Agreement" and click "Submit".

You must agree to our [User Agreement](#) before continuing

I agree to the User Agreement

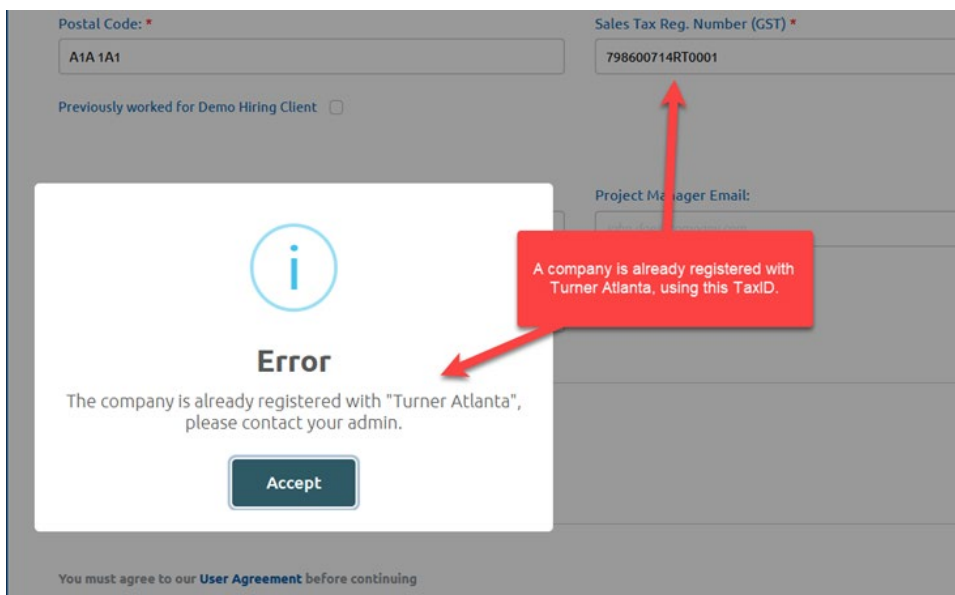
5. If your application is successful, click "Accept, and you'll be redirected to your company's Subcontractor Prequalification Account.



## Registration Errors

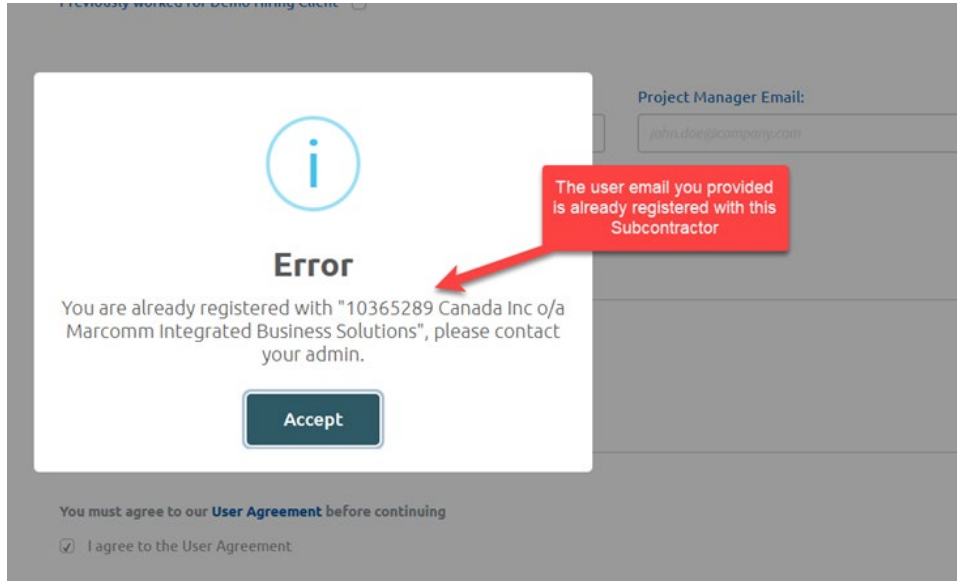
**Error: "The company is already registered with {Hiring Client}, please contact your admin.**

If you receive the error message below, your company is already registered with one of the Hiring Clients from step 1. Click "Accept" and the system redirects you to the log in page for you to log in with the user information of your existing account. If you don't have the user information, please contact your Admin.



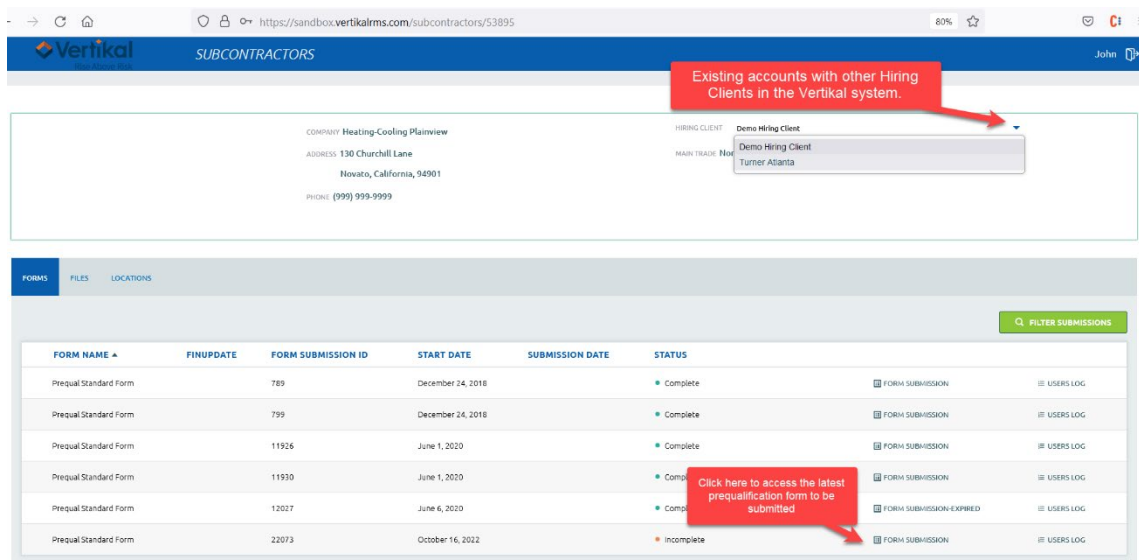
**Error: "You are already registered with {Subcontractor Name}, please contact your admin.**

If you receive the error message below, your user email is already registered for a different subcontractor under a different FEIN or GST number. Click “Accept” and the system redirects you to the log in page for you to log in with the user information of your existing account. If you don’t have the user information, please contact your Admin.



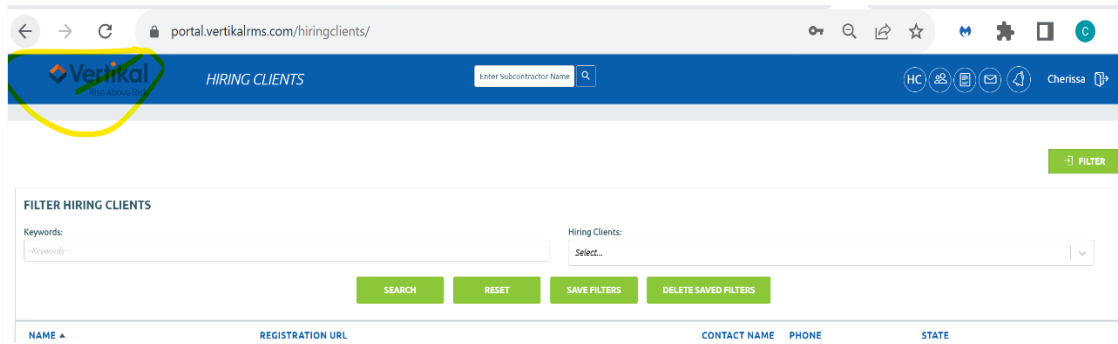
## Subcontractor Prequalification Account

After the successful submission of the application form, you are redirected to your company’s prequalification account. If your company already has a prequalification account with other Vertikal Hiring Clients, click the arrow next to the Hiring Client to toggle between the Hiring Clients.



### Error – I cannot see my Subcontractor Account Page.

If you see this page ([screenshot below](#)), when logging in, please click on the Vertikal logo in the upper left corner to reset the site. Once reset, it will take you to the subcontractor page.

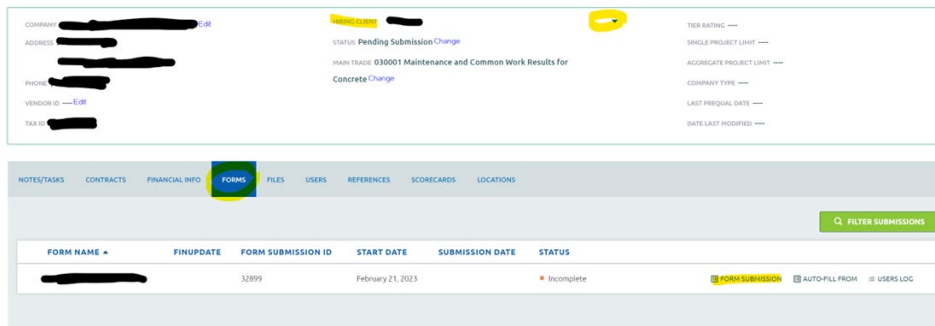


## Form Access Instructions

Below is the link to access the prequalification.

<https://portal.verticalrms.com/login>

Once you log in, you will be taken to your subcontractor page. *Make sure you chose the correct hiring client when you fill out the form (if applicable, you'll see a down arrow next to Hiring Client).* Please see the screenshot below. You will then click on forms and then form submission (highlighted in yellow in the screenshot below). The form is online and has a place for uploads.



## Form Submission Instructions

**Everything with a red asterisk \* needs to be completed to submit, including uploads. Make sure you click on save at the bottom of each page before moving to another page.** When you click on SAVE at the bottom of the page, there is a slight delay in the save confirmation box popping up, so you MUST wait until the box pops up before navigating away from the page otherwise you will lose your data. When you have completed the form, click on save/submit on the last page.

If you complete the form successfully, you will get a message letting you know that the submission was completed successfully.

If this does not pop up after a minute, you have not successfully submitted, and you will be taken to the first page with missing information.

Please note: once the form is submitted, the form is locked, and a Subcontractor can only view the form but no longer make any changes to any fields.

## Prequalification Form Renewal – Autofill Option

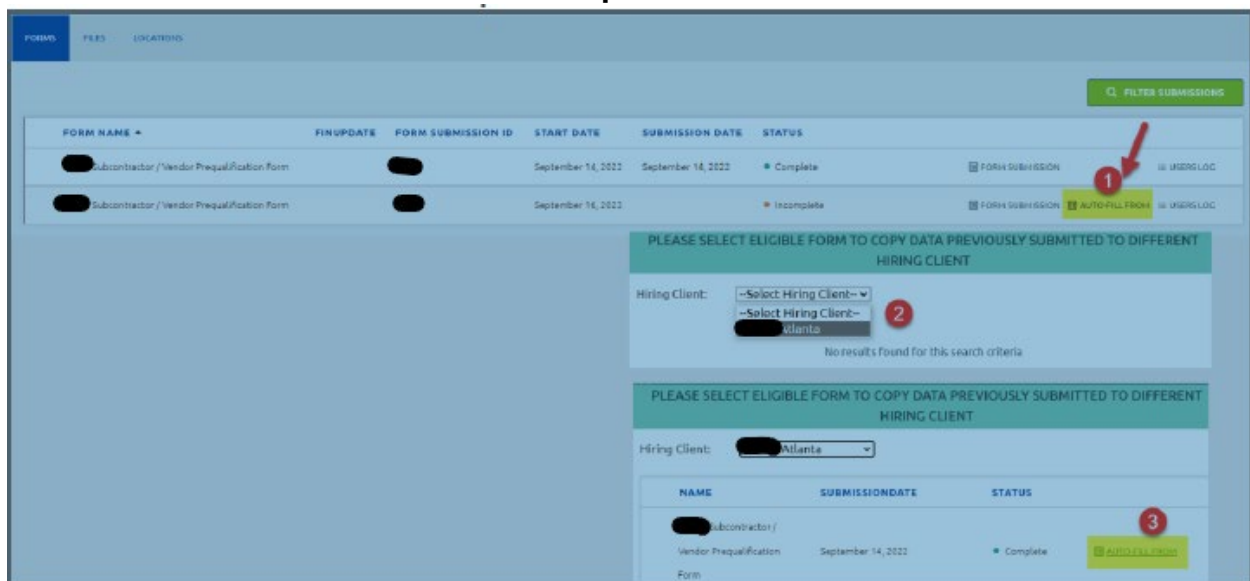
Autofill is based on time and only certain fields will come over.

In the “**Forms**” tab, if you only have a form with “**Complete**” status, **NO** action is needed on the prequal form.

At the time of renewal, a system-generated email will be sent to all applicants’ company staff with a user account. Click on the URL link in the renewal email to access the login page to begin the renewal process.

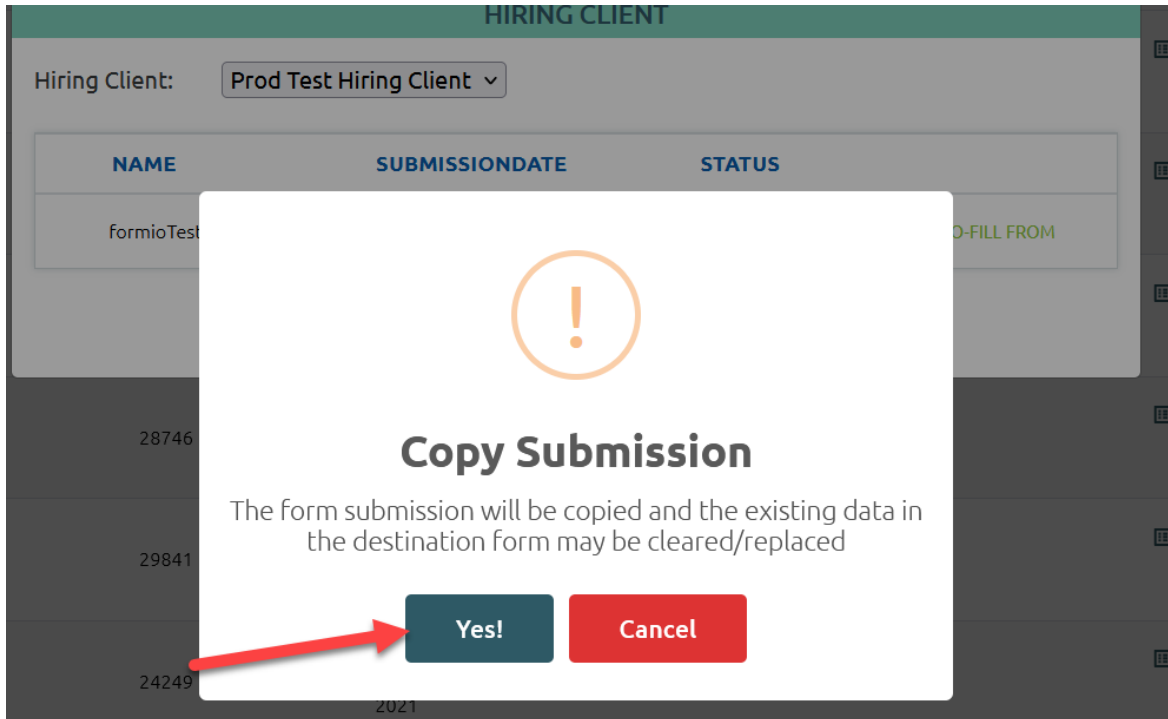
The **Auto-Fill Form** option will show automatically if the renewal is eligible to autofill specific fields in the new form. If the auto-fill option is unavailable, complete the form from the beginning.

1. Click **Auto-Fill Form**.
2. Select the **Turner** Hiring Client's prequalification form from which you want to copy data.
3. Click **Auto-Fill From** on the current **Complete** form.

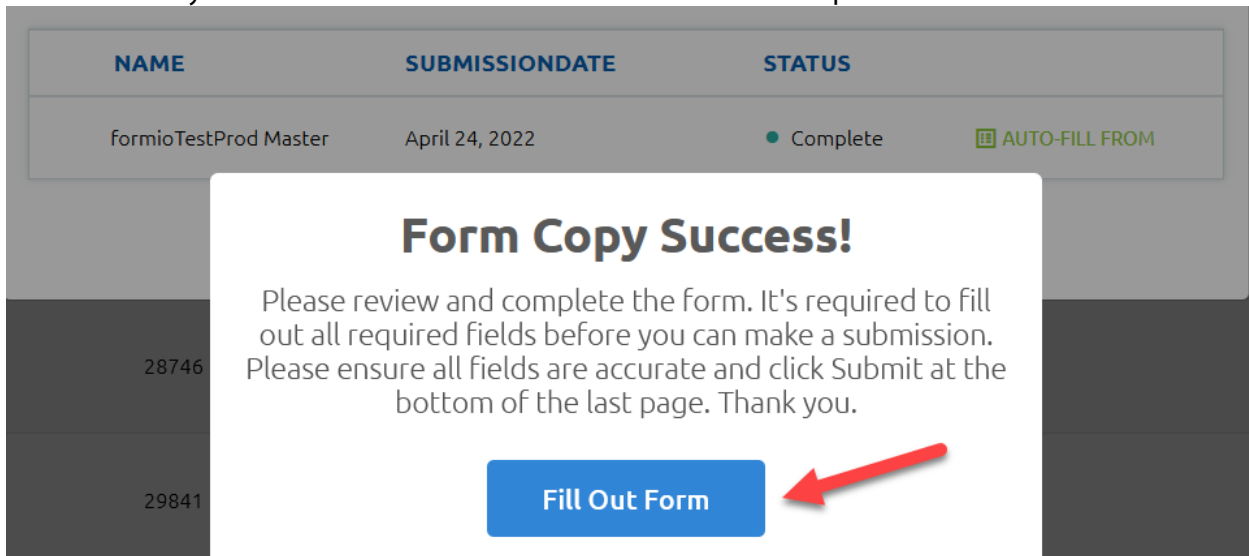


The screenshot displays a web application interface for prequalification form renewal. At the top, there are navigation tabs for 'FORMS', 'FILES', and 'LOCATIONS'. A search bar labeled 'FILTER SUBMISSIONS' is located in the top right. Below the navigation is a table with columns: 'FORM NAME', 'FINUPDATE', 'FORM SUBMISSION ID', 'START DATE', 'SUBMISSION DATE', and 'STATUS'. Two rows are visible, both for 'Subcontractor / Vendor Prequalification Form'. The first row has a status of 'Complete' and a submission date of 'September 14, 2022'. The second row has a status of 'Incomplete' and a submission date of 'September 16, 2022'. A red arrow points to the 'AUTO-FILL FROM' button in the second row. Below the table, there are two sections for selecting a source form. The first section is titled 'PLEASE SELECT ELIGIBLE FORM TO COPY DATA PREVIOUSLY SUBMITTED TO DIFFERENT HIRING CLIENT' and has a 'Hiring Client' dropdown menu with options '--Select Hiring Client--' and 'Atlanta'. A red circle '2' is next to the 'Atlanta' option. Below this, it says 'No results found for this search criteria'. The second section is identical but has 'Atlanta' selected in the dropdown. Below this, there is a table with columns 'NAME', 'SUBMISSIONDATE', and 'STATUS'. It shows one row for 'Subcontractor / Vendor Prequalification Form' with a submission date of 'September 14, 2022' and a status of 'Complete'. A red circle '3' is next to the 'AUTO-FILL FROM' button in this row.

4. Click **Yes** to confirm you want to copy data from the selected source form.



5. Click "Fill Out Form" for the system to take you to the new form with pre-filled data. It may take a few seconds for the fields to load with the copied data.



## If Autofill Is Not Available

Another option is to open 2 browser windows and have your old form in one window open and the new form open in the other window. You can copy and paste over that way.

Lastly, you can also download a PDF version of your old form for your review and copy that way. Please click on View PDF (see screenshot below highlighted in yellow.) Then you can print the PDF. Click on Print PDF. From there you can choose to print or save.



COMPANY <input type="text"/> <a href="#">Edit</a>	HIRING CLIENT <input type="text"/>	TIER RATING <input type="text"/> <a href="#">Change</a>
ADDRESS <input type="text"/>	STATUS <input type="text"/> <a href="#">Change</a>	SINGLE PROJECT LIMIT <input type="text"/>
PHONE <input type="text"/>	MAIN TRADE <input type="text"/> <a href="#">Other Change</a>	AGGREGATE PROJECT LIMIT <input type="text"/>
VENDOR ID <input type="text"/> <a href="#">Edit</a>		COMPANY TYPE <input type="text"/>
TAX ID <input type="text"/>		LAST PREQUAL DATE <input type="text"/>
		DATE LAST MODIFIED <input type="text"/>

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Please make sure you click the "save" button on the bottom of every page before you leave the form.

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General Information

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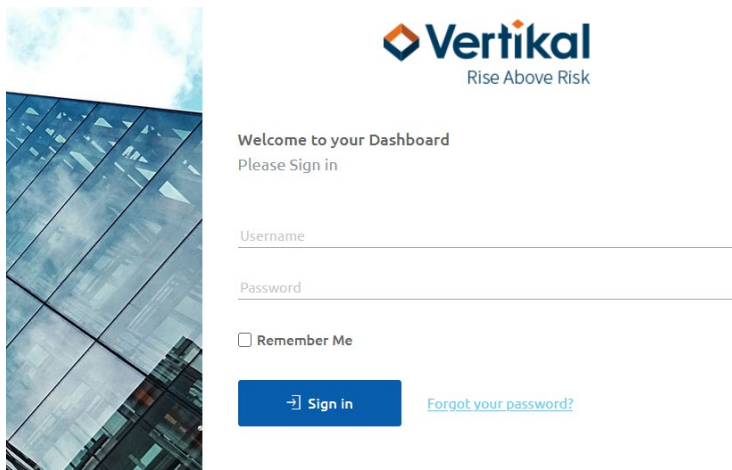
Company Name / DBA

For help and instructions, please visit: [Prequalification](#)

## Login Page

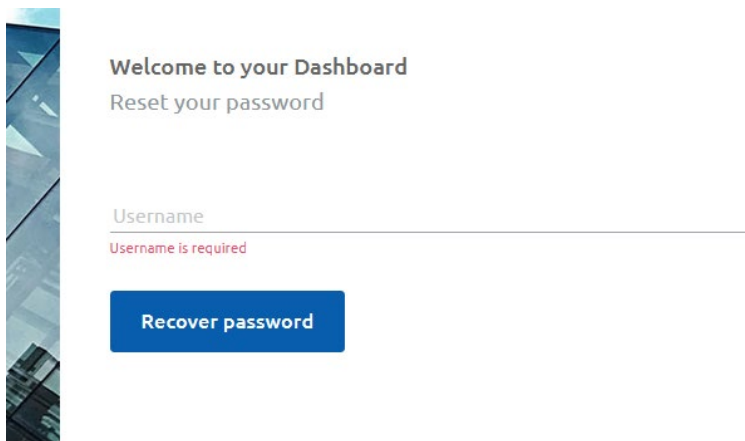
You can exit and return to your Prequalification Account at any time. The login page (<https://portal.vertikalrms.com/login>) allows any user with an active account (Subcontractor and Hiring Client) to login. It has two fields, the Username (email address), and the Password. The inputs will be compared with our user database and the password verified. Once the verification is complete, the user will proceed to the Prequalification Account.

**\*Please ensure that there aren't any additional spaces, periods(.), or other characters when typing in your username and password.**



## Forgot Password


1. If you forgot your password, click the “forgot password” link, which will prompt you to enter your email address.




2. After entering the user email, click the “Recover password” button. The input will be compared with our user database and the email verified. Once the verification is complete an email with a temporary password will be sent to the email address entered.

Today  
Vertical RMS Password Recovery Sun 10/16/2022 3:01 PM 69 KB  
Hi, Sina Windmuller You recently notified us that you forgot your Password.  
> Last Week

### Password Recovery

 notifications=vertikalrms.com@mg.vertikalrms.com on behalf of Vertical RMS <notifications@vertikalrms.com>  
To:  sinaw@prequalusa.com

[Reply](#) [Reply All](#) [Forward](#) 

Sun 10/16/21

Hi, Sina Windmuller

You recently notified us that you forgot your Password.

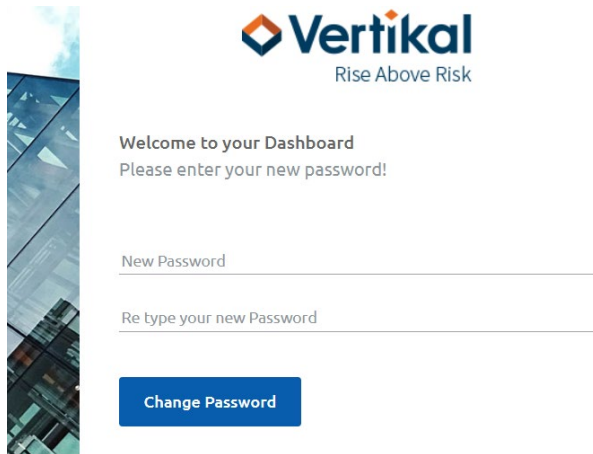
Please Click [this link](#) and use the following temporary password to reset your password: **5m4j12df**

If you have any questions or need additional assistance please contact our office at **877-576-2378**

Thank you for using Vertikal!

The Vertikal Team.

3. Click the link in the email, enter your user email and the password provided in the password recovery email and click "Sign in".
4. You'll be prompted to enter a new password. Type in the new password and click "Change Password".



The screenshot shows the password recovery page for Vertikal. At the top is the Vertikal logo with the tagline "Rise Above Risk". Below the logo, it says "Welcome to your Dashboard" and "Please enter your new password!". There are two input fields: "New Password" and "Re type your new Password". A blue button labeled "Change Password" is at the bottom.

5. After entering the new password, the system brings you back to the log in page, where you must enter your email and new password again. Click "Sing in", and you'll get access to your account.

### Welcome to your Dashboard

Please Sign in

Username

Password

Remember Me

 Sign in

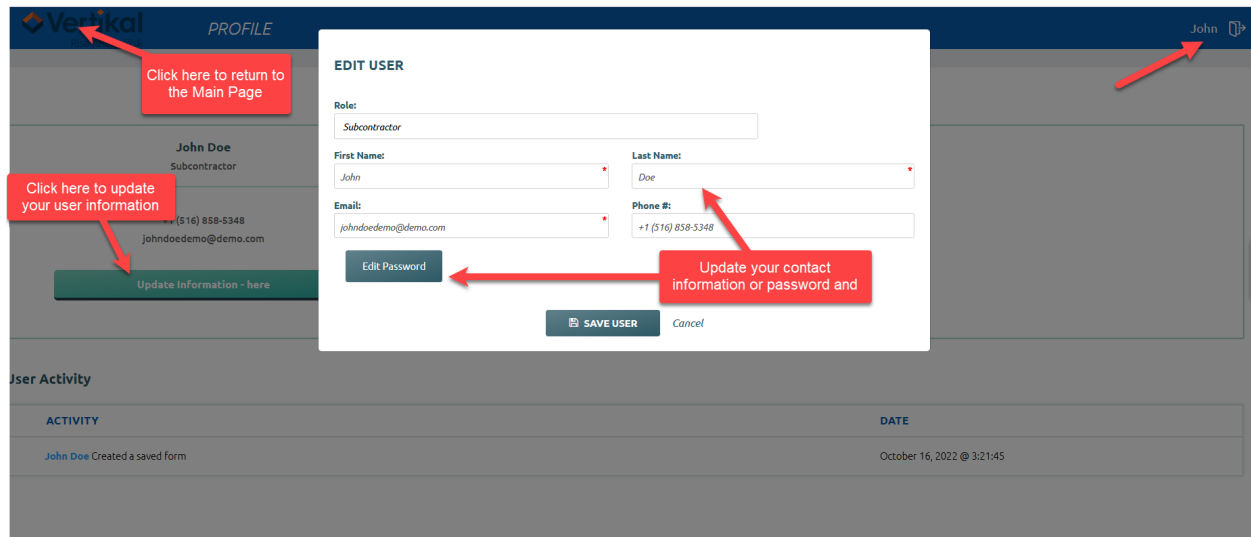
[Forgot your password?](#)

## Change Your User Information

To change your user information, click your name in the top right corner of the screen. And click the “Update Information – here” button.

To update your password, click “Edit Password”. Click “Save User” to save your changes and exit out of the window.

To return to the Main Page, click the Vertikal logo at the top left of the screen.



The screenshot shows the user profile page for John Doe, a Subcontractor. The page includes a header with the Vertikal logo and the user's name. A modal window titled "EDIT USER" is open, displaying fields for Role, First Name, Last Name, Email, and Phone #. The modal also contains buttons for "Edit Password", "SAVE USER", and "Cancel". Red callout boxes provide instructions: "Click here to return to the Main Page" points to the Vertikal logo; "Click here to update your user information" points to the "Update Information - here" button; "Update your contact information or password and" points to the "Edit Password" button; and "Click here to return to the Main Page" points to the "SAVE USER" button.

ACTIVITY	DATE
John Doe Created a saved form	October 16, 2022 @ 3:21:45