



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.

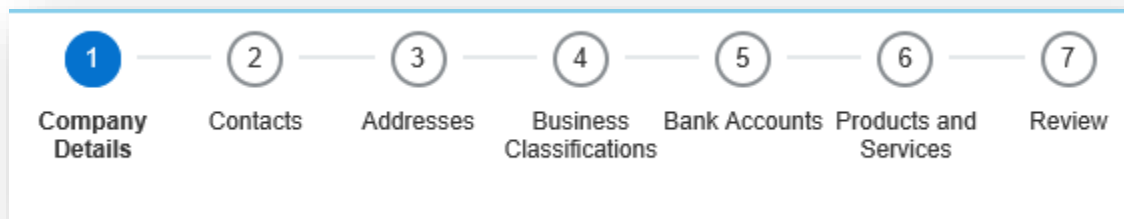
If you are a **new supplier**, use the [Self-Registration URL](#) and follow the instructions provided in this guide to begin supplier registration.

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 not 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.

Register Supplier: Company Details Back Next Save for Later Register Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

* Company <input type="text"/>	D-U-N-S Number <input type="text"/>
* Tax Organization Type <input type="text" value="v"/>	Tax Country <input type="text" value="v"/>
Supplier Type <input type="text" value="v"/>	Taxpayer ID <input type="text"/>
Corporate Web Site <input type="text"/>	Tax Registration Number <input type="text"/>
Attachments None +	Note to Approver <input type="text"/>

Additional Information

IFAS Supplier# <input type="text"/>	CA Secy of State Business Entity # <input type="text"/>
Dept of Industrial Relations # <input type="text"/>	City of Roseville Business License # <input type="text"/>

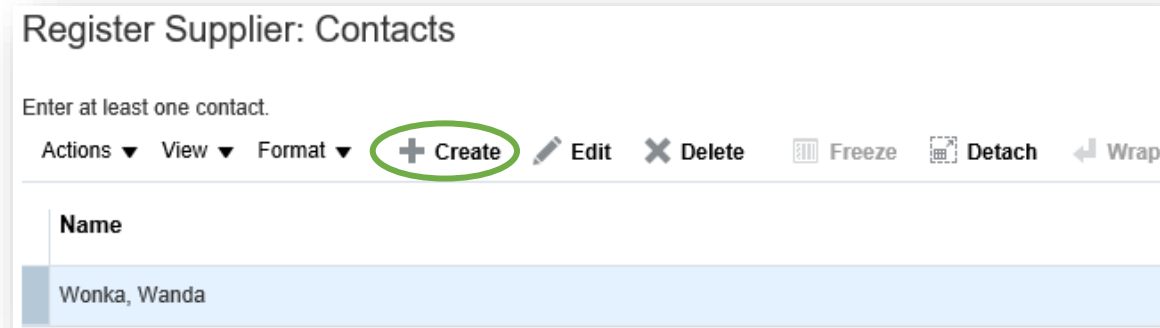
Your Contact Information

Enter the contact information for communications regarding this registration.

* First Name <input type="text"/>
* Last Name <input type="text"/>
* Email <input type="text"/>
* Confirm Email <input type="text"/>

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 must 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 except “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.

The screenshot shows a user account management form. At the top, there are fields for Salutation, First Name, Middle Name, Last Name, and Job Title. To the right are fields for Phone, Mobile, Fax, and Email. Below these is a checkbox for 'Administrative contact'. A section titled 'User Account' contains a checked checkbox for 'Request user account'. A tooltip points to the 'Email' field with the text 'E-mail is required when requesting a user account'. Below the 'User Account' section is a 'Roles' section with a toolbar containing 'Actions', 'View', 'Format', 'X', 'Freeze', 'Detach', and 'Wrap'. A table lists three roles: 'COR Supplier Account receiving specialist', 'Supplier Bidder', and 'Supplier Customer Service Representative'. The 'X' icon in the toolbar and the 'OK' button at the bottom right are circled in green. A blue callout box points to the 'X' icon with the text: '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.'

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

* Email

User Account

Request user account

E-mail is required when requesting a user account

Roles

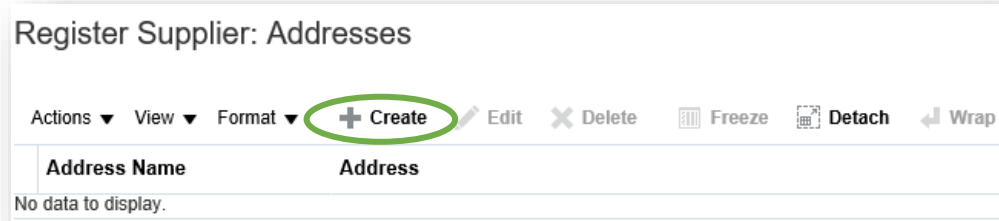
Actions View Format X Freeze Detach Wrap

Role	Description
COR Supplier Account receiving specialist	View invoices and payments for the supplier company. Primary tasks include viewing invoices as well as tracking invoice a...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requ...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company . Primary tasks include...

OK Cancel

Addresses

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



Register Supplier: Addresses

Actions ▼ View ▼ Format ▼ **+ Create** Edit Delete Freeze Detach Wrap

Address Name	Address
No data to display.	

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.

Create Address

* Address Name

* Country

* Address Line 1

Address Line 2

* City

* State

* Postal Code

County

* Address Ordering

Purpose Remit to

RFQ or Bidding

Phone

Fax

Email

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

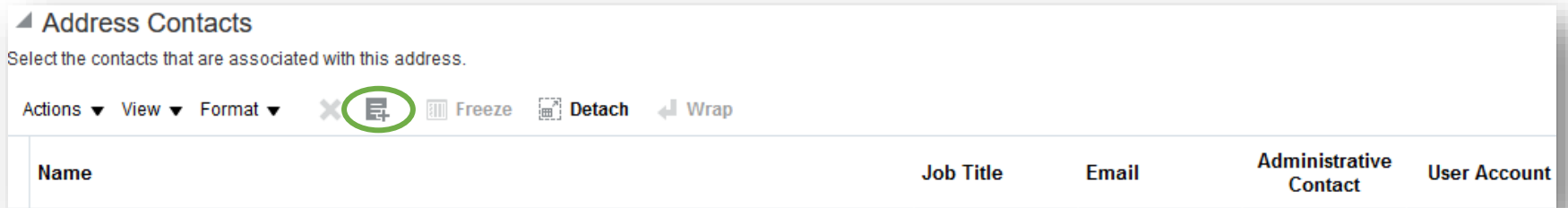
TIP: Use the [USPS website](#) to check the formatting of your address.

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

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.

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



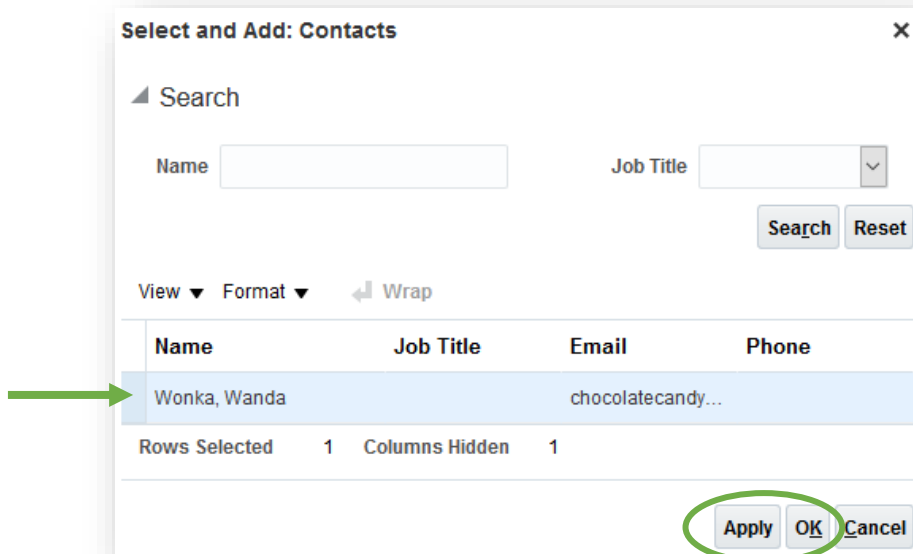
Address Contacts
Select the contacts that are associated with this address.

Actions ▾ View ▾ Format ▾ **Select and Add** Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	User Account
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Another pop-up window will appear titled **“Select and Add: Contacts.”**

Highlight the name and click **“Apply,”** then click **“OK.”**



Select and Add: Contacts

Search

Name Job Title

Search Reset

View ▾ Format ▾ Wrap

Name	Job Title	Email	Phone
Wonka, Wanda		chocolatecandy...	

Rows Selected 1 Columns Hidden 1

Apply OK Cancel

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.

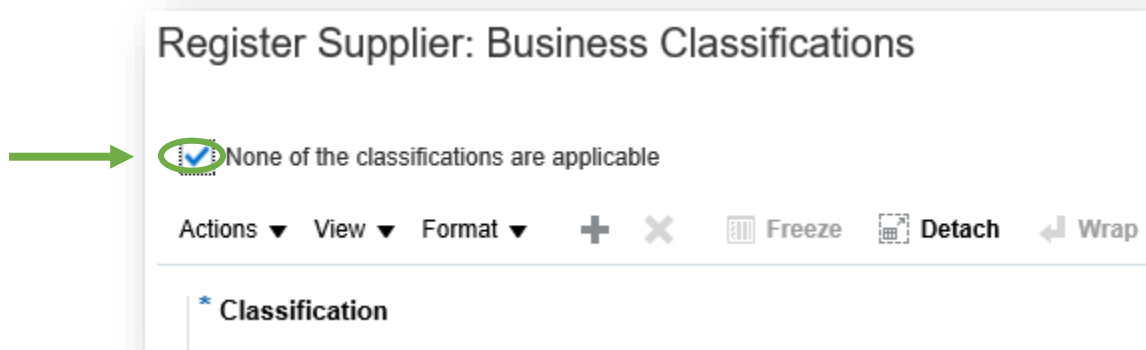
At the “Register Supplier: Addresses” screen, you will see the address is now added. To add additional addresses, click “**Create.**”

Business Classifications

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

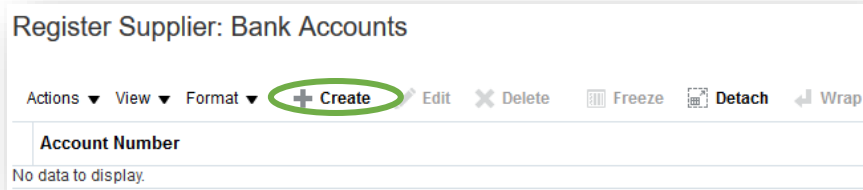
Check the box for “None of the classifications are applicable.” At this time, the City of Roseville, does not collect business classification information.

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.**”

Create Bank Account

* Country IBAN

Bank Currency

Branch

* Account Number

Additional Information

Account Name Agency Location Code

Alternate Account Name Account Type

Account Suffix Description

Check Digits

Comments

Note to Approver

Create Another **OK** **Cancel**

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.

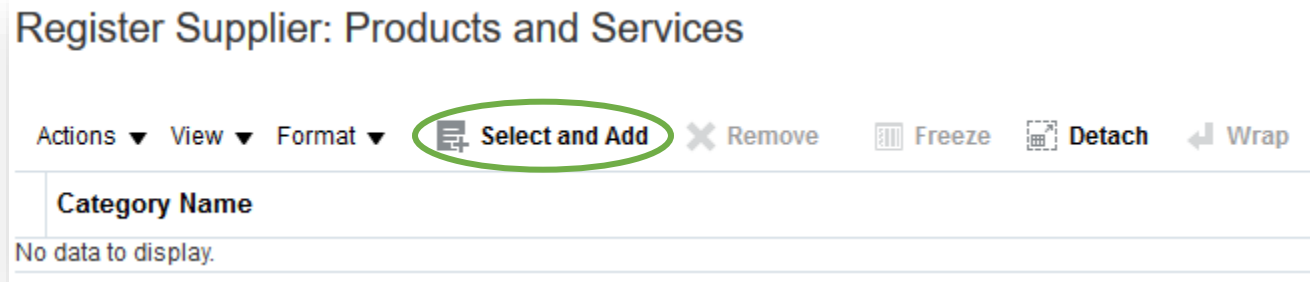
In the Products and Services category, you are able to select product categories associated with the goods and/or services your company provides.

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.”

Select	Category Name	Description
<input type="checkbox"/>	Paper goods: diapers, medication blister cards, pillow	Paper goods: diapers, medication blister cards, pillow cases, sheets, wiping tissues, etc.
<input checked="" type="checkbox"/>	Paper Products: Cups, Doilies, Napkins, Plates, Straws	Paper Products: Cups, Doilies, Napkins, Plates, Straws, Facial Tissues, Other Than Hospital

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

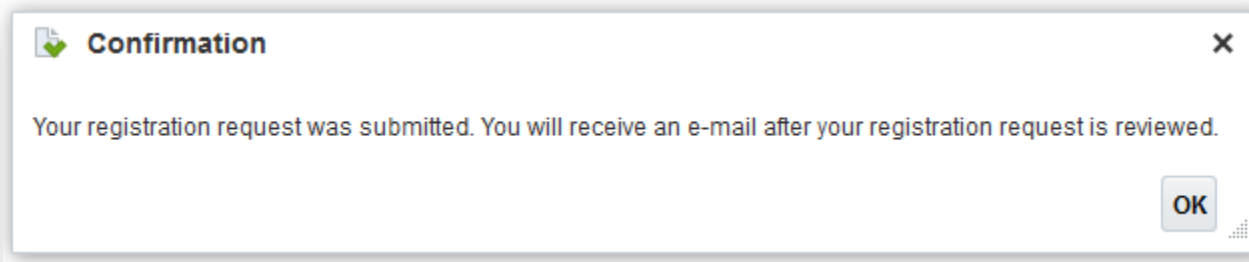
TIP: You may add as many NIGP codes as is applicable. To add additional NIGP codes, click “**Select and Add**” again.

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.