TCH Supplier Portal Guide

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Registration

The following is a quick guide on how to best complete the required details for registering as supplier via the TCH Supplier Portal after receiving the registration link provided by Oracle Vendor Support. Please provide accurate details for all highlighted fields as shown in the highlighted fields below:

1. **Company Details**

   ![Company Details Section](image)

   **Company Details Section**

   - **Company** – Your organization’s name as shown on a valid and signed W-9. This is the name that should also be registered with the IRS. For non-US, this would be a W-8BEN form for individuals or W-8BEN-E form for organizations.
   - **Tax Organization Type** – There are several options to choose from, but this selection should also align with the selection indicated on the W-9 (box 3) or W-8BEN-E (box 4).
   - **Supplier Type** – please select the best option based on your organization
- **Corporate Web Site** – please enter your organization’s website, if applicable
- **D-U-N-S Number** – refers to an organization’s [Dun & Bradstreet](https://www.dnb.com/) (D&B) number, if applicable
- **Taxpayer ID** – can be found on W-9 (under Part I), W-8BEN (box 5) or W-8BEN-E (box 8). *For US tax ID’s only, please enter without dashes, spaces or any extra characters.
- **Business Purpose** – enter general purpose of business to be conducted with TCH

**Additional Information section**

- **TCH Contact Name** – provide the first and last name of the TCH employee you are or have been working with.
- **TCH Contact Email ID** – enter email of TCH employee (domain is @texaschildrens.org)
- **TCH Contact Phone Number** – enter TCH employee’s direct phone number

**Your Contact Information section**

- The person completing the supplier registration should enter their name and valid organizational email address in this section. This will also create an initial “Contact” for your organization that will show up in the Contacts section of the registration.

After completing this page, click red “Next” button at the top right-hand side of the screen.
2. Contacts

At this train stop, you will have the option to Create “+”, Edit “/”, or Delete “x” contacts prior to submitting the registration using the action buttons highlighted in the screenshot shown above. When editing or deleting contacts, be sure to first select the row you want to affect prior to clicking the action button. You can also access these actions from the Actions dropdown feature.

Creating/Editing a Contact

When creating/editing a contact, please take care to complete as much of the information as possible, including Job Title. If the contact, is or should be a key person of contact for your organization, be sure to select the box to the left of ✔ Administrative Contact. Multiple
contacts can be flagged as an Administrative Contact if needed. This person or persons will also be notified of the registration review outcome. *Please note that this should not be a TCH employee.

Supplier Portal User Account

If the new or existing Contact will need or should have a User Account to access the supplier portal for your organization, be sure to select the box to the left of Request User Account.

After all contacts have been created or edited as required, select OK or Create Another if you need to add an additional contact. Click the red “Next” button at the top right-hand side of the screen to save these details and move to the next train stop, Addresses.

3. Addresses

For the Addresses train stop, you have the option to Create “+”, Edit “✓”, or Delete “x” one or multiple addresses (main, ordering, remit to, etc) using the action buttons highlighted in the screenshot shown above. When editing or deleting contacts, be sure to first select the row you want to affect prior to clicking the action button. You can also access these actions from the Actions drop-down feature.

Creating/Editing an Address

Clicking the Create “+” or Edit “✓” buttons will open a pop-up box that can be used to provide details, as shown below.
**Address Name** – This field can be used to give the address being entered a specific name to indicate its purpose (Main, Ordering, Remit to, W-9, etc).

**Country** – Will default to United States. If another country is required, use the drop-down to search for alternate country. *When another country other than United States is selected the address fields provided will vary slightly from the screenshot shown above to accommodate the requirements of country selected.

**Address Line 1 / 2** – Enter address details as needed using line 1, if additional space is required use line 2.

**Zip Code** – Type in 5-digit zip code for the address being entered and hit the Tab key, this will open a pop-up box with options to choose from. Select the best zip code, city, county, state option and click OK. Based on your selection, the remaining address fields will be auto-populated.

**Address Purpose** – Any address entered has to be flagged with at least one of the following options *Ordering, Remit to, RFQ or Bidding*. If the address being entered serves multiple purposes, you have the ability to select a combination of these options as well.

**Phone / Fax** – Enter phone number best associated with the address being entered.

**Email** – If a specific email is associated with the address please provide or either a general customer service email for contact purposes.
After all addresses have been created or edited as required, select **OK** or **Create Another** if you need to add an additional address. Click the red “**Next**” button at the top right-hand side of the screen to save these details and move to the next train stop, *Business Classification*.

### 4. Business Classification

In this section, if none of the groups below are applicable, click the box just to the left of **✅ None of the classifications are applicable**. Otherwise, click the “+” to provide details/identify if your organization falls into one of the following classification groups. Fields available will vary based on classification selected:

- Hub Zone – Historically Underutilized Business
- Minority Owned
- Service-disabled Veteran Owned
- Small Business
- Texas Allowed
- Texas Non-Allowed
- Veteran Owned
- Woman Owned

Click the red “**Next**” button at the top right-hand side of the screen to save these details and move to the next train stop, *Products and Services*. 

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This section will allow you to provide TCH details on your organization’s products and/or services. To begin adding these details, click the action button to open the pop-up box for selection(s). In the box shown below, you have the ability to search for the necessary product(s) and/or service(s) via the Category Name or Description boxes. Alternatively, you can use the scroll feature to search for and click into the Category names shown to find the best Product(s) and/or Services(s).
When you have identified the best category or categories for your organization by clicking the box(es) next to the name, click **Apply** to add your selection(s) to the registration and **OK** to close this box.

Click the red “**Next**” button at the top right-hand side of the screen to save these details and move to the next train stop, **Review**.

6. **Review**

On this screen you have the opportunity to review all the details provided in the prior sections:

- Company Details
- Contacts
- Addresses
- Business Classifications
- Products and Services

Please take a moment here to review all information provided to ensure completeness. If any changes need to be made, simply select the section that requires the change from the train stops shown at the top of the page:

If no additional changes are required, click the red “**Register**” button to transmit the registration details to TCG for review.
Logging In

After receiving the system generated email confirming that your organization has been approved as a supplier, you should be able to login to the portal via the following link. The login screen will look as shown below.

Website: TCH Supplier Portal

**Sign In**

**Oracle Applications Cloud**

Enter your User ID and unique password, then click the **Sign In** button.

**User ID** – this will be the email address used during the initial registration of your organization.

**Password** - the password chosen by the owner of the email used for the USER ID

*Note: If additional Contacts have been added from your organization that require user accounts, they will individually receive two system generated emails. One confirming that they have been added as a contact, and another with a password reset link.*
Navigation

Once you have successfully logged into the portal, you will be greeted with the following Welcome screen:

![Welcome screen](image)

From this screen, you will need to click the **Supplier Portal** icon as highlighted in the above screenshot. This will take you to the next screen (shown below) where you’ll find a list of tasks that can be executed based on your level of access.
On this screen, it is broken out into three major sections.

1. **Search** - Here you have the ability to execute a quick search for orders, invoices, payments, and more using the drop-down.
2. **Tasks** - This section offers another method of viewing and/or managing various features using the self-explanatory hyperlinks.
3. **Dashboard and News** - Displays a quick overview of items requiring your attention, recent activity, transaction reports, and news from TCH.

Additionally, there is a bell icon in the top right of your screen. If there are pending actions items that require your attention, you will see a red circle with a number indicating how many items require your attention.
See below for a quick overview of the Tasks section:

Orders

- Manage Orders – here you have the ability to search for and view orders and order status.

- Manage Schedules – similar to orders, you have the ability to search for and view schedules, if applicable.
Invoices and Payments

- View Invoices

On this screen you can search for invoices submitted to TCH for payment. Please note that you have to provide a response for at least one of the following fields before you can execute a search.

- **Invoice Number**
- **Supplier**
- **Purchase Order**

You may also use the additional fields in the right column to narrow your search. When your search is executed, the system will return a response below the *Search Results* section.
View Payments

On this screen you can search for payments made by TCH to your organization. Please note that you have to provide a response for at least one of the following fields before you can execute a search.

- **Payment Number**
- **Supplier**

You may also use the additional fields below Payment Number and Supplier to help narrow your search. When your search is executed, the system will return a response below the Search Results section.
Negotiations

- View Active Negotiations

If applicable, you have the ability to search for active negotiations with TCH. Please note that you have to provide a response for at least one of the following fields before you can execute a search.

- **Negotiation**
- **Title**
- **Negotiation Close By**
- **Invitation Received**

Any additional fields can be used to better define your search criteria. When your search is executed, the system will return a response below the *Search Results* section.
If applicable, you have the ability to manage and search Responses tied to negotiations with TCH. Please note that you have to provide a response for at least one of the following fields before you can execute a search.

- **Negotiation Title**
- **Negotiation**
- **Response**
- **Response Status**

When your search is executed, the system will return a response below the *Search Results* section.
Qualifications

- Manage Questionnaires

If applicable, occasionally TCH will transmit a questionnaire to your organization to request details and/or information to help better understand your organization.

If applicable, you have the ability to manage and search Responses tied to negotiations with TCH. Please note that you have to provide a response for at least one of the following fields before you can execute a search. Multiple fields can be completed to narrow your search.

- **Questionnaire Title
- ** Questionnaire
- **Supplier Site
- ** Status
- **Response Due Date
- **Supplier Contact

When your search is executed, the system will return a response below the Search Results section.
• View Qualifications

If TCH conducts an Assessment and/or Qualification and chooses to share with your organization, the details will be shown under this task selection.
Company Profile

- Manage Profile

This particular task is only available to select contacts within your organization who are, or should be authorized to manage company details and sensitive information.

The Manage Profile task allows a user to view and make changes to existing company details broken out as follows:

- Organization Details
  - Contains general information about your organization as your organization’s supplier number with TCH.
- Tax Identifiers
  - Show relevant tax details
- Addresses
  - Lists your organization’s addresses (active and inactive) used for ordering, remittance, and/or RFQ
- Contacts

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- Shows contacts (active and inactive) for your organization. Some contacts may or may not have an associated User Account to access the Supplier Portal
  - Payments
    - This section shows default payment method and any associated banking details provided for Electronic (ACH) payments
  - Business Classifications
    - If applicable, this section is used to identify your organization’s classification (HUB, Women Owned, Minority Owned, Veteran Owned, etc)
  - Products and Services
    - This section is used to provide data on the type(s) of product(s) and/or service(s) your organization provides.