

MADE IN MONTANA MEMBERSHIP PORTAL USER GUIDE

Last Revised 11/18/2022

Joining Made in Montana is free and offers many rewarding benefits for your business. It is important to note that the Made in Montana program is a certification program for your products, not services, or your company or business.

Memberships

<u>Made in Montana</u>: You can apply for Made in Montana if your product is made, created, or enhanced in the state and is now worth 50% or more in added value.

<u>Grown in Montana</u>: You can apply for Grown in Montana if your product is either grown from the start or significantly grown and finished in the state and is now worth 50% or more in added value.

<u>Native American Made in Montana</u>: Enrolled members of Montana Tribes can apply for Native American Made in Montana if their products are made, created, or enhanced in the state and is now worth 50% or more in added value.

To be eligible for membership, you must sign a "self-attestation" form in your application that states your product(s) meet the Made in Montana criteria.

For more information visit https://www.madeinmontanausa.com/Membership.

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Application Process

The application process requires 3 steps:

- 1. Create a State of Montana Single Sign On (SSO) account with your email address. This can be used to access multiple government services.
- 2. Register your Business with the Made in Montana program.
- 3. Register your products/listings.

Existing Members - Creating State of Montana Single Sign On (SSO) Account

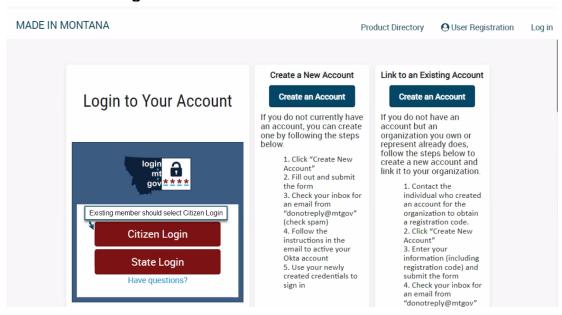
If you have had a Made in Montana membership prior to November 2022, your profile has been created in the new system. It now needs to be linked to SSO.

The State of Montana uses the Okta platform for the SSO account.

Navigate to https://montana.servicenowservices.com/mim



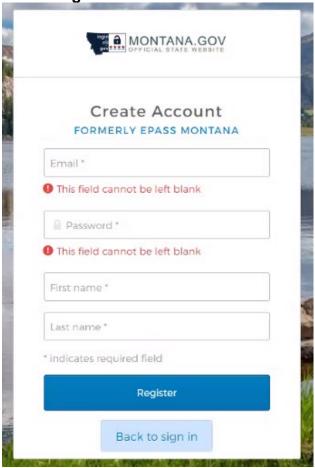
- 1. Select Log In.
- 2. Select Citizen Login.



3. You will now create your SSO account with Okta.
On the SSO screen select **Sign up** at the bottom of the screen.



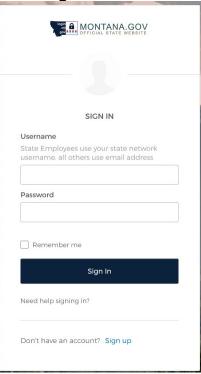
- 4. Create the SSO account.
 - a. Enter **Email Address** used to participate in the Made in Montana program.
 - b. Set a Password.
 - c. Enter First and Last Name.
 - d. Select Register.



5. Check your email and click on the link provided to activate your account.



- 6. Go back to https://montana.servicenowservices.com/mim and select **Log In**.
- 7. Select Citizen Login.
- 8. On the SSO screen enter your email address for the **User Name** and the **Password** set in step 4b above.
- 9. Select Sign in.



10. Now your name (profile) will appear in the top right corner instead of log in.

New Members - Creating a State of Montana Single Sign On (SSO) Account

This application uses the State of Montana's Single Sign On (SSO) account solution. If you already have an Okta account for other State of Montana portals then it will be linked to the Made in Montana portal when you register.

If someone else from your business has already registered for Made in Montana, you will need to obtain the registration code from them to link your contact information to the business profile during registration. They can find the code by logging into the system and selecting profile under their user profile in the upper right corner (scroll down under the account section). If you are not sure if

someone else has registered, search the <u>online directory</u> to see if the business is listed or contact the Made in Montana Program - <u>https://madeinmontanausa.com/contact</u> (include the name of the business and business owner in the request). This code will be required in step 3 e below.

To Register:

- 1. Go to the Made in Montana portal https://montana.servicenowservices.com/mim.
- 2. Select User Registration.



- 3. Fill out the **Register New User** form to create a new SSO account.
 - a. Enter your **Email** address.
 - b. Enter your First Name.
 - c. Enter your Last Name.
 - d. Enter your **Phone** number with +1 in front and no spaces.
 - e. Select I am representing a business.
 - If someone else has already registered on behalf of your business, select Yes
 and enter the registration code provided by the person who initially registered the
 business.
 - ii. If you are registering your business for the first time, then select **No**.
 - f. Check the box "I'm not a robot."
 - g. Select Submit.
 - h. You will receive an email to validate your new account. Click the link in it and it will redirect you back to the portal.
 - i. You will be prompted to set a password, security question and select an image.
 - j. Click on **Create My Account**. This will link your ServiceNow and Okta accounts for the Made in Montana portal.



k. Return to the Made in Montana online directory at https://montana.servicenowservices.com/mim to begin the registration process. (It is recommended that you bookmark this site or create a favorite in your web browser).

If you experience problems creating a SSO account contact the Montana state helpdesk at 406.444.2000 for assistance.

Logging In

Once you have created a SSO account, you can log in to the system.

- 1. Select **Log in** at the top right corner of the page.
- 2. Select Citizen Login.
- 3. Enter your User Name (email address), Password and select Sign In.
 - a. If you forgot your password, select **Need help signing in?** and follow the prompts.

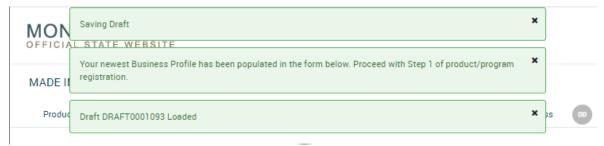
Navigating to the Made in Montana portal

When you log in to the system you may get redirected to a citizen landing page. If so, just remove the word citizen in the URL in the web browser and replace it with mim (in lower case letters). It should look like this – https://montana.servicenowservices.com/mim.

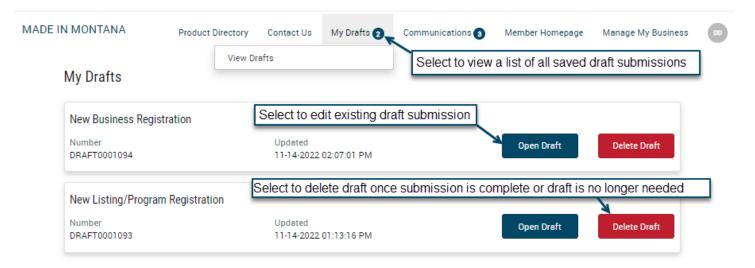


Saving Drafts

The system will time out if there is no movement on the screen for 30 minutes and you will be required to log back in. If you cannot complete your application during one session, select **Save** anytime at the bottom of the screen. The system will create a draft submission and notifications will appear across the screen. You can click on the x in the right corner of each message to close them.



You can then log in again later and select **My Drafts** from the top navigation menu to continue with your application. *Note: Drafts will remain until you delete them even after you have successfully submitted your application or changes.*



Exiting Screens without Saving

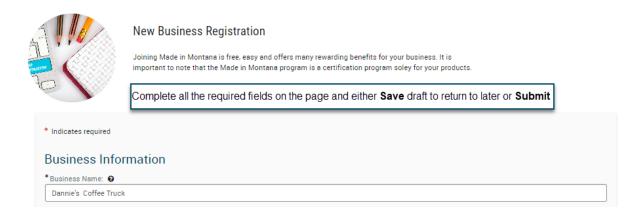
The easiest way to exit a screen without saving is to select one of the top menu navigation items such as Manage My Business and then select **Leave** on the pop-up screen.



Contacting the MIM Program Staff

If you have any questions or issues, use the **Contact Us** link in the top navigation if you are logged in. If you are unable to login, use this contact form instead - https://www.madeinmontanausa.com/contact.

Registering your Business



- 1. Go to the Made In Montana Online Directory at https://montana.servicenowservices.com/mim
- 2. Verify you are logged into the portal. In the top right corner, your initials should be displayed. If not **Log in**.
- 3. Select Register your Business.
- 4. Select Apply.
- 5. Enter **Business Name** as you want it to appear in the portal.
- 6. Enter your **Business Description** as you want it to appear in the portal (limited to 1000 characters).
- 7. **Upload** a photo of your storefront or logo (this step is optional). Photo must be a jpg, jpeg, bmp, gif, or png and smaller than 5 MB.
- 8. If you have a **Website** for your business, enter the entire URL including https:// or http://. Note: https:// is the preferred option. Verify the address by pasting into a web browser window to confirm it works and then paste it in this field. Also https or http must be all lower case.
- 9. Select your **Business Type(s).** This is a multi-select field, click in it to see options appear on the list. Select option. Repeat for each additional type. To remove type, click in the box and select the X for the items that you want to delete. *Note: It is important to select the correct type, failure to do so will require reregistering your business.*
 - a. If you select Producer/Manufacturer, you will be prompted to select one of five Industry Sectors that best relates to your business from the dropdown list.
- 10. Enter your **Estimated Annual Revenue** (this step is optional). Note: This information is not posted. It is used internally to evaluate the impact and value of the Made in Montana program for members growing businesses.
- 11. Select all **Options** that apply to your business. Note: This information is not posted. It is used internally to evaluate the impact and value of the Made in Montana program for members growing businesses.
 - a. If you are an enrolled member of one of the eight Tribal Nations that call Montana home, please check the Native American owned box and upload a photo of your tribal ID or enrollment information.
- 12. Select whether you *Export* your products outside the United States or not.
 - a. If you do not export but would like to in the future, indicate if you are *interested in exporting* and we will share your information with the Department of Commerce Export Team to follow up.
- 13. Select whether you would like to be notified of **vending opportunities** to sell your products such as tradeshows and other markets.
- 14. Enter your *Contact Information* which includes:
 - a. Owner's Name.
 - b. Manager's Name.

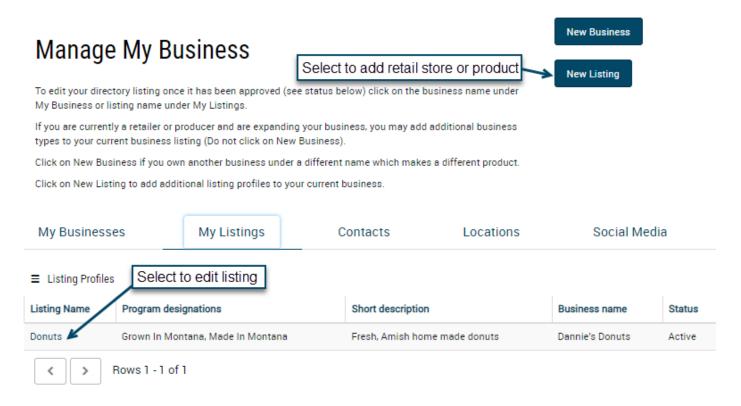
- c. Business Phone 406-xxx-xxxx or 406xxxxxxxx (option to display in the directory).
- d. Alternate Phone (does not display in the directory).
- e. Toll Free phone (option to display in the directory).
- f. Correspondence Email (Does not display in the directory, only used to log in and manage your business and listings).
- g. Business Email (displays in the directory).
- 15. Be sure to check the box to subscribe to news if you want to receive the monthly Made in Montana electronic newsletter.
- 16. Enter *Location* Information. Mailing and Physical Location are required and can be the same address. You can choose the option to display the full address or only the Montana city. You can also enter additional locations such as a Showroom, Gallery, Retail Store, Farmers' Market, Museum, Restaurant/Bar, etc.
 - a. Select Add New Location.
 - b. For the Location Name enter a description such as Primary Location, Physical Location, or Name of the business at this location where products are sold.
 - c. If the location where the products are sold is outside of Montana, change the state before entering the street address.
 - d. Check all location types that apply for this address and click on Submit.
 - e. To edit a location, select the pencil icon to the right of it under actions or to remove a location from the list select the trash can icon.
- 17. Indicate whether you want your business and product information displayed for free in the Made in Montana *Online Directory*.
 - a. If you choose to include your business and products, you will be asked to accept the terms of use.
 - b. You can add more information about your business such as which tradeshows you attend, or other ways your customers can purchase your products or awards/certifications that your business has received that will encourage customers to visit your business.
 - c. You will need to specify how much of your location address you want displayed. Only physical locations will be displayed on the map. If you work from your home and do not want customers to visit you at your location, you can select City/State and it will at allow customers to see only the name of the City.
 - i. If you select Full address or City/State, you will then be prompted to select which addresses you want displayed online.
 - d. Add any online presence websites you use to promote your business. This includes social media and shopping sites.
 - i. Select Add
 - ii. Select the type of website
 - iii. Enter the URL to go directly to your page on the website including the https://
 - iv. Select Add and repeat this process for each website
 - v. To edit a website, select the pencil icon under actions or to delete it select the trash can icon
- 18. Review the **Self Attestation** and type your name in the Signature box to sign electronically. It will automatically date stamp the signature.
- **19.** Select Save to return later and make more changes or if completed select **Submit**. This completes the business registration section. You will then be prompted to submit a product profile.

YOU MUST ALSO ADD AT LEAST ONE PRODUCT IN ORDER FOR YOUR APPLICATION TO BE COMPLETE. ***Check Manage My Business to confirm status***

Registering or Reactivating your Product(s)/Listing(s)

This online directory is not intended to be a comprehensive catalog of every product you sell. Rather it is meant to highlight your product categories by type such as Grown In Montana or Native American Made In Montana Products. For example, if you sell beverages, you would add one product listing for beverages and upload up to 6 images of the various types of beverages sold rather than add a listing for every coffee roast or every t-shirt design you offer. The purpose of these listings is to drive customer traffic to your website for direct inquiries and sales.

You can save a draft if you are not ready to fill out the product listing. Just remember to return later and select My Drafts from the top navigation menu and add at least one product so that you can successfully submit your application for review.



- 1. From the Manage My Business summary screen select New Listing or if adding a product for the first time enter the **Listing Name**.
 - a. If you are a producer this will be the name of the general product category you are promoting or need labels/logos for such as "Beverages"
 - b. If you are a retailer this will be the name of your store.
- 2. Enter a **Short Description** (it will appear in the search summary results in the online directory).
 - a. If you are a retail store this would be the headliner you would use to describe your store
 - b. If this is a product it would be a more detailed description such as "Specialty Teas, Coffees and Caffeinated Drinks".
- 3. Enter a **Detailed Description** of the product limited to 1000 characters (this description appears when someone clicks on your summary thumbnail in the online directory for more information).
 - a. If you are a retail store this would be an in-depth description of the Made in Montana products you carry and any other details that will encourage consumers to click on the link to your website.

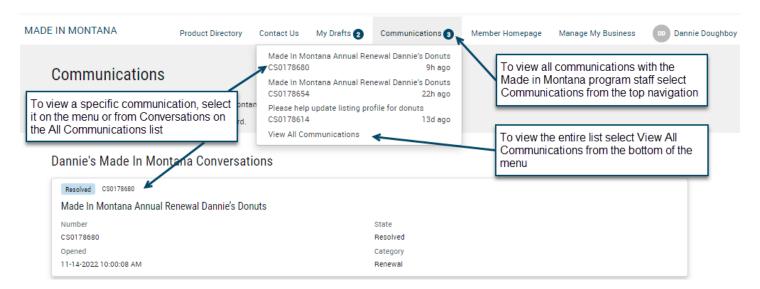
- b. For a product description, this would be the details about the product such as "We carry over 100 varieties of teas, many blends of coffees from light to dark roast both caffeinated and decaf as well as low calorie keto friendly but still tasty sports drinks".
- 4. Select the Made in Montana program(s) you are applying for this product/listing. *Made in Montana*, *Grown in Montana* and/or *Native American Made in Montana* program. Native American Made in Montana designation is only available if the Native American owned box is checked in the Business Registration section. If Native American Made in Montana is not available, and you are eligible, please save application and <u>contact</u> the Made in Montana team for assistance. Select these additional designations from the list by clicking in the box and selecting the appropriate program.
- 5. Select one or more *Product Categories* people would use to search for your product:
 - a. If you are a retail store you can select as many categories as appropriate.
 - b. If you are a producer, you are limited to 4 categories per listing.
- 6. Indicate if you sell the product through retail, wholesale, or both channels. If you do not sell your product, you can choose "Neither."
- 7. If you have a **Certified Organic** product, select yes if approved by the Montana Department of Agriculture.
- 8. Select the *Logos* you would like to access for your products or store:
 - a. If you are a producer you can chose to purchase printed logos, hang tags and decals.
 - i. If yes, then describe how you will use them.
 - b. If you are retailer, you are cannot purchase printed stickers, but you can purchase window decals, posters, and other printed material to promote Made in Montana products sold in your store.
 - c. If you would like to download the logos to for promotional use, select yes and explain what you plan to do with them.
 - d. If you want to use the logos, you will need to sign the terms of use as these logos are trademarked and can only be used by approved members as indicated on the application form.
- 9. All members are strongly encouraged to add *Directory Images* (Photos) to highlight the unique products.
 - a. Select Add New Image.
 - b. Photo must be a jpg, jpeg, bmp, gif, or png and smaller than 5 MB.
 - c. Select the paperclip to upload image.
 - d. Enter a title that describes the image.
 - e. Type in a number from 1-6 that indicates the order the images should appear.
 - f. Select Submit and repeat the process for up to 6 images per product listing.
 - g. If you need to reorder them, use the arrows under actions.
 - h. If you need edit/replace photo, use the pencil icon.
 - i. To delete a photo, use the trash can.
 - j. Consent to the photo usage agreement.

If you need more time to edit the product/listing, click on Save. This will create a draft displayed on the top navigation menu that you can return to later and finish. If completed, then **Submit**.

You will be prompted to add another product. Select Yes to repeat this process if you are a producer and have multiple products, otherwise select No and your completed application will be sent for review by the Made in Montana team. You will not be able to make any further changes to your application until it is approved.

Communications

The communications section of the portal has a list of all your submissions and requests (also known as cases) related to the Made in Montana program.



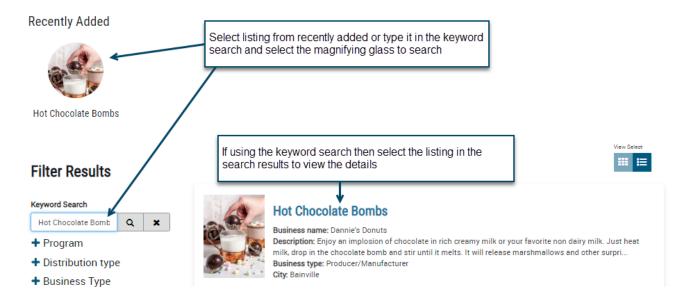
- 1. To review your communications select it from the top menu navigation.
- 2. There will be a list of conversations (case summaries) for each item.
- 3. Select the request or case to view the details.
- 4. The activity tab displays the latest information related to the communication along with the status of the request or case.
 - a. You can post a message to add information related to the request or case to the record.
 - b. The request details tab displays the request, case or membership application details.
 - c. If you need to add additional attachments for review on active requests select the attachments tab and then select the paperclip or drag files into the dotted box.

Any edits to your business or listing profile need to be made through Manage My Business rather than Communications. The communications section is to communicate with the Made in Montana staff on questions related to your submissions or the portal.

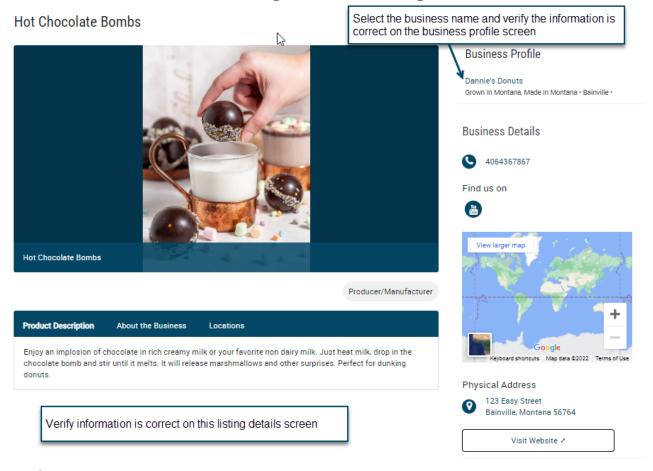
Viewing Listing in the Directory

You will get an email when your business or listing has been approved. If you checked the box on your business profile to list your business and products in the Online Directory then take a minute to confirm everything is displaying correctly to the public.

- Visit https://montana.servicenowservices.com/mim
- Select it from the Recently Added section if it appears or use the keyword search to type in your product or business name and then select the magnifying glass.



3. In the search results window on the right select each listing and view the details.



- 4. Verify the location is displaying correctly.
- 5. Verify the photos are correct.
- 6. Verify the information is accurate.
- 7. If not log in and go to Manage My Business to make edits.

Member Homepage

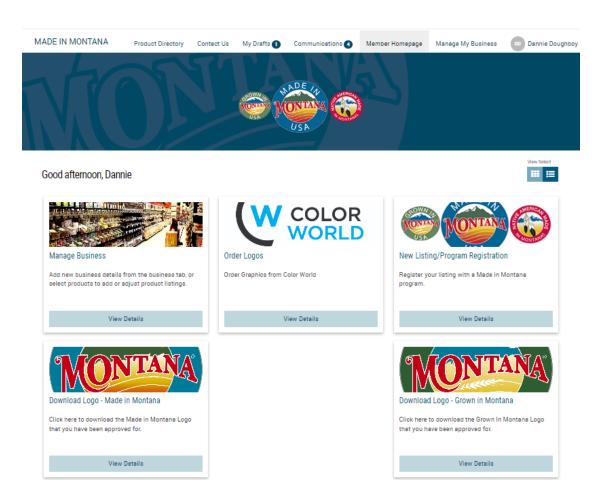
The member homepage is primary page to access all the details related to your membership and order/download logos. News or messages will be displayed on this page.

Logos

If approved to purchase Logo stickers and printed materials, a card will appear on the member home page for **Color World**. Select **View Details** and it will direct you to vendor portal. Color World will set up your ordering account within a few business days of your membership approval. They will contact you using the email you listed as your Communications email address. Use the Contact Us or call them at 406.587.4508. to get set up with an account and password in their portal.

If approved to download logos, one or more cards will appear on the member home page titled **Download Logo** (one card for each logo you have been approved to use). Select **View Details**, **review the logo usage agreement** and then **download the zip file** at the bottom of the screen. Use your local device to unzip the files and access the individual logos.

If you receive any error messages when selecting these cards, try logging out and then log in again.



Manage My Business

The Manage My Business section allows you to view/update your business and listing profile information when it is approved and active. If your listing has expired, <u>contact</u> the Made in Montana team for assistance. It also allows you to see the list of contacts associated with the account, locations (edit Business Profile to update) and social media/online presence (edit Listing to update) for your business profile.

If you want to update your contacts, use the Contact Us in the top navigation. List the name, title, phone number and email address for the contact and whether it should be added or removed.

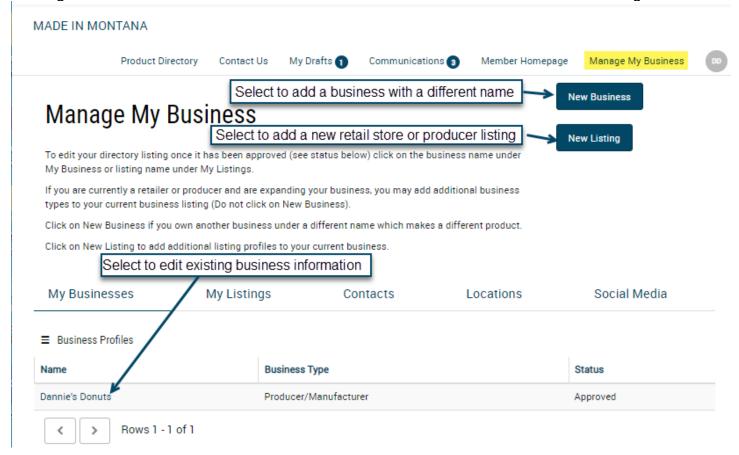
Note: If you do not have any active listings for your business or you have not selected the check box to participate in the online directory in your Business Profile, your business information will not display in the online directory.

Adding a Business Profile

Members should add a business profile for each business that will be registered in the Made in Montana program.

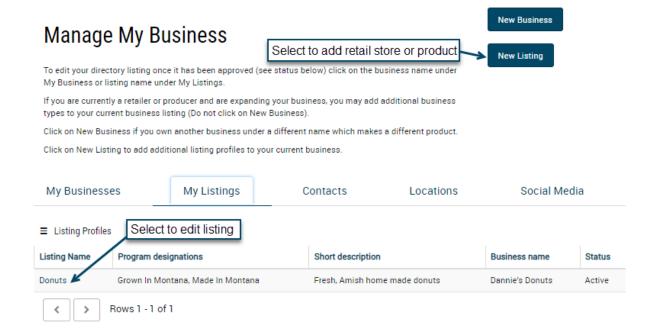
If you are a producer and a retailer you only need one business profile but you will add a listing profile for the retail store and a listing profile for the producer. You will then have one business profile with two listings.

To add a business select **New Business**. You will get a warning message that you already have an existing business. Enter the new business name and continue with the new business registration.



Adding a Listing

Adding a listing can be done directly from the Member Homepage by selecting the New Listing/Program Registration Card or from Manage My Business. If adding a listing from the Manage My Business page, select the blue **New Listing** button. Follow the same steps described above in the section titled Registering or Reactivating your Product(s)/Listing(s).



Reactivating a Listing

- Go to Manage my business and select My Listings.
- 2. Select the listing to reactivate.
- 3. Select Reactive Listing (if this is not an option then click on Contact Us from the menu and open a request to activate your listing.

Edit Business Profile

- 1. Select the **Business Profile** under My Business.
- Select Edit Business.
- 3. Make any changes needed and **Save** (to create a draft so you can return later and complete) or **Submit**.

Edit Listings

- 1. Select the Listing Profile under My Listings.
- Select Edit Business.
- 3. Make any changes needed and **Save** (to create a draft so you can return later and complete) or **Submit**.

If you want to abandon the changes during editing, just select Manage My Business from the top menu and select Leave.

When you edit your Business or Listing profile, the following changes will require MIM staff review before publishing:

- Tribal Affiliation
- Business Description
- Product Description
- Business Type
- Product Categories
- Distribution Type
- Certified Organic Status
- Program Designation

When you update photos, your listing will be temporarily removed from the online directory until the photos are reviewed and approved by the Made in Montana staff. You will receive an email once your edits are approved and if your listing was temporarily removed it will be re-added to the directory.

View/Print Your Membership Agreement

- 1. Select the **Business Profile** under My Business.
- 2. At the top of the screen the attachment in the top left corner labeled **MIM Business Summary.pdf** will be the most recent version of your agreement.
- 3. Select it to view or print it.

Renewing Your Membership

Members are required to renew their Made in Montana registration/membership annually. It is important to get keep the online directory content fresh and accurate and provide you with up-to-date logos and member information. Therefore, we require an **annual renewal** to confirm you still are interested in participating in the program. Once a year you will get a notification to renew your listing. We encourage you to review your business and product information and make any edits after you renew it. You will have up to **60 days to renew** your listing once notified. Failure to renew will result in deactivation/expiration. Expired listings will no longer appear in the directory and you will no longer have approval to use the Made In Montana logos associated with the listing(s).

Once you have renewed your listing and have received a notification that any changes submitted have been approved, take a minute to search the <u>Directory</u> and ensure your listing appears as expected. Note: If you have updated your photos, your photo or the specific product will be temporarily removed from the directory until the photos are approved. You will receive an approved email after the approval has been granted.

If you forget to renew your listing before it expires, select Contact Us at the top of the menu in the portal and request it be reactivated.

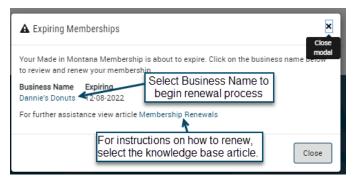
The MIM program staff will reactivate both your business and listing(s) and then uncheck display in the online directory. You will receive an email notifying you that your listing/business has been approved. Follow the instructions above for editing your business profile and listing(s). When you edit your business be sure to check display in online directory again if you want your listing publicly displayed.

Reminders

You will receive an email 30 days before your membership expires with instructions to renew. If you forget to renew your membership, you will receive a second reminder to renew within 14 days. If you do not act, you will receive a final notice that your membership expired and is no longer active. You will need to contact the Made in Montana program staff to reactive your membership if it has expired.

How to Renew

You will receive an email with instructions on how to renew 30 days before your listing(s) expire. The first time you login within the 30-day renewal window, a pop up will appear on the screen.

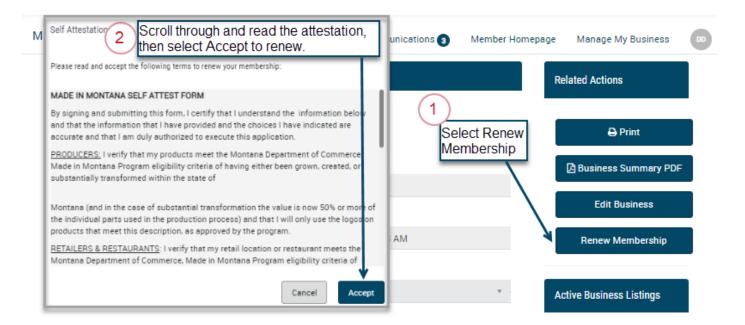


When you access the Member Homepage, there will be a pop-up message with a reminder about an expiring membership.

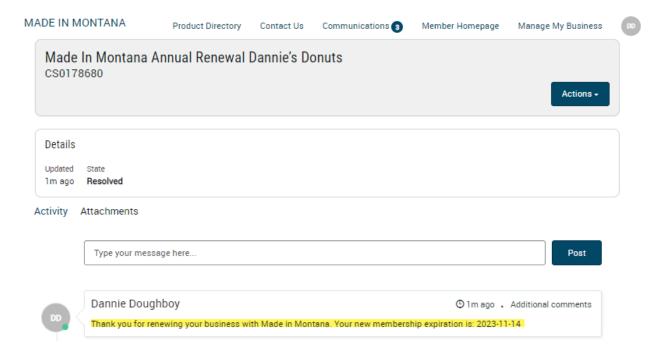
This is the easiest way to renew. Just select the **Business Name** in the pop-up screen. For instructions on how to renew, select Membership Renewals.

If you do not renew the first time you login, you can manually go to the business profile to begin. Either select Manage My Business from the top navigation or Manage Business from the Member Home page. Select the Business profile to renew.

On the membership details page, select the blue **Renew Membership** button. Scroll through and read the attestation then select **Accept**.



The Renew Membership button will disappear from the screen, and you will receive an email notification with your new expiration date. A copy of this email will also appear under Communications in the portal.



Congratulations! You have successfully renewed your membership. Now is the perfect time to review your information. Follow the instructions for editing the business profile or listing profile in this guide to update your information.

Cancel Membership or Listing

Use the Contact Us menu item and request that your membership or product be deactivated.