

# 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
- ☐ Proof of Business Classifications (If Applicable)
  - ☐ 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)

- ☐ Please enter a valid email address, then click on the **Send Access Code** button.

East Bay Municipal Utility District

## Supplier Registration

### Enter your email

Get a one-time access code to start.

Required

**Send Access Code**

- ☐ An access code will be sent to the email address entered above.

East Bay Municipal Utility District

## Supplier Registration

### Enter your code

Use the code we've sent to email [redacted]

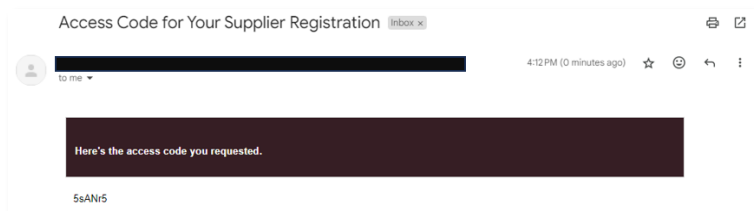
The code expires in 15 minutes.

Required

**Continue**

[Get a new code](#)

- ☐ Go to your email to obtain the access code. Do not close the tab or browser.
- ☐ Copy and Paste the access code. Click on “Continue” to go to the first registration page.



**NOTE:** If you leave at any time before the registration is complete, you will need to obtain a new access code each time to continue.

## STEP 1 - COMPANY DETAILS

- ☐ Enter company name in all **CAPITAL LETTERS**.
- ☐ Fill out all required fields: Country, Taxpayer ID (available once Country is selected), Organization Type, and Supplier Type.

**TIP:** In the drop-down menus, start typing to filter results more quickly.

East Bay Municipal Utility District

Supplier Registration

### Company Details

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Company Details

Contacts

Addresses

Business Classifications

Bank Accounts

Products and Services

Company

Website

Country

Taxpayer ID

Tax Registration Number

D-U-N-S Number

Organization Type

Supplier Type

Note to Approver

- ☐ In the Attachments section, please attach your W-9 (**required**), as well as any relevant insurance documentation.
- ☐ You can search for and select your documents, or you can simply drag and drop.

Attach tax, insurance, and other relevant documents

**Drag and Drop**  
Select or drop files here.

URL

Add URL

Insurance Docs.PDF

Last updated on 5/16/2024  
344.75 KB

W-9.PDF

Last updated on 5/16/2024  
344.75 KB

Last updated now

Cancel Save Continue

- ☐ Once completed, click on the “Continue” button.

## STEP 2 – CONTACTS

- ☐ Enter your First Name, Last Name, and Job Title.
- ☐ The initial email address will carry over into the **Contacts** page. DO NOT CHANGE the Email address, once registration is complete, it will become the **username**.
- ☐ A Supplier Phone Number will need to be entered. Mobile and Fax are optional.
- ☐ Verify that “Yes” is selected for both **is this an administrative contact?** and **Does this contact need a user account?**, as this will allow the individual to make future edits on the account.

East Bay Municipal Utility District

Supplier Registration

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### Contacts

**Contact 1**  
Enter contact details. Registration communications will be sent to this contact.

First Name Test	Last Name Vendor	Job Title Business Manager
--------------------	---------------------	-------------------------------

Email  
[REDACTED]

Country US	Mobile +1
---------------	--------------

Country US	Phone +1	Ext
---------------	-------------	-----

Country US	Fax +1
---------------	-----------

**Is this an administrative contact?**  
Administrative contact will receive general communications from us.

☒ Yes ☐ No

**Does this contact need a user account?**  
User accounts will provide online access to supplier transactions and self-service tasks.

☒ Yes ☐ No

- ☐ **What user roles does this contact need?** Keep default User Roles: Supplier Self Service Administrator, Supplier Sales Representative, and Supplier Bidder.

#### What user roles does this contact need?

Assign at least 1 user role to specify the responsibilities of the contact.

- ☒ **Supplier Self Service Administrator**  
Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
- ☒ **Supplier Sales Representative**  
Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to agreements in addition to adding catalog line items with customer specific pricing and terms. Updates contract deliverables that are assigned to the supplier party and updates progress on contract deliverables for which the supplier is responsible.
- ☐ **Supplier Inventory Manager**  
Individual in a supplier organization responsible for managing inventory process control from beginning to end. Monitors available supplies, materials and products to ensure that customers, employees and production have access to the materials they need.
- ☐ **Supplier Customer Service Representative**  
Manages inbound purchase orders and communicates shipment activities for the supplier company . Primary tasks include tracking, acknowledging or requesting changes to new orders. Communicates order schedules that are ready to be shipped by submitting advance shipment notices, and monitors the receipt activities performed by the buying organization.
- ☒ **Supplier Bidder**  
Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requests for information and reverse auctions.
- ☐ **Supplier Accounts Receivable Specialist**  
Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.

+ Add Another Contact

- ☐ To add another contact, click “+ Add Another Contact” on the bottom of the page and repeat the process.

**TIP:** To create a new, separate account for the additional contact, please ensure that “Yes” is checked next to **Does this contact need a user account?** The additional contact will receive a separate email notification upon completion of the registration process.

- ☐ Click “Save”, then “Continue” to go to the Supplier **Addresses** details.

## STEP 3 – ADDRESSES

- ☐ Enter your company's address information into the appropriate fields.
- ☐ In the **Address Name** field, please enter a name for the address (Main Office, Sales, Remittance, etc.).
- ☐ In the **What's this address used for?** section, you can specify whether the address is used to **Receive Purchase Orders**, to **Receive Payments** on an invoice, or both. If you have only one address, please select both. If you have a separate address for each purpose, please select the appropriate one and create another address for the other. Do not select **Bid on RFQs**.

East Bay Municipal Utility District

Supplier Registration

Addresses

Address 1

Address Name  
Main Office

What's this address used for? Select at least 1 purpose.

☒ Receive Purchase Orders ☒ Receive Payments ☐ Bid on RFQs

Country/Region  
United States

Address Line 1  
375 11th Street

Address Line 2

Address Line 3

City  
OAKLAND

State  
CA

Postal Code  
94607

Country  
ALAMEDA

Email

Country  
US

Phone  
+1

Ext

Last updated 5 minutes ago

Cancel Save Continue

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Company Details

Contacts

Addresses

Business Classifications

Bank Accounts

Products and Services

- ☐ In the **Which contacts are associated to this address?** section, you will be asked to assign a contact to the address. Please select the appropriate contact(s) from the list of available contacts.  
**TIP:** If a contact is not available, you can go back to the **Contacts** page and add them. Please **Save** your changes before going back to the previous page.

County  
ALAMEDA

Email

Country  
US

Phone  
+1

Ext

Country  
US

Fax  
+1

Which contacts are associated to this address?

☒ [Redacted Contact Name]

☐ [Redacted Contact Name]

☐ [Redacted Contact Name]

☐ [Redacted Contact Name]

+ Add Another Address

Last updated 8 minutes ago

Cancel Save Continue

Company Details

Contacts

Addresses

Business Classifications

Bank Accounts

Products and Services

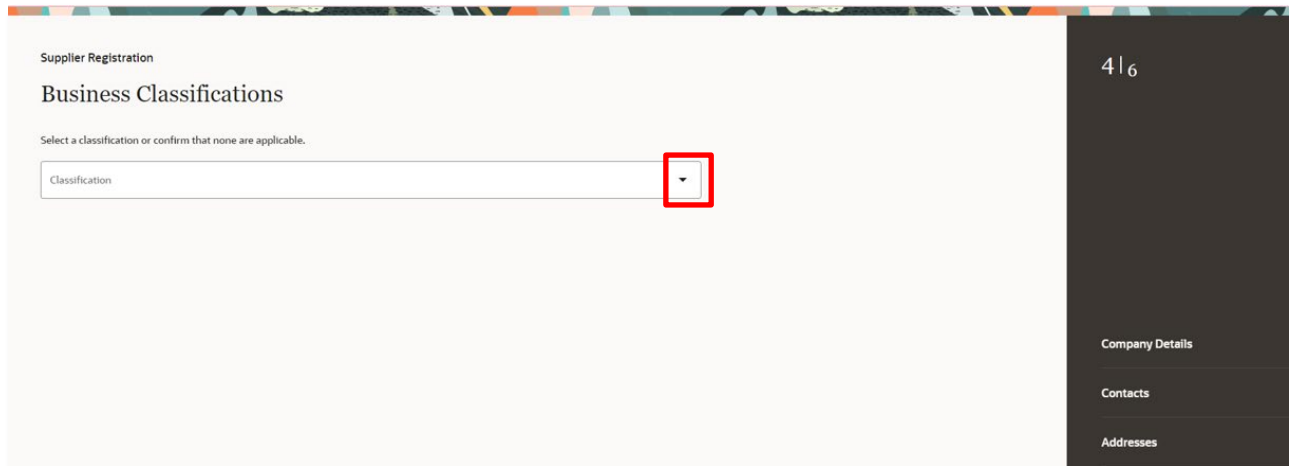
- ☐ Click "Continue" to go to the **Business Classifications** page.

## STEP 4 – BUSINESS CLASSIFICATIONS (IF APPLICABLE)

This section is applicable to businesses that falls under any of the small/local businesses and availability groups as defined in the **Contract Equity Guidelines and Forms** of the Contract Equity Program (CEP). EBMUD collects business classifications in accordance with its CEP program “to enhance equal opportunities for business owners.” Please visit the [EBMUD Contract Equity Program](#) for more information.

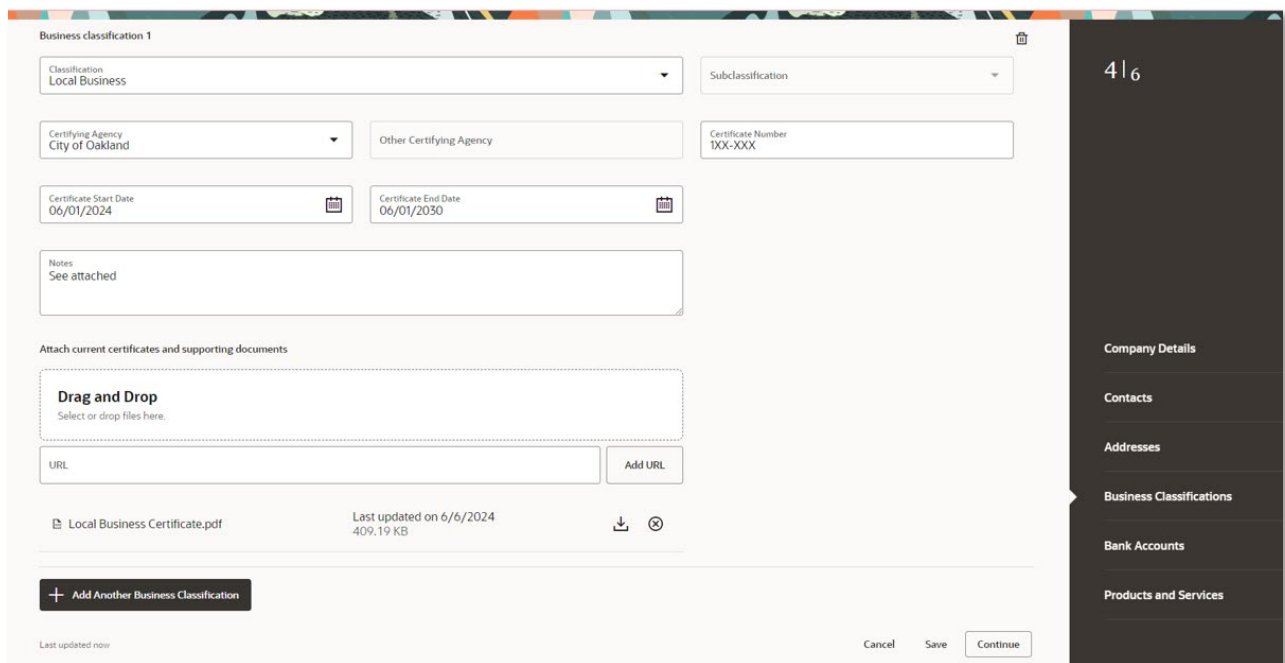
If this is not applicable to your business, you may skip this step.

- ☐ Click on the down arrow to select the applicable business classification.
- ☐ Once a classification has been selected, additional fields will appear.



The screenshot shows the 'Supplier Registration' page with the 'Business Classifications' section. It prompts the user to 'Select a classification or confirm that none are applicable.' There is a text input field labeled 'Classification' with a red square highlighting a downward arrow icon on its right side. On the right sidebar, the page number '4 | 6' is visible at the top, and a list of navigation links includes 'Company Details', 'Contacts', and 'Addresses'.

- ☐ Select the appropriate **Certifying Agency** and enter all required information.
- ☐ If a certificate has been issued to your business as proof of a classification, it is **required** to be uploaded at this step.



The screenshot shows the 'Business classification 1' form. It includes fields for 'Classification' (set to 'Local Business'), 'Subclassification', 'Certifying Agency' (set to 'City of Oakland'), 'Other Certifying Agency', 'Certificate Number' (placeholder 'XXX-XXXX'), 'Certificate Start Date' (06/01/2024), and 'Certificate End Date' (06/01/2030). There is a 'Notes' section with 'See attached'. Below this is a section to 'Attach current certificates and supporting documents' with a 'Drag and Drop' area and a 'URL' input field with an 'Add URL' button. A file named 'Local Business Certificate.pdf' is shown as attached, with a note 'Last updated on 6/6/2024 409.19 KB'. At the bottom, there is a '+ Add Another Business Classification' button and 'Cancel', 'Save', and 'Continue' buttons. The right sidebar shows the page number '4 | 6' and a list of navigation links including 'Company Details', 'Contacts', 'Addresses', 'Business Classifications' (which is highlighted), 'Bank Accounts', and 'Products and Services'.

- ☐ Repeat this process as many times as necessary if you have more than one business classification by clicking the “+ Add Another Business Classification” button at the bottom of the page.
- ☐ Select “Save”, then “Continue” to proceed to **Bank Accounts**

## STEP 5 – BANK ACCOUNTS (SKIP THIS STEP)

## STEP 6 – PRODUCTS AND SERVICES

- ☐ 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.
- ☐ Refer to the [Product Categories and Descriptions](#) PDF file for a searchable list of EBMUD categories and descriptions.


**NOTE:** You must select one or more Products and Services categories. Failure to do so will result in rejection of your registration or a delay in payment of invoices.

East Bay Municipal Utility District

Supplier Registration

Products and Services

Search by category or description

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

Company Details

Contacts

**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.

- ☐ Select the appropriate categories and click “Save.” Do not click “Submit” until you have reviewed the information entered in the previous steps.



Supplier Registration

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Products and Services

Category	Description
<input type="checkbox"/> <input checked="" type="checkbox"/> COMPUTER HARDWARE AND SOFTWARE - COMMUNICATIONS DEVICES	COMPUTER HARDWARE AND SOFTWARE - COMMUNICATIONS DEVICES
<input type="checkbox"/> <input checked="" type="checkbox"/> COMPUTER HARDWARE AND SOFTWARE - COMPUTER FURNITURE	COMPUTER HARDWARE AND SOFTWARE - COMPUTER FURNITURE
<input type="checkbox"/> <input checked="" type="checkbox"/> COMPUTER HARDWARE AND SOFTWARE - COMPUTER PRINTER SUPPLIES	COMPUTER HARDWARE AND SOFTWARE - COMPUTER PRINTER SUPPLIES
<input type="checkbox"/> <input checked="" type="checkbox"/> COMPUTER HARDWARE AND SOFTWARE - COMPUTER PRINTERS	COMPUTER HARDWARE AND SOFTWARE - COMPUTER PRINTERS
<input type="checkbox"/> <input checked="" type="checkbox"/> COMPUTER HARDWARE AND SOFTWARE - COMPUTER PROGRAM MTC AND ENHANCEMENTS	COMPUTER HARDWARE AND SOFTWARE - COMPUTER PROGRAM MTC AND ENHANCEMENTS
<input type="checkbox"/> <input checked="" type="checkbox"/> COMPUTER HARDWARE AND SOFTWARE - DIGITAL PROCESS CONTROL SYSTEMS	COMPUTER HARDWARE AND SOFTWARE - DIGITAL PROCESS CONTROL SYSTEMS
<input type="checkbox"/> <input checked="" type="checkbox"/> COMPUTER HARDWARE AND SOFTWARE - MID-RANGE,LARGE COMPUTER PERIPHERALS	COMPUTER HARDWARE AND SOFTWARE - MID-RANGE,LARGE COMPUTER PERIPHERALS

Last updated 2 minutes ago

Cancel

Save

Submit

Company Details

Contacts

Addresses

Business Classifications

Bank Accounts

Products and Services

## STEP 7 – REVIEW

- ☐ Review all your previously entered supplier information and go back to edit as necessary.
- ☐ Once the review has been completed, click the **Submit** button.

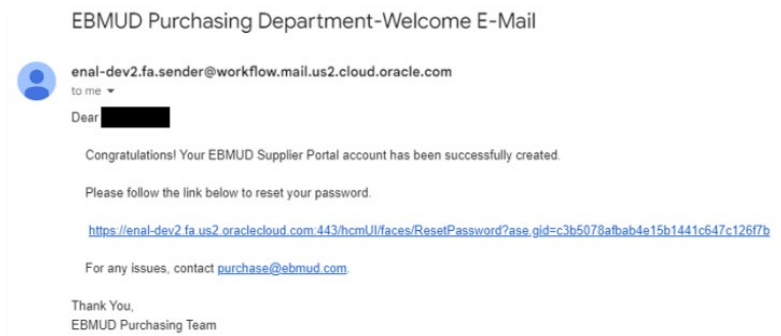
A new window will appear, confirming the registration was submitted:



**Your account will be reviewed by Purchasing staff.**

Purchasing may reach out to you if documentation is missing or additional information is required.

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).



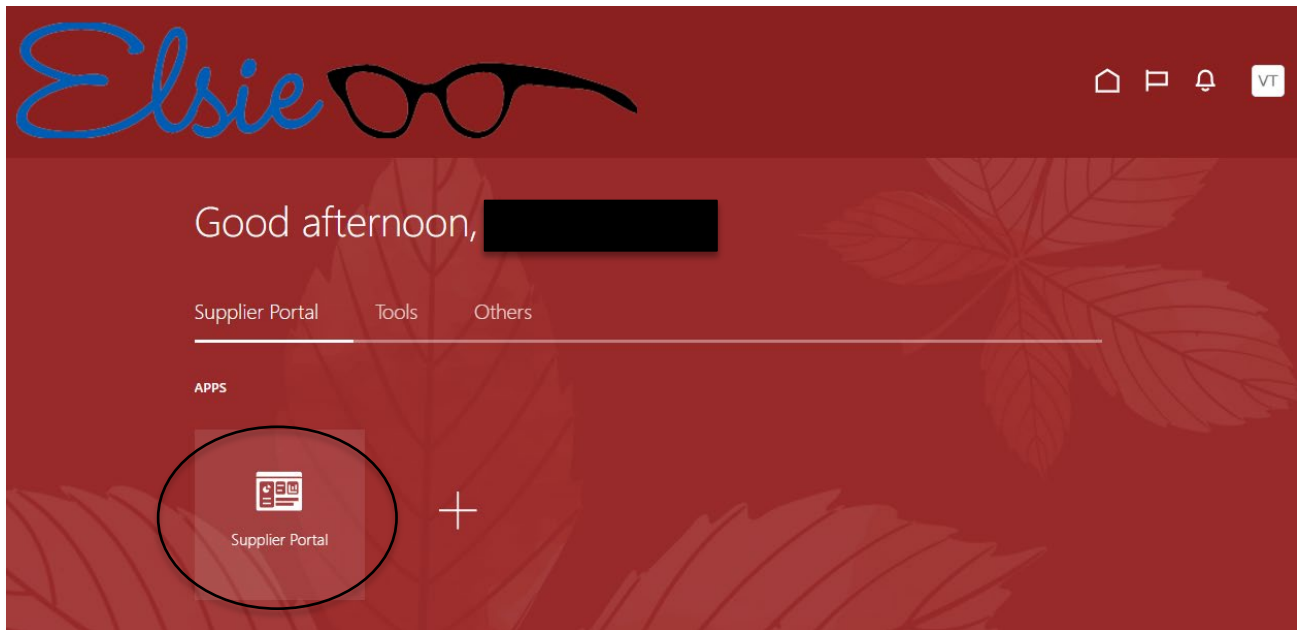
**NOTE:** The Oracle link will expire within 24 hours.

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).

A screenshot of a login form titled "Company Single Sign-On". It has a header "or" with a line. Below is a "User ID" field with a red box around it containing a redacted email address. Below that is a "Password" field with a red box around it containing masked characters. There is a "Forgot Password" link. A "Sign In" button is below the password field. At the bottom is a "Select Language" dropdown menu with "English" selected.

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



## Thank you for registering with EBMUD!

Once registered, the contact with the **Self-Service Administrator** role can make changes to the Company Profile at any time. Continue to the **Edit Supplier Profile** section of this document for instructions.

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](mailto:purchase@ebmud.com).

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## EDIT SUPPLIER PROFILE

- ☐ To make changes to your profile, log into the Supplier Portal and click on the "Manage Profile" link on the bottom of the Tasks pane

## Supplier Portal

Search Orders 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

No data available

#### Recent Activity

Last 30 Days

No data available

#### Transaction Reports


Last 30 Days

No data available

#### Supplier News

Welcome to East Bay Municipal Utility District Supplier Portal

- ☐ Click on the “Edit” button on the top of the page. A pop-up message will appear asking if you wish to continue, click “Yes”.

HomeCalendarNotificationsVT

**Company Profile** ?EditDone

Last Change Request111002

Requested ByTest, Vendor

Request StatusProcessed

Request Date9/26/24

Change Descriptiontest

[Organization Details](#)[Tax Identifiers](#)[Addresses](#)[Contacts](#)[Payments](#)[Business Classifications](#)[Products and Services](#)

### Warning

POZ-2130390 Making edits will create a change request for the profile. Do you want to continue?

Yes

No

- ☐ Enter a Change Description. Scroll through the tabs to review the information you've already entered.

Edit Profile Change Request: 111006

Delete Change Request

Review Changes

Save

Save and Close

Cancel

Change Description

Change Supplier Type

[Organization Details](#)[Tax Identifiers](#)[Addresses](#)[Contacts](#)[Business Classifications](#)[Products and Services](#)

Some fields can be updated directly by clicking on them.

Organization Details Tax Identifiers Addresses Contacts Business Classifications Products and Services

General

\* Supplier Name  Tax Organization Type

Supplier Number 901381 Status Active

Supplier Type  Attachments None +

Identification


D-U-N-S Number

National Insurance Number


Customer Number

Corporate Web Site

SIC

Other fields such as Addresses, Contacts, Business Classifications, and Products and Services will require you to click on the link or the pencil icon  to make changes. A smaller window will pop out, allowing you to make your desired changes. Once changes have been made, click "OK".

Organization Details Tax Identifiers Addresses Contacts Business Classifications Products and Services

Actions View Format +  Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
MAIN	375 11th Street, OAKLAND, CA 9460...		Ordering; Remit to		Active

Edit Address: MAIN

\* Address Name

\* Country

\* Address Line 1

Address Line 2

Address Line 3

City

State

Postal Code

County

Language

\* Address ☒ Ordering

Purpose ☒ Remit to

☐ RFQ or Bidding

Phone

Fax

Email

Inactive Date

Status Active

OK Cancel

☐ When all changes have been made, click "Save", and then "Review Changes".

[Delete Change Request](#)[Review Changes](#)[Save](#)[Save and Close](#)[Cancel](#)

- ☐ A summary of the changes will be displayed. If everything looks OK, click “Submit”. A confirmation message will appear. Click “OK.”

## Review Changes

[Edit](#)[Submit](#)[Cancel](#)

Change Description    Update name and change Supplier Type

### Organization Details

[View](#)[Format](#)[Freeze](#)[Detach](#)[Wrap](#)

#### Attribute

#### Changed From

#### Changed To

Supplier Name	Test Company	Test Company - ABC
Supplier Type	Contractor	Supplier



## Confirmation



Your profile change request 111007 was submitted for approval.

[OK](#)

The page will refresh, showing that the change request was submitted for approval. **Please allow 48 hours for Purchasing to review and approve the changes.** Click “Done” to finish.

## Company Profile ?

[Cancel Change Request](#)[Edit](#)[Done](#)

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

Last Change Request    111007

Requested By    Test, Vendor

Change Description    Update name and change Supplier Type

Request Status    Pending Approval

Request Date    9/26/24

[Organization Details](#)   [Tax Identifiers](#)   [Addresses](#)   [Contacts](#)   [Payments](#)   [Business Classifications](#)   [Products and Services](#)

You profile will be updated once the changes have been processed.

## Company Profile ?

[Edit](#)[Done](#)

Last Change Request    112002

Requested By    Test, Vendor

Change Description    Add AR Role

Request Status    Processed

Request Date    10/1/24

[Organization Details](#)   [Tax Identifiers](#)   [Addresses](#)   [Contacts](#)   [Payments](#)   [Business Classifications](#)   [Products and Services](#)

### General

Company    Test Company - ABC    Tax Organization Type    S Corporation  
Supplier Number    901381    Status    Active  
Supplier Type    Supplier    Attachments    None