HOW TO SELF-REGISTER AS A NEW SUPPLIER

STEP-BY-STEP REFERENCE GUIDE

If you are an **existing supplier** with the City of Roseville and would like to request a supplier portal account, please get in touch with your City contact.

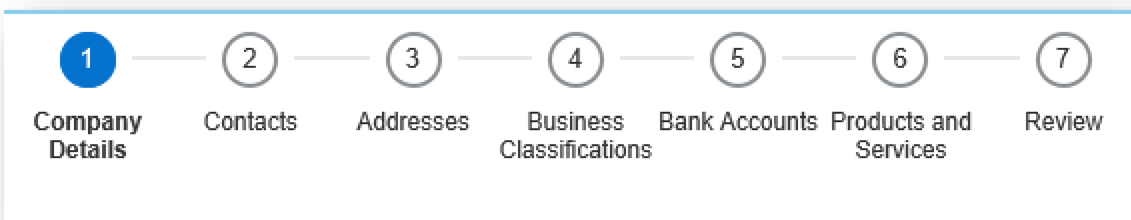
If you are a **new supplier**, use the Self-Registration URL and follow the instructions provided in this guide to begin supplier registration.

Clicking on the self-registration link will bring you to the **Register Supplier: Company Details** page.

At the top of the page, you will see the categories or "train stops" for required information to be entered (image show below).

The categories must be completed in order. Once the required information is entered for each "train stop," you can advance to the next "train stop." You can navigate by clicking on each "train stop," or by using the "**Back**" and "**Next**" buttons located at the top right of your screen.

TIP: If you are unable to complete the registration all at once, be sure to click "**Save for Later**" in the top right of your screen. A link to complete your registration will be emailed to the email address provided in the "Company Details" category.



Company Details (see screenshot on following page)

At the "**Company Details**" train stop, enter your company details.

Company – Enter your Company name as you wish it to appear in the City database.

Tax Organization Type – Select the applicable type for your organization.

Supplier Type – Select "**Supplier**" from the drop-down list. Do not select other options.

Attachments – You must attach: 1) W-9 documentation, and, 2) a voided check used to verify bank account information. Click the plus symbol (+) to create attachments. Select the type of file from the "**Type**" drop-down list. Click "**Browse**" to locate your saved file from your computer. Enter a "**Title**" and "**Description**" for the file and click "**OK**" to attach the file.

IFAS Supplier # – Leave this field blank. Do not enter anything in this field.

Dept of Industrial Relations # – The DIR# is required for suppliers working on Public Works projects.

Tax Country – Once you select your tax country, you will be able to populate the Taxpayer ID and Tax Registration Number fields.

Taxpayer ID – Enter the taxpayer ID number. This is a required field.

Tax Registration Number – Do enter anything in this field.

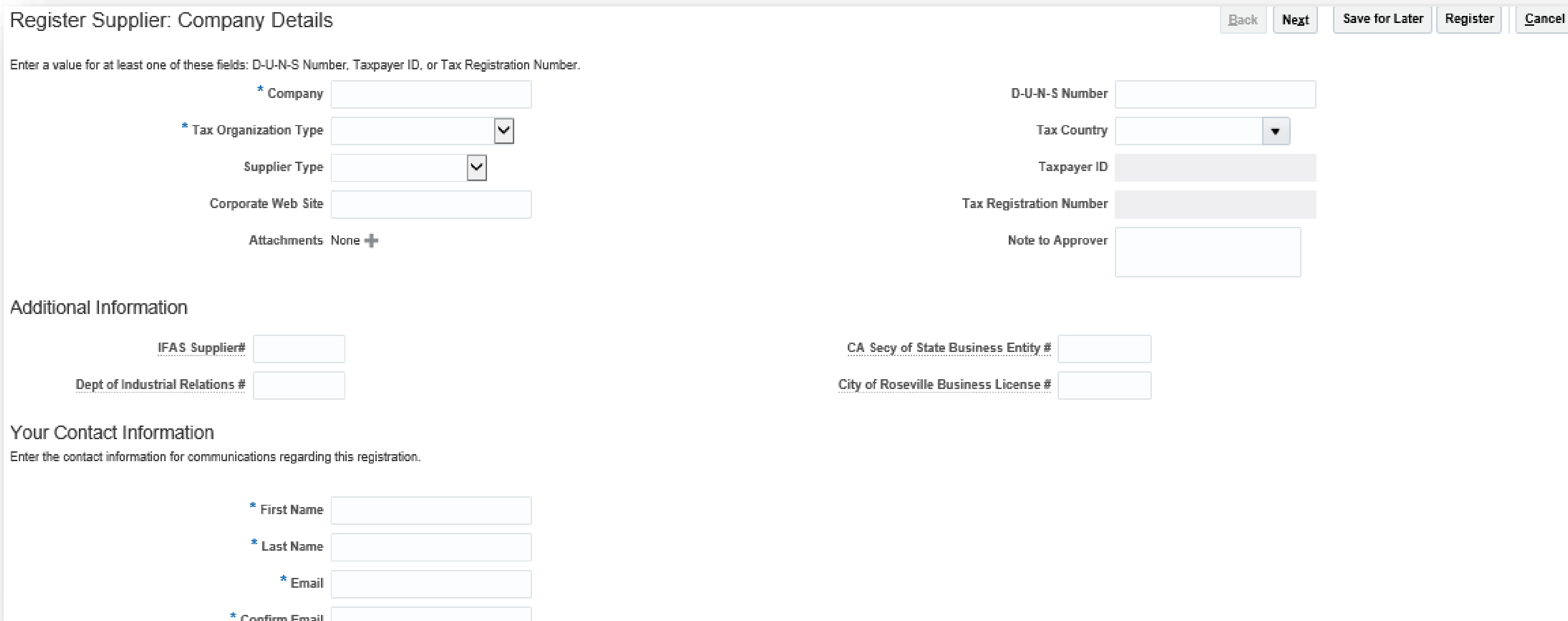
Note to Approver – This is a required field.

- If you would like to participate in an online negotiation/bid as a prospective supplier, please enter "***We would like to participate in bids*.**"
- If you have a pending order with the City, please provide a City contact name and enter "***We have a pending order*.**"

CA Secy of State Business Entity # – This field is required to show proof of registration to do business in the state of CA.

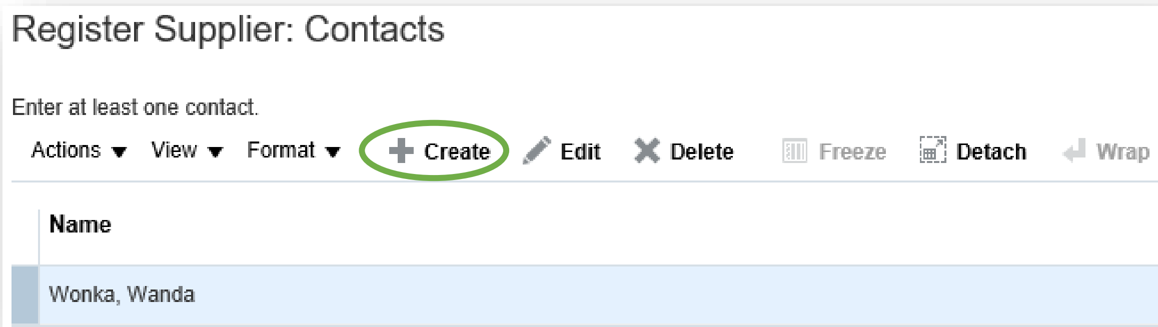
City of Roseville Business License # - This field is required for companies doing business in Roseville.

Your Contact Information – Enter the name and email of the initial contact. You may add additional Contacts at the “Contacts” train stop.



Contacts

At the "**Contacts**" train stop, the contact information you added at the "Company Details" train stop will be listed as a Contact. If you do not need to add any additional Contacts, you can move to the next "train stop." To add an additional Contact for your organization, click "**Create**."



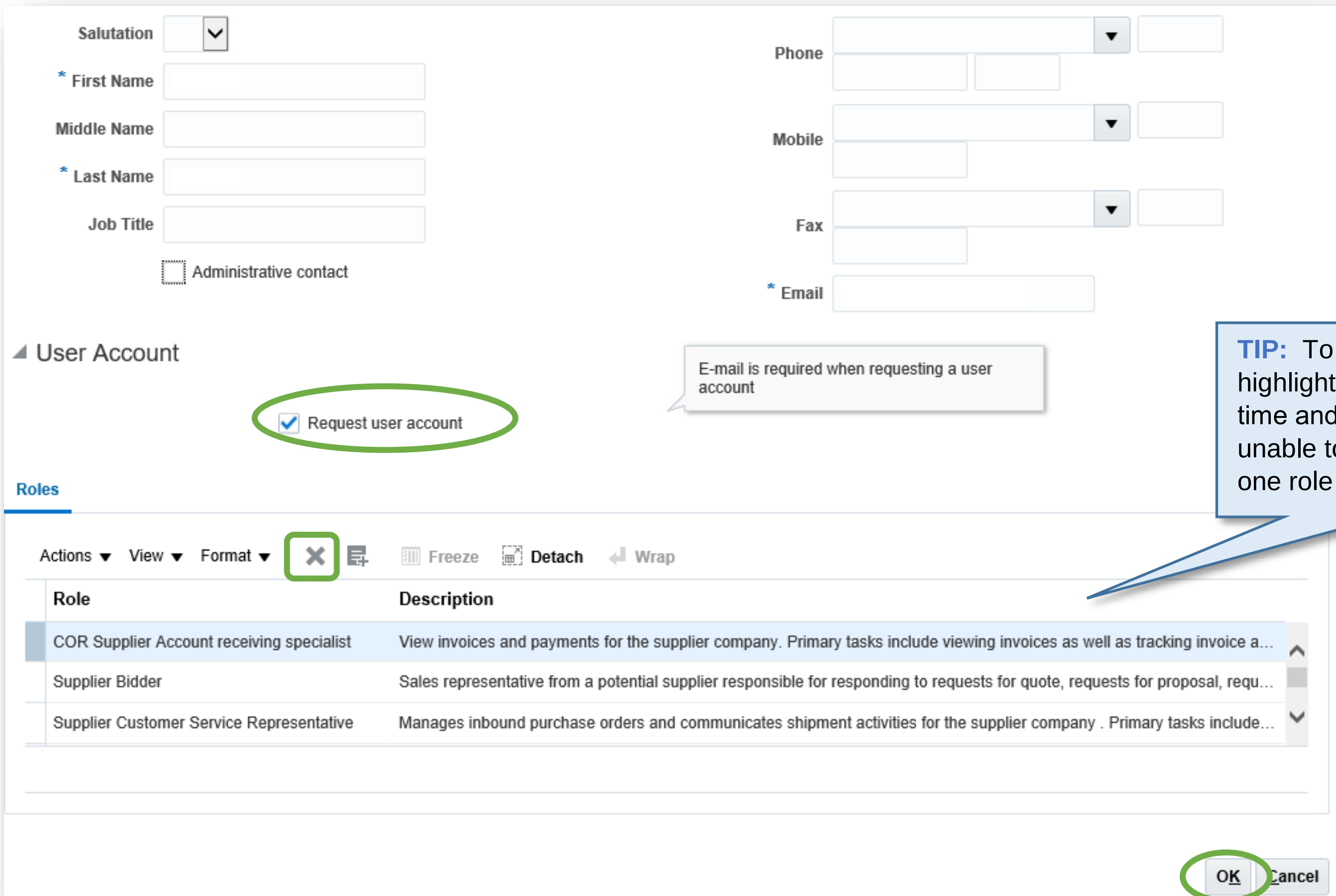
When you click "**Create,**" a new window will appear (shown on following page). All fields marked with an asterisk (*) are required.

To request a supplier portal account for this Contact, check the "**Request User Account**" box. In order to participate in online bids, a Contact <u>must</u> have a supplier portal account. When the "Request User Account" box is checked, a list of **Roles** will appear. Scroll down to see all roles.

If you are a **Prospective Supplier**, not actively doing business with the City, highlight all Roles <u>except</u> "Supplier Bidder" and click "**X**." The "Supplier Bidder" role allows for participation in informal online bidding.

If you have been **selected to do business with the City** and you have a pending order, highlight all roles except “COR Supplier Account Receiving Specialist,” “Supplier Bidder,” and Supplier Customer Service Representative” and click “**X**.”

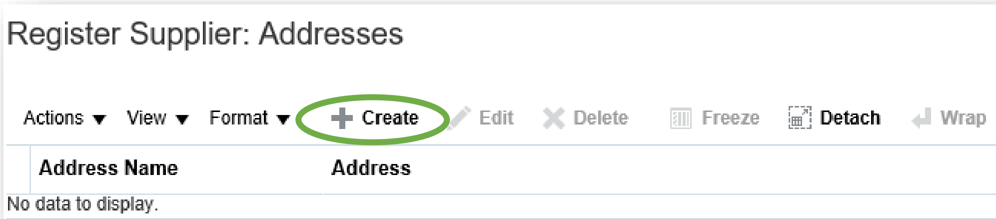
Click “**OK**” when complete.



TIP: To **remove roles**, highlight the roles one at a time and click “**X**.” You are unable to highlight more than one role at a time.

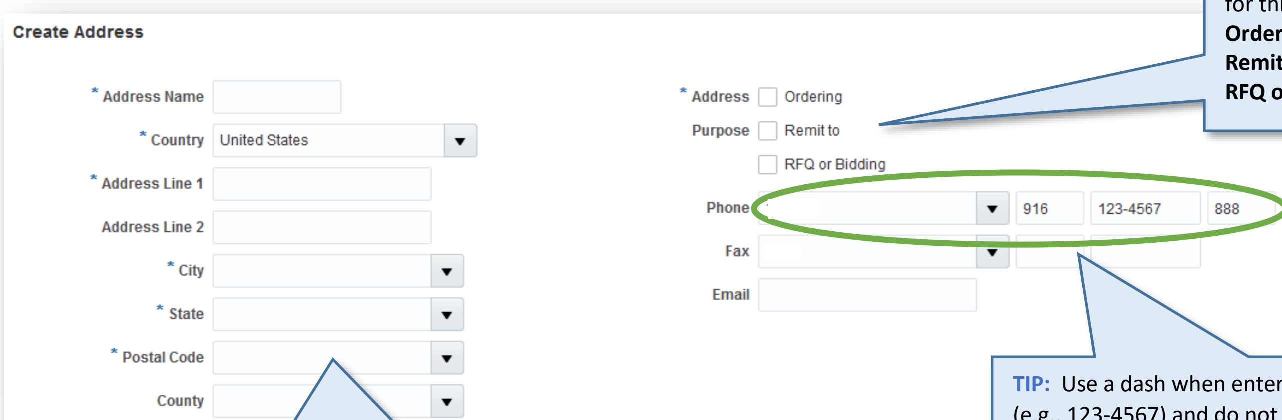
Addresses

At the “**Addresses**” train stop, click “**Create**” to add an address.



A new window titled “**Create Address**” will appear. All fields marked with an asterisk (*) in this window are required.

Use an Address Name of “**Address1**” for the first address entered, “**Address2**” for the second address, etc.



TIP: Choose as many address purposes as applicable for this particular address.
Ordering = sales location address
Remit to = where checks are addressed
RFQ or Bidding = address will show on bid responses

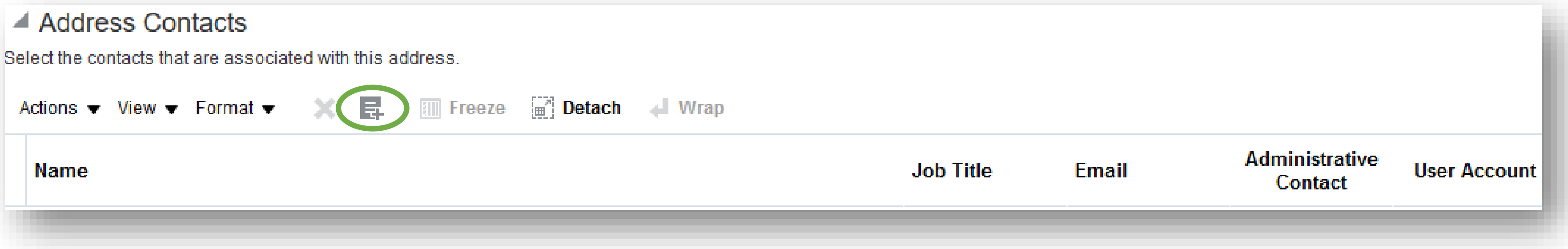
TIP: Use a dash when entering a phone or fax number (e.g., 123-4567) and do not enter a country code.

Purchase Orders and Contract Purchase Agreements will show the numbers exactly as they are entered in the “phone” and “fax” fields.

TIP: Use the USPS website to check the formatting of your address.

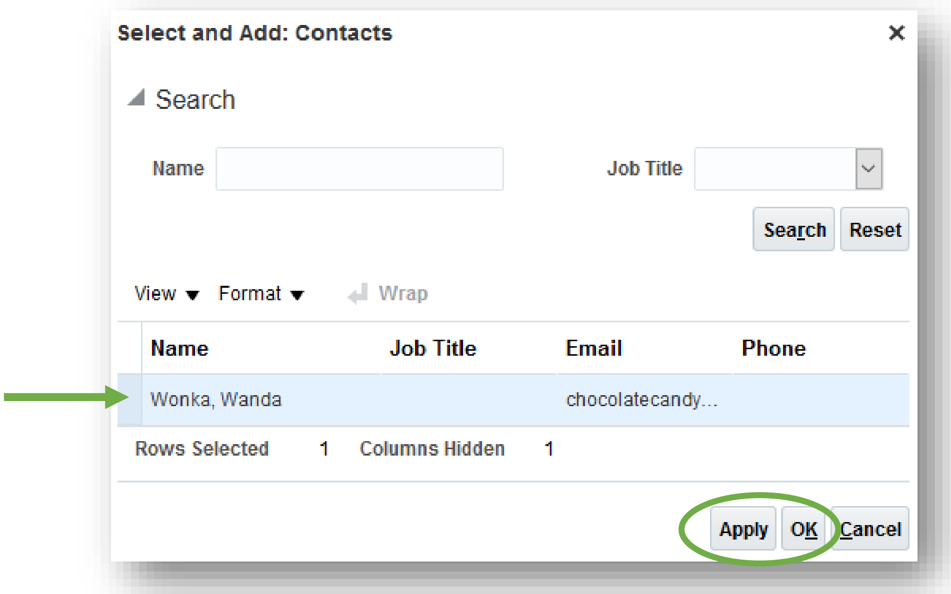
Enter the Postal Code first and the City, State and County will pre-populate.

To associate a Contact with the Address you entered, click the "**Select and Add**" button.



Another pop-up window will appear titled "**Select and Add: Contacts**."

Highlight the name and click "**Apply**," then click "**OK**."



The “Select and Add: Contacts” pop-up window will close and the Contact name is now added in the “Create Address” window.

Click “**OK**” to close the “Create Address” window or click “**Create Another**” to associate another contact with this address.

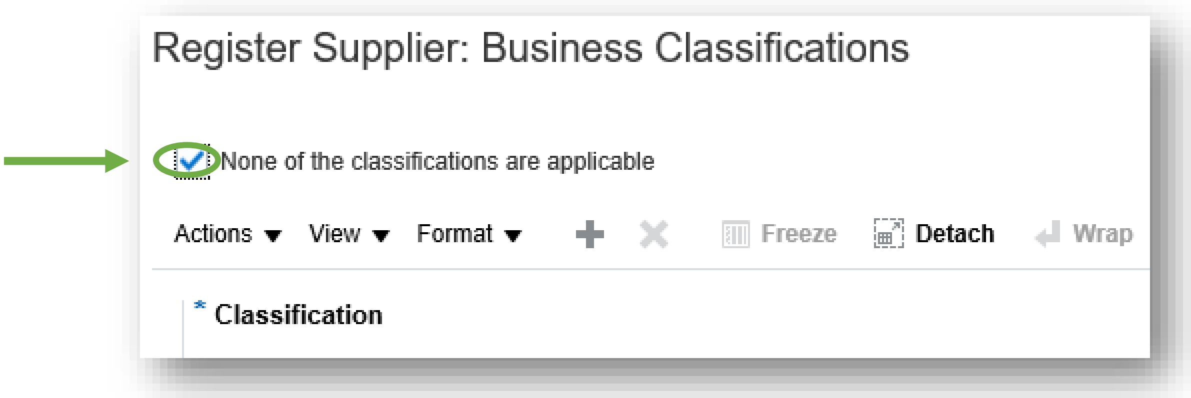
At the “Register Supplier: Addresses” screen, you will see the address is now added. To add additional addresses, click “**Create**.”

Business Classifications

Click the “**Business Classifications**” train stop.

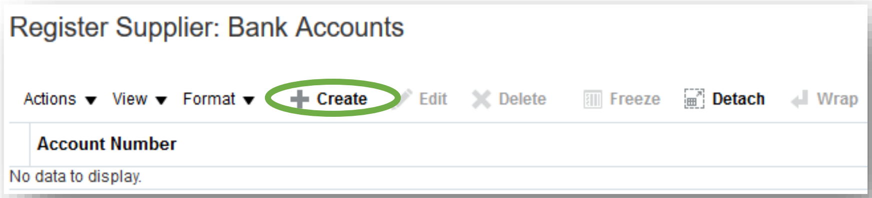
Check the box for “None of the classifications are applicable.” At this time, the City of Roseville, does not collect business classification information.

TIP: You must check the box in order to proceed to the next step.



Bank Accounts

At the "**Bank Accounts**" train stop, click "**Create**."



A new window titled "Create Bank Account" will appear (image shown on following page).

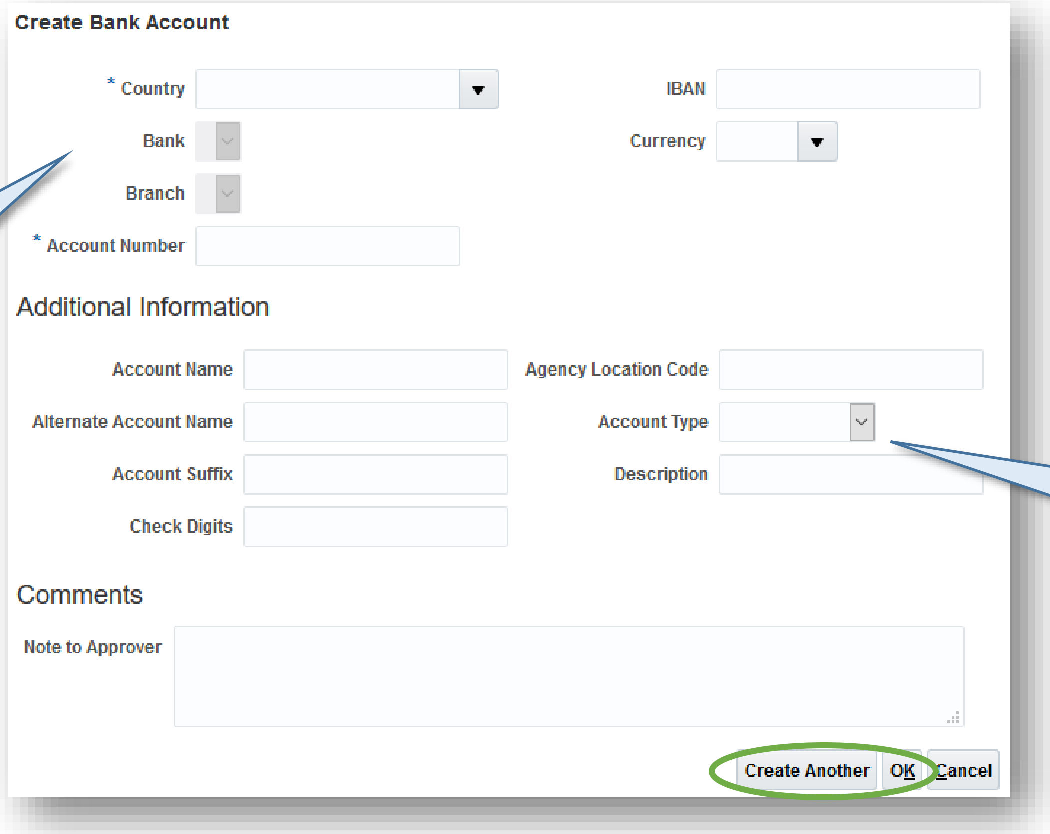
Once you enter the "**Country**," a selection of banks will populate the drop-down list in the "**Bank**" field.

Once you enter the "**Bank**," a selection of branches will populate the drop-down list in the "**Branch**" field. Select the bank routing number from the "**Branch**" drop-down list.

Enter your bank account in the "**Account Number**" field.

You must also select the "**Account Type**" from the drop-down list.

When complete, click "**OK**" to close the window or click "**Create Another.**"



TIP: Once you populate the "**Country**" field, the "**Bank**" drop-down list will populate. Once you select the "**Bank**," the "**Branch**" drop-down list will populate.

Select the bank routing number from the "**Branch**" drop-down list and enter your bank account in the "**Account Number**" field.

TIP: Be sure to select the "**Account Type**" from the drop-down list.

Products and Services

Click the “**Products and Services**” train stop.

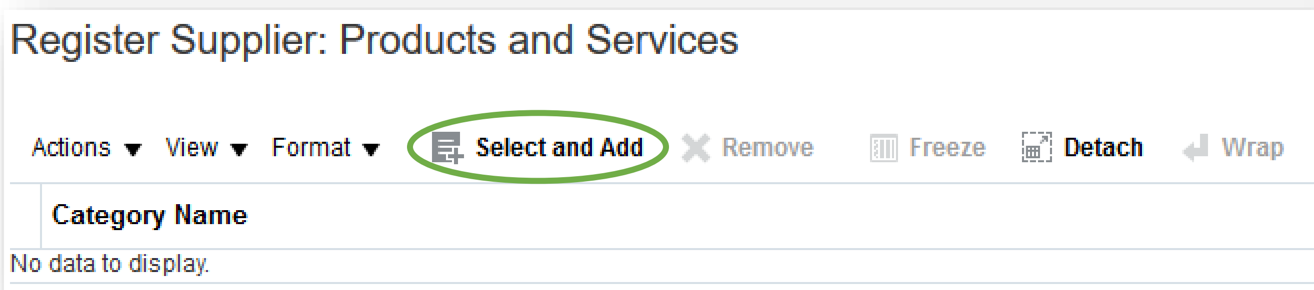
In the Products and Services category, you are able to select product categories associated with the goods and/or services your company provides.

This is an optional category and is not required in order to register.

City employees searching for suppliers of certain goods or services can perform a search by product category to view which suppliers provide a particular good or service.

The City uses the National Institute of Governmental Purchasing (NIGP) codes to categorize goods and services.

To add an NIGP code to your company profile, click the “**Select and Add**” button.

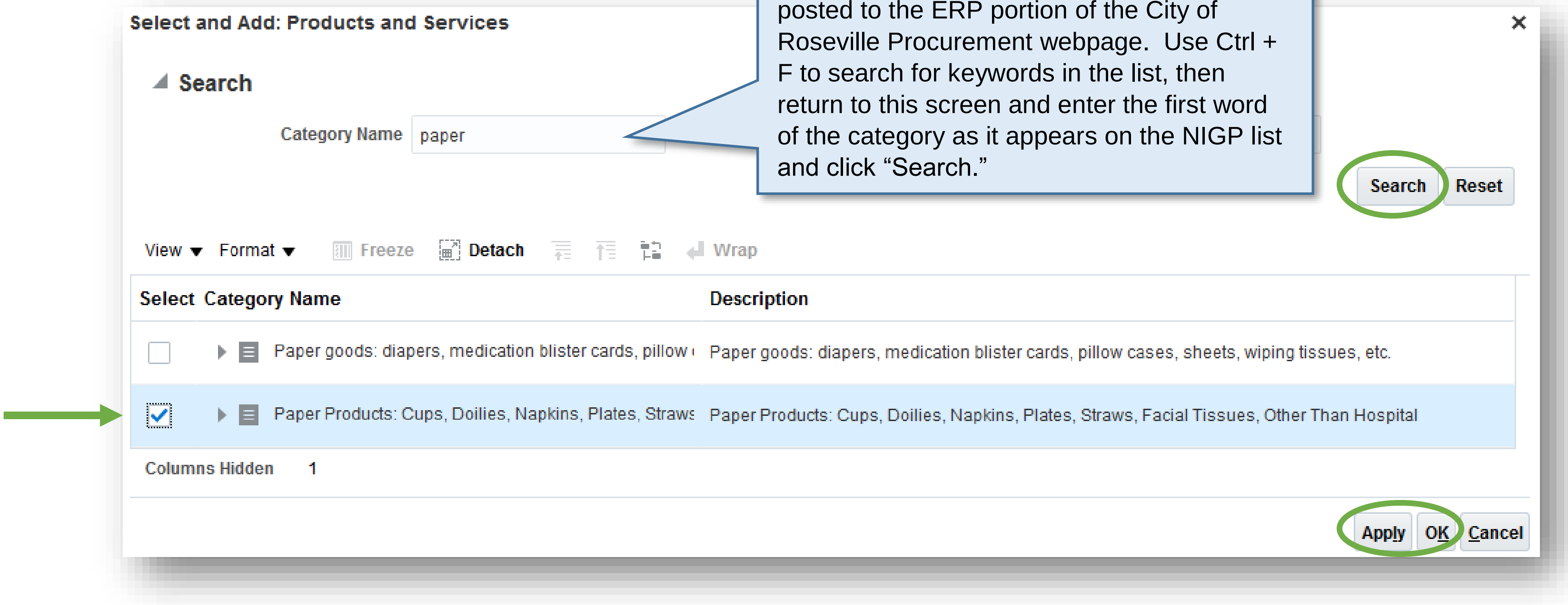


A new window titled “Select and Add: Products and Services” will appear.

Type the first word of the NIGP category in the “Category Name” field (e.g., paper), and click “**Search**.”

Matching search results will display. Check the box next to the desired categories.

Click “**Apply**,” then click “**OK**.”



TIP: If you do not know the first word of the NIGP category, reference the **NIGP List** posted to the ERP portion of the City of Roseville Procurement webpage. Use Ctrl + F to search for keywords in the list, then return to this screen and enter the first word of the category as it appears on the NIGP list and click “Search.”

You will be returned to the “Register Supplier: Products and Services” screen and you will see the NIGP code you selected is now added.

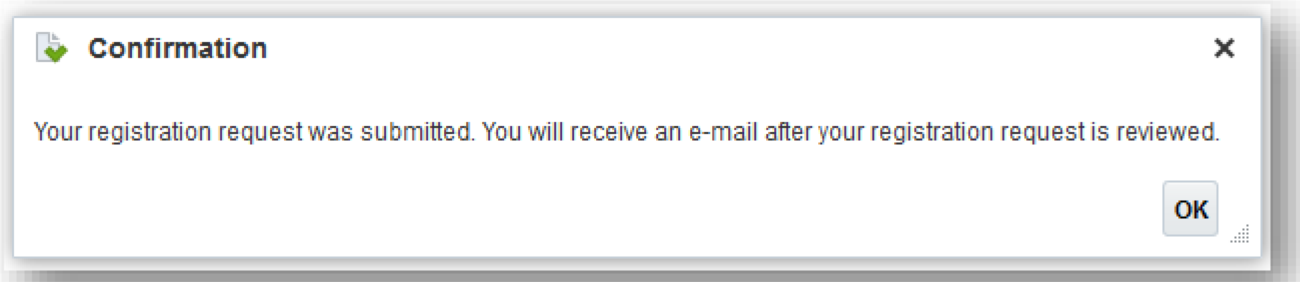
TIP: You may add as many NIGP codes as is applicable. To add additional NIGP codes, click “**Select and Add**” again.

Review

At the "**Review**" train stop, all information you entered in the train stops will be displayed. Review for accuracy. If needed, return to the train stops to make modifications.

If the information is displayed accurately, click "**Register**" at the top right of your screen.

A pop-up window will confirm the registration was submitted. Click "**OK**."



Thank you for registering with the City! Your registration will route to the City for review.

Upon approval, you will receive an email from Oracle with a link and your login information. The link will expire within 24 hours so it's important to access the link immediately to create your password.

Once you've setup your supplier portal account, return to the ERP section of the City's Procurement website to view available reference guides to assist you in your navigation.