General Supplier Registration – Section 2.0

This process will be used to add a new supplier which is currently not in Oracle and will be reviewed for approval. Suppliers are created upon approval, not registration.

Audience: All

Additional Resources:
- Glossary
- Video
- https://www.gmhec.org/procurement-knowledge-base/
- cheryl.foster@gmhec.org

<table>
<thead>
<tr>
<th>Process Step &amp; Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2.1 Search for Your Supplier</strong></td>
<td>Navigation Path: ➢ Procurement ➔ Suppliers</td>
</tr>
</tbody>
</table>

Before registering a supplier, please make certain that the supplier is not already in Oracle. To search:

1. Click the search icon in the Suppliers Module

Quick Tip!
Remember to enable your pop-ups for use in Oracle.
2. You can do a search in the keywords field, however the advance search option creates better results. To do an advance search, click the advanced search link.

Quick Tip! For individuals, search by last name.

3. Search for your supplier.

Quick Tip! You only need to use one field with a double asterisk to search.

If your supplier is in the system, your search will appear below:
If the supplier is not in Oracle, your search will turn up blank:

Move on to the next section to request your supplier to be added into Oracle.

2.2 Go to Supplier Registration and Enter Basic information

Under tasks click on “Register Supplier”. Using the supplier W-9 or your institution’s substitute W-9 to complete the fields.
2.3 Under Register Supplier: Add Registration Details and Company Details

Enter Registration and Company details. These pieces are required for you to move forward. All of this information should be on your supplier’s W-9:

- Company
- Request Reason
- BU (Business Unit)
- Business Relationship
- Tax Organization Type
- Tax Country
- Taxpayer ID (do not enter dashes)

**IMPORTANT NOTE:**
Company/Supplier name must be unique. You may come across a person with the exact same name when working with an individual supplier, like a guest speaker. If you cannot register due to a unique supplier name error, please use the following naming conventions:

- If available, add the middle initial: Last Name, First MI. (Smith, John M.)
- If name is still not unique, add middle name if available: Last Name, First Name Middle Name (Smith, John Michael)
- If the above two still do not provide a unique name, add the date: Last Name, First MMDDYY (Smith, John 032019)

**Accounts Payable:** Please add an Alternate Name in the profile tab to ensure correct check printing.

When entering a supplier, please follow the Data Governance Rules – Supplier Name Example:

<table>
<thead>
<tr>
<th>Acceptable</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Inc.</td>
<td>Supplier, Inc.</td>
</tr>
<tr>
<td>Smith, John</td>
<td>John Smith</td>
</tr>
</tbody>
</table>

You can locate your supplier’s Tax Organization Type on their W9. For more information go to the Oracle Procurement Glossary.
Request Reason – New Supply Source is the most common choice.

* Company

* Request Reason

Justification

Check Request
New Supply Source
One-time Supplier Request
Sourcing Supplier Registration

Your Procurement BU (Business Unit) should automatically default to your institution’s ID:

- CC: Champlain College
- GMHEC: Green Mountain Higher Education
- MIDD: Middlebury College
- SMC: Saint Michael’s College

Business Relationship:

- Spend Authorized – Most often used. For suppliers you are ready to do business with. Transactional: exchanging goods/services for money.
- Prospective – Not often used. For bidding/proposal purposes only. Supplier is not approved for monetary transactions.

For Tax Organization Type, if the supplier did not provide on their substitute W-9, please default to “Corporation”.

For Supplier Type, the following are available: Supplier, Student, and Employee – please choose one. In the case of a guest speaker/presenter, choose supplier.

Attach the supplier’s W-9 or Substitute W-9. Click the “+” next to the attachments section:

Quick Tip! It is required to attach the W-9 or Substitute W-9.

If applicable, you would also add your Independent Contractor Worksheet (Middlebury only) here.

The following box will appear:

Choose a file from your computer, upload and click “Ok.” For multiple attachments, click the “+” button again.
Tax Country (no asterisk – but still a required field):
- Type in your country until Oracle provides a dropdown choice; or,
- Click the dropdown box and search for your country

Taxpayer ID (No asterisk – but still a required field):
- Add taxpayer ID as shown on the W-9
- If supplier is a student requesting reimbursement, the following will be used – BU initials + student ID number; for example:
  - Champlain College: CC123456
  - Green Mountain Higher Education Consortium: GMHEC: 987654
  - Middlebury College: MD147852
  - Saint Michael's College: SM369852
- If supplier is an international guest speaker/presenter
  - Enter US TIN if available
  - Enter Foreign TIN if available
  - If none of the above are available, enter “International YYYYMMDD” (e.g. International 20190318)
  - If more than one international supplier was entered, add -1 to the end of the date (e.g. International 20190318-1)

2.4 Create Supplier Contact

Navigation Path:
➢ Scroll down to Contact Info Fields
Click on “+” to add a new Contact

Quick Tip! Recording contact information is BEST PRACTICE in supplier development.

Quick Tip! Dashes are not required in the taxpayer ID.
**2.5 Add Address Info**

Create Contact

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salutation</td>
<td>▼</td>
</tr>
<tr>
<td>First Name</td>
<td>Starley</td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Hudson</td>
</tr>
<tr>
<td>Job Title</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>▼ 570</td>
</tr>
<tr>
<td>Mobile</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td>▼</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:shudson@durnermiffin.com">shudson@durnermiffin.com</a></td>
</tr>
</tbody>
</table>

**Navigation Path:**
- Scroll down to Address Info Fields
- Click on “+” to add a new Address

**A window will pop-up to add address information.**

| Addresses | | |
|-----------|---|
| Address Name | Address | Phone | Address Purpose |
|            | | | |

Your Address Name is always the Business Address city and a “-1”. If you have a supplier with multiple locations in the same city, you would add the next number. (Ex. Scranton-1, Scranton-2, Scranton-3, etc.)

The Address Purpose can be either of the following three choices:
- Ordering (where orders are sent to)
- Remit To (where to send a payment)
- RFQ or Bidding (for bidding purposes – to be used only for potential procurement contracts)

The most popular choices are Ordering & Remit To. If you do not choose Ordering, you will not be able to place an order via requisition in Oracle.

Quick Tip!
Please reference the Data Governance rules for details on address naming conventions.

Ignore Administrative Contact information. This will not be needed in Oracle.
Add your supplier contact to the address by scrolling down choosing “Actions” and then “Select and Add” sign:

Highlight your contact:

Address information box will appear for your review:

Click “Ok” when you are finished reviewing the address information.
2.6 Complete Registration

Skip “Business Classification”, “Bank Accounts” and “Products and Services Categories”
- Please make sure you attach any bank account information so Accounts Payable can add it into Oracle

When you are ready to register your supplier click “Register”

The following confirmation pop-up will appear:

Click “OK.”

You will receive an email notification when your registration is approved and complete.