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

<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>Prior to registering any supplier: student, guest speaker, company, etc. – <strong>YOU MUST SEARCH FOR YOUR SUPPLIER</strong></td>
</tr>
<tr>
<td></td>
<td>Not only are we sharing suppliers amongst the Consortium member institutions, but other people may be registering the same supplier as you. The following directions will instruct you on how to search for a supplier in two separate screens.</td>
</tr>
<tr>
<td></td>
<td><strong>Screen 1: Manage Your Suppliers</strong> – This search is used for existing suppliers already in Oracle.</td>
</tr>
<tr>
<td></td>
<td>Navigation Path: ➢ Procurement → Suppliers</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Screen 1: Manage Your Suppliers" /></td>
</tr>
<tr>
<td></td>
<td>Before registering a supplier, please make certain that the supplier is not already in Oracle. To search:</td>
</tr>
<tr>
<td></td>
<td>1. Click the search icon in the Suppliers Module</td>
</tr>
</tbody>
</table>

**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! A supplier can be a Company, Guest Speaker, Independent Contractor, and a Student. As you read through this guide, and others, please note that this definition is not restricted to companies only.
3. Search for your supplier.

If your supplier is in the system, your findings will appear below:

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

If the supplier is not in Oracle, your search will turn up blank:
**Screen 2: Manage Supplier Registration Requests** – This search is used for suppliers that may have already been submitted by another user and could be pending approval.

**Navigation Path:**

➢ Procurement → Suppliers

**Click the Tasks icon:**

- Manage Suppliers
- Register Supplier
- **Manage Supplier Registration Requests**
- Import Suppliers
- Merge Suppliers

**Under search, in the Company field, search for your supplier:**

- **Individuals:** Search by last name
- **Companies:** Search by company name

You can also add an Approval Status filter. However, for a more general result, just add the company and click search.

Your search results will appear below. In this case, this supplier record is “Pending Approval” as shown in the Approval Status column.

<table>
<thead>
<tr>
<th>Registration Request</th>
<th>Inviting Procurement BU</th>
<th>Company</th>
<th>Business Relationship</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>36022</td>
<td>MIDD BU</td>
<td>Joseph, Miranda</td>
<td>Spend Authorized</td>
<td>Pending Approval</td>
</tr>
</tbody>
</table>
What to do with your results:

Screen 1: Manage Your Suppliers
- Existing/Approved: There is no need to register your supplier. You are free to create your invoice or requisition.
- Cannot be found/No Record. Move on to search in Screen 2: Manage Supplier Registration Requests.

Screen 2: Manage Supplier Registration Requests
- Pending Approval: Someone else has requested this supplier to be added to Oracle. Do not register your supplier. Wait 24 – 48 hours and check the registration requests again to see if the supplier has been approved. Once the supplier is approved, you are free to create your invoice or requisition.
- Cannot be found/No Record. Move on to the next section of this reference guide to request your supplier.

STOP AND READ:
If you have not conducted a full search of your supplier stop here, and go back up to the above section 2.1 Search For Your Supplier. If you do not search for your supplier and choose to register them directly, you are adding more workload to the Accounts Payable’s queue, thereby creating a longer turnaround for other suppliers to be approved. This will also create a longer turnaround for all suppliers to be paid. It is always important to search first.

Navigation Path:
➢ Procurement → Suppliers → Tasks

Quick Tip! Follow the tips provided by Data Governance when inputting data!

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.

Justification – You may want to enter the reason why you need this supplier added to Oracle. Frequent examples are:

- Guest Speaker Coming to Campus
- Reimbursement for student expenses (if using, please add the legacy ID if applicable)
- Reimbursement for previous employee expense (if using, please add the legacy ID if applicable)

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

* If you do not have a Business Unit available, or you have the incorrect Business Unit, please contact your local helpdesk.

Business Relationship:

- Spend Authorized – **Most often used**. For suppliers you are ready to do business with. Transactional: exchanging goods/services for money. You will need to choose this relationship in order to pay your supplier.
- Prospective – Very rarely used. For bidding/proposal purposes only. Supplier is not approved for monetary transactions. You will **not** be able to pay your supplier if you choose prospective.

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:

If applicable, you would also add:

- Independent Contractor Worksheet (Middlebury only)
- Certificate of Insurance (COI) for labor services such as builder contractor work

**Quick Tip!** Unless your supplier is a student requesting a reimbursement, it is required to attach the W-9 or Substitute W-9.
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 – this is usually the Taxpayer Identification Number (TIN) or Social Security Number (SSN)
- 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 MMDDYYYY" (e.g. International 03182019)
  - If more than one international supplier was entered, add -1 to the end of the date (e.g. International 03182019-1)

Quick Tip! Dashes are not required in the taxpayer ID. Please do not add dashes.
2.4 Create Supplier Contact

Navigation Path:
➢ Scroll down to Contact Info Fields

Click on “+” to add a new Contact

A window will pop-up to add contact information

-salutation
- First Name: Sterling
- Middle Name: 
- Last Name: Hudson
- Job Title: 
- Administrative contact

Phone: 570
Mobile: 
Fax: 
* Email: shudson@dundertifflin.com

Click “OK” when complete

Ignore Administrative Contact information. This will not be needed in Oracle.

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

2.5 Add Address Info

Navigation Path:
➢ Scroll down to Address Info Fields

Click on “+” to add a new Address

A window will pop-up to add address information.

- Address Name: Bozanton-1
- Country: United States
- Address Line 1: 1726 Sough Ave.
- Address Line 2: 
- City: Bozanton
- State: PA
- Postal Code: 19505

* Address
- Purpose: Ordering
- Remit to: 
- Phone 1: 570
- Fax 1: 
- Email: ordering@dundertifflin.com
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. If your supplier is a guest speaker, choose Ordering or you will not be able to create the requisition without it.
- If you do not choose Remit To, you will not be able to access the supplier when creating an invoice.

Add your supplier contact to the address by scrolling down choosing “Actions” and then “Select and Add” sign:

Highlight your contact:

Click “Apply” and then “OK” when complete.

Quick Tip! If your supplier is a student, add the remit to address (aka where the check goes), and if available, add the student’s residential address. If you have more than one address, click the “+” button again to create another address.
Address information box will appear for your review:

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

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.
2.7 Troubleshooting and Follow-Up

Registered your supplier and haven’t received your approval:

- To find out the status of your supplier registration, see the directions under “2.1 Search For Your Supplier” then in Screen 2 – Manage Supplier Registrations located in the first section above.

- From the Manage Supplier Registrations screen, you will be able to see what the status of your supplier is, such as “pending approval”

Registered your supplier, received approval, but you still cannot access:

- Did you choose Spend Authorized?
  If you did not choose Spend Authorized, and chose Prospective, your supplier has not been approved to do any monetary transactions. Contact your local helpdesk for support or, if possible, contact Accounts Payable for assistance.

- For a Requisition, did you choose “Ordering” for your address?
  If you did not choose Ordering when you were inputting the address, your supplier is not authorized to accept any Purchase Orders. Contact your local helpdesk for support or, if possible, contact Accounts Payable for assistance.

- For an Invoice, did you choose “Remit To” for your address?
  If you did not choose Remit To when you were inputting the address, your supplier is not authorized to accept payment. Contact your local helpdesk for support or, if possible, contact Accounts Payable for assistance.

- Accounts Payable Only: Was the site assignment created?
  Please refer to Reference Guide 2.0a – Supplier Approval & Edit (AP Only) for directions on site assignments. If the site was not assigned, then the supplier will not be accessible in both requisitions and invoices, regardless of the address purpose.