

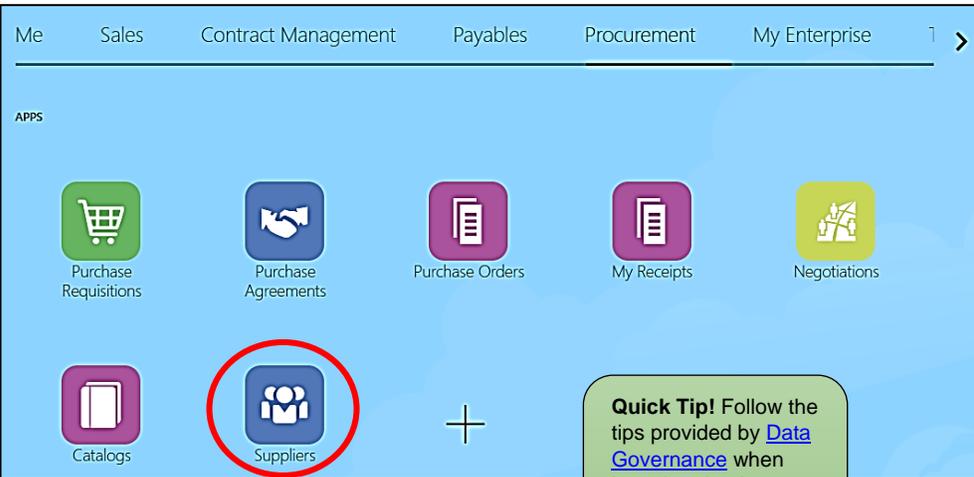
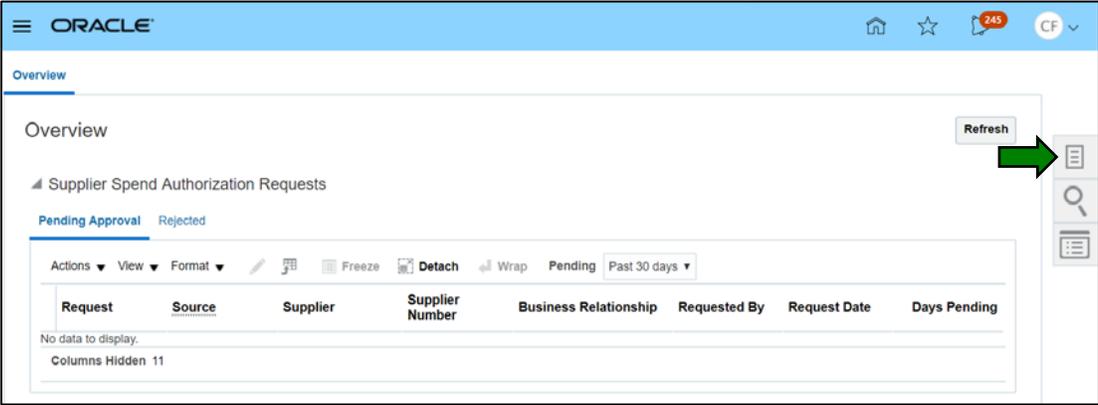
General Supplier Registration – Section 2.0b

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

Process Step & Description	Action
<p>2.1b Go to Supplier Registration and Enter Basic information</p>	<div style="text-align: center;"> <h2>STOP AND READ:</h2> <p>If you have <i>not</i> conducted a full search of your supplier <i>stop here</i>, 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. <i>It is always important to search first.</i></p> </div>  <p>The screenshot shows the Oracle Procurement Home Page. The navigation bar includes: Me, Sales, Contract Management, Payables, Procurement, My Enterprise. Under the 'APPS' section, there are icons for Purchase Requisitions, Purchase Agreements, Purchase Orders, My Receipts, Negotiations, Catalogs, and Suppliers. The 'Suppliers' icon is circled in red. A 'Quick Tip!' callout bubble says: 'Follow the tips provided by Data Governance when inputting data!'.</p> <p>Navigation Path: > Procurement → Suppliers → Tasks</p>  <p>The screenshot shows the Oracle Supplier Spend Authorization Requests page. It includes a 'Refresh' button with a green arrow pointing to it. Below is a table with columns: Request, Source, Supplier, Supplier Number, Business Relationship, Requested By, Request Date, Days Pending. The table currently shows 'No data to display.' and 'Columns Hidden 11'.</p>

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.

2.2b Under Register Supplier: Add Registration Details and Company Details

Register Supplier Register ▼ Cancel

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

Registration Details

* Company Procurement BU

* Request Reason * Business Relationship

Justification

Company Details

* Tax Organization Type D-U-N-S Number

Supplier Type Tax Country

Corporate Web Site

Attachments Taxpayer ID

Tax Registration Number

When entering a supplier, please follow the [Data Governance Rules](#) – Supplier Name Example:

Acceptable	Unacceptable
<ul style="list-style-type: none"> • Supplier Inc. • Smith, John 	<ul style="list-style-type: none"> • Supplier, Inc. • John Smith

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.



A screenshot of the Oracle Procurement 'Request Reason' dropdown menu. The menu is open, showing several options: 'Check Request', 'New Supply Source', 'One-time Supplier Request', and 'Sourcing Supplier Registration'. The 'New Supply Source' option is highlighted in blue. Above the dropdown, there are input fields for '* Company' and '* Tax Organization Type'.

Quick Tip! Unless your supplier is a student requesting a reimbursement, it is required to attach the W-9 or Substitute W-9.

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:



A button labeled "Attachments None +" with a plus sign icon, used to click to add attachments.

If applicable, you would also add:

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

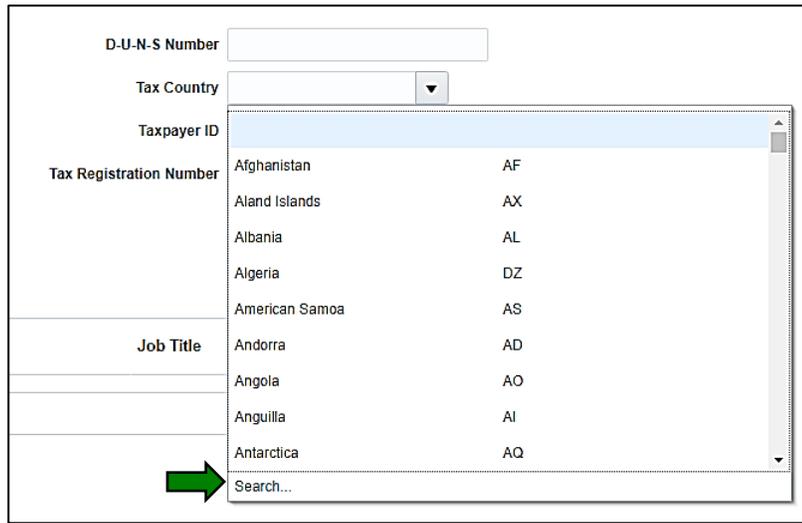
The box below will appear. Choose a file from your computer, upload and click "Ok." For multiple attachments, click the "+" button again.



A screenshot of the Oracle Attachments dialog box. It features a table with columns: Type, Category, * File Name or URL, Title, Description, and Attached By. The 'Type' column has a dropdown menu set to 'File'. The 'Category' column has a dropdown menu set to 'From Supplier'. The 'File Name or URL' column contains a 'Choose File' button and the text 'No file chosen'. The 'Attached By' column shows 'Cheryl Foster'. At the bottom, there are 'OK' and 'Cancel' buttons. The dialog also shows 'Actions', 'View', and a '+' icon at the top left.

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



D-U-N-S Number

Tax Country

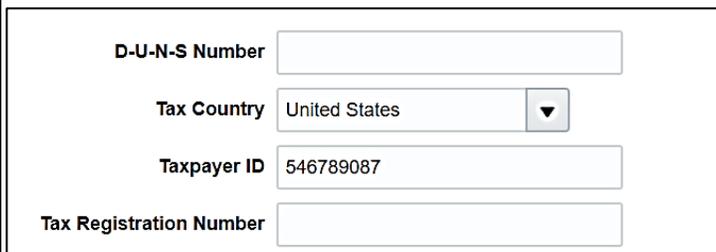
Taxpayer ID

Tax Registration Number	Country	Code
Afghanistan	AF	
Aland Islands	AX	
Albania	AL	
Algeria	DZ	
American Samoa	AS	
Andorra	AD	
Angola	AO	
Anguilla	AI	
Antarctica	AQ	

Search...

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”



D-U-N-S Number

Tax Country

Taxpayer ID

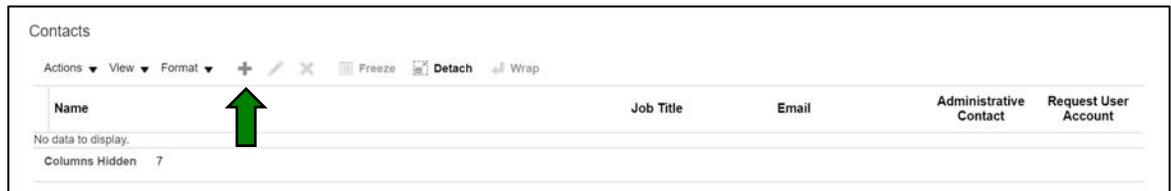
Tax Registration Number

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

Navigation Path:

- Scroll down to Contact Info Fields

Click on “+” to add a new Contact



Contacts

Actions View Format + ✎ ✕ Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	Request User Account
No data to display.				
Columns Hidden 7				

2.3b Create Supplier Contact

A window will pop-up to add contact information

Create Contact

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

* Email

Click "OK" when complete

Do not click "Administrative Contact."

Navigation Path:

➤ Scroll down to Address Info Fields

Click on "+" to add a new Address

Addresses

Actions View Format

Address Name	Address	Phone	Address Purpose
No data to display.			
Columns Hidden	3		

A window will pop-up to add address information.

Create Address

* Address Name

* Country

Address Line 1

Address Line 2

City

State

Postal Code

* Address Ordering

Purpose Remit to

RFQ or Bidding

Phone

Fax

Email

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.

Address Contacts

Select the contacts that are associated with this address.

Actions View Format

Columns Hidden 4

Highlight your contact:

Select and Add: Contacts

Search

Name Job Title

Search Reset

View Format Wrap

Name	Job Title	Email	Phone
Hudson, Stanley		shudson@dund...	(570)555 x9999

Rows Selected 1 Columns Hidden 1

Apply OK Cancel

Quick Tip! If your supplier is a student, add the remit to address (aka where the check goes). If a Domestic student add the student's residential address, too. Do not add International addresses. If you have more than one address, click the "+" button again to create another address.

Click "Apply" and then "OK" when complete.

Address information box will appear for your review:

Create Address

* Address Name * Address Ordering

* Country Purpose Remit to

Address Line 1 RFQ or Bidding

Address Line 2

City Phone 1

State Fax 1

Postal Code Email

Address Contacts

Select the contacts that are associated with this address.

Actions View Format X Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	User Account
Hudson, Stanley		shudson@dund...	—	—

Columns Hidden 4

Create Another OK Cancel

Click "Ok" when you are finished reviewing the address information.

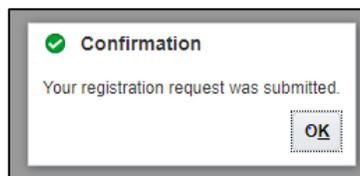
2.5b Complete Registration

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.