

Register Supplier (Prospective) using the Supplier Portal

Audience: Prospective Suppliers, *and on their behalf:* Supplier Administrator, Supplier Manager, Supplier Self Service Administrator, Supplier Bidder, Procurement Manager

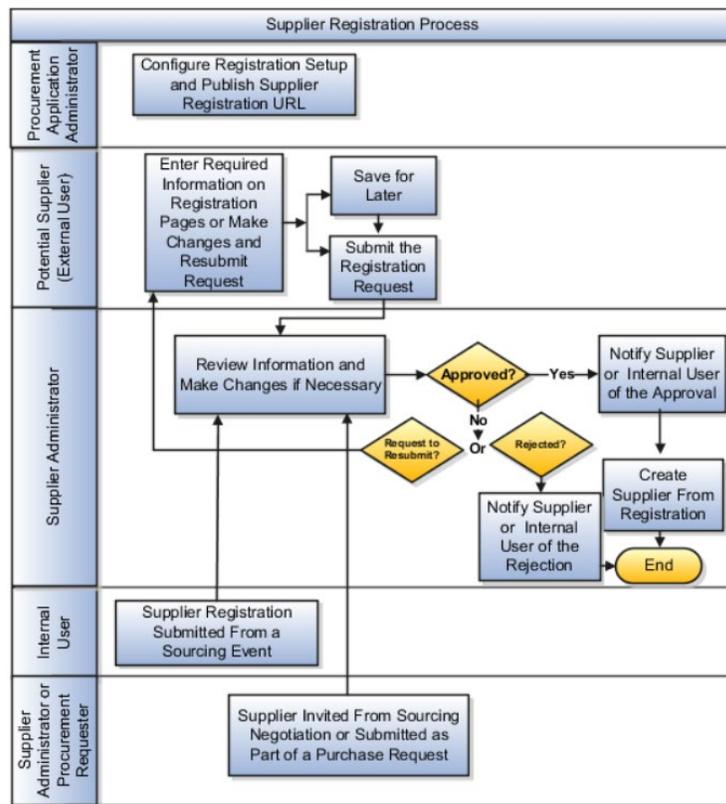
Purpose: The Supplier Registration process is used by companies/vendors (and internal users on their behalf) to submit their registration request to become a supplier of the buying organization. Suppliers can potentially enter into a business relationship with the County through:

- External supplier registrations
- Internal supplier registrations - allows employees to request new suppliers through sourcing, suppliers work area, and through Self Service Procurement.

Regardless of how a supplier is introduced, the County reviews the registration request using a collaborative review process and determines if it wants to consider this company as a new source of supply. The process is displayed in the image below.

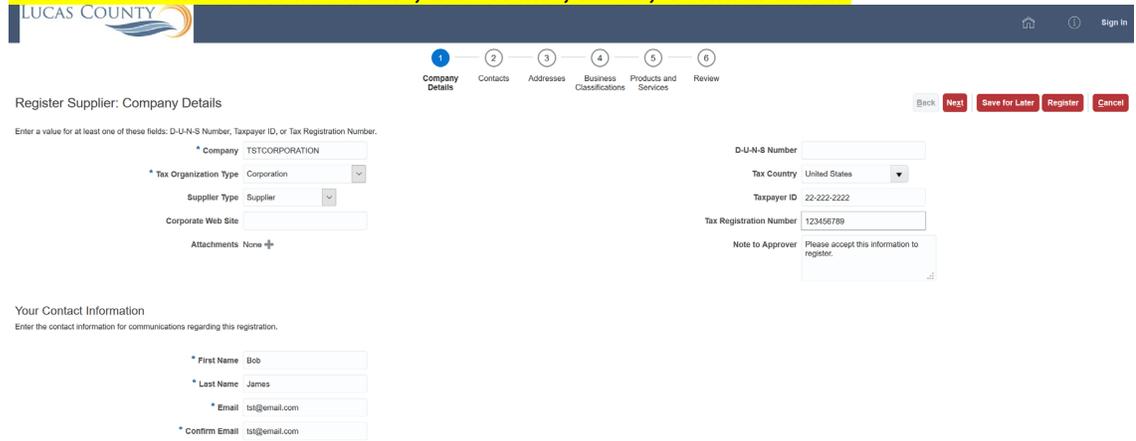
Suppliers can ask to be registered with the application either independently by accessing the buying company's registration web page, or they can be registered internally, for example, a category manager can request to register a new supplier when completing an invitation list for a new negotiation. In either case, the registration requests go to the supplier manager for review. Once the supplier manager approves the registration request, the supplier becomes a Prospective Supplier in the system. Prospective Suppliers have a restricted level of access. They can participate in supplier qualification initiatives, and they can view and respond to negotiations. Prospective Suppliers are identified within the application by an icon that indicates their prospective status.

This job aid provides the steps to register as a Prospective Supplier using the URL for Supplier Registration.



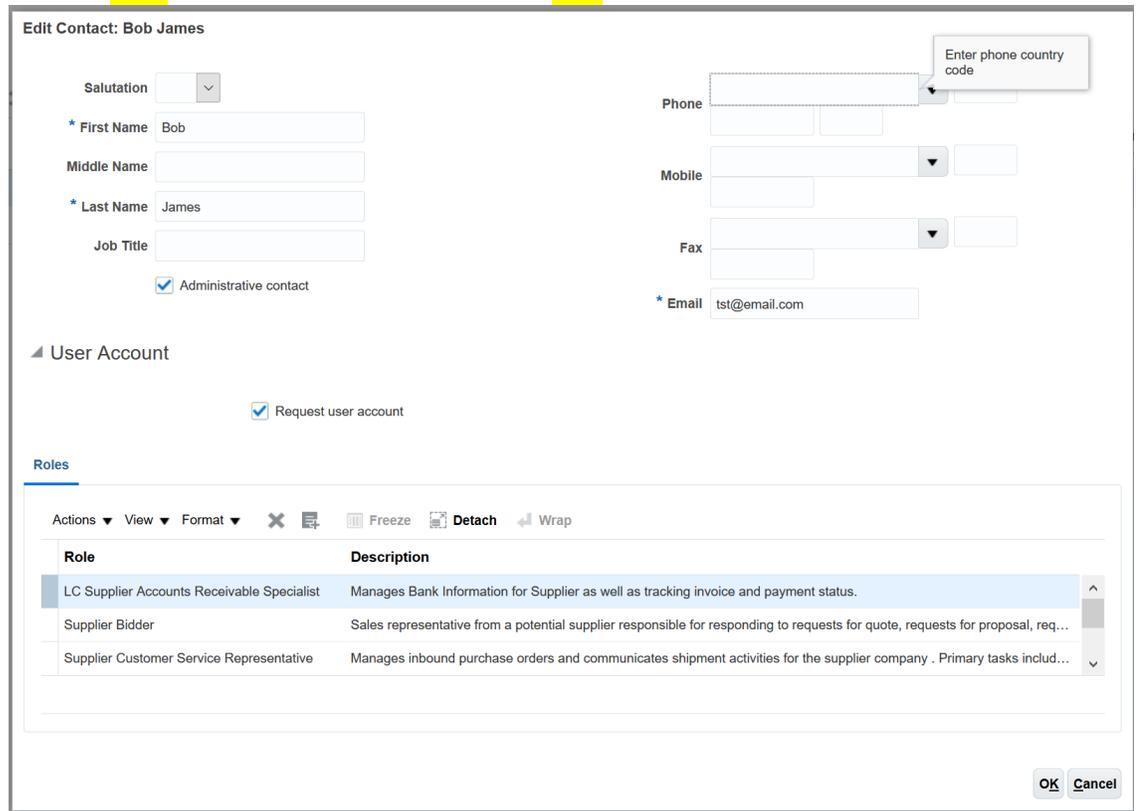
Step	Action
1	<p>Open the URL in a New browser: Prospective Supplier Registration Link</p> <p>The screenshot shows the Lucas County Oracle Supplier Portal. The main content area is titled "Bid Opportunities" and includes a welcome message and a red-bordered box containing the text: "Suppliers interested in doing business with Lucas County must register in the Supplier Portal. To access the Lucas County Oracle Supplier Portal, please visit: Lucas County Oracle Supplier Portal".</p>

Click on **Company Details** and add information to the following fields: **Company, Tax Organization Type, Supplier Type, Corporate Web Site, Add an Attachment if applicable, DUNS number, Tax Country, Tax Payer ID, Note to Approver. Contact Information: First Name, Last Name, Email, Confirm Email.**



2

Click on **Next** to review Contact details. Click **Edit** on the contact line.



Role	Description
LC Supplier Accounts Receivable Specialist	Manages Bank Information for Supplier as well as tracking invoice and payment status.
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, req...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company . Primary tasks includ...

3

- 4 Enter a **Supplier Phone Number**.
- 5 Verify that **Administrative Contact** is selected.
- 6 Verify that **Request User Account** is selected.
- 7 In the **Roles** section select the **Supplier Bidder Role**.

Roles

Actions ▾ View ▾ Format ▾ ✕ 📄 📄 Freeze 📄 Detach 📄 Wrap

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Click the **Next** button to enter the Supplier Addresses details.

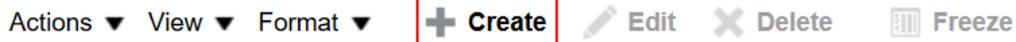


8

Click **+ Create** to add the following fields: **Address Name, Country, Address Line, City, State, Postal Code, *Address (select Ordering checkbox) Under Purpose** select **(RFQ to Bid)**.

Register Supplier: Addresses

Enter at least one address.



Address Name	Address
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No data to display.

Columns Hidden 3

9

In the Address Contacts section select **Actions, Select and Add.** The supplier name will display in the Select and Add: Contacts page.

Create Address

* Address Name

* Country

Address Line 1

Address Line 2

City

State

Postal Code

* Address Ordering

Purpose Remit to

RFQ or Bidding

Phone 1

Fax 1

Email

Address Contacts

Select the contacts that are associated with this address.

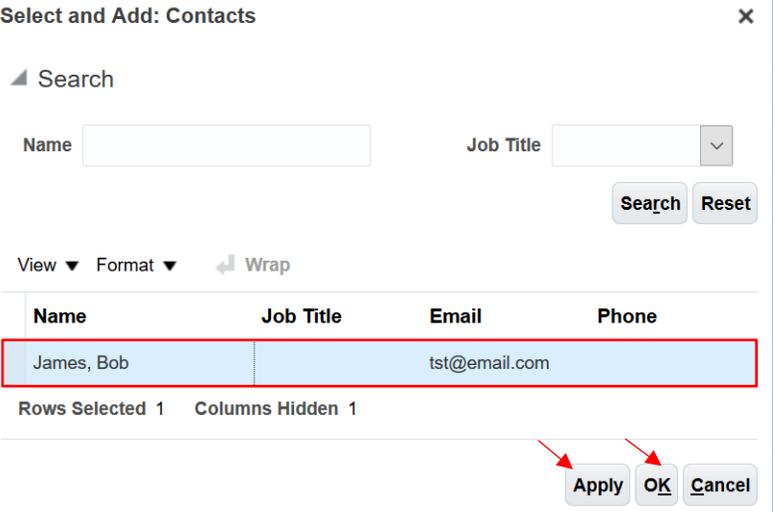
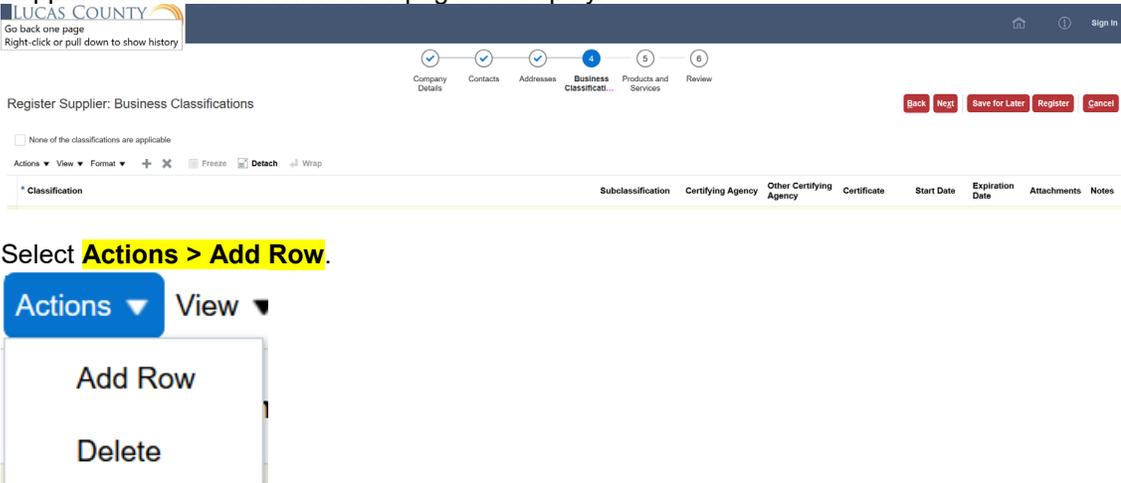
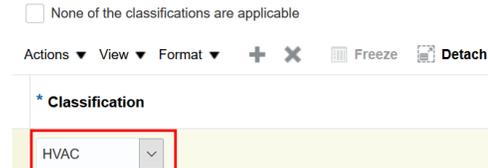
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Name	Job Title	Email	Administrative Contact	User Account
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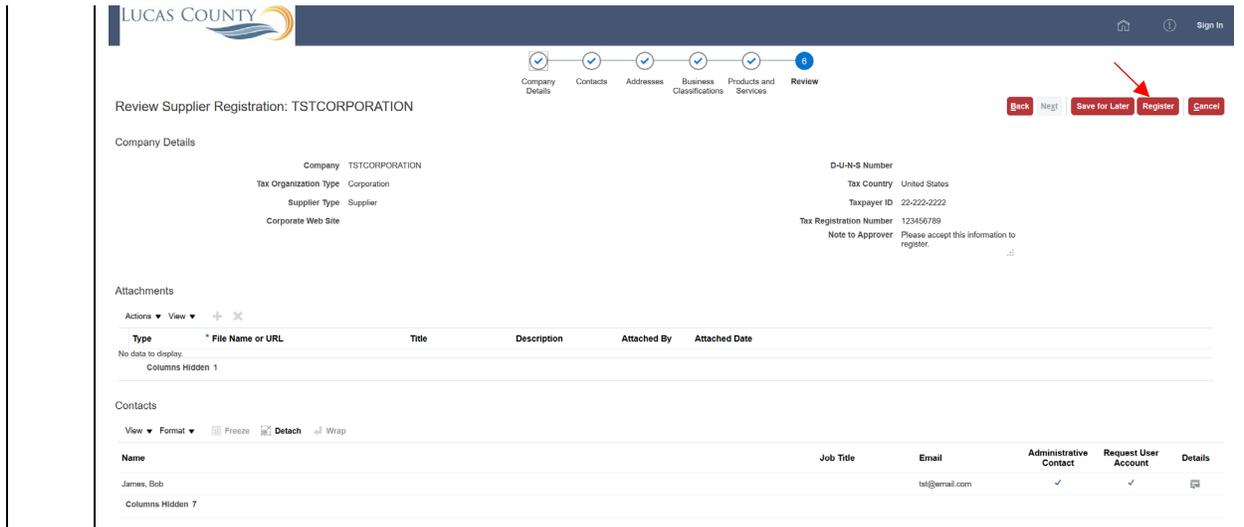
No data to display.

Columns Hidden 4

Create Another OK Cancel

<p>10</p>	<p>Select the Name listed and then click the Apply button. Click the Ok button.</p> 
<p>11</p>	<p>Click the Next button to enter Supplier Business Classification details. The Register Supplier: Business Classifications page will display.</p>  <p>Select Actions > Add Row.</p>
<p>12</p>	<p>Select a Classification, if applicable.</p> <p>Register Supplier: Business Classifications</p> 
<p>13</p>	<p>Select a Certifying Agency, if applicable.</p> <p>Add a Certificate ID, if applicable.</p>

14	<p>Click the Next button and enter Supplier Product and Services details.</p>																																	
15	<p>Select Actions > Select and Add.</p>																																	
16	<p>Click in the checkboxes to select any applicable Category Name(s) and click the Apply button.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Category Name</th> <th>Description</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/></td><td>005</td><td>ABRASIVES</td></tr> <tr><td><input type="checkbox"/></td><td>010</td><td>ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES</td></tr> <tr><td><input type="checkbox"/></td><td>015</td><td>ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES; CH...</td></tr> <tr><td><input type="checkbox"/></td><td>019</td><td>AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES</td></tr> <tr><td><input type="checkbox"/></td><td>020</td><td>AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)</td></tr> <tr><td><input type="checkbox"/></td><td>021</td><td>AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)</td></tr> <tr><td><input type="checkbox"/></td><td>022</td><td>AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>025</td><td>AIR COMPRESSORS AND ACCESSORIES</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>031</td><td>AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (...)</td></tr> <tr><td><input type="checkbox"/></td><td>035</td><td>AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES</td></tr> </tbody> </table>	Select	Category Name	Description	<input type="checkbox"/>	005	ABRASIVES	<input type="checkbox"/>	010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	<input type="checkbox"/>	015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES; CH...	<input type="checkbox"/>	019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES	<input type="checkbox"/>	020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)	<input type="checkbox"/>	021	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)	<input type="checkbox"/>	022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS	<input checked="" type="checkbox"/>	025	AIR COMPRESSORS AND ACCESSORIES	<input checked="" type="checkbox"/>	031	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (...)	<input type="checkbox"/>	035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES
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19	<p>Review the Supplier Details.</p>																																	



Review Supplier Registration: TSTCORPORATION

Company Details

Company: TSTCORPORATION
 Tax Organization Type: Corporation
 Supplier Type: Supplier
 Corporate Web Site:
 D-U-N-S Number:
 Tax Country: United States
 Taxpayer ID: 22-222-2222
 Tax Registration Number: 123456789
 Note to Approver: Please accept this information to register.

Attachments

Type	File Name or URL	Title	Description	Attached By	Attached Date
No data to display.					

Contacts

Name	Job Title	Email	Administrative Contact	Request User Account	Details
James, Bob		tsl@email.com	✓	✓	

Click the **Register** button to register the Supplier.

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Back Next Save for Later Register Cancel

The potential supplier or the internal user enters all required information and submits the registration request. Suppliers can save their in-process registrations if they need to gather requested information and return to submit the registration later.

The buying organization receives a registration request, which goes through a collaborative review process. The Approval Management Service facilitates the approval routing of the registration. During the review process, the company name, information, and tax identifiers are verified against the existing supplier master to prevent duplicate suppliers from being created.

Approvers who have the required privileges can edit the registration during approval. The default approvers for spend authorized suppliers are defined in the procurement agents table in the Manage Suppliers function for each specific Procurement BU. The approval routing looks for at least one active site within the Procurement BU and is then routed through a notification to users for that BU that can manage suppliers.

The outcome of the review is either approved or rejected. An email notification with the registration request outcome is sent to the user who submitted the supplier registration request and any contacts marked as administrative contacts on the registration.