General Supplier Registration – Section 2.0b

This process is 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
- Procurement Knowledge Base
- Substitute W-9
- procurement@gmhec.org or ap@gmhec.org

<table>
<thead>
<tr>
<th>Process Step &amp; Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1b Go to Supplier Registration and Enter Basic information</td>
<td>STOP AND READ: If you have <em>not</em> conducted a full search of your supplier <em>stop here</em>, and go back up to the above Reference Guide 2.1a 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. <em>It is always important to search first.</em></td>
</tr>
</tbody>
</table>

*Quick Tip!* Follow the tips provided by Data Governance when inputting data!
Under tasks click on “Register Supplier”. Use the completed substitute W-9 to complete the fields.

Navigation Path:
➢ Procurement → Suppliers → Tasks → Register Supplier

Enter Registration and Company details. These pieces are required for you to move forward. Most of this information should be on the substitute 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.

<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>
The Tax Organization Type on the substitute W-9. For details see 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)
- New supplier for goods and/or services

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 in your dropdown, or you have the incorrect Business Unit, please contact procurement@gmhec.org.*

Business Relationship:
- Select “Spend Authorized”. This must be chosen in order to pay your supplier.

For Tax Organization Type, if the supplier did not provide on their substitute W-9, please default to “Corporation” if it’s a business and not an individual.

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 Substitute W-9. Click the “+” next to the attachments section:

*Quick Tip!* Unless your supplier is a student requesting a reimbursement, 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 box below 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 – 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 (with leading zeros); for example:
  - Champlain College: CC00123456  
  - Middlebury College: MD00147852  
  - Saint Michael's College: SM00369852
- If supplier is an **International Independent Contractor**
  - Preferred: Enter the U.S. SSN/EIN if available  
  - If no U.S. SSN or EIN, use W-8 Foreign Tax number  
  - If none of the above are available, enter “International YYYYMMDD” (e.g. International 20190318), or add “-1” if already used, e.g. “International 20190318-1”

**Quick Tip!** Dashes are not required in the taxpayer ID. Please do not add dashes.
A window will pop-up to add contact information

<table>
<thead>
<tr>
<th>Create Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Name</td>
</tr>
<tr>
<td>* First Name</td>
</tr>
<tr>
<td>Middle Name</td>
</tr>
<tr>
<td>* Email</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Click “OK” when complete

- Create Another
- OK
- Cancel

Do not click “Administrative Contact.”

Navigation Path:
- Scroll down to Address Info Fields

Click on “+” to add a new Address

<table>
<thead>
<tr>
<th>Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Name</td>
</tr>
<tr>
<td>Phone</td>
</tr>
<tr>
<td>Address Purpose</td>
</tr>
</tbody>
</table>

A window will pop-up to add address information.

<table>
<thead>
<tr>
<th>Create Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Address Name</td>
</tr>
<tr>
<td>* Country</td>
</tr>
<tr>
<td>Address Line 1</td>
</tr>
<tr>
<td>Address Line 2</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>State</td>
</tr>
<tr>
<td>Postal Code</td>
</tr>
</tbody>
</table>

2.4b Add Address Info

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.)

Under Address Purpose choose both “Ordering” and “Remit To”:
- If you do not choose Ordering, you will not be able to create a Requisition, and in turn, a Purchase Order.
- If you do not choose Remit To, you will not be able to create 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.

Address information box will appear for your review:

2.5b Complete Registration

Skip “Business Classification”, “Bank Accounts” and “Products and Services Categories” – However, 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.