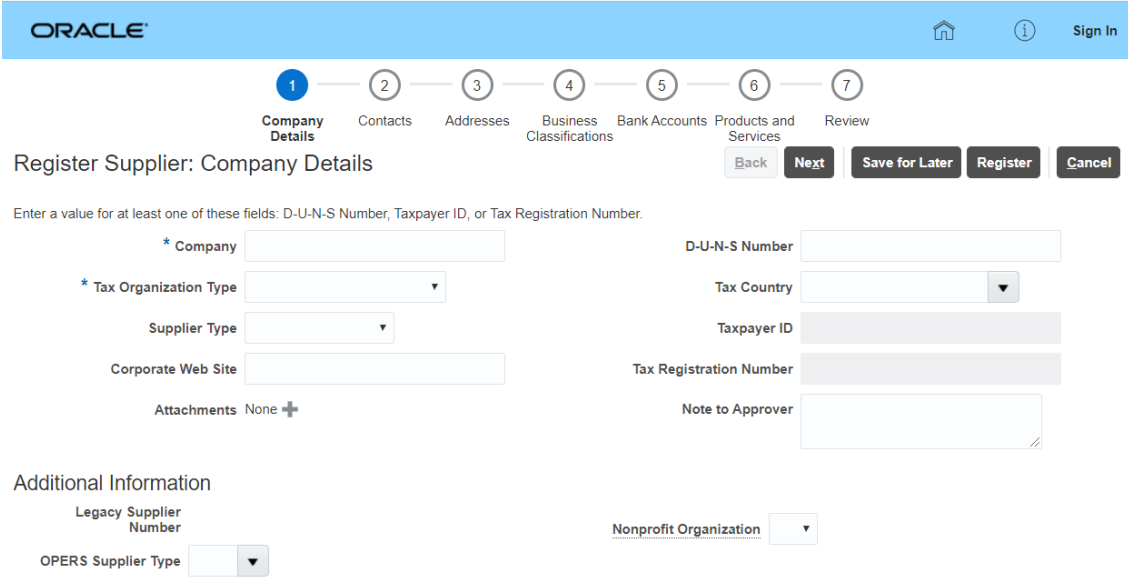
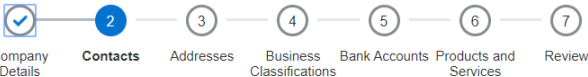


Spend Authorized Supplier Registration

Audience: Supplier

Purpose: This job aid will assist with the steps to register a spend authorized supplier using the Supplier Registration URL.

Step	Action
1	Select the Spend Authorized Supplier Registration URL to request registration as a spend authorized supplier.
2	<p>Within the Company Details section, add information to the following fields: Company, Tax Organization Type, Supplier Type, Corporate Web Site, DUNS number, Tax Country, Tax Payer ID, Note to Approver. Add attachments (W9, Master Vendor Form, Cancelled Check or Bank Letter for ACH payments, and if applicable OPERS Independent Contractor Form.)</p>  <p>Tip: When entering Tax Country for US-based suppliers, type the letter “U” to bring up the short list of countries that start with U. Then pick “United States.”</p>

3	<p>In the Contact Information section, add required information into the First Name, Last Name, Email, and Confirm Email fields.</p> <p>Your Contact Information</p> <p>Enter the contact information for communications regarding this registration.</p> <p>* First Name <input type="text"/></p> <p>* Last Name <input type="text"/></p> <p>* Email <input type="text"/></p> <p>* Confirm Email <input type="text"/></p>														
4	<p>Click the Next button to review Contact details.</p> <p><input type="button" value="Back"/> <input type="button" value="Next"/> <input type="button" value="Save for Later"/> <input type="button" value="Register"/> <input type="button" value="Cancel"/></p>														
5	<p>The supplier information entered displays.</p> <p>Click Edit on the contact line to ensure important information has defaulted.</p>  <p>Register Supplier: Contacts <input type="button" value="Back"/> <input type="button" value="Next"/> <input type="button" value="Save for Later"/> <input type="button" value="Register"/> <input type="button" value="Cancel"/></p> <p>Enter at least one contact.</p> <p>Actions ▾ View ▾ Format ▾ <input type="button" value="+ Create"/> <input type="button" value="Edit"/> <input type="button" value="X Delete"/> <input type="button" value="Freeze"/> <input type="button" value="Detach"/> <input type="button" value="Wrap"/></p> <table border="1"> <thead> <tr> <th>Name</th> <th>Job Title</th> <th>Email</th> <th>Administrative Contact</th> <th>Request User Account</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Plunket, Patty</td> <td></td> <td>plumplunket@plunket.com</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="button" value="Edit"/></td> <td><input type="button" value="X"/></td> </tr> </tbody> </table>	Name	Job Title	Email	Administrative Contact	Request User Account	Edit	Delete	Plunket, Patty		plumplunket@plunket.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="X"/>
Name	Job Title	Email	Administrative Contact	Request User Account	Edit	Delete									
Plunket, Patty		plumplunket@plunket.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="X"/>									
6	<p>The Edit Contact fields and User Account options display.</p> <p>Verify that both the “Administrative contact” and “Request user account” boxes are checked.</p>														

Edit Contact: Patty Plunket

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

* Email

▲ User Account

Request user account

Roles

Actions View Format X Freeze Detach Wrap

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 propo...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company . Primary task...

OK Cancel

7 Enter supplier **Phone** number, using the format explained below. Hover over each field to view a tooltip explaining what to enter into each field.

The first phone field is a Country code field. Use the dropdown to select. Note that United States is always Country code 1.

Enter phone country code

Phone

Second phone field is area code.

Enter phone area code

Phone




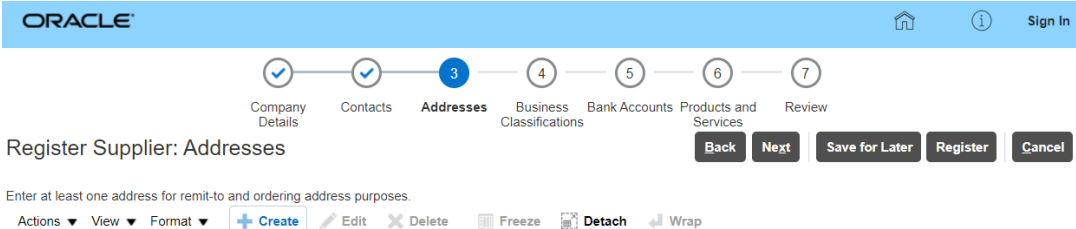
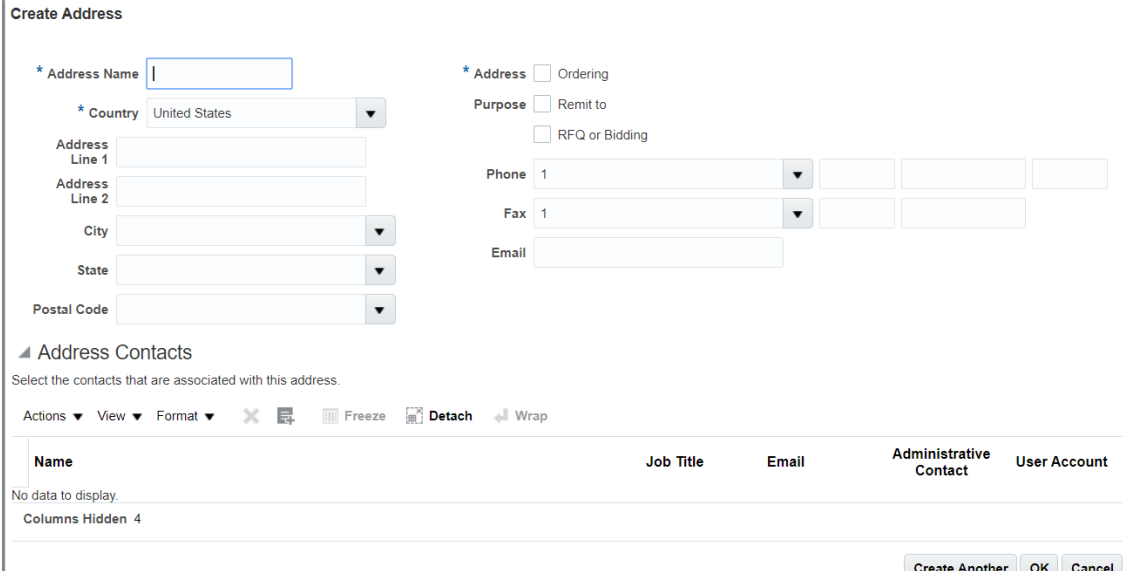
The remaining 7 digits of phone number go into the next field.

Enter phone

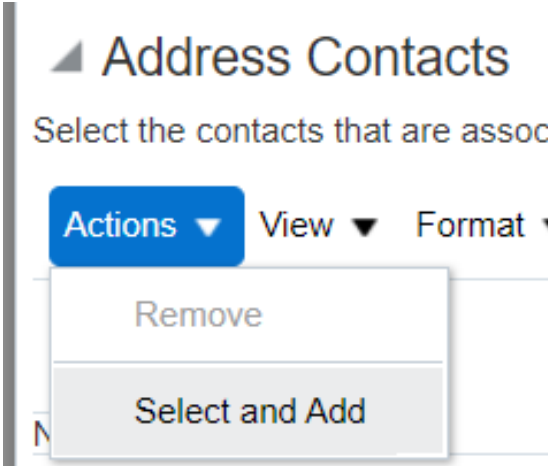
Phone

Any extension will go into the last Phone field, or leave blank if not applicable.

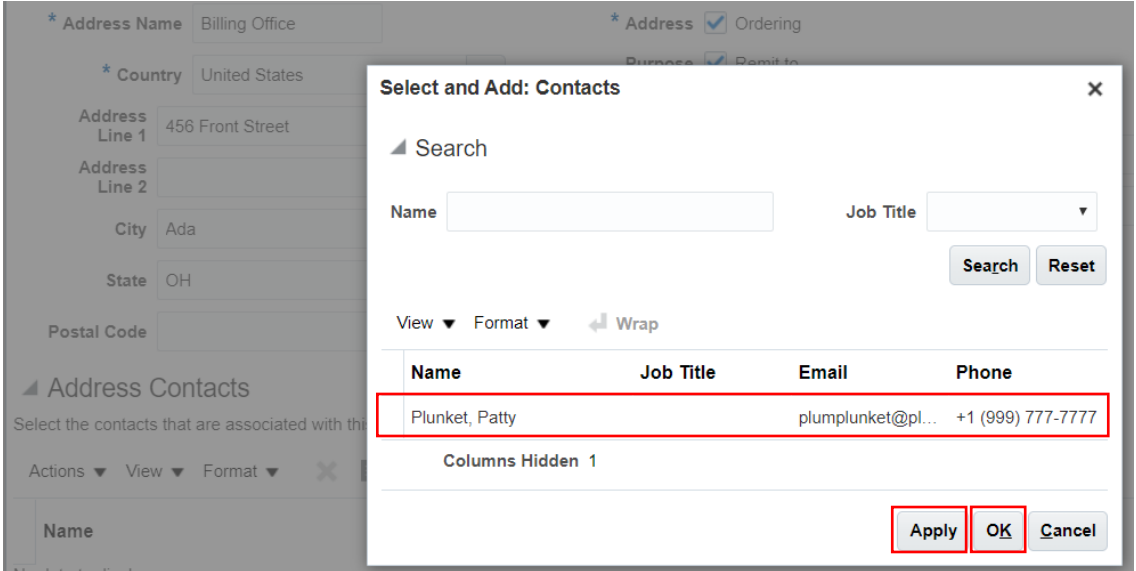
8 No changes to the Roles are required. The default Roles will provide complete visibility to Purchase Orders, Receipts, Invoices, Payments and Sourcing activities.

9	<p>Click on the OK button  to close the edit window and return to the Register Supplier: Contacts window.</p>
10	<p>Click the Next button  and then Create Address  Create and enter the supplier address details.</p>  <p>The screenshot shows the Oracle Register Supplier: Addresses page. At the top, there is a navigation bar with the Oracle logo and a 'Sign In' link. Below the navigation bar is a progress indicator with seven steps: 1. Company Details, 2. Contacts, 3. Addresses (highlighted), 4. Business Classifications, 5. Bank Accounts, 6. Products and Services, and 7. Review. Below the progress indicator, the page title is 'Register Supplier: Addresses'. There are several buttons: 'Back', 'Next', 'Save for Later', 'Register', and 'Cancel'. Below the buttons, there is a text input field for the address and a toolbar with 'Create', 'Edit', 'Delete', 'Freeze', 'Detach', and 'Wrap' options.</p>
11	<p>Enter Address Name: The naming convention for address names shall be as follows:</p> <p>If the purpose of the address is solely for:</p> <ul style="list-style-type: none"> • Remit to, name to be Remit01 • Ordering, name to be Ordering01 • RFQ, name to be Bidding01 <p>If the address has multiple purposes, i.e., Remit, Ordering or RFQ, name shall be Main</p> <p>Enter Country, Address Line, City, State, Postal Code, *Address (select Ordering checkbox) Under Purpose select (Remit To checkbox).</p>  <p>The screenshot shows the 'Create Address' form. It has several fields: '* Address Name' (text input), '* Country' (dropdown menu set to 'United States'), 'Address Line 1' (text input), 'Address Line 2' (text input), 'City' (text input), 'State' (dropdown menu), and 'Postal Code' (text input). On the right side, there are checkboxes for '* Address' (Ordering), 'Purpose' (Remit to, RFQ or Bidding), 'Phone' (text input with dropdown), 'Fax' (text input with dropdown), and 'Email' (text input). Below the form is a section titled 'Address Contacts' with a table header: 'Name', 'Job Title', 'Email', 'Administrative Contact', and 'User Account'. The table currently shows 'No data to display.' and 'Columns Hidden 4'. At the bottom right, there are buttons for 'Create Another', 'OK', and 'Cancel'.</p>

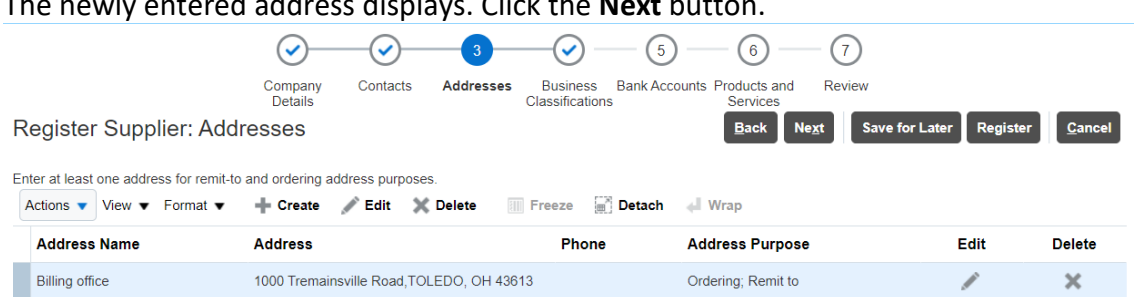
12 In the **Address Contacts** section select **Actions> Select and Add**.



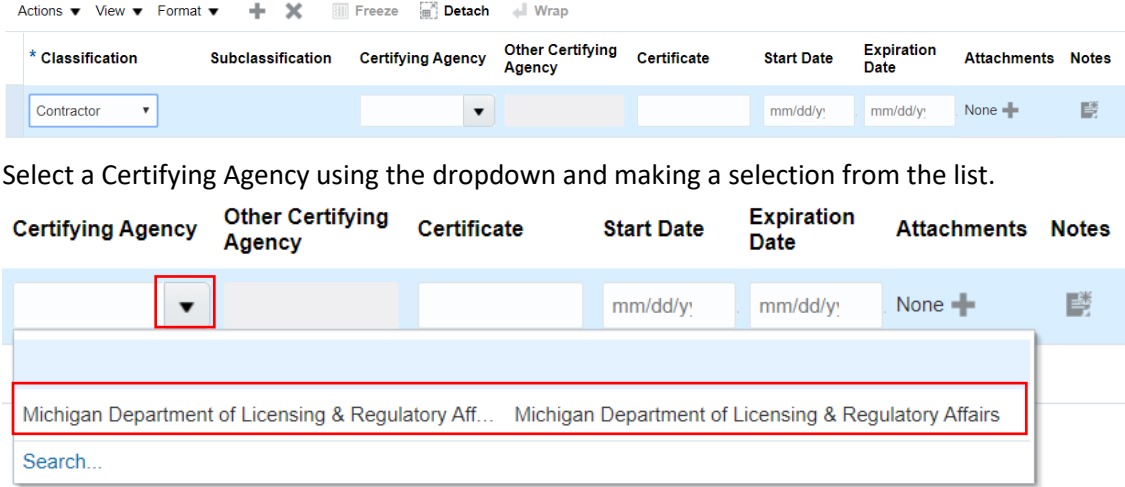
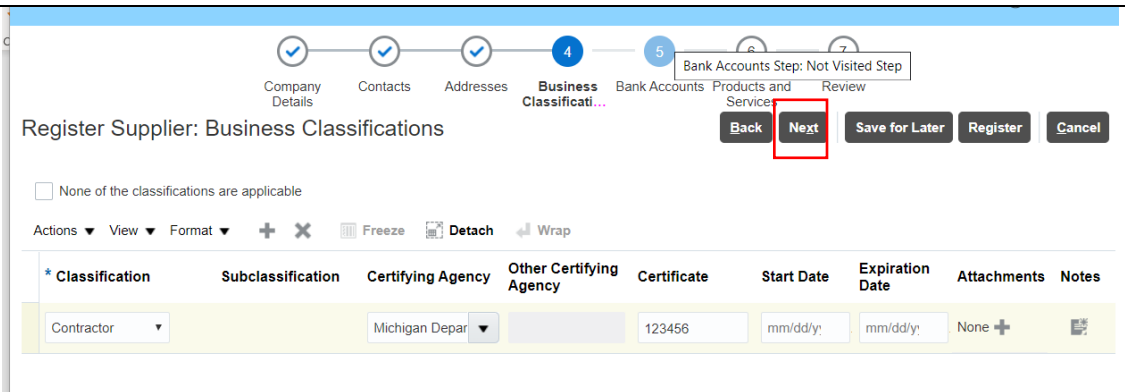
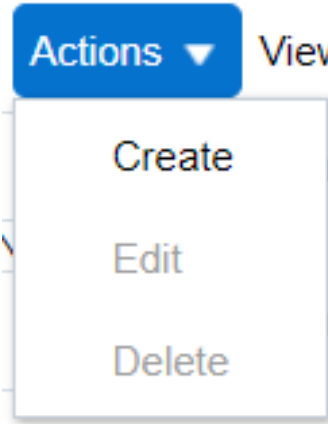
13 Select the name listed, and then click **Apply**. Click **OK** to associate the name with the address added.
Click **OK**

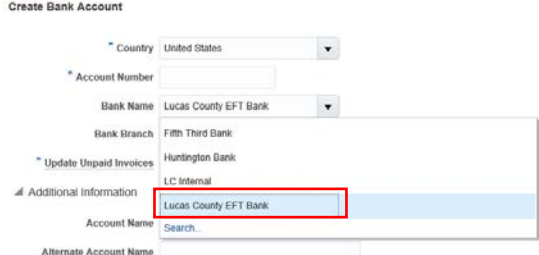



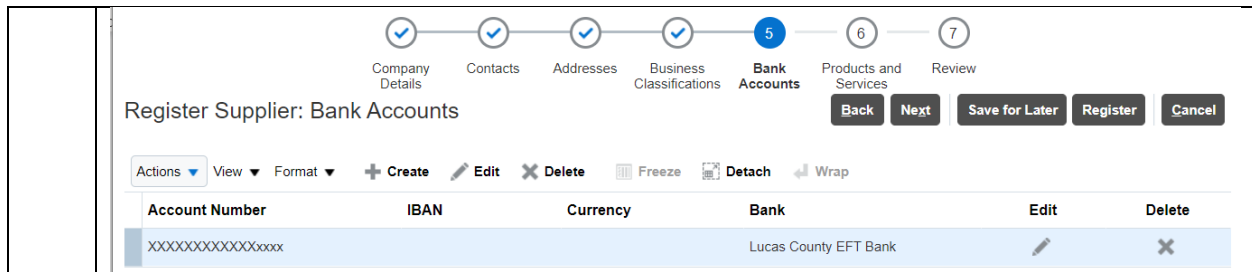
14 The newly entered address displays. Click the **Next** button.



Address Name	Address	Phone	Address Purpose	Edit	Delete
Billing office	1000 Tremainsville Road, TOLEDO, OH 43613		Ordering; Remit to		

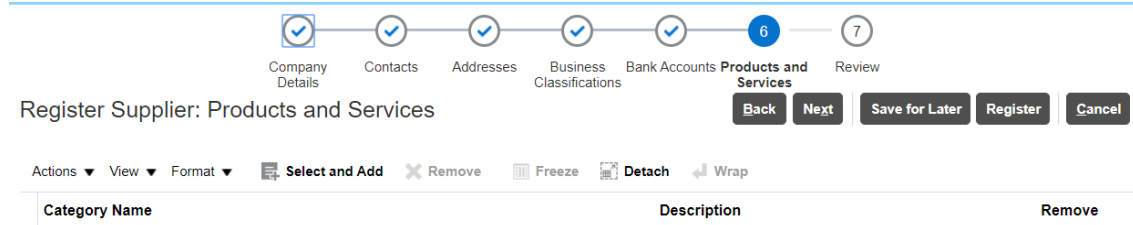
<p>17</p>	 <p>Select a Certifying Agency using the dropdown and making a selection from the list.</p>
<p>18</p>	 <p>Enter a Certificate ID.</p>
<p>19</p>	<p>If you desire to be paid via electronic payment (ACH), Click Actions > Create +. If you will not be entering Bank Information select Next, and skip to Step 27 of this guide.</p> 
<p>20</p>	<p>The Create Bank Account window displays.</p>

	<p>Create Bank Account</p> <p>* Country <input type="text"/> ▼</p> <p>Bank <input type="text"/> ▼</p> <p>Branch <input type="text"/> ▼</p> <p>* Account Number <input type="text"/></p> <p>IBAN <input type="text"/></p> <p>Currency <input type="text"/> ▼</p> <p>Additional Information</p> <p>Account Name <input type="text"/> Agency Location Code <input type="text"/></p> <p>Alternate Account Name <input type="text"/> Account Type <input type="text"/> ▼</p> <p>Account Suffix <input type="text"/> Description <input type="text"/></p> <p>Check Digits <input type="text"/></p> <p>Comments</p> <p>Note to Approver <input type="text"/></p> <p><input type="button" value="Create Another"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/></p>
21	Click in the Country field, and enter information.
22	<p>Select the United States US from the list.</p> <p>Click in the Bank name field and select Lucas County EFT Bank from the list.</p> 
23	Click in the Branch field dropdown and make a selection from the list. Select the correct routing number for your bank from the Branch list.
24	<p>Enter your Account Number in Account number field</p> 
25	Click the OK button.



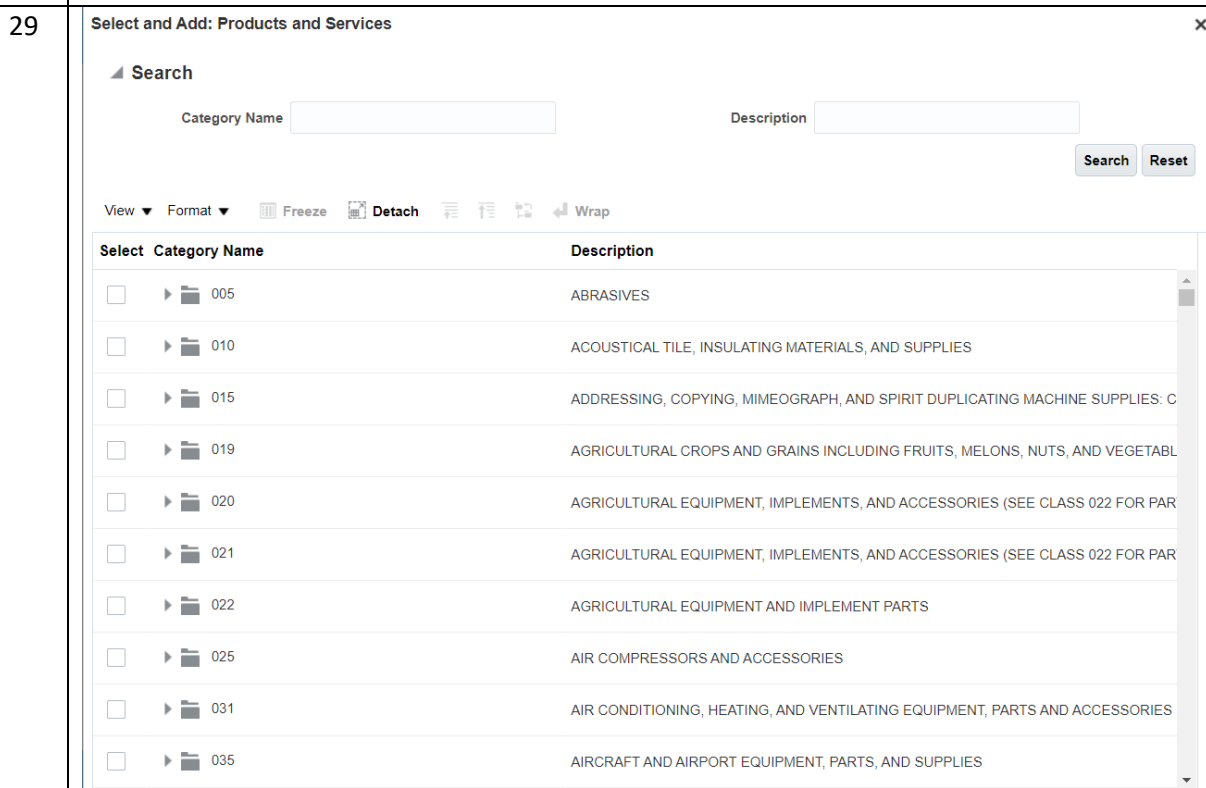
26 The Register Supplier: Bank Accounts page displays saved information.

27 Click the **Next** button.



Enter **Product and Services** details.

28 Select **Actions> Select and Add**.



Click the checkboxes to select **Category** (multiple may be selected) and **Apply**. If not displayed, you can enter words into the Search boxes for **Category Name** or **Description** to find the service or products. Click the **Search** button to display matching results.

Select and Add: Products and Services

Search

Category Name Description

Search Reset

View Format Freeze Detach Wrap

Select	Category Name	Description
<input type="checkbox"/>	670	PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES

Columns Hidden 1

Apply OK Cancel

30 After selecting the category checkbox, click **OK**.

31 The category name and description selected now displays.

Company Details Contacts Addresses Business Classifications Bank Accounts Products and Services Review

Register Supplier: Products and Services

Back Next Save for Later Register Cancel

Actions View Format Select and Add Remove Freeze Detach Wrap

Category Name	Description	Remove
670	PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES	X

Click **Next** or click **Review**.

32 Review the Supplier details.

Company Details Contacts Addresses Business Classifications Bank Accounts Products and Services Review

Review Supplier Registration: Plunket Plumbing

Back Next Save for Later Register Cancel

Company Details

Company Plunket Plumbing D-U-N-S Number 999999999

Tax Organization Type Partnership Tax Country United States

Supplier Type Contractor Taxpayer ID

Corporate Web Site Tax Registration Number Note to Approver

Additional Information

Legacy Supplier Number Nonprofit Organization

OPERS Supplier Type

Attachments

Actions View + X

Type	* File Name or URL	Title	Description	Attached By	Attached Date
------	--------------------	-------	-------------	-------------	---------------

Columns Hidden 1

	<p>Contacts</p> <p>View ▼ Format ▼ Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Job Title</th> <th>Email</th> <th>Administrative Contact</th> <th>Request User Account</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>Punket, Patty</td> <td></td> <td>plumplunket@plunket.com</td> <td>✓</td> <td>✓</td> <td></td> </tr> </tbody> </table> <p>Columns Hidden 7</p> <p>Addresses</p> <p>View ▼ Format ▼ Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Address Name</th> <th>Address</th> <th>Phone</th> <th>Address Purpose</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>Billing office</td> <td>1000 Tremainsville Road, TOLEDO, OH 43613</td> <td></td> <td>Ordering, Remit to</td> <td></td> </tr> </tbody> </table> <p>Columns Hidden 3</p> <p>Business Classifications</p> <p>— None of the classifications are applicable</p> <p>View ▼ Format ▼ Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Classification</th> <th>Subclassification</th> <th>Certifying Agency</th> <th>Other Certifying Agency</th> <th>Certificate</th> <th>Start Date</th> <th>Expiration Date</th> <th>Attachments</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>Contractor</td> <td></td> <td>Michigan Department c</td> <td></td> <td>123456</td> <td></td> <td></td> <td>None</td> <td></td> </tr> </tbody> </table> <p>Bank Accounts</p> <p>View ▼ Format ▼ Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Account Number</th> <th>IBAN</th> <th>Currency</th> <th>Bank</th> </tr> </thead> <tbody> <tr> <td>XXXXXXXXXXXXxxx</td> <td></td> <td></td> <td>Lucas County EFT Bank</td> </tr> </tbody> </table> <p>Columns Hidden 8</p> <p>Products and Services</p> <p>View ▼ Format ▼ Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Category Name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>670</td> <td>PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES</td> </tr> </tbody> </table>	Name	Job Title	Email	Administrative Contact	Request User Account	Details	Punket, Patty		plumplunket@plunket.com	✓	✓		Address Name	Address	Phone	Address Purpose	Details	Billing office	1000 Tremainsville Road, TOLEDO, OH 43613		Ordering, Remit to		Classification	Subclassification	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Contractor		Michigan Department c		123456			None		Account Number	IBAN	Currency	Bank	XXXXXXXXXXXXxxx			Lucas County EFT Bank	Category Name	Description	670	PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES
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33	Click Register to register the Supplier																																																				
34	<p>Use the Back button to make corrections, Save for Later, or click Register to finalize. Cancel will cancel the entry.</p> <div style="display: flex; justify-content: center; gap: 10px;"> <div style="border: 1px solid black; padding: 5px 15px; background-color: #ccc;">Back</div> <div style="border: 1px solid black; padding: 5px 15px; background-color: #eee;">Next</div> <div style="border: 1px solid black; padding: 5px 15px; background-color: #333; color: white;">Save for Later</div> <div style="border: 1px solid black; padding: 5px 15px; background-color: #333; color: white;">Register</div> <div style="border: 1px solid black; padding: 5px 15px; background-color: #333; color: white;">Cancel</div> </div>																																																				