ADB ASIAN DEVELOPMENT BANK

How to Complete Full Registration and Onboarding in APEX

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Introduction

This Quick Reference Guide (QRG) provides a step-by-step overview of how to register a new firm in the ADB Procurement and Expert Engagement System (APEX). It is intended for firms (goods suppliers and service providers) participating in Technical Assistance (TA) projects.

The registration process begins with initial registration and account creation. **Once user credentials are received, the firm can proceed with the onboarding process to complete the required firm profile and registration information.** This guide covers these key stages, as well as maintaining company details. **Instructions for adding payment information are provided in a separate guide.** Completing these requirements helps establish a complete and compliant firm profile in APEX and enables firms to participate in procurement opportunities and transactions.

This QRG is designed to help users quickly understand the process and perform each step efficiently within the APEX system.

By following this QRG, users will be able to:

- Successfully create and activate their APEX account.
- Complete all mandatory registration and onboarding requirements.
- Submit and manage firm-related information, including contacts and supporting documents.
- Provide and update payment details for transaction processing.
- Maintain an up-to-date profile to support ongoing participation in procurement activities.

This document is intended to serve as a practical and user-friendly reference for navigating the Firm Registration process in APEX. It is particularly useful for new users who are registering for the first time, as well as for existing firms that need to complete onboarding requirements or update their profile information.

Before proceeding, ensure that all required steps under the Supplier/ Service Provider Registration process have been completed:

- Initial registration and access
- Set up Single Sign-On and multi-factor authentication

User Role Involved

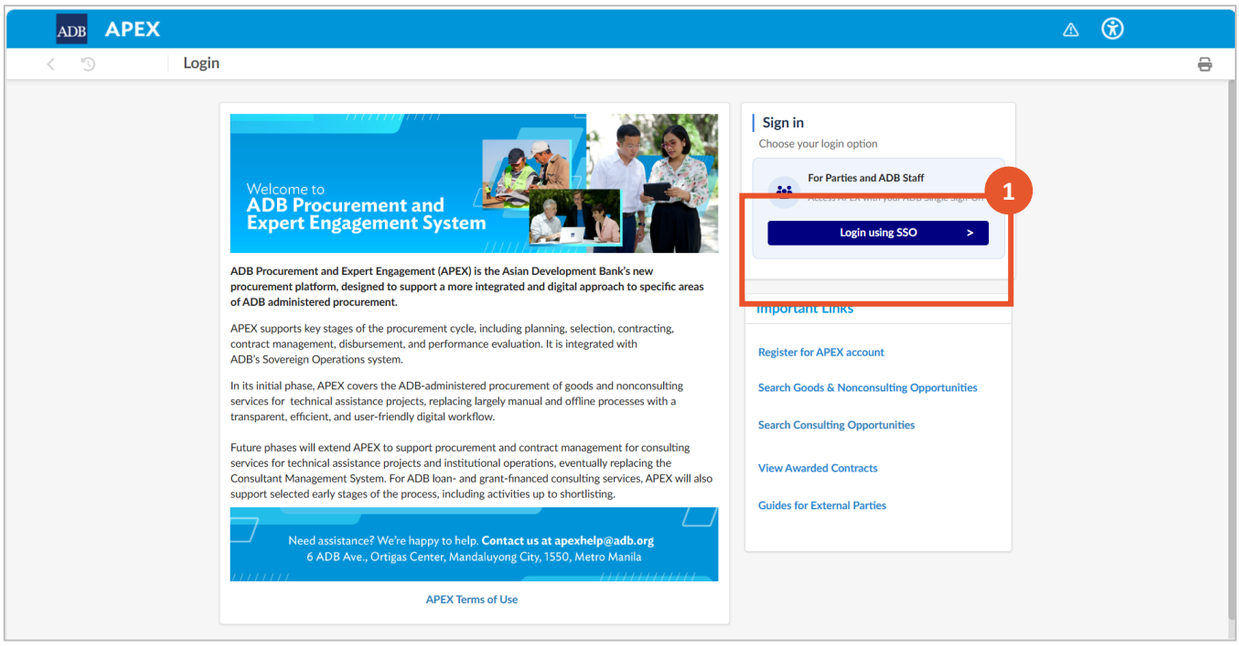
User Role	Description
APEX Project Team Project Analyst	Payment Information requests are approved by Project Team members associated with the project identified in the transaction details. Approvals follow the hierarchy below. If an approver is not assigned to the project team, the request will automatically proceed to the next available approver in the sequence: 1. Analyst 2. Alternate Analyst 3. Project Team Lead (PTL) 4. Alternate PTL 5. ADB Party Administrator 6. Note: For Payment Information of Suppliers or Service Providers related to Batch Cash Category, approvals will be routed to the Corporate Services Department (CSD). if the Batch Cash category field is updated in Party Profile by ITD Administrator
APEX PPFD Party Administrator	User responsible for updating party status to *Suspended* based on OAI sanction screening advisory
Party	These are the Goods Suppliers and Service Providers to ADB

Full Registration & Onboarding

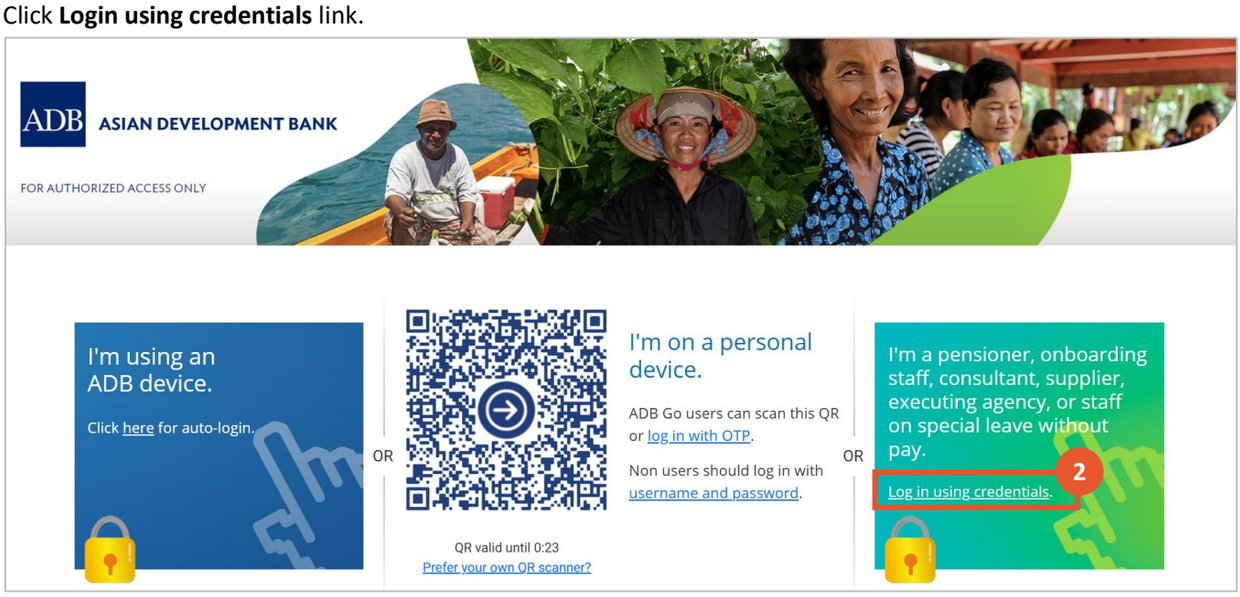
The *Full Registration and Onboarding* process enables new Parties to complete their profiles in APEX by submitting required information, documents, and declarations – ensuring comprehensive data capture and compliance before participating in procurement and contracting.

Log in to APEX

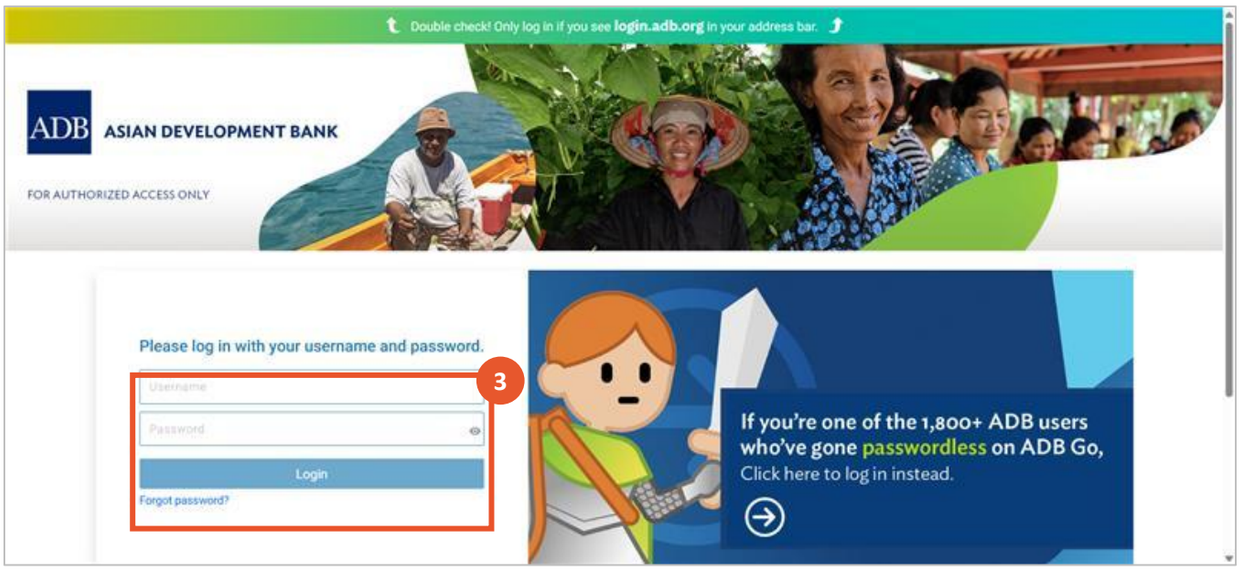
1. Go to https://apex.adb.org and click **Login Using SSO** button.



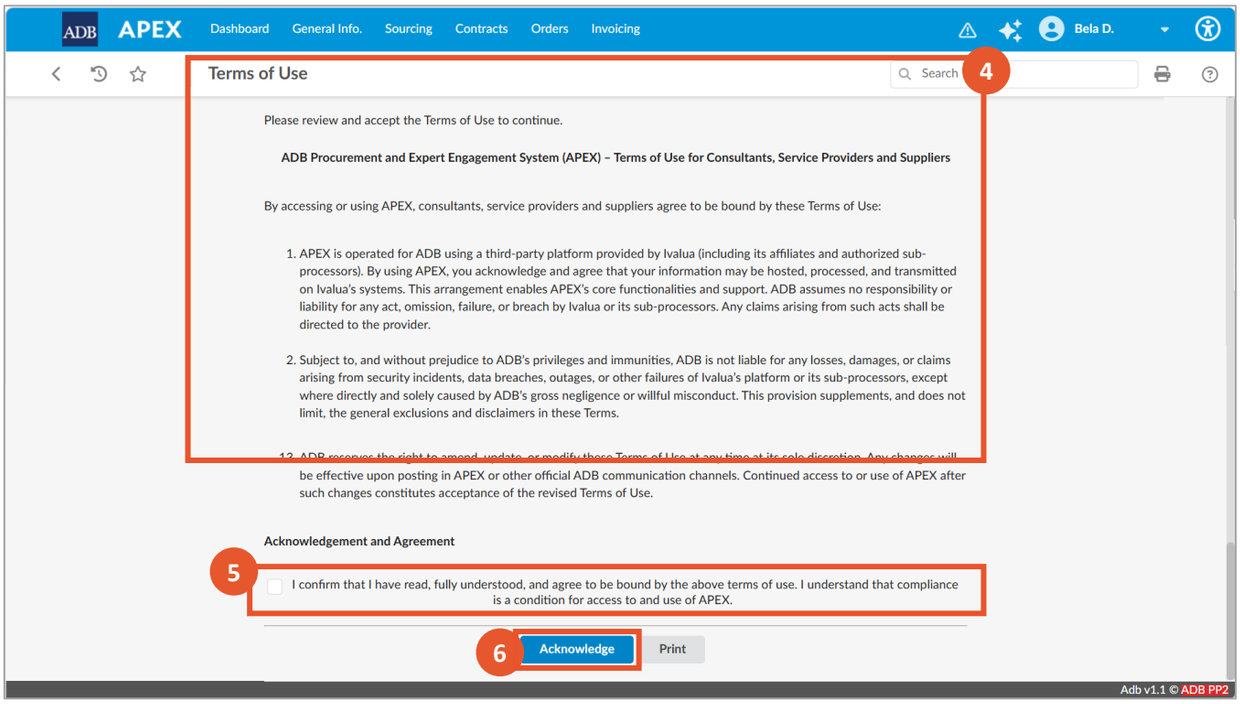
2. Click **Login using credentials** link.



3. Enter your **username and password**, then **click Login**.



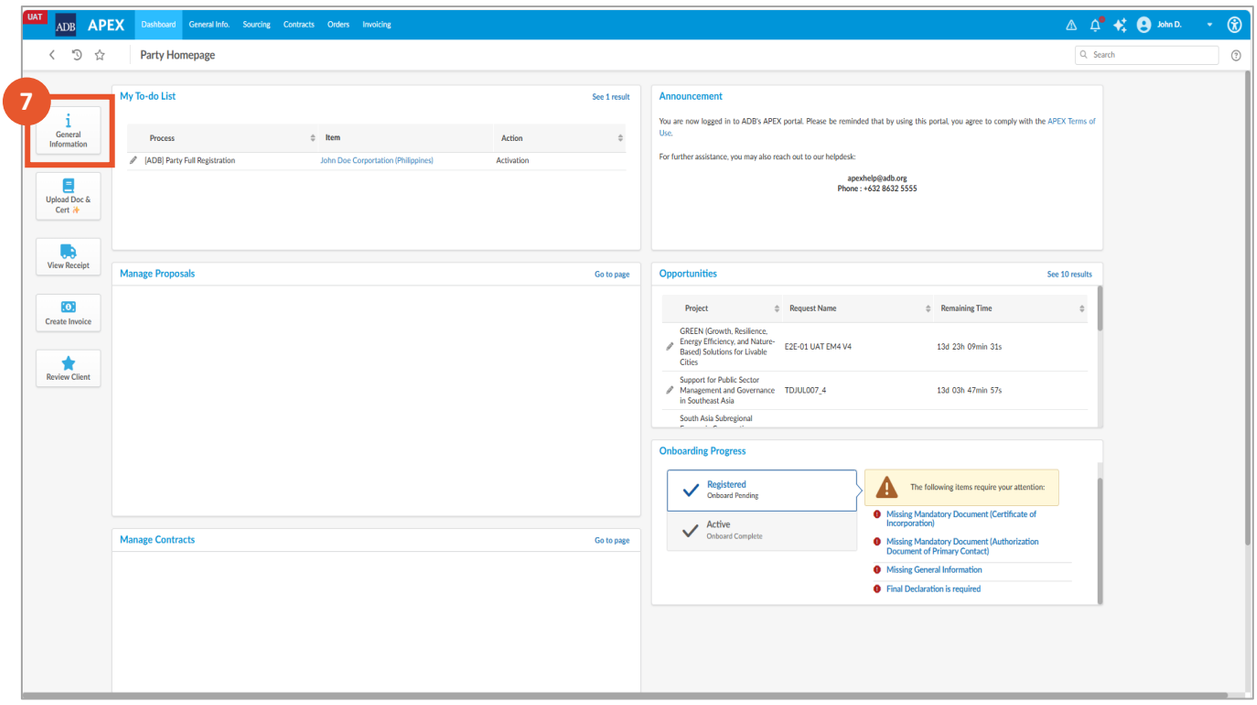
4. During the first log in, read through the **Terms of Use for Consultants, Service Providers, and Suppliers** that will be displayed.
5. Confirm your understanding and agreement by clicking the ***checkbox*** at the bottom of the page.
6. Click ***Acknowledge*** to submit your response.



General Information

7. On the Party Homepage, click the **General Information** link. Review the full registration and onboarding requirements that must be completed.

> *Note*
>
> - Alternatively, you can access the *General Information* page by hovering over *General Info* tab and selecting the *Profile* tab.
> - Complete all fields marked with a red asterisk (*), as these are mandatory.

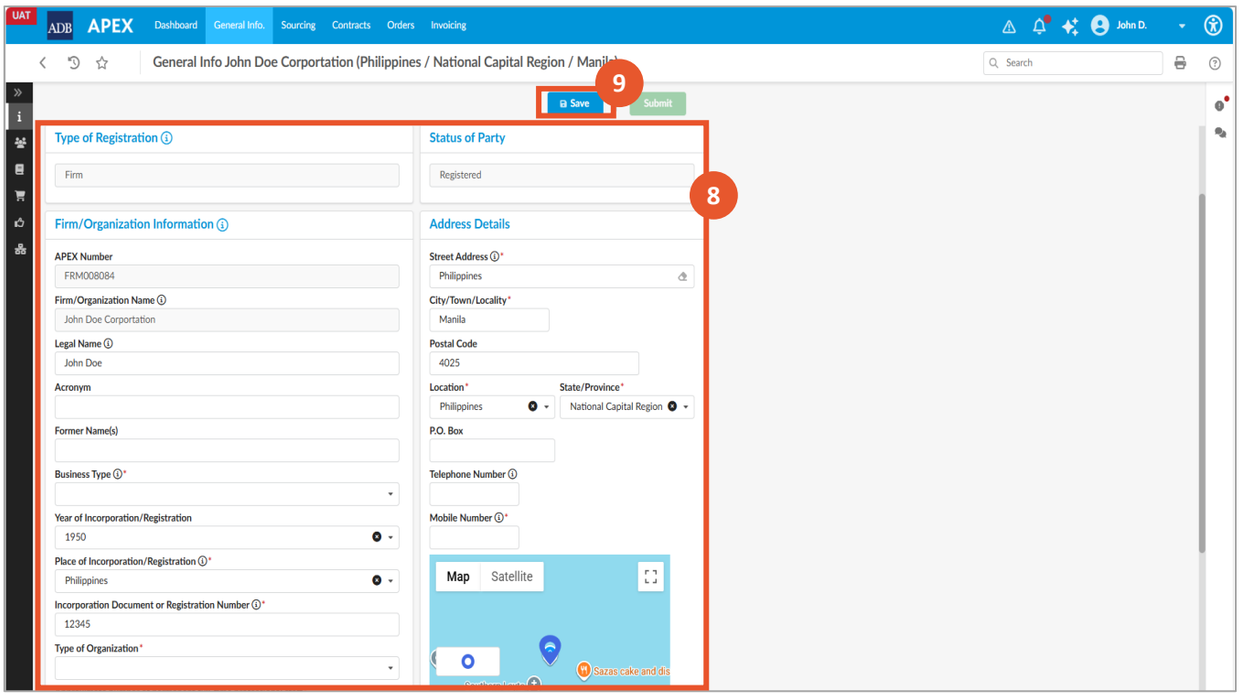


8. On the **General Information** page, accomplish all required information for your firm's profile:

   - **Firm/ Organization Information**
     - Business Type
     - Place of Incorporation/Registration
     - Incorporation Document or Registration Number
     - Type of Organization
     - Approximate Number of Permanent Full-time Professional Staff
   - **Address Details**
     - Street Address
     - City/Town/Locality
     - Location
     - State/Province
     - Mobile Number

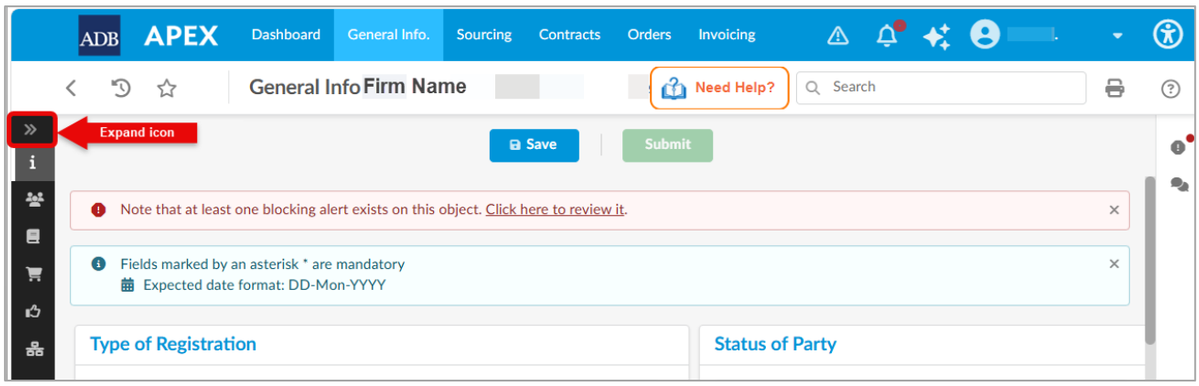
> *Note*
> Scroll down the page to ensure that all requested details are displayed and completed.

9. Click the **Save** button to record all changes.



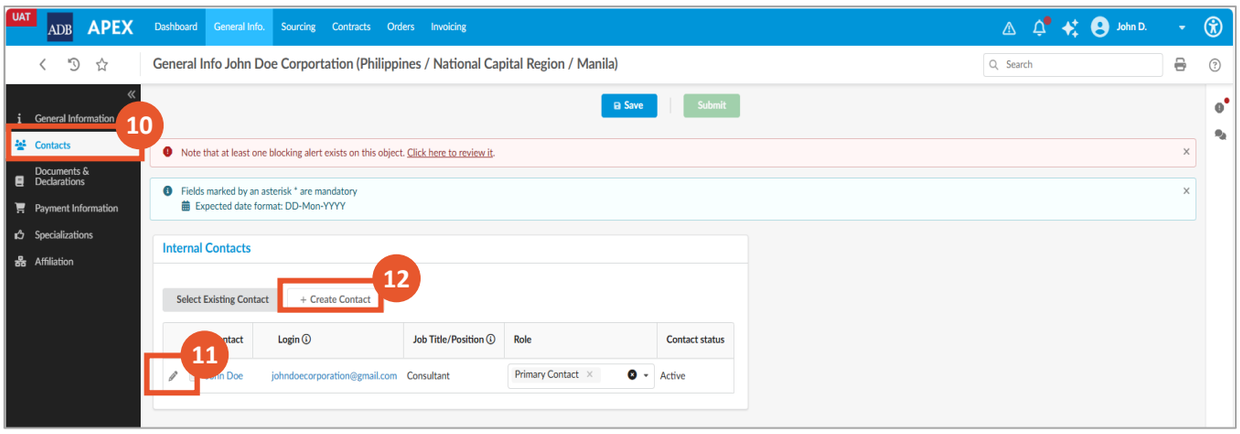
Contacts

10. Click **Contacts** to view the current list of contacts for the party record.

> *Note*
>
> Click the **expand icon** to open the navigation panel and view the available menu options.
>
> 
>

11. Click the **pencil button** to view the details of the existing contact.
12. Click the **+ Create Contact** button to create additional contact, as needed.

> *Note*
>
> - Only the primary contact can add additional contact.
> - Additional contacts will only be granted access to APEX system once they are assigned to a specific project or transaction.

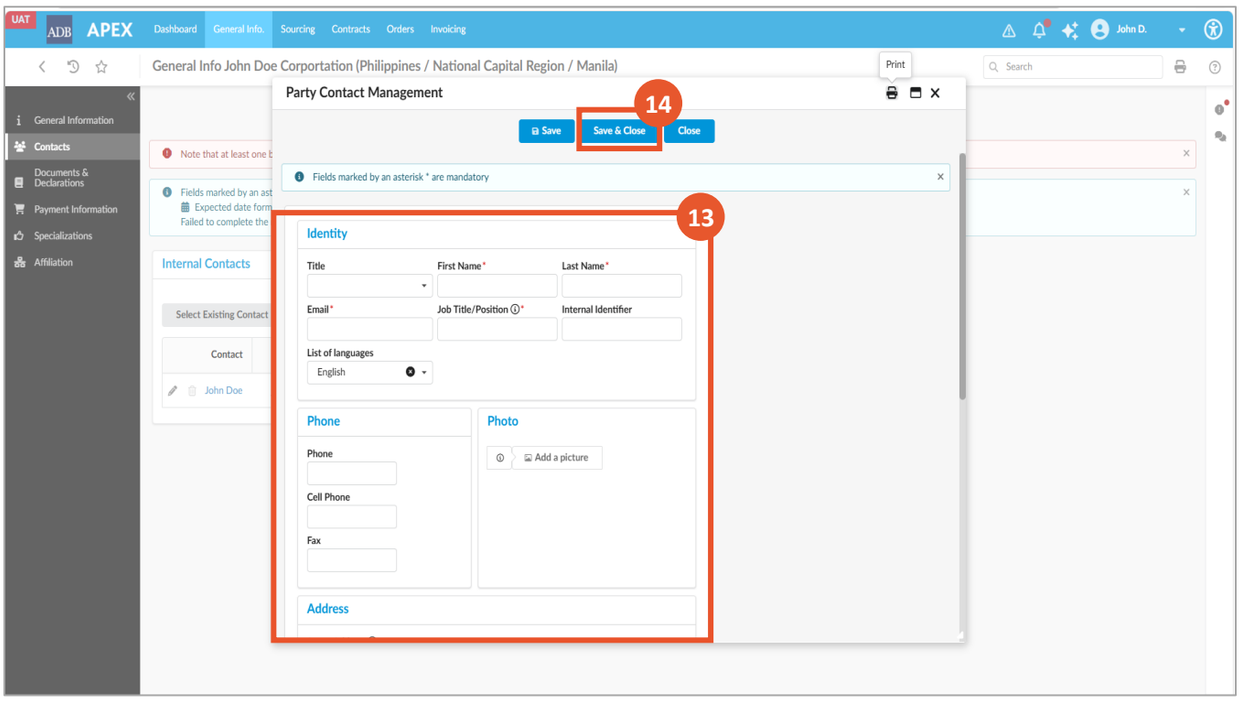


13. Provide the following mandatory information for the additional contact:

- First Name
- Last Name
- Email
- Job Title/ Position

> *Note*
> Scroll down the page to ensure that all requested details are displayed and completed.

14. Click **Save and Close** button to save the changes and return to the **Contacts** page.



15. In the Contacts page, use the **Role** drop-down menu and to add/update the role of each contact.

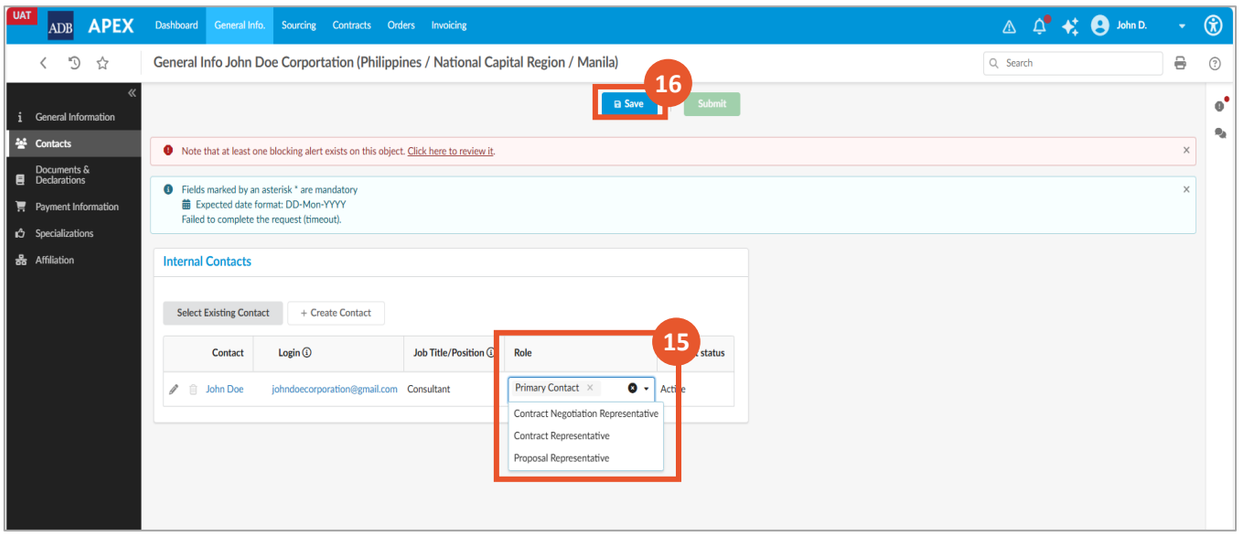
Role Types:

- *Primary Contact* – Will perform administrative functions on behalf of the firm. Add Contacts and assign role.
- Contract Negotiation Representative - Authorized signatory of contract.

- *Contract Representative* - Contract authorized representative during contract execution.
- *Proposal Representative* -Authorized Signatory of Quotation.

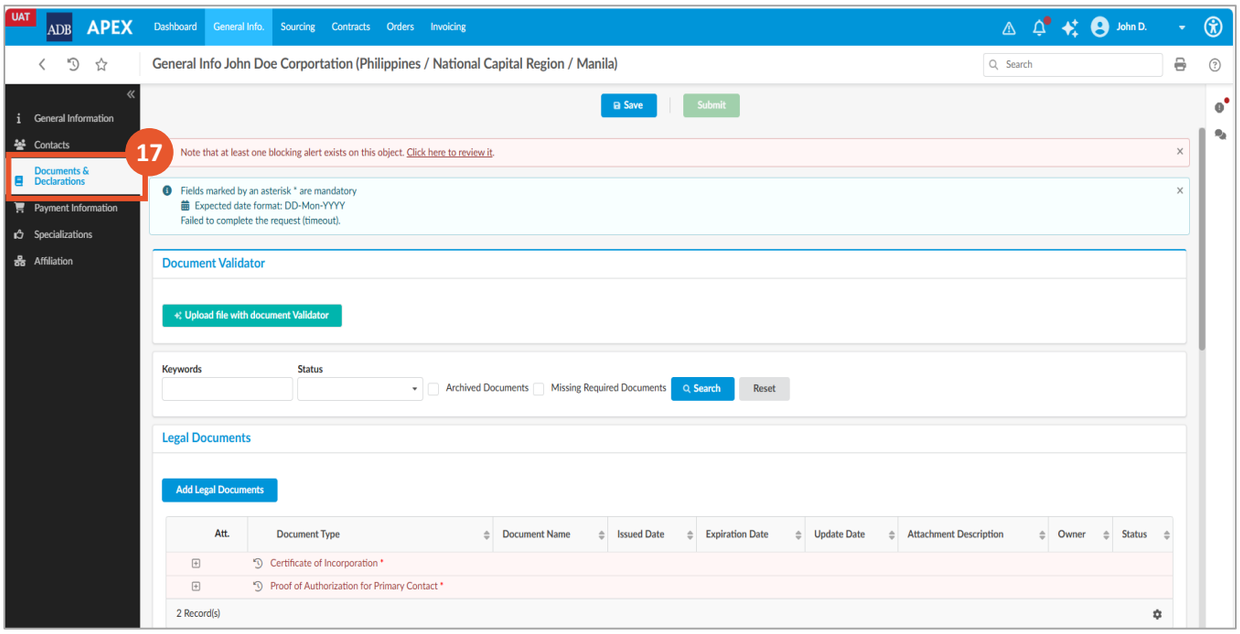
> ***Note***
>
> Only **one Primary Contact** can be designated per profile, and a **Primary Contact must always be maintained**. Before removing or changing the current Primary Contact, ensure that another contact is assigned as the Primary Contact.

16. Click the **Save** button to record all changes.



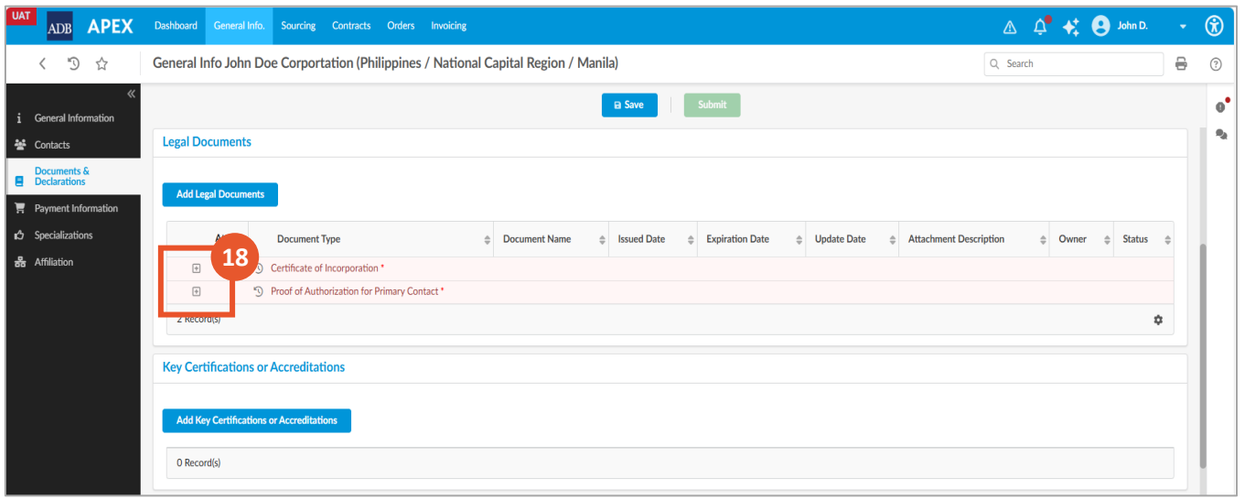
Documents and Declaration

17. Click **Documents and Declaration**.

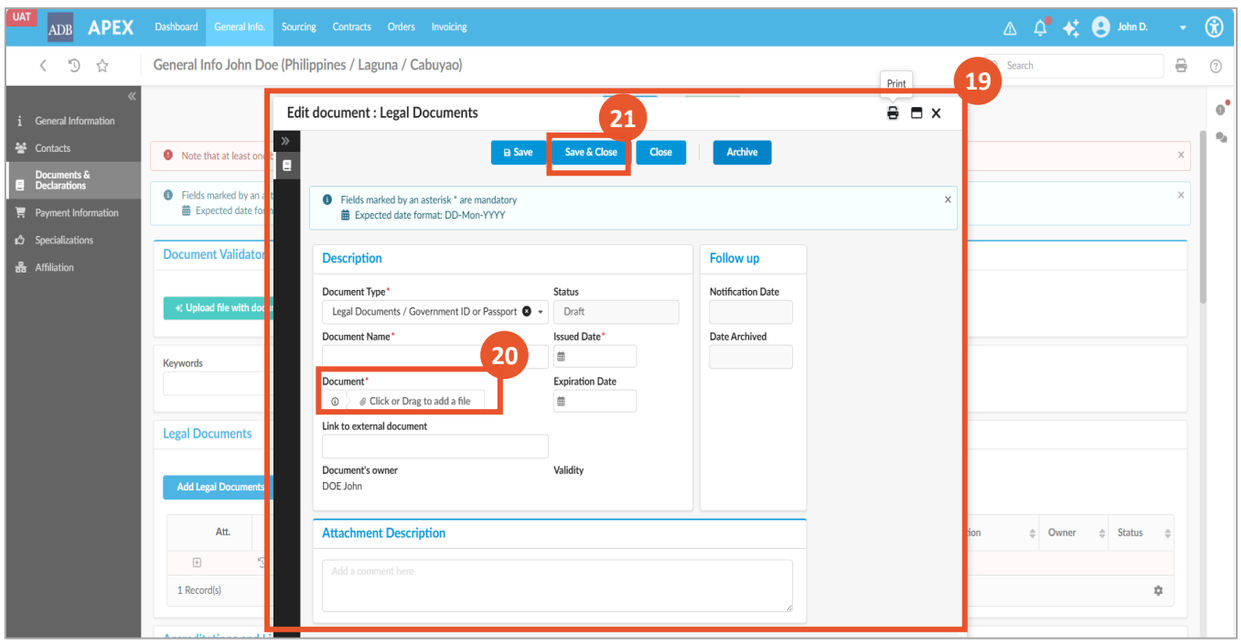


18. Click the **plus** button to open the **Edit Document window,** where you can update the required legal documents and upload relevant artifacts.

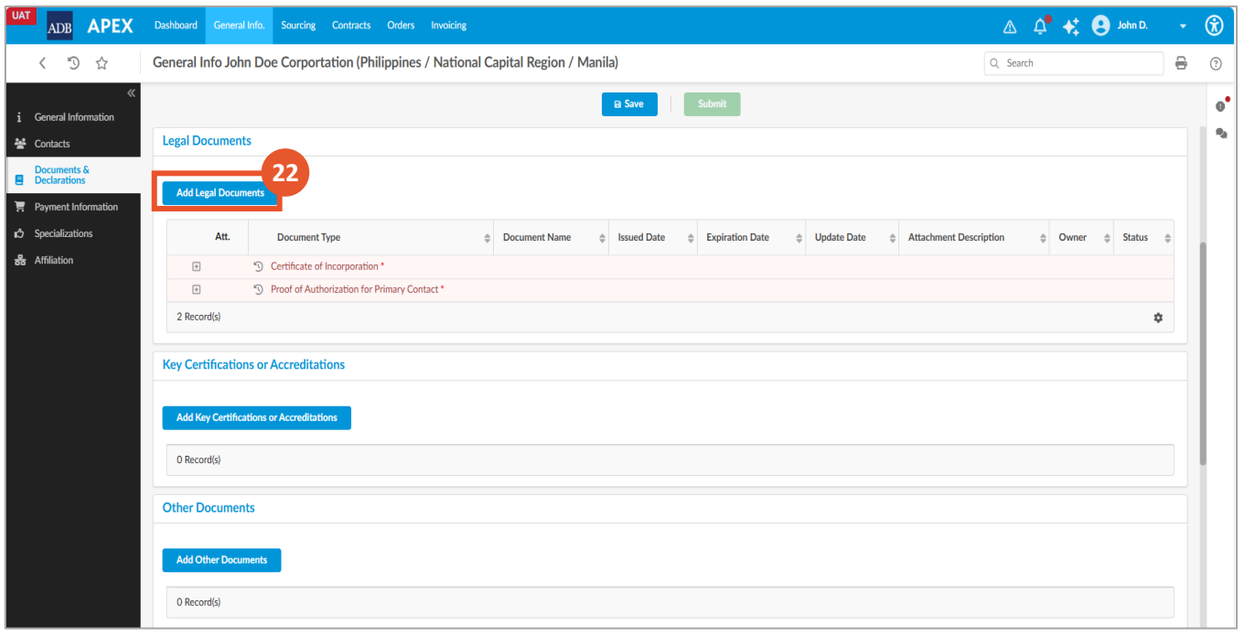
> *Note*
>
> - For Firm Party, *Certificate of Incorporation* and *Proof of Authentication for Primary Contact* is required.
> - For Individual Party, Curriculum Vitae (CV) and *Government ID or Passport* is required.



19. Accomplish all the mandatory information regarding the required legal document:
    - Document Name
    - Issued Date
    - Document
20. Click the **Click or Drag to add a file** button to upload relevant artifacts to the legal document.
21. Click **Save & Close** button to record your changes and return to the *Documents and Declarations* page.

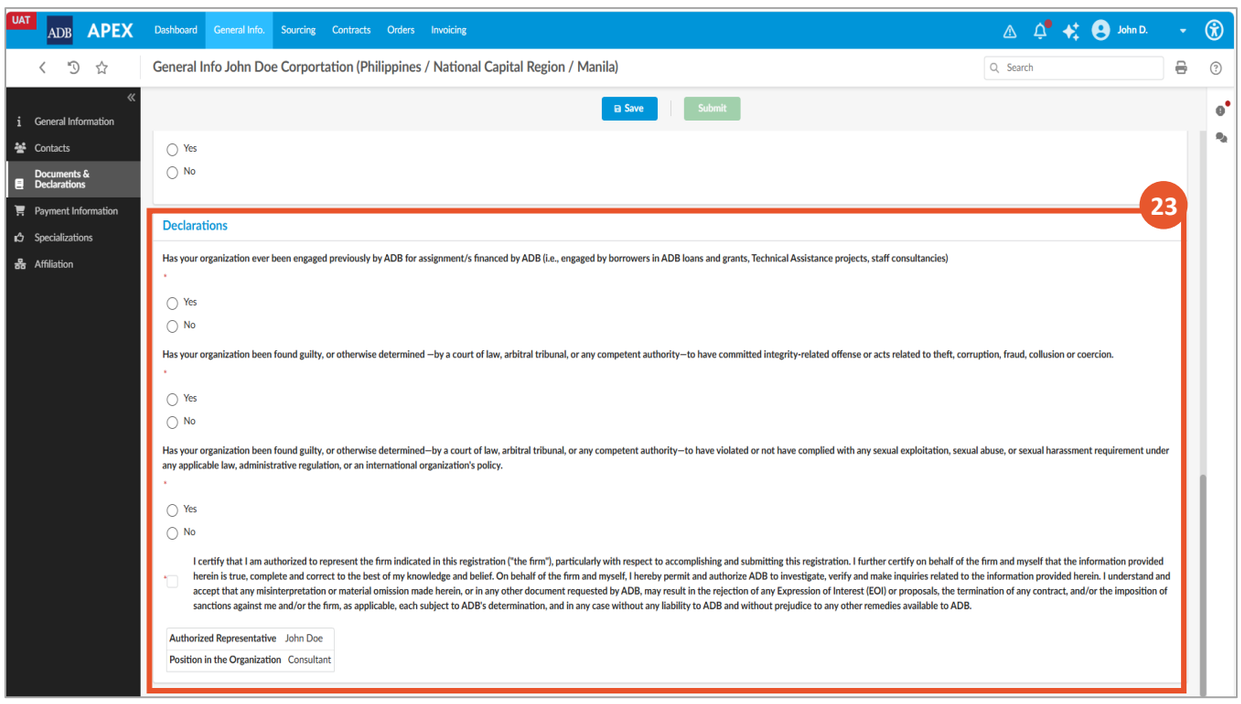


22. Click **Add Legal Documents** button to display the window where you can upload additional legal documents that may be relevant to the party profile.

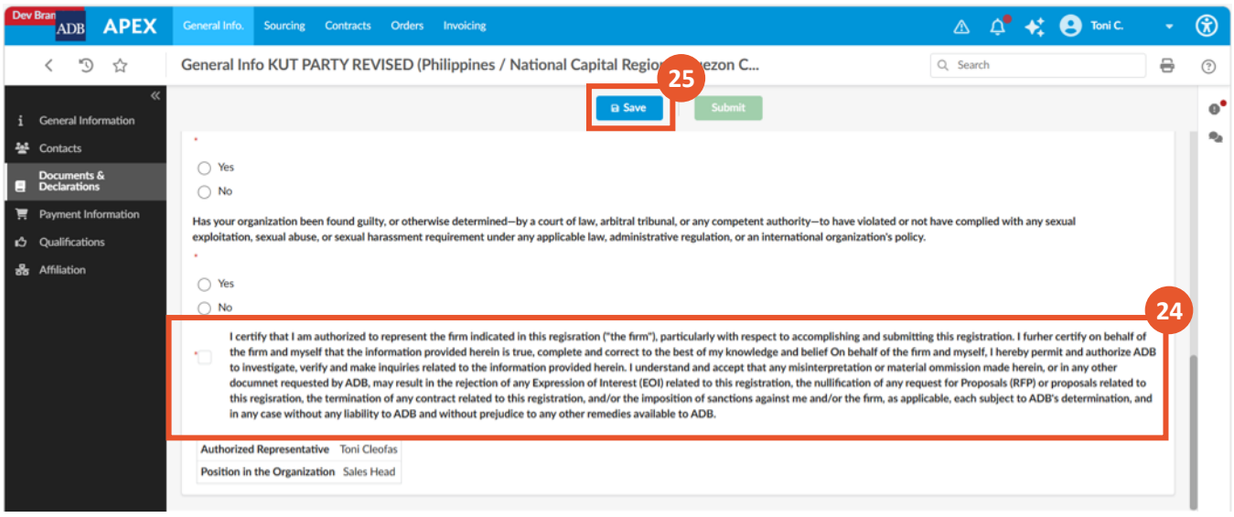


23. Scroll down and accomplish the **Declarations** section. ADB requires parties to read through and answer a list declaration. Tick the *option* to that corresponds your answer.

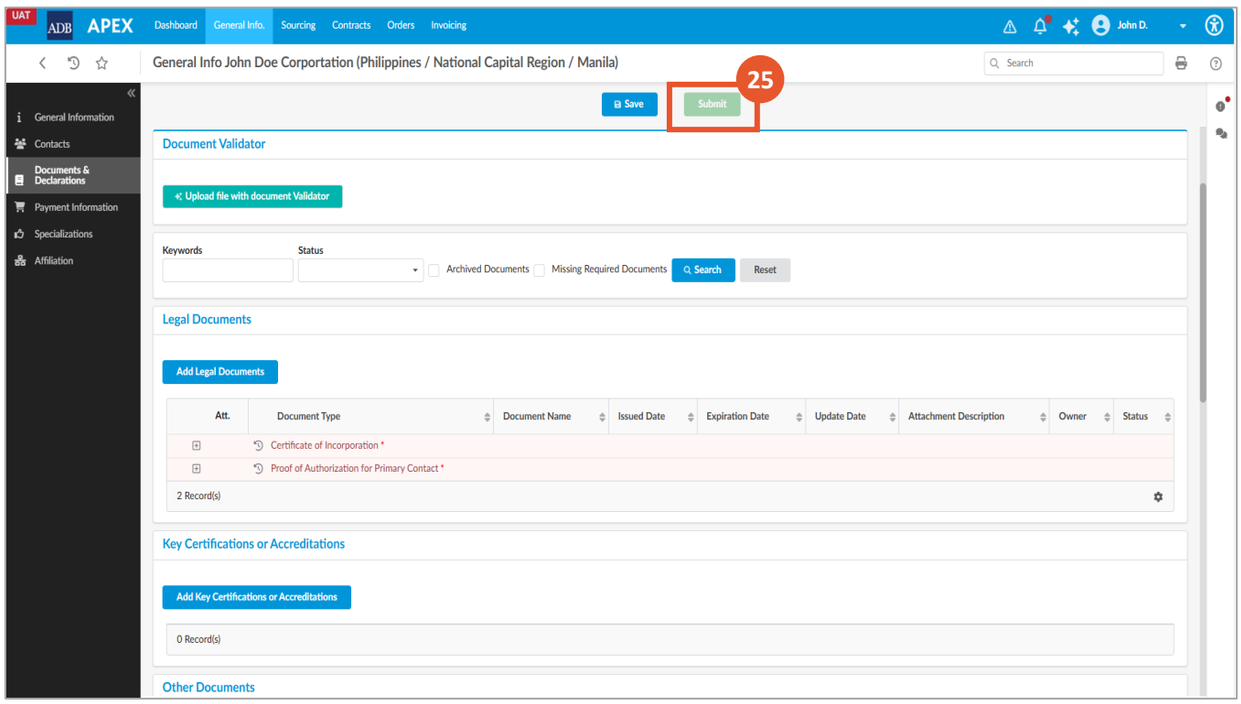
> ***Note***
>
> - This must be completed before Key *Certifications or Accreditations, Other Documents, and SEAH Training* section.
> - Please scroll down the page to ensure that all requested details are displayed and completed.



24. Once all declarations are answered, *tick the box* at the bottom of the page to certify the completeness and correctness of the information you provided.
25. Click the *Save* button to record the changes you made in the Documents and Declarations page.



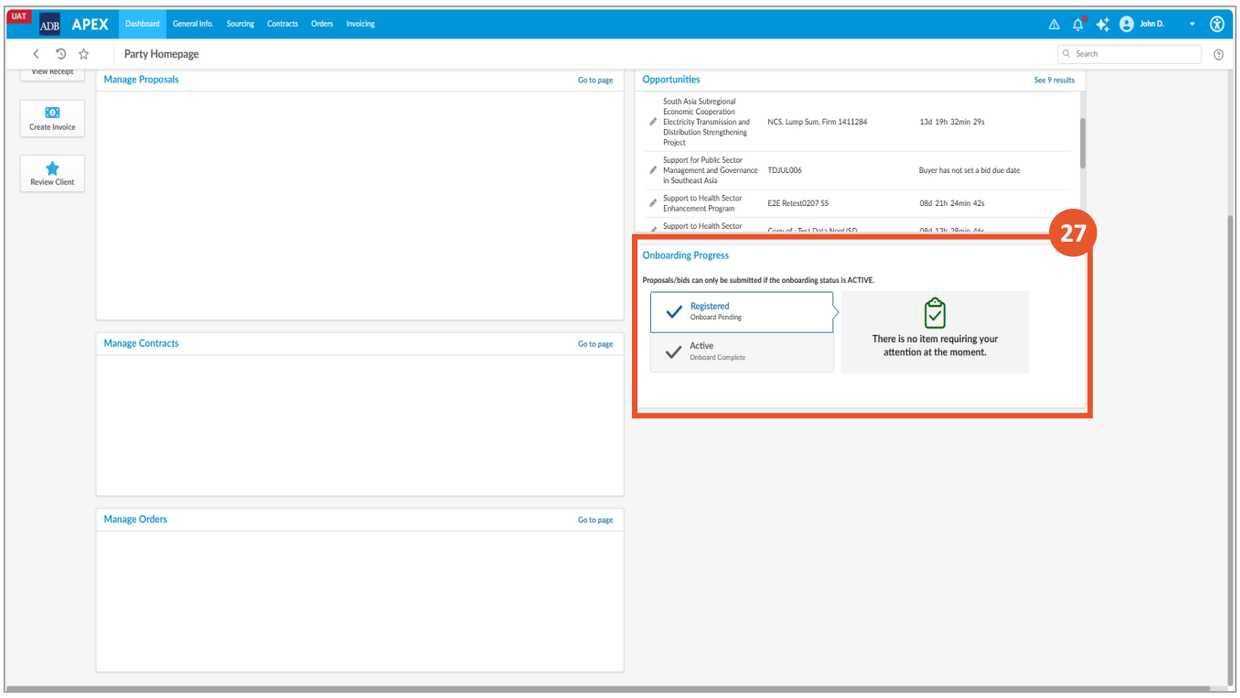
26. Click the **Submit** button to complete the Full Registration and Onboarding.



> ***Note***
>
> Submit button is only enabled after all the required information are provided and blocking errors are resolved.

27. Return to the *APEX Home* page and verify in the *Onboarding Progress* section that all required submission items are completed.

> ***Note***
>
> Upon completion of *Full Registration and Onboarding*, the party profile will be Active and can already start participating in procurement events.



28. After completing the **Full Registration and Onboarding Process**, you are encouraged to submit your payment information in advance to ensure it is readily available if your profile is selected by an **ADB Project Team** for a procurement opportunity. Follow the step-by-step guidance below to submit your payment information: APEX Quick Reference Guide: How to Add Payment Information in APEX.