

EBMUD PROSPECTIVE VENDOR REGISTRATION

Use these steps when setting up a **new vendor** account within our Oracle

Elsie system.



BEFORE WE BEGIN

Please have the following information/documentation available prior to registration. To reduce errors and troubleshooting, and to expedite the process, it is recommended that registration is completed in one session.

VENDOR SELF-REGISTRATION CHECKLIST:

- Taxpayer ID
- W9 Documentation
- Supplier Contact with Email Address
- Bank Information Including:
 - Bank Name
 - Bank Routing Number
 - Bank Account Number
- Business Classifications (If Applicable)
 - LGBT Small Business Entity
 - Local Business
 - Micro Business
 - Minority Owned
 - Service-disabled Veteran Owned
 - Small Business
 - Veteran Owned
 - Woman Owned

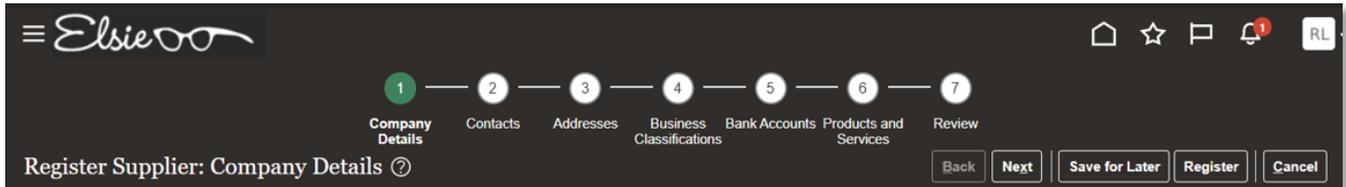
VENDOR SELF-REGISTRATION

- Open the URL below in a new browser and follow the instructions provided in this guide to begin vendor registration. For best user experience, please use Firefox or Google Chrome.

[Supplier Registration \(oraclecloud.com\)](https://oraclecloud.com)

- At the top of the page, you will see the categories or “train stops” for required information to be entered (image shown 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.



STEP 1 - COMPANY DETAILS

- Enter company name in all **CAPITAL LETTERS**. Complete all fields with an asterisk, as well as Tax country and Taxpayer ID, a.k.a. Tax Identification Number on your W-9, or social security number if registering as an individual. Do not include hyphen(s).
TIP: The Taxpayer ID field will be available after you select the Tax Country.
- Please attach your W-9 (**required**), as well as any relevant insurance documentation on the Attachment line by selecting the + icon.
- Once completed, click on “Next” in the upper right-hand area.

Register Supplier: Company Details

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

* Company

* Tax Organization Type

Supplier Type

Corporate Web Site

Attachments None +

D-U-N-S Number

Tax Country

Taxpayer ID

Tax Registration Number

Note to Approver

Your Contact Information

Enter the contact information for communications regarding this registration.

* First Name

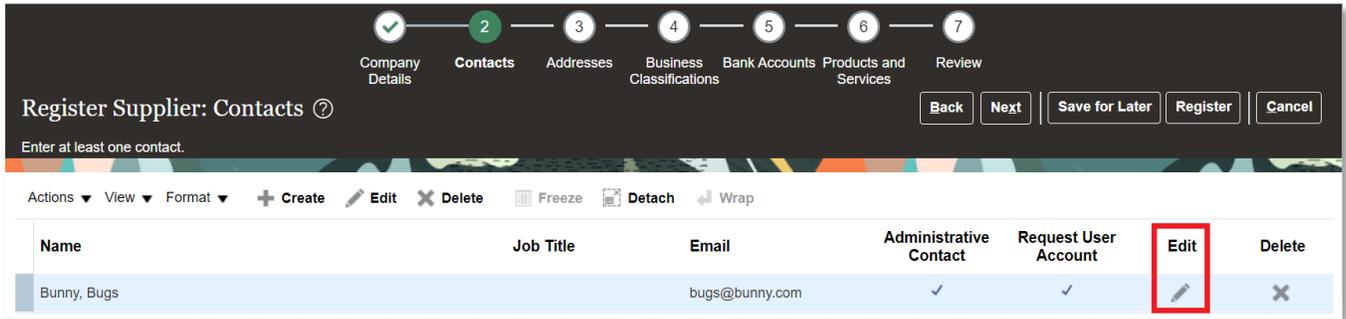
* Last Name

* Email

* Confirm Email

STEP 2 – CONTACT DETAILS

- Click on the pencil icon  titled “Edit”.



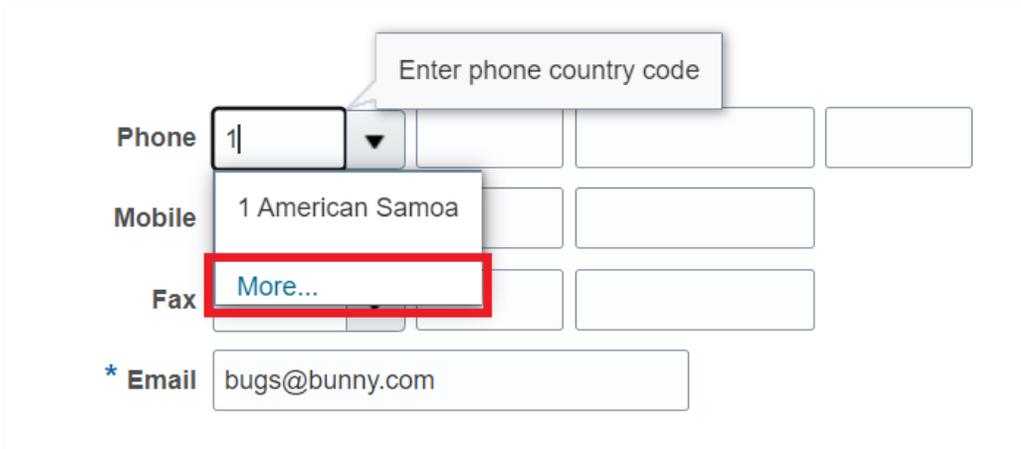
Register Supplier: Contacts 

Enter at least one contact.

Actions View Format + Create Edit Delete Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	Request User Account	Edit	Delete
Bunny, Bugs		bugs@bunny.com	✓	✓		

- A pop-up window will appear, where a Supplier Phone Number will need to be entered. The first box is for the country code. Enter in “1”, which will pull up the following pop out window, and select more:



Enter phone country code

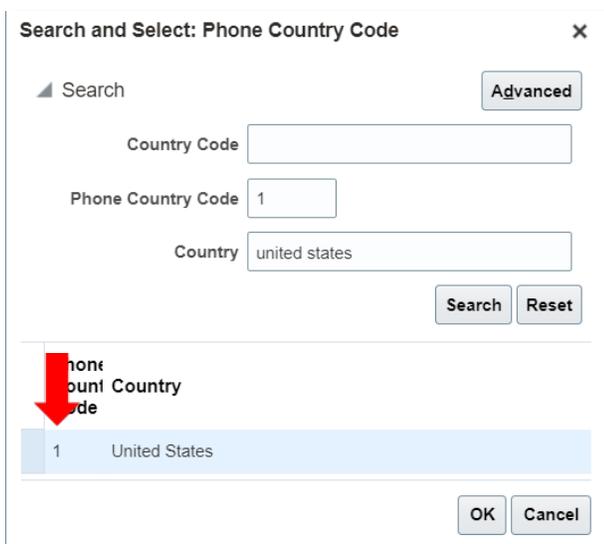
Phone 1

Mobile 1 American Samoa

Fax More...

* Email bugs@bunny.com

- Type in “United States”, then hit the search button. Highlight the correct entry by clicking next to it (demonstrated by the red arrow) and click OK.



Search and Select: Phone Country Code

Search Country Code Phone Country Code 1 Country united states

Search Reset

1 United States

OK Cancel

- Verify that both **Administrative Contact** and **Create User Account** are selected, as this will allow the individual to make future edits on the account.
- In the **Roles** section select the **Appropriate Role** using the up/down arrows on the left side of the description, and click **“OK”**. This will return you to the prior screen.

Edit Contact: Bugs Bunny

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

* Email

Create user account

Roles

Actions View Format Freeze Detach Wrap

Role	Description
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, request...
Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes...
Supplier Self Service Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requ...

- To add another contact, click **“Create”**, fill in all required information (*), and select the appropriate role for the additional contact.

TIP: To request a separate supplier portal account for the additional contact, please ensure that the **“Request User Account”** box is checked, and a separate email address is entered. The additional contact will receive a separate email notification upon completion of the registration process.

Register Supplier: Contacts

Enter at least one contact.

Actions View Format **Create** Edit Delete Freeze Detach

Name	Job Title
Bunny, Bugs	

Create Contact

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

* Email

▾ User Account

Create user account

Roles

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Role	Description
Supplier Self Service Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requ...
Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, request...

- Click the “Next” button in the upper right hand of screen to enter the **Supplier Addresses** details.

STEP 3 – ADDRESSES

- Click + Create to add the following fields: Address Name (Enter “Main office”, “Remit”, etc.), Country, Address Line, City, State, Postal Code, and Address Purpose (select Ordering checkbox, and select Remit to if applicable).
- If the remit to address differs, please create a second address entry, and select “Remit to”.

Create Address

* Address Name

* Address Purpose Ordering
 Remit to
 RFQ or Bidding

* Country

* Address Line 1

Address Line 2

Address Line 3

City

State

Postal Code

County

Phone 1

Fax 1

Email

▲ Address Contacts

Select the contacts that are associated with this address.

Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	User Account
No data to display.				
Columns Hidden 4				

TIP: For City, County, and State, enter the Postal Code first then hit the “Tab” key on your keyboard. A list of City, County, and State combinations will appear. Choose the appropriate combination associated with your Postal Code and select “OK”. The system will pre-populate this information on the Address Screen.

Search and Select: Postal Code

▲ Search

* Postal Code Required

Language

Postal Code	Parent Geography
94606	EMERYVILLE, ALAMEDA, CA
94606	OAKLAND, ALAMEDA, CA
94606	PIEDMONT, ALAMEDA, CA
94606	EMERYVILLE, ALAMEDA, California
94606	OAKLAND, ALAMEDA, California
94606	PIEDMONT, ALAMEDA, California

- In the Address Contacts section select Actions, Select and Add. The supplier’s name will display in the Select and Add: Contacts page.

Address Contacts

Select the contacts that are associated with this address.

Actions View Format Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	User Account
No data to display.				

Columns Hidden 4

Create Another OK Cancel

- Select the appropriate contact and then click the “Apply” button. Click the “OK” button.

Select and Add: Contacts

Search

Name Job Title Search Reset

View Format Wrap

Name	Job Title	Email	Phone
Bunny, Bugs		bugs@bunny.com	+1 (000)0000

Rows Selected 1 Columns Hidden 1

Apply OK Cancel

- Click the “Next” button to enter **Business Classifications** details.

STEP 4 – BUSINESS CLASSIFICATIONS

EBMUD collects business classifications in accordance with its Contract Equity Program (CEP). For more information regarding the CEP, please visit: [EBMUD Contract Equity Program](#).

- To add a business classification, select Actions > Add Row.

Actions View

- Add Row
- Delete

- Select the applicable classification, certifying agency or enter a certificate number.

- Please note: If a certificate has been issued to your business as proof of a classification, it is **required** to be uploaded at this step in order for your profile to be approved.

* Classification	Subclassification	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes
[Dropdown]					m/d/yy	m/d/yy	None +	

- Repeat this process as many times as necessary if you have more than one business classification.
- Select “Next” to proceed to **Bank Accounts**.

STEP 5 – BANK ACCOUNTS

If your business would like to receive ACH/Direct Deposit as default payment for invoices, please enter your bank account information, otherwise you can skip this step.

Purchasing uses a third-party solution to validate all ACH/Direct Deposit information. Please ensure that the bank account number and routing number provided are associated with the business name and address you are registering.

If the bank account does not pass validation, Purchasing will reach out to the Administrative contact on file for more information.

- Select “Create” and the Create Bank Account screen will appear.

Register Supplier: Bank Accounts

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

Back | Next | Save for Later | Register | Cancel

Account Number	IBAN	Currency	Bank	Edit	Delete
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Create Bank Account

Enter account number or IBAN unless account number is marked as required.

* 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

- Country: Enter "United States."
 - Bank: Select the name of your bank from the drop-down list.
 - Branch: Select the routing number associated with your bank from the drop-down list.
 - Currency: Select "USD" from the drop-down list.
 - Account Number: Enter your bank account number.
- TIP:** If you cannot find your bank name or routing number, please skip this step and send an email to purchase@ebmud.com for assistance. In your email, please provide the following:
 In the "Subject" area, please enter "New Vendor Registration – Request to add routing number"
 In the body of the email, please include the following:
- Your Name (should match the contact(s) in the Contacts section)
 - Business Name
 - Bank Name
 - Bank Routing Number
- DO NOT INCLUDE your bank account number.** Purchasing will reach out to you once your bank information has been added. Log in to your vendor portal, go to "Manage Profile" and enter your bank account information in the Payments section. Your bank and routing number should now be available.
- Select "Next" to proceed to **Products and Services**.

STEP 6 – PRODUCTS AND SERVICES

- Refer to the [Product Categories and Descriptions](#) PDF file (link on the Purchasing Business Center page) for a searchable list of EBMUD categories and descriptions.
- Select **Actions > Select and Add**, and the following screen will appear.
Expand the categories by clicking on the arrow icon (shown within the red box below) and place a checkmark next to all those that apply.

Select and Add: Products and Services

Search

Category Name Description

Search Reset

View Format Freeze Detach Wrap

Select	Category Name	Description
<input type="checkbox"/>	▶ EBMUD Supplier Categories	EBMUD Supplier Categories

Columns Hidden 1

Apply OK Cancel

TIP: Use the “Search” button to look up your products by category or description. Type in the **beginning** words or letters of your products in either the Category Name or Description field and click “Search.” For anything service related, enter “professional” into the Category Name to filter your results.

Search by Category Name Example

Select and Add: Products and Services

Search

Category Name Description

Search Reset

View Format Freeze Detach Wrap

Select	Category Name	Description
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - AUTO AND TRI	AUTO. EQUIP., PARTS AND ACCESS. - AUTO AND TRUCK BODY REPAIR
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - AUTO AND TRI	AUTO. EQUIP., PARTS AND ACCESS. - AUTO AND TRUCK DEALERS, MANUFACTURING
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - AUTO AND TRI	AUTO. EQUIP., PARTS AND ACCESS. - AUTO AND TRUCK PARTS, ACCESSORIES, SERVICE
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - AUTOMOTIVE	AUTO. EQUIP., PARTS AND ACCESS. - AUTOMOTIVE BATTERIES
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - BOAT EQUIPM	AUTO. EQUIP., PARTS AND ACCESS. - BOAT EQUIPMENT, REPAIR, PARTS
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - BOATS AND BK	AUTO. EQUIP., PARTS AND ACCESS. - BOATS AND BOAT RENTAL
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - CONSTRUCTI	AUTO. EQUIP., PARTS AND ACCESS. - CONSTRUCTION EQUIPMENT DEALERS AND MFG.
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - CONSTRUCTI	AUTO. EQUIP., PARTS AND ACCESS. - CONSTRUCTION EQUIPMENT RENTAL
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - OTHER MISCE	AUTO. EQUIP., PARTS AND ACCESS. - OTHER MISCELLANEOUS
<input type="checkbox"/>	▶ AUTO. EQUIP., PARTS AND ACCESS. - RENTAL MOVE	AUTO. EQUIP., PARTS AND ACCESS. - RENTAL MOVE IN AND OUT CHARGES

Columns Hidden 1

Apply OK Cancel

Search by Description Example

Select and Add: Products and Services

Search

Category Name Description Search Reset

View ▼ Format ▼ Freeze Detach ☰ ☰ ☰ ☰ Wrap

Select	Category Name	Description
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - DELIVERY,SETU	FURNITURE AND FIXTURE REPAIR - DELIVERY,SETUP,PICKUP CHARGES
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - FLOOR COVERI	FURNITURE AND FIXTURE REPAIR - FLOOR COVERINGS
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - FURNITURE REI	FURNITURE AND FIXTURE REPAIR - FURNITURE REFINISHING
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - METAL SHELVIN	FURNITURE AND FIXTURE REPAIR - METAL SHELVING
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - MISC. HOUSEH	FURNITURE AND FIXTURE REPAIR - MISC. HOUSEHOLD FURNISHINGS
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - OFFICE FURNIT	FURNITURE AND FIXTURE REPAIR - OFFICE FURNITURE
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - OFFICE FURNIT	FURNITURE AND FIXTURE REPAIR - OFFICE FURNITURE RENTAL
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - SHOP FURNISH	FURNITURE AND FIXTURE REPAIR - SHOP FURNISHINGS
<input type="checkbox"/>	FURNITURE AND FIXTURE REPAIR - WINDOW COVE	FURNITURE AND FIXTURE REPAIR - WINDOW COVERINGS

Columns Hidden 1

Apply OK Cancel

Search for Service-Related Categories

Select and Add: Products and Services

Search

Category Name Description

Search Reset

View ▼ Format ▼ Freeze Detach ☰ ☰ ☰ ☰ Wrap

Select	Category Name	Description
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - AERIAL PHOT	PROFESSIONAL SVCS: CONSULTANT - AERIAL PHOTOGRAPHY
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - ARCHAEOLO	PROFESSIONAL SVCS: CONSULTANT - ARCHAEOLOGICAL
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - ARCHITECTU	PROFESSIONAL SVCS: CONSULTANT - ARCHITECTURE
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - AUDIT AND A	PROFESSIONAL SVCS: CONSULTANT - AUDIT AND ACCOUNT
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - BOARD APPF	PROFESSIONAL SVCS: CONSULTANT - BOARD APPROVED CONSULTANT CONTRACTS
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - COMMUNICA	PROFESSIONAL SVCS: CONSULTANT - COMMUNICATIONS
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - COMPUTER	PROFESSIONAL SVCS: CONSULTANT - COMPUTER
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - EARTHQUAK	PROFESSIONAL SVCS: CONSULTANT - EARTHQUAKE
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - ECONOMIC	PROFESSIONAL SVCS: CONSULTANT - ECONOMIC
<input type="checkbox"/>	PROFESSIONAL SVCS: CONSULTANT - EDUCATION/	PROFESSIONAL SVCS: CONSULTANT - EDUCATIONAL

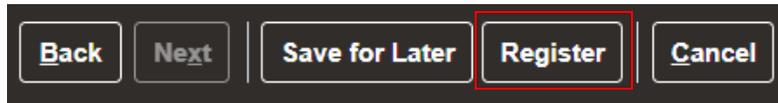
Columns Hidden 1

Apply OK Cancel

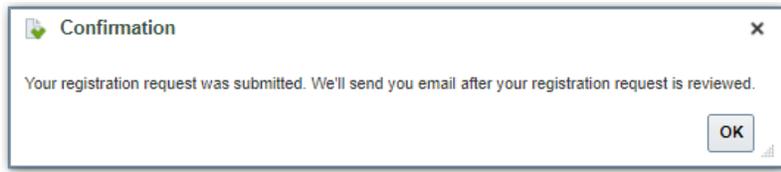
- Click the “Next” button to proceed to the final step.

STEP 7 – REVIEW

- Review all of your previously entered Supplier Details and go back to edit as necessary. Once the review has been completed, click the “Register” button to register as a Supplier.



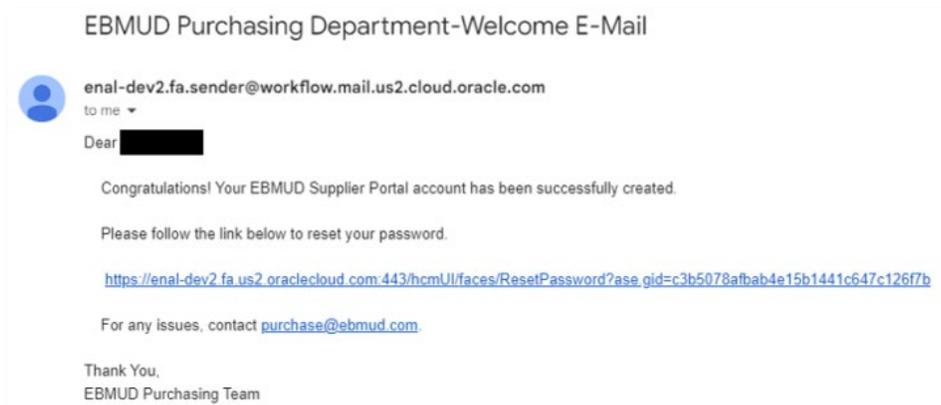
A pop-up window will appear, confirming the registration was submitted:



Your account will be reviewed by Purchasing staff.

Upon approval, you will receive an email from Oracle with a link to complete your registration by creating a password (please note incoming email address below).

Please note that the Oracle link will expire within 24 hours.



Once you have your vendor account, you can access your vendor account by going to the [Vendor Sign-in page](#).

Enter your User ID and password, then click “Sign In.” **DO NOT** click on the “Company Single Sign-On” link. Your User ID is the email address you entered for the contact profile(s).

Company Single Sign-On

_____ or _____

User ID

Password

[Forgot Password](#)

Select Language

You will be directed to the Main Dashboard. Click on the Supplier Portal link to go to the Supplier Portal page.

Good afternoon, [REDACTED]

[Supplier Portal](#) [Tools](#) [Others](#)

APPS

+

Things to Finish

Assigned to Me	0
Created by Me	0

You have no open notifications.

There are several self-service functions in the Vendor Portal such as “Manage Orders” to view and manage your Purchase Orders and “Manage Profile” to make changes to your vendor profile.

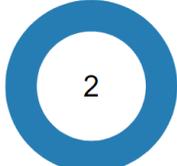
Supplier Portal

Search Order Number

Tasks

- Orders
 - Manage Orders
 - Manage Schedules
 - Acknowledge Schedules in Spreadsheet
- Agreements
 - Manage Agreements
- Channel Programs
 - Manage Programs
- Contracts and Deliverables
 - Manage Contracts
 - Manage Deliverables
- Negotiations
 - View Active Negotiations
 - Manage Responses
- Qualifications
 - Manage Questionnaires
 - View Qualifications
- Company Profile
 - Manage Profile

Requiring Attention



2

2

■ Negotiations Closing Soon

Recent Activity
Last 30 Days
Negotiation Invitations 2

Transaction Reports
Last 30 Days
No data available

Supplier News
Welcome to East Bay Municipal Utility District Supplier Portal

Thank you for registering with EBMUD!

Once you're familiar with the Vendor Portal, return to the [Purchasing Business Center](#) for additional information and announcements.

For any questions, please email us at purchase@ebmud.com.