HOW TO VIEW & MODIFY YOUR SUPPLIER PORTAL ACCOUNT

STEP-BY-STEP REFERENCE GUIDE

(Applicable AFTER July 1, 2019)

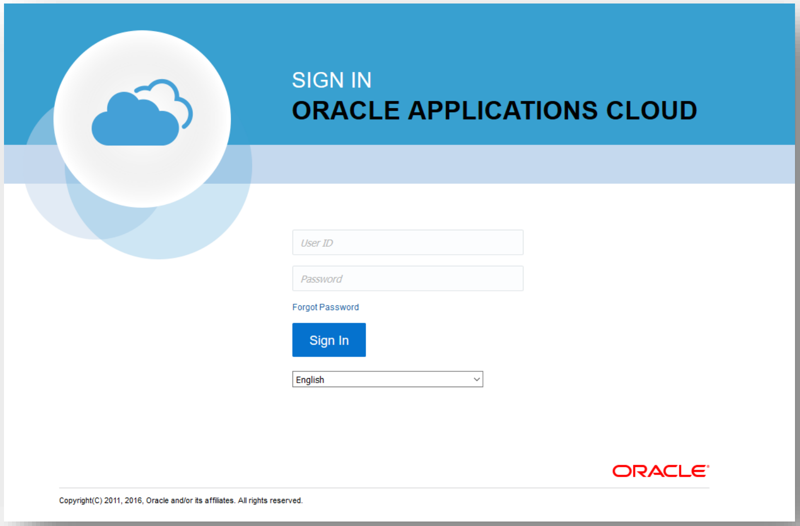
Once a supplier portal account is activated on your behalf by the City, you will receive an auto-generated email containing a link to reset your supplier portal password.

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

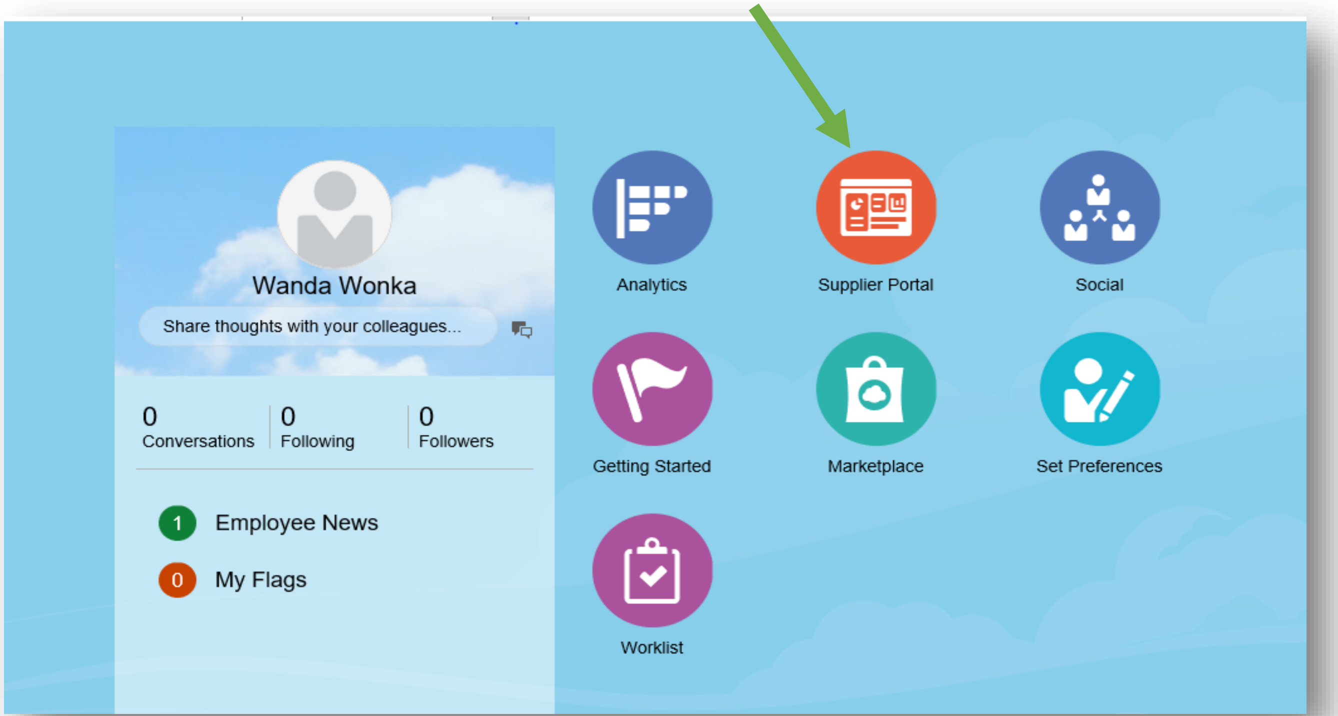
Once you reset your password, follow the instructions below to view and, if needed, modify your organization's account information.

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.

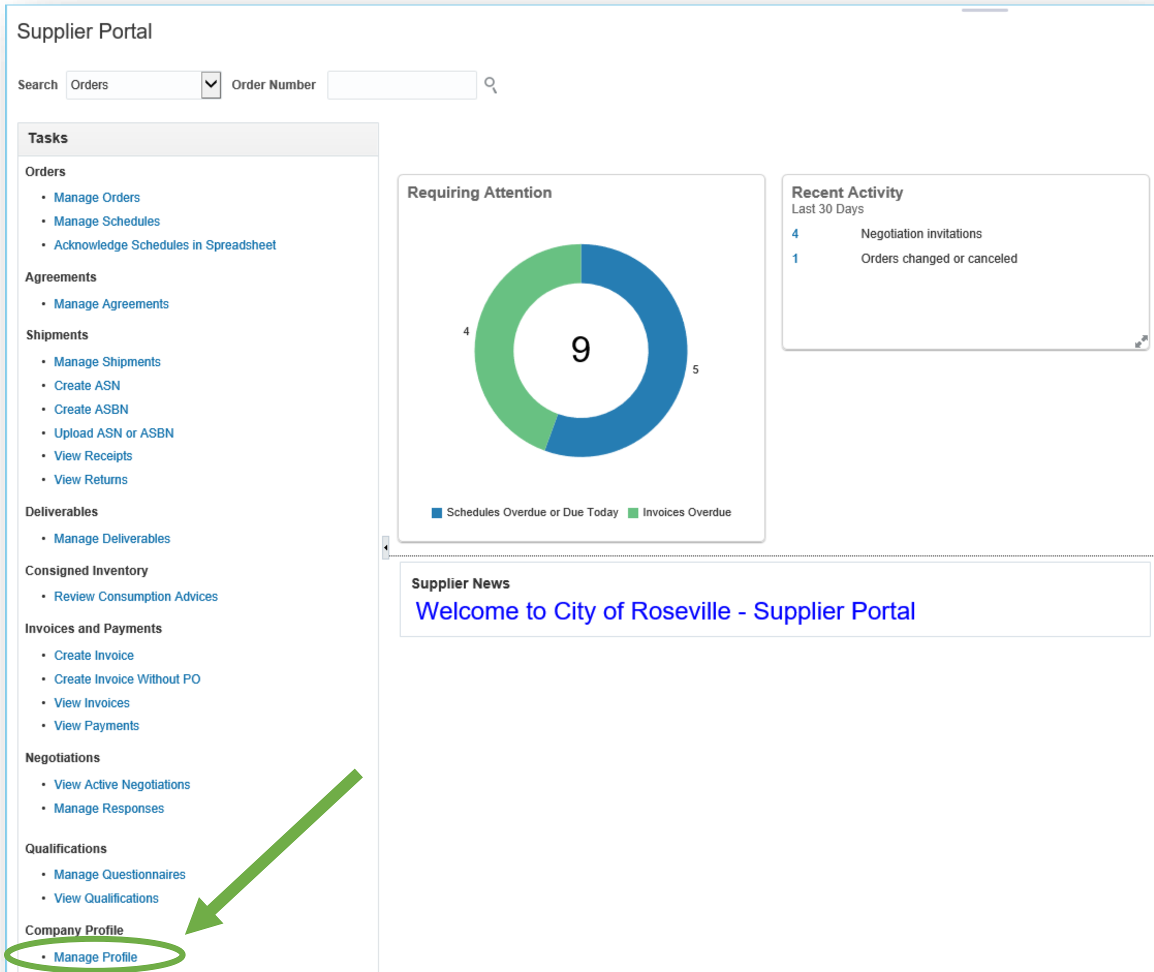


Click the **Supplier Portal icon** from the home page.

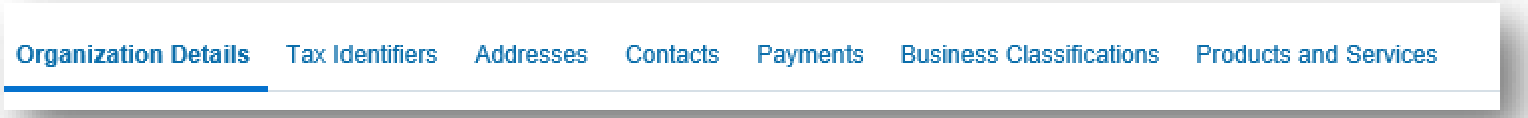


From the Supplier Portal main page, select **Manage Profile**.

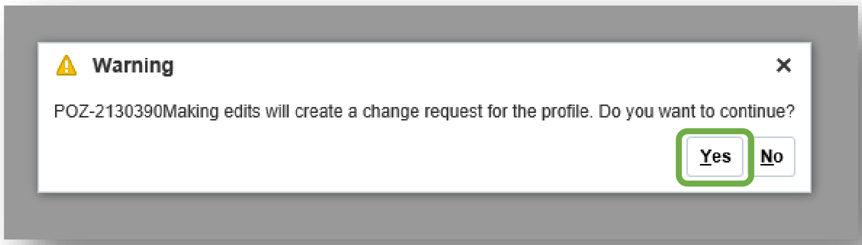
TIP: Scroll down if you are unable to see the Manage Profile link.



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



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

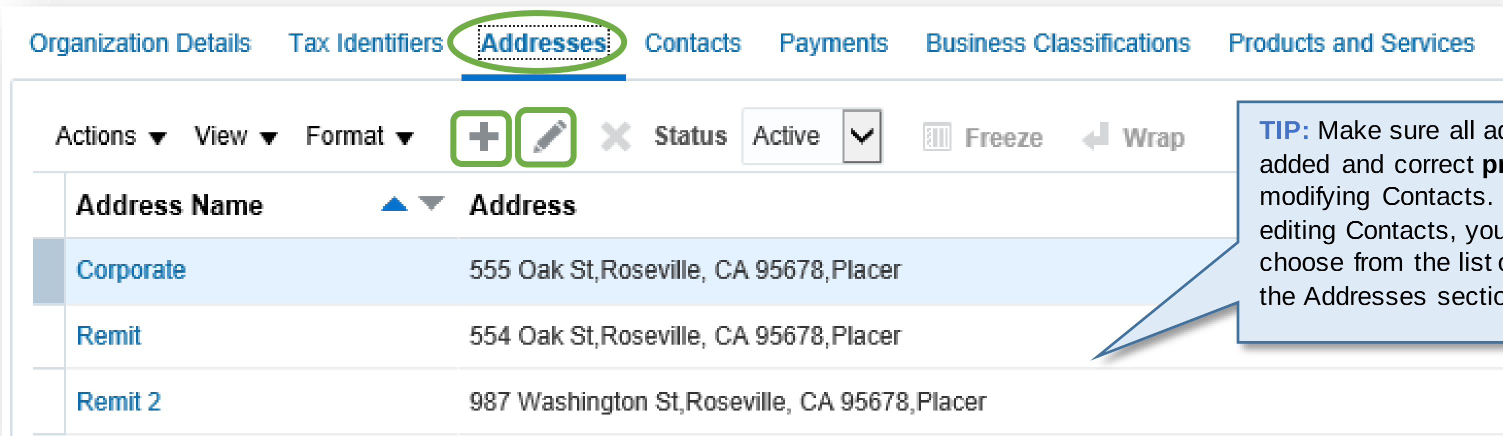
To make changes to company addresses, click the “**Addresses**” category, then click “**Edit**” if you haven’t already.

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).



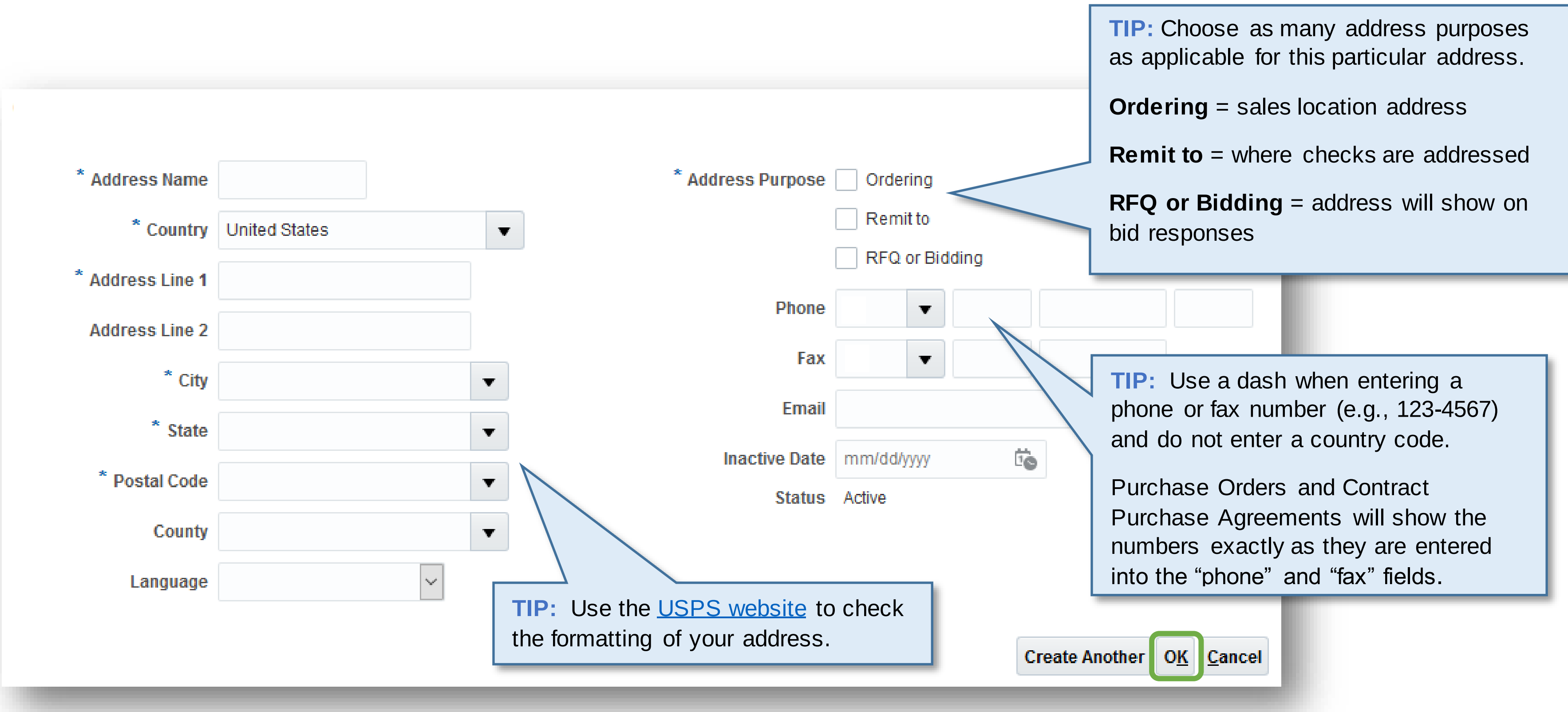
TIP: Make sure all addresses are added and correct **prior to** adding or modifying Contacts. When adding or editing Contacts, you will need to choose from the list of addresses in the Addresses section.

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.

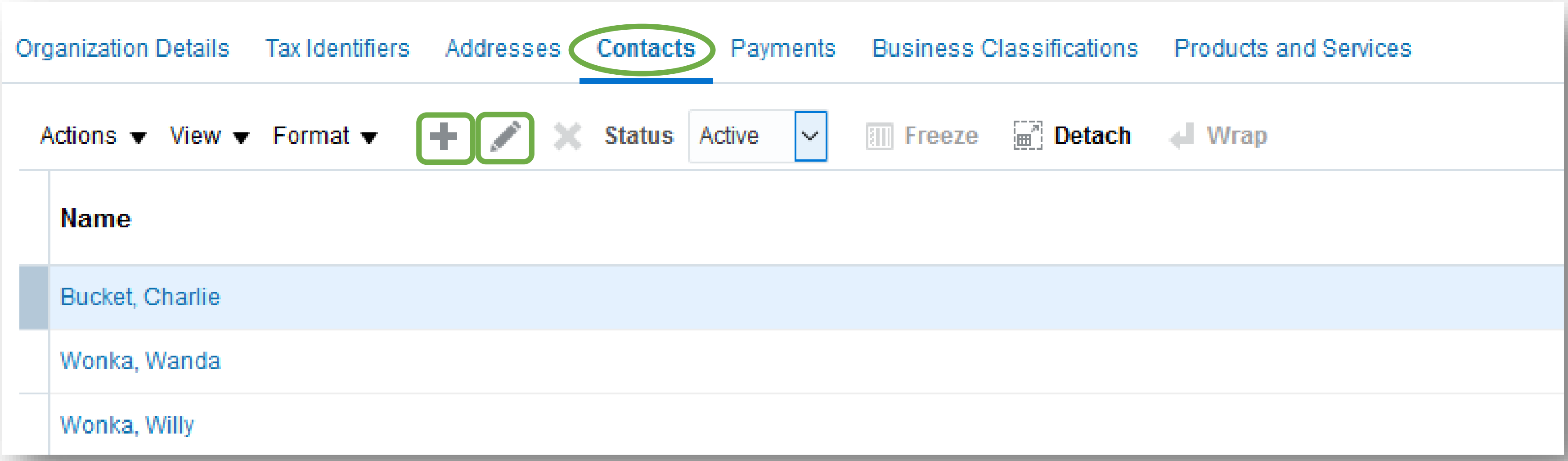


Contacts

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.

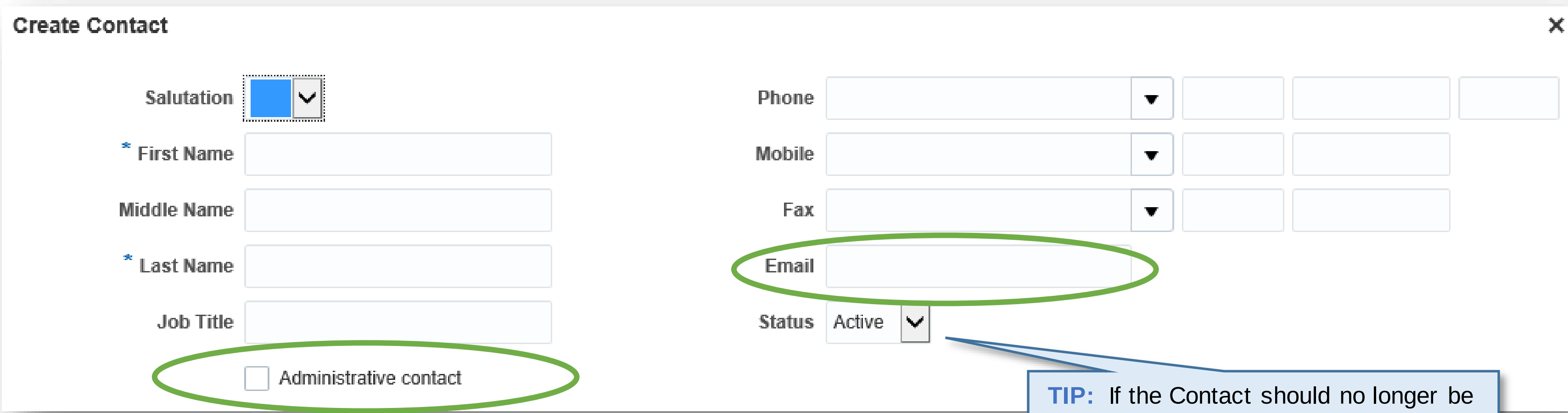


A new window will appear. The top section of the window is shown below.

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.

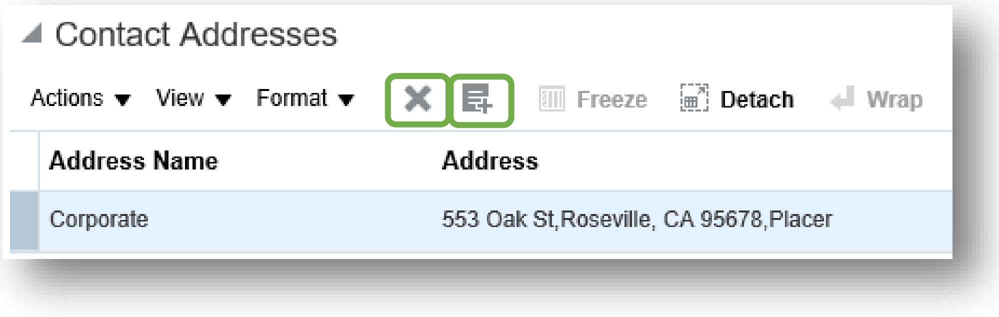


TIP: If the Contact should no longer be used as a Contact, change the status to "**Inactive**."

Continue to the "Contact Addresses" section of the window.

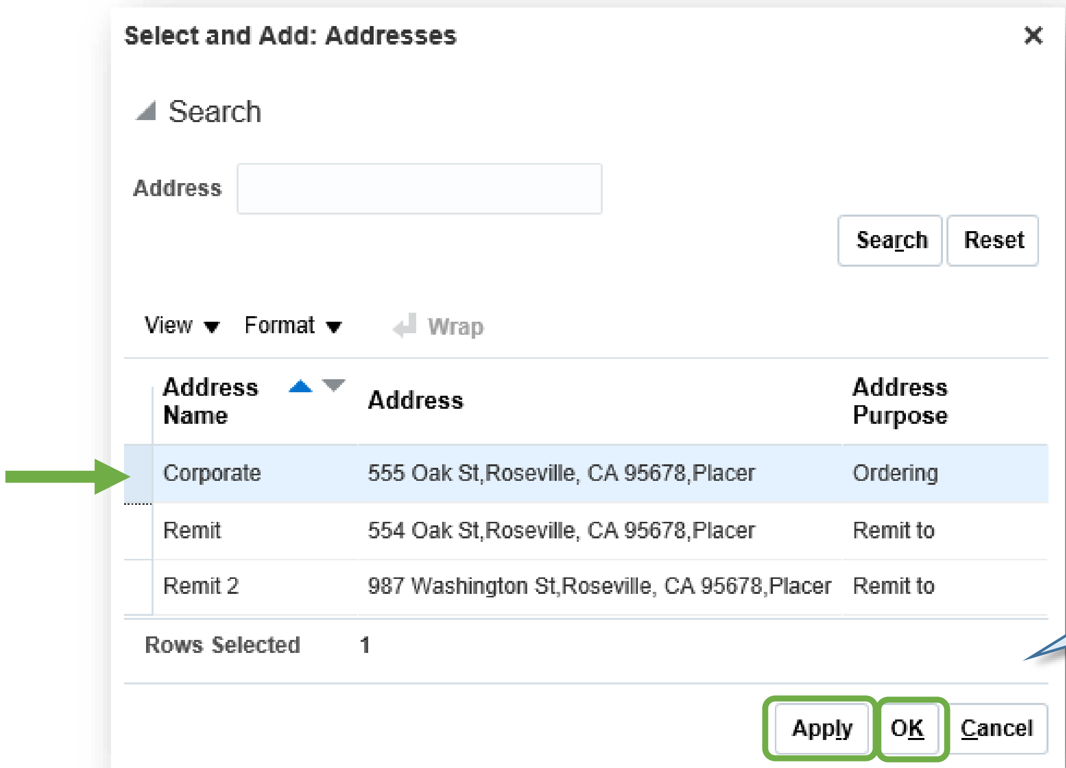
To delete an address for the Contact, highlight the address and click "**X**."

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.



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.

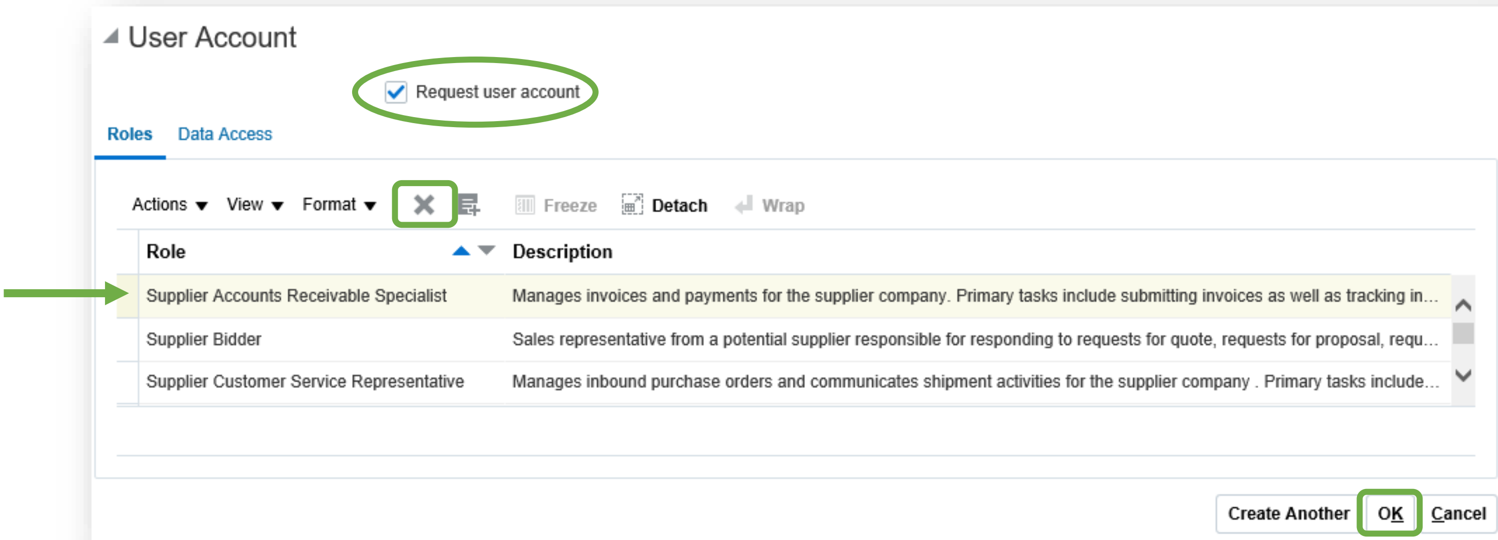
Continue to the “User Account” section of the window.

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.

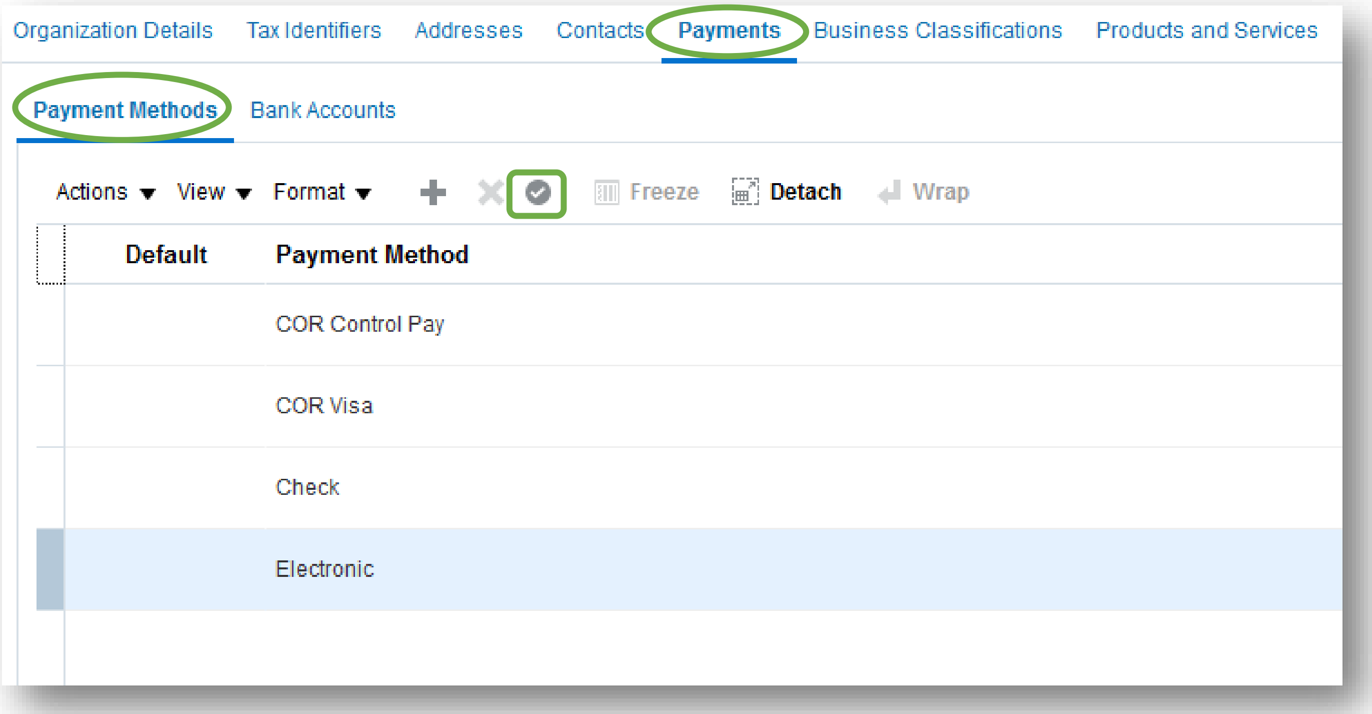


Payments

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.

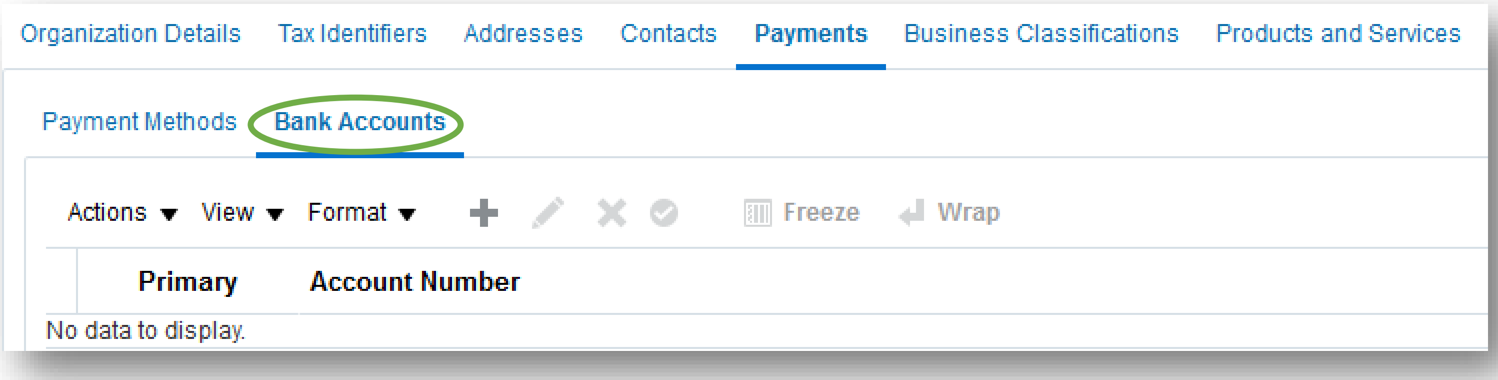


In the Bank Accounts tab, you can make modifications to company bank accounts.

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

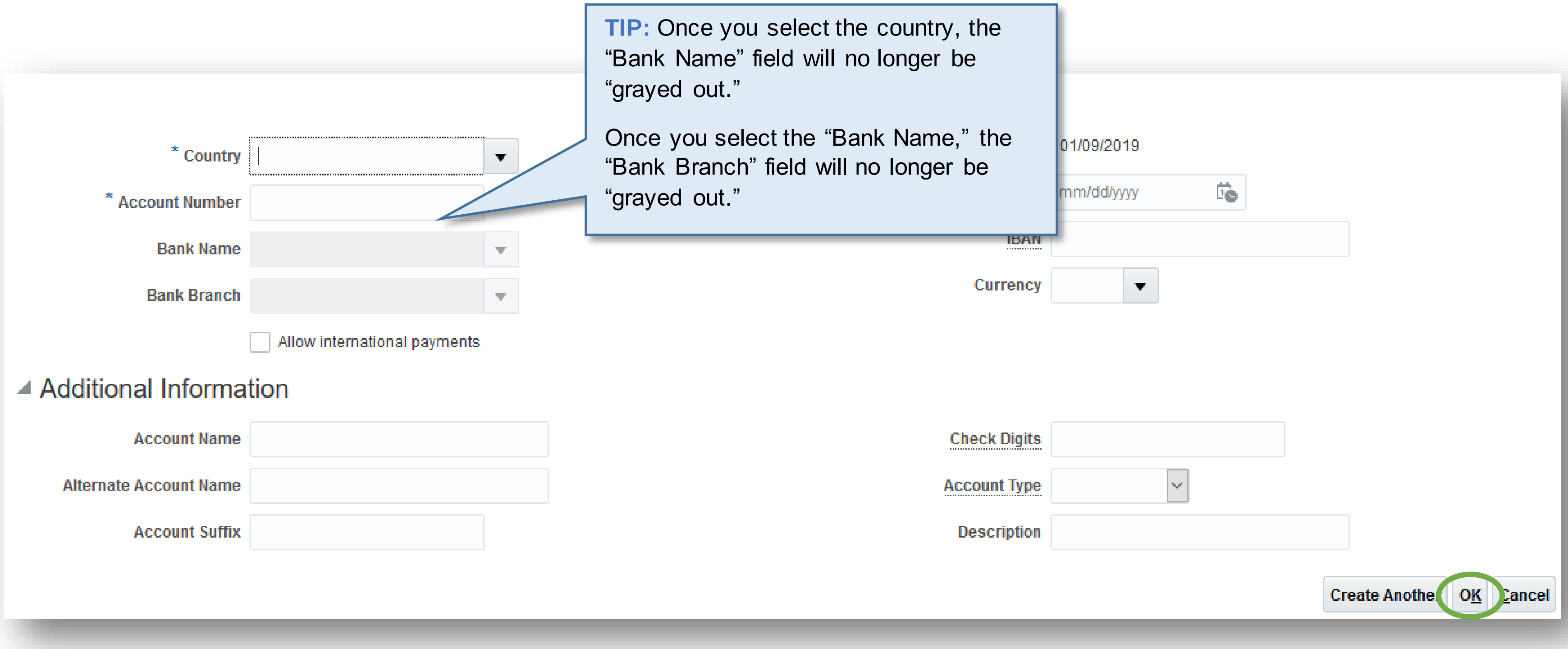
To create a new account not already listed, click the plus symbol (+).

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.



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.

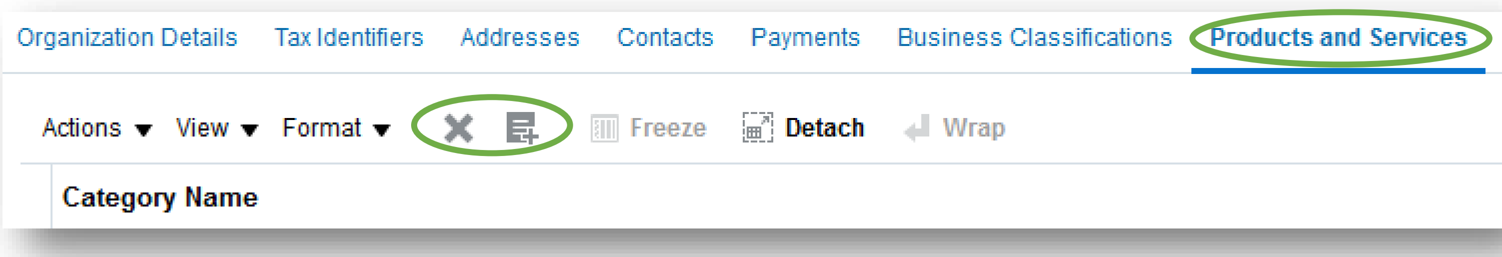
City employees searching for suppliers of certain goods or services can perform a search by product category to view which suppliers provide a particular good or service.

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.

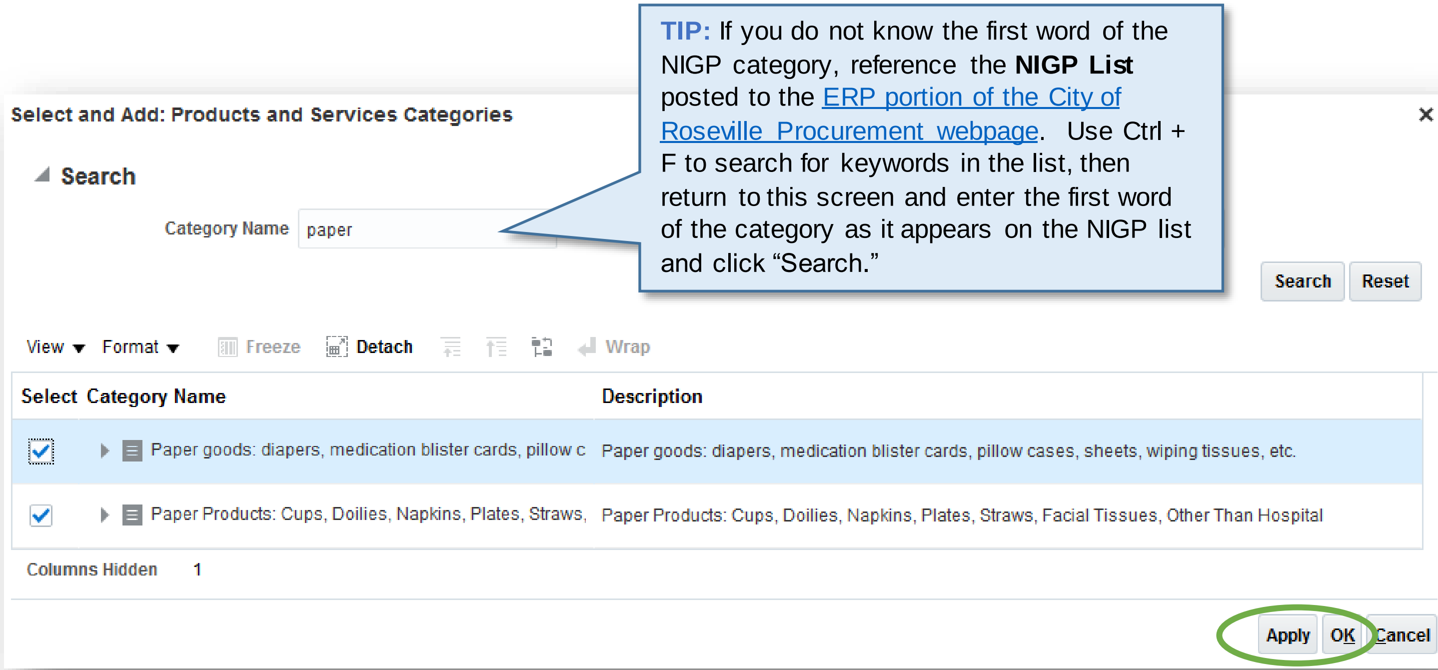
To add an NIGP category to your company profile, click the "**Select and Add**" button.

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.

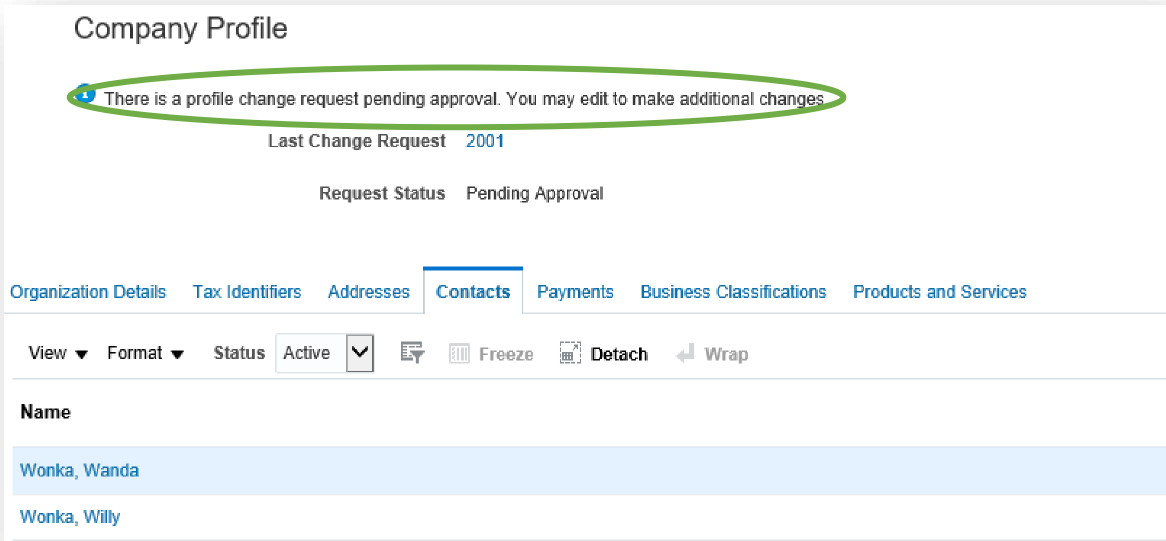
If you need to make corrections, click “**Edit**” to return to the “Edit Profile” screen.

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.



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