



HOW TO VIEW & MODIFY YOUR SUPPLIER PORTAL ACCOUNT

STEP-BY-STEP REFERENCE GUIDE

(Applicable AFTER July 1, 2019)

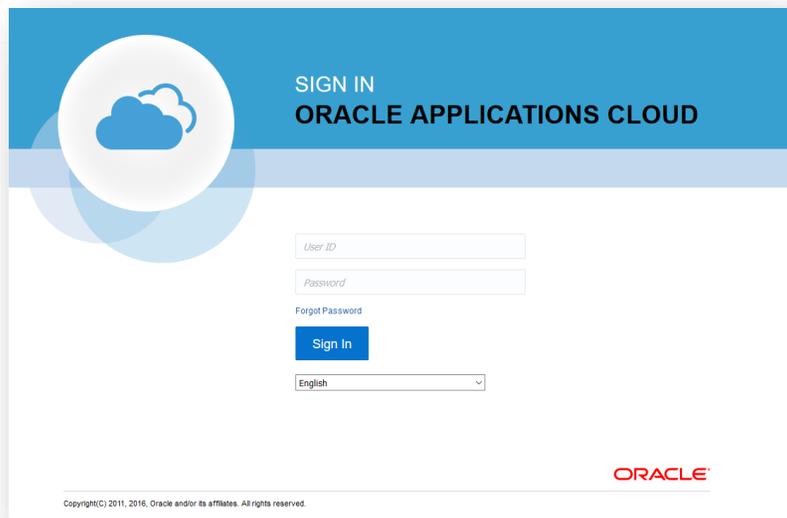
Once a supplier portal account is activated on your behalf by the City, you will receive an auto-generated email containing a link to reset your supplier portal password.

To request a supplier portal account, please follow the instructions provided on the [ERP portion of the City of Roseville Procurement webpage](#).

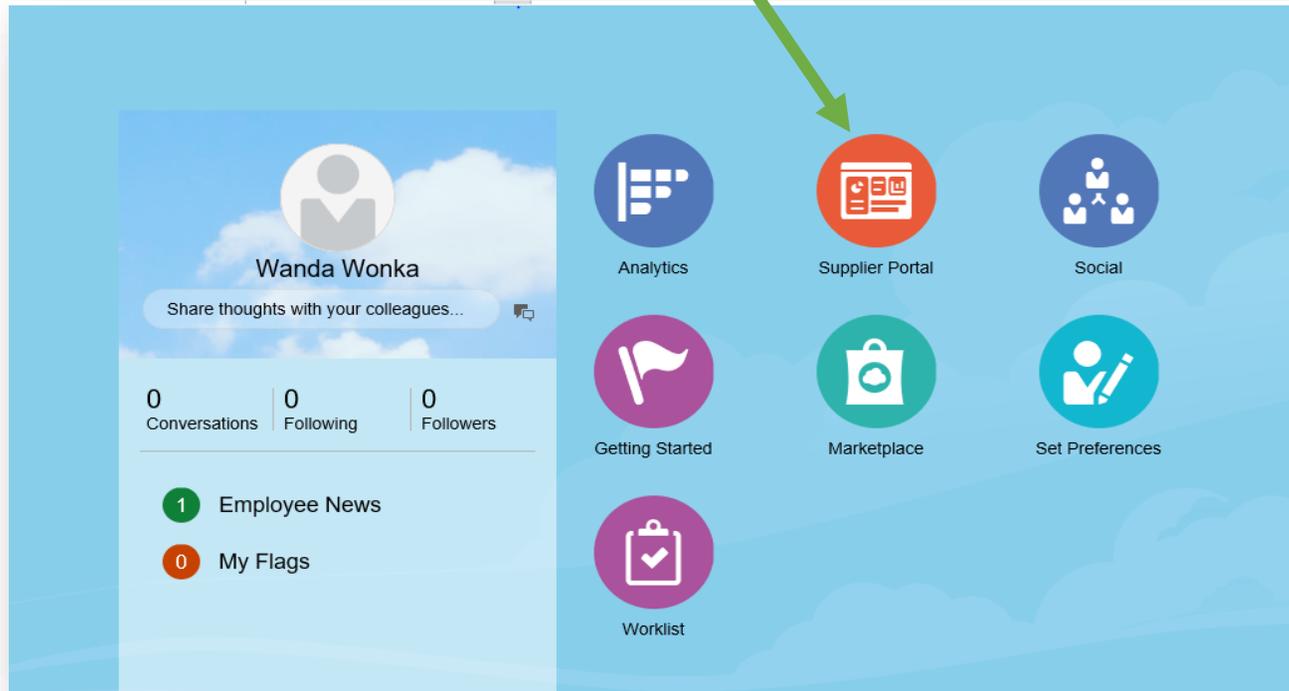
Once you reset your password, follow the instructions below to view and, if needed, modify your organization's account information.

TIP: Visit the [ERP portion of the City of Roseville Procurement webpage](#) to view additional supplier portal training materials (e.g., viewing a payment, responding to bids, etc.)

Log into the Oracle Supplier Portal using your email address and password.



Click the **Supplier Portal icon** from the home page.



From the Supplier Portal main page, select **Manage Profile**.

TIP: Scroll down if you are unable to see the Manage Profile link.

Supplier Portal

Search

Tasks

- Orders
 - Manage Orders
 - Manage Schedules
 - Acknowledge Schedules in Spreadsheet
- Agreements
 - Manage Agreements
- Shipments
 - Manage Shipments
 - Create ASN
 - Create ASBN
 - Upload ASN or ASBN
 - View Receipts
 - View Returns
- Deliverables
 - Manage Deliverables
- Consigned Inventory
 - Review Consumption Advices
- Invoices and Payments
 - Create Invoice
 - Create Invoice Without PO
 - View Invoices
 - View Payments
- Negotiations
 - View Active Negotiations
 - Manage Responses
- Qualifications
 - Manage Questionnaires
 - View Qualifications
- Company Profile
 - Manage Profile

Requiring Attention

9

4 5

■ Schedules Overdue or Due Today ■ Invoices Overdue

Recent Activity
Last 30 Days

- 4 Negotiation invitations
- 1 Orders changed or canceled

Supplier News
Welcome to City of Roseville - Supplier Portal

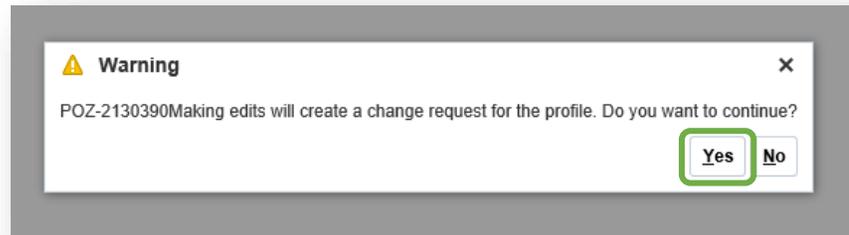
Once at the **Company Profile** page, click through each category (in blue) to view your organization's information.



Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

The image shows a horizontal navigation bar with seven items: 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Organization Details' item is highlighted with a blue underline.

If you need to make modifications in any category, click **Edit** at the top right of your screen. When you click **Edit**, a new window will appear notifying you a change request will be created. Click **Yes** to continue.



The instructions following provide guidance for modifying information in selected categories (**Addresses, Contacts, Payments, and Products and Services**). Should you have questions about other categories not covered in in this guide, please email supplierportalquestions@roseville.ca.us.

Once you are done making modifications, follow the instructions beginning on page 18 to review and submit your changes.

If no changes are needed, click **Done** at the top right of your screen to return to the main Supplier Portal screen.

Addresses

To make changes to company addresses, click the “**Addresses**” category, then click “**Edit**” if you haven’t already.

Your company profile may need to include multiple addresses for different purposes (e.g., remit, orders, etc.), or for different locations.

To create a new address not already listed, click the plus symbol (+).

To edit an existing address, highlight the address you wish to edit and click the pencil symbol.

Note: You are not able to delete an address, but you may choose a date to inactivate a particular address (see the **Inactive Date** field in the screen shot shown on the following page).

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications Products and Services

Actions ▾ View ▾ Format ▾    Status Active ▾  Freeze  Wrap

Address Name	Address
Corporate	555 Oak St,Roseville, CA 95678,Placer
Remit	554 Oak St,Roseville, CA 95678,Placer
Remit 2	987 Washington St,Roseville, CA 95678,Placer

TIP: Make sure all addresses are added and correct **prior to** adding or modifying Contacts. When adding or editing Contacts, you will need to choose from the list of addresses in the Addresses section.

A new window will appear as shown below.

Fields marked with an asterisk (*) are required.

If you are entering a new Address Name, use a name of “**Order**” or “**Remit.**” If the address is used for both purposes, use a name of “Remit.” If you have multiple Order or Remit addresses, add a numeric value to the Address Name. For example, a second address may be named “Order2” or “Remit2.”

Click “**OK.**” You will be returned to the “Edit Profile Change Request” screen.

The screenshot shows a web form for adding an address. The form includes the following fields and options:

- * Address Name**: Text input field.
- * Country**: Dropdown menu with "United States" selected.
- * Address Line 1**: Text input field.
- Address Line 2**: Text input field.
- * City**: Text input field.
- * State**: Dropdown menu.
- * Postal Code**: Text input field.
- County**: Dropdown menu.
- Language**: Dropdown menu.
- * Address Purpose**: Radio button options for "Ordering", "Remit to", and "RFQ or Bidding".
- Phone**: Text input field with a dropdown arrow.
- Fax**: Text input field with a dropdown arrow.
- Email**: Text input field.
- Inactive Date**: Text input field with format "mm/dd/yyyy" and a calendar icon.
- Status**: "Active".

Callout boxes provide additional information:

- Tip 1**: "Choose as many address purposes as applicable for this particular address." It lists: **Ordering** = sales location address; **Remit to** = where checks are addressed; **RFQ or Bidding** = address will show on bid responses.
- Tip 2**: "Use the [USPS website](#) to check the formatting of your address." (points to the Postal Code field).
- Tip 3**: "Use a dash when entering a phone or fax number (e.g., 123-4567) and do not enter a country code." (points to the Phone and Fax fields).

Buttons at the bottom: "Create Another", "OK" (highlighted with a green box), and "Cancel".

Contacts

To make changes to company contacts, click the “**Contacts**” category, then click “**Edit**” if you haven’t already.

To add a new Contact, click the plus symbol (+).

To edit an existing Contact, highlight the name of the Contact you wish to edit and click the pencil symbol.

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

Actions ▾ View ▾ Format ▾ Status Active ▾ Freeze Detach Wrap

Name
Bucket, Charlie
Wonka, Wanda
Wonka, Willy

A new window will appear. The top section of the window is shown below.

All fields marked with an asterisk (*) are required.

A valid email address must be provided in order to setup the Contact with a supplier portal account.

Check the “**Administrative Contact**” box to ensure the Contact receives notifications regarding Purchase Orders and Agreements. Your organization may have as many Administrative Contacts as needed.

The screenshot shows a 'Create Contact' form with the following fields and annotations:

- Salutation**: A dropdown menu with a blue square icon.
- * First Name**: A required text input field.
- Middle Name**: A text input field.
- * Last Name**: A required text input field.
- Job Title**: A text input field.
- Administrative contact**: A checkbox, which is circled in green.
- Phone**: A text input field with a dropdown arrow.
- Mobile**: A text input field with a dropdown arrow.
- Fax**: A text input field with a dropdown arrow.
- Email**: A text input field, circled in green.
- Status**: A dropdown menu with 'Active' selected, circled in green.

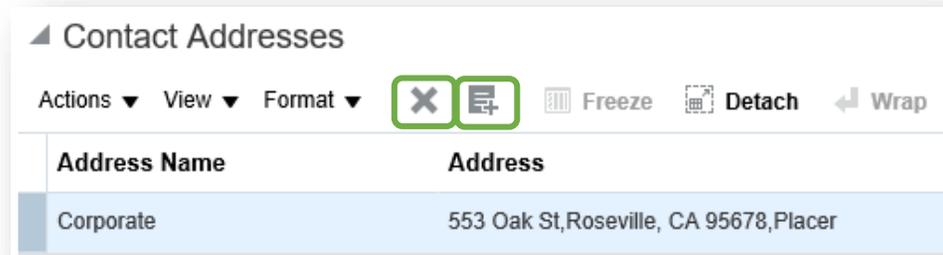
A blue callout box points to the Status dropdown with the following text:

TIP: If the Contact should no longer be used as a Contact, change the status to “Inactive.”

Continue to the “Contact Addresses” section of the window.

To delete an address for the Contact, highlight the address and click “X.”

To add an address for the Contact, click “**Select and Add.**”



When you click “Select and Add,” another window will appear (shown on the following page).

Highlight the desired address, click “**Apply**,” then click “**OK**.” The address will now show as added to the Contact.

Select and Add: Addresses ✕

▲ Search

Address

View ▼ Format ▼ Wrap

Address Name ▲ ▼	Address	Address Purpose
Corporate	555 Oak St,Roseville, CA 95678,Placer	Ordering
Remit	554 Oak St,Roseville, CA 95678,Placer	Remit to
Remit 2	987 Washington St,Roseville, CA 95678,Placer	Remit to

Rows Selected 1



TIP: If the Address you need is not listed, click “Cancel” to return to the “Edit Profile Change Request” screen and follow the instructions beginning on page 6 to add an address.

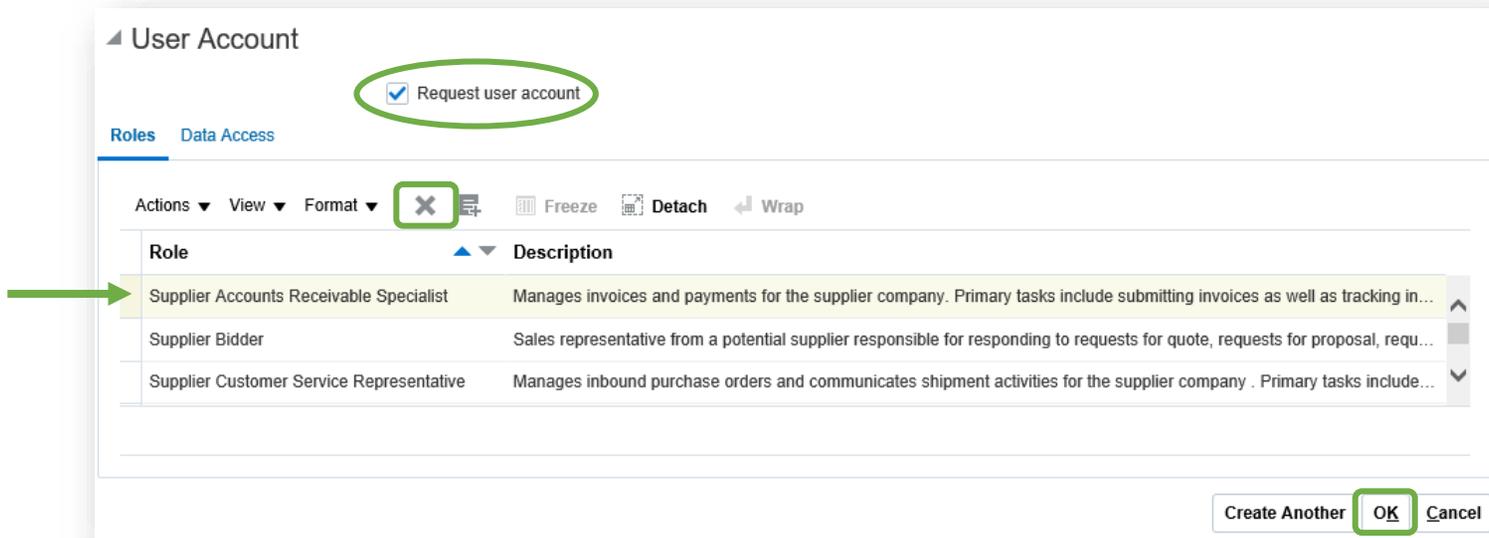
Continue to the “User Account” section of the window.

To request a supplier portal account for this Contact, click the box next to “**Request User Account.**” In order to participate in informal online bids, a Contact must have a supplier portal account.

Once the “Request User Account” box is checked, a list of default **Roles** will appear. You may need to scroll down the list to view all Roles.

All Roles listed will be assigned to the Contact unless you deselect the Role(s). To deselect, highlight the Role you wish to remove and click the “**X**” to remove it.

Click “**OK**” when complete.



Payments

To make changes to company payment methods or bank accounts, click the “**Payments**” category, then click “**Edit**” if you haven’t already.

In the Payments Methods tab, highlight one of the payment methods listed and click the checkmark to select the default payment method.

TIP: Do not enter dates into the “To Date” fields unless you want to stop using a particular payment method.

Organization Details Tax Identifiers Addresses Contacts **Payments** Business Classifications Products and Services

Payment Methods Bank Accounts

Actions ▾ View ▾ Format ▾ + × Freeze Detach Wrap

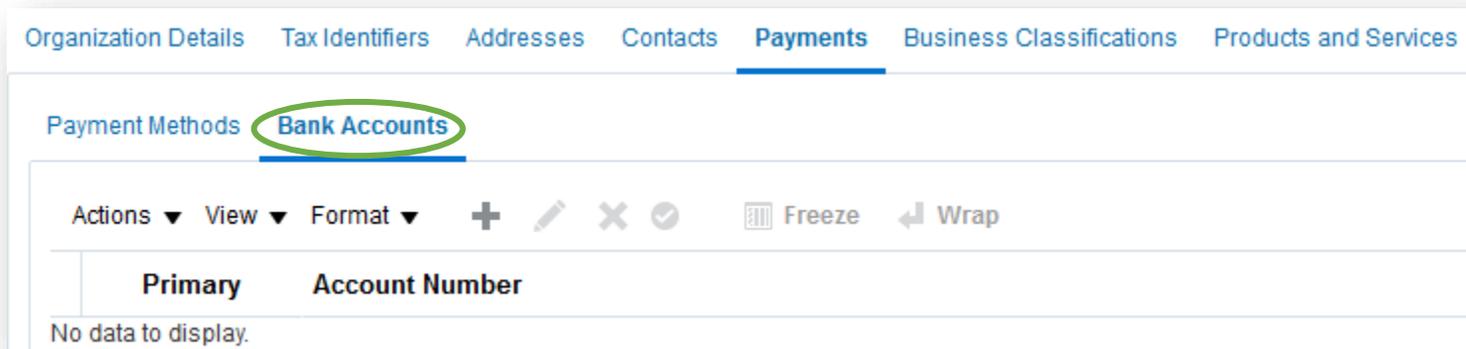
Default	Payment Method
	COR Control Pay
	COR Visa
	Check
	Electronic

In the Bank Accounts tab, you can make modifications to company bank accounts.

To delete a bank account, highlight the account and click “X.” The account will disappear from your screen.

To create a new account not already listed, click the plus symbol (+).

To edit an existing account, highlight the address you wish to edit and click the pencil symbol.



A new window will open. Fields marked with an asterisk (*) are required.
Click “**OK**” when complete.

The screenshot shows a form for creating a bank account. The form includes the following fields and controls:

- * Country**: A dropdown menu.
- * Account Number**: A text input field.
- Bank Name**: A dropdown menu, currently grayed out.
- Bank Branch**: A dropdown menu, currently grayed out.
- Allow international payments
- Additional Information** section:
 - Account Name**: Text input field.
 - Alternate Account Name**: Text input field.
 - Account Suffix**: Text input field.
 - Check Digits**: Text input field.
 - Account Type**: Dropdown menu.
 - Description**: Text input field.
- IBAN**: Text input field.
- Currency**: Dropdown menu.
- Date**: Text input field with a calendar icon, showing 01/09/2019.
- Time**: Text input field with a clock icon, showing mm/dd/yyyy.
- Buttons: **Create Another**, **OK** (circled in green), and **Cancel**.

TIP: Once you select the country, the “Bank Name” field will no longer be “grayed out.”
Once you select the “Bank Name,” the “Bank Branch” field will no longer be “grayed out.”

Products and Services

To make changes to products or services your company provides, click the “**Products and Services**” category, then click “**Edit**” if you haven’t already.

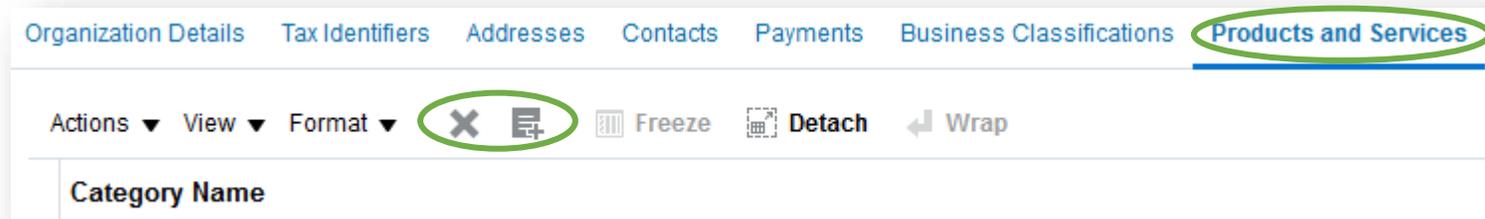
City employees searching for suppliers of certain goods or services can perform a search by product category to view which suppliers provide a particular good or service.

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

To delete an NIGP category from your company profile, highlight the category you wish to delete and click the “**X**.” The category will disappear from your screen.

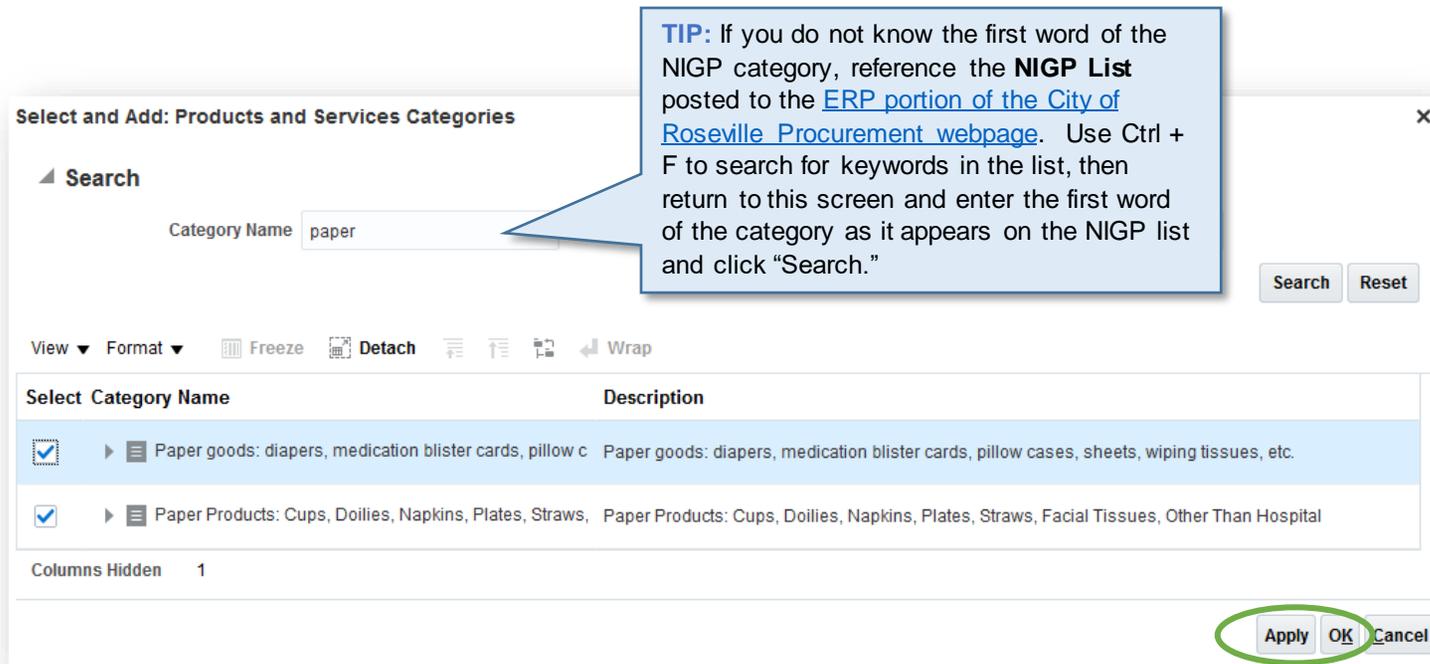
To add an NIGP category to your company profile, click the “**Select and Add**” button.

TIP: The “Select and Add” button looks like a piece of paper with a plus sign (shown below).



A new window will appear (shown below). 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**.”



You will be returned to the “Edit Profile Change Request” screen and you will see the NIGP category you selected is now added.

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

Review Changes

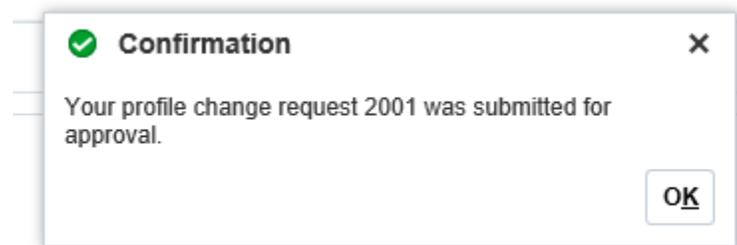
When you are complete making changes, click “**Review Changes**” at the top right of your screen.

You will be brought to a new screen where a summary of all changes you made in each category will be listed.

If you need to make corrections, click “**Edit**” to return to the “Edit Profile” screen.

If the summary of changes is correct, click “**Submit**” at the top right of your screen.

A pop-up window will confirm the profile change request was submitted.



You will see the below message at the top of your screen.

Click “**Done**” to exit.

Company Profile

There is a profile change request pending approval. You may edit to make additional changes.

Last Change Request 2001

Request Status Pending Approval

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

View ▼ Format ▼ Status Active ▼ [Print] [Freeze] [Detach] [Wrap]

Name

- Wonka, Wanda
- Wonka, Willy

Your request for changes will be submitted to the City Accounts Payable team. When approved, you will receive an email confirming your changes.