

## Inviting New Suppliers

This QRG addresses how to create a new supplier profile when the supplier you want to invite to a sourcing event is **not** in the system. There are two parts to this process: 1) Checking to see if the supplier is in CalUsource; 2) Adding new suppliers to CalUsource.

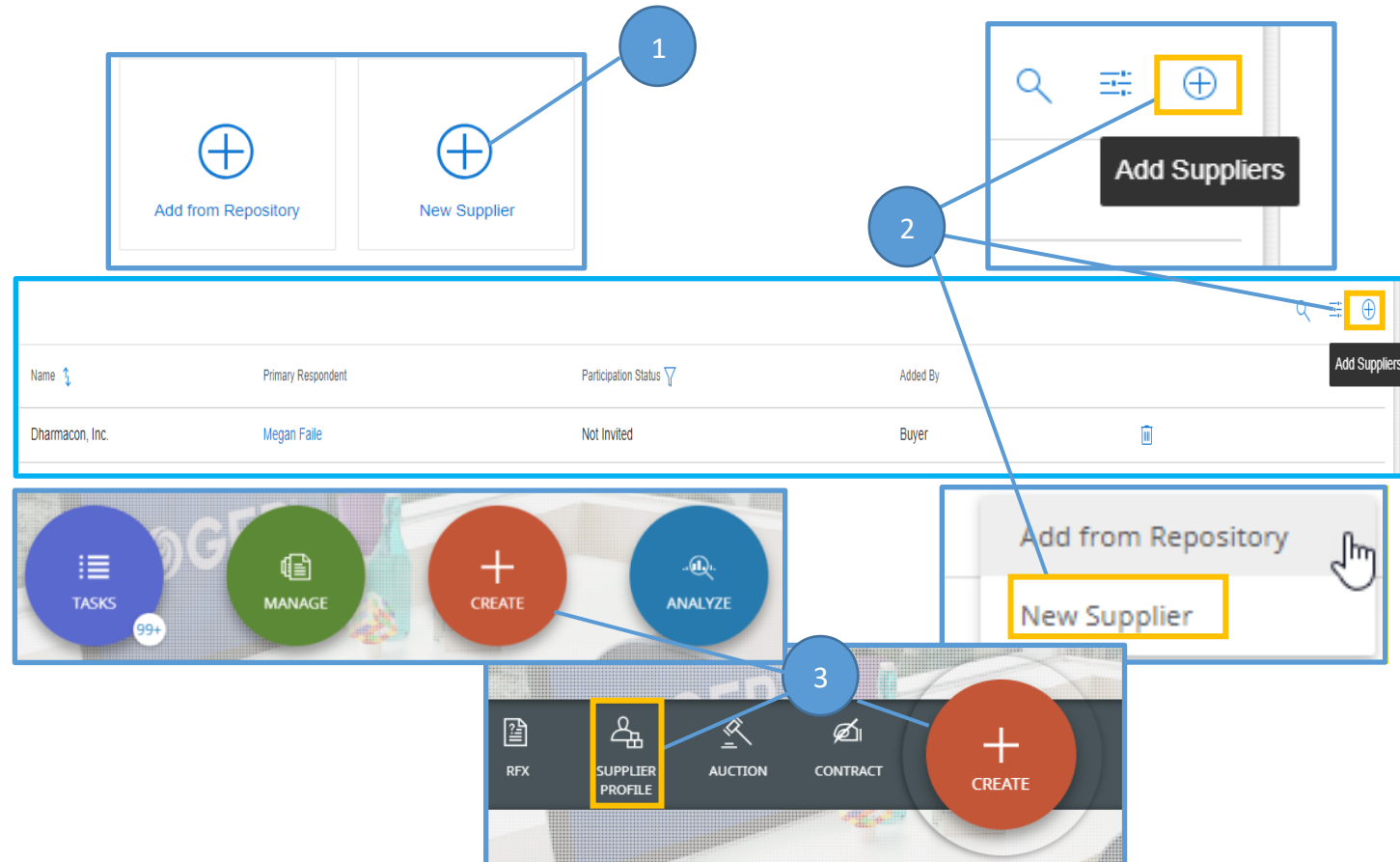
### Check to see if Supplier is already in the system

Before creating a new supplier, make sure the supplier does **not** already exist in system. This helps minimize duplicate supplier records in CalUsource.

### How to create a new Supplier

There are three ways to start the process of creating a new CalUsource supplier.

1. Select **New Supplier** in the **Supplier section** if *there are no* suppliers are listed in this event.
2. Click the **+ icon** in the right of the **Supplier section** and then **New Supplier** if *there are* suppliers listed in this event.
3. Click create from the **Main Menu** and then **Supplier Profile** from the **Create menu**.



## 4. Fill in Supplier's **BASIC DETAILS**:

- **Supplier's Legal Name:** The name that will be referenced in email communications and searches.
- **Category:** Select one or more categories of products and services the Supplier provides.
- **Organization Entity:** Choose 'Procurement'.
- **First and Last Name:** Name of the Supplier Contact.
- **Business Phone Number:** Supplier Contact phone number
- **Contact Email:** Supplier Contact email address.
- **Send Invitation:** Always check this checkbox.
- **Supplier Managers:** Enter a CalUsource user's name (e.g. your name) who has permission to manage suppliers. More than one Supplier Manager can be added.

## 5. Click **Submit**.

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ADD SUPPLIER

BASIC DETAILS

Supplier's Legal Name

Category  
DRUGS & PHARMACEUTICAL PRODUCTS

Choose Organization Entity

First Name

Last Name

Business Phone Number Extn.

Contact Email  Send Invitation

Supplier Managers

RESET

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CANCEL SUBMIT

CANCEL SUBMIT

### Tips for adding a Primary Contact

- You can add a Primary Contact on the Contact Information section of the Supplier Profile (in the Supplier Repository) by checking a name that displays there or adding a new name and checking it.

### What happens after you have added the Supplier

- If the **Send Invitation** checkbox is checked, the Supplier contact will receive an email invitation at the email address entered above. Selecting the link in the email will direct them to a web page where they can register and create a login account.
- Once the account has been created, they will receive a second email with a link for account activation. Clicking the link will activate their account and allow them to log in to the site.
- The Supplier's status has now changed from **Invited** to **Registered**.
- This requires the Supplier go through an internal review and approval process (24-hour lead-time).
- While the Supplier is being approved, a contract can still be authored, but it cannot be sent out for Supplier review until the Supplier has been approved and added to the contract.

### Tips for Sourcing events

- Both **Invited** and **Registered** Suppliers can be added to sourcing events and invited to bid.
- Only **Registered** Suppliers will be able to sign-in to bid.

### Tips for Contracts

- To be added to a contract, a Supplier must be in **Approved** or **Normalized** status.