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.
2. You can do a search in the keywords field, however the advanced search option creates better results. To do an advanced 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.

Navigation Path:
➢ Procurement → Suppliers → Tasks

Under tasks click on “Register Supplier”. Using the supplier W-9 or your institution’s substitute W-9 to complete the fields.

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

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### Register Supplier

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

**Registration Details**

- **Company:** Dunder Mifflin Paper Co.
- **Request Reason:** New Supply Source
- **Business Relationship:** Spend Authorized

**Company Details**

- **Tax Organization Type:** Corporation
- **Supplier Type:** Supplier
- **Corporate Website:**
- **Attachments:** None

**Taxpayer ID:**

- **Country:** United States
- **Taxpayer ID:** 5467890127
- **Tax Registration Number:**

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

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

The following box will appear:

Attachments: None

Quick Tip! If you do not see the file you are looking for, you may need to upload it to your Oracle account first.
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:
  o Champlain College: CC123456
  o Green Mountain Higher Education Consortium: GMHEC: 987654
  o Middlebury College: MD147852
  o Saint Michael's College: SM369852
• If supplier is an international guest speaker/presenter
  o Enter US TIN if available
  o Enter Foreign TIN if available
  o If none of the above are available, enter “International YYYYMMDD” (e.g. International 20190318)
  o If more than one international supplier was entered, add -1 to the end of the date (e.g. International 20190318-1)

D-U-N-S Number

Tax Country United States

Taxpayer ID 546789087

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

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

Click "OK" when complete

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

Navigation Path:
➢ Scroll down to Address Info Fields

Click on “+” to add a new Address

A window will pop-up to add address information.

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

Highlight your contact:

Select and Add: Contacts

Search

Name

Job Title

Search

Reset

View Format Wrap

Name

Job Title

Email

Phone

Hudson, Stanley

shudson@lund...

(570)555 x9999

Rows Selected 1 Columns Hidden 1

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

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.