

# PROCUREMENT: Requesting New Suppliers

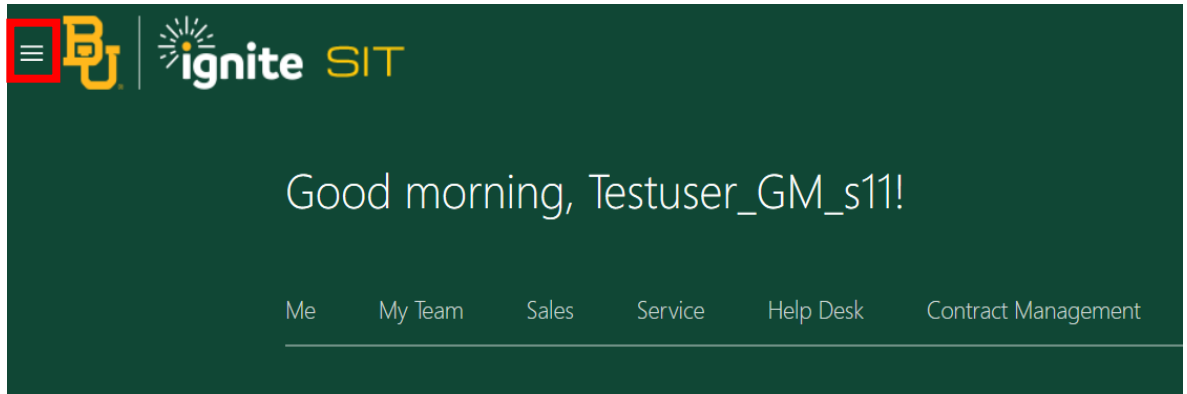
## Overview

- I. This job aid is intended for Department Approvers that must request registration of a new supplier.
  - a. Please note: It is recommended to utilize the Marketplace and existing contracted suppliers for most Baylor University ordering. If there is not an existing supplier arrangement already in place for the goods or services requested, refer to this job aid to request registration of a new supplier.
  - b. For questions related to suppliers and sourcing, contact Procurement.

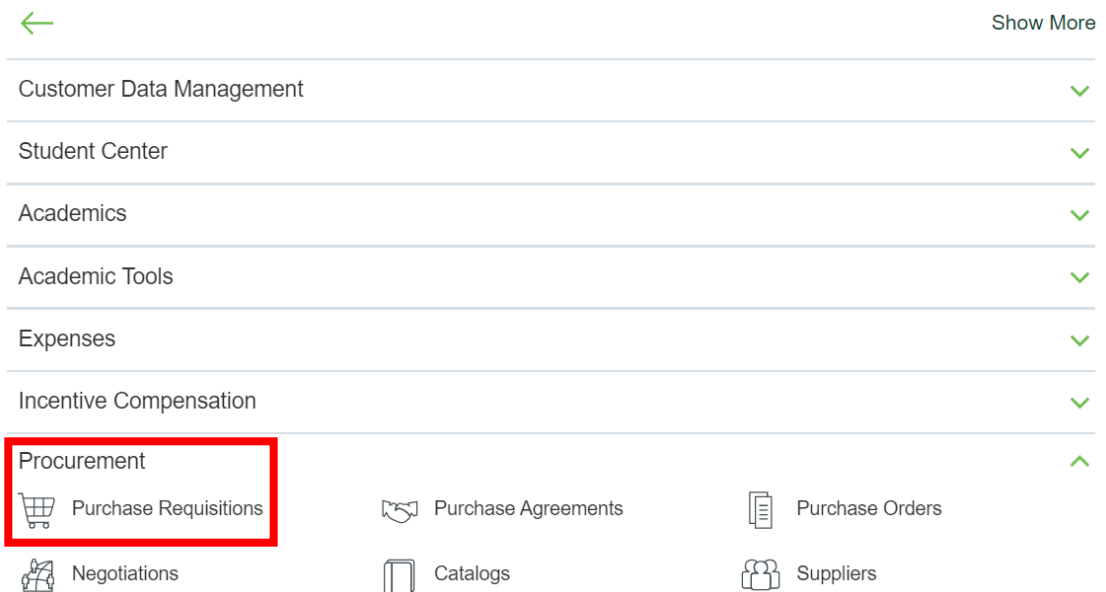
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## I. Navigate to Requisition Page

- I. You can access the **Purchase Requisitions** task in two ways:
  - a. (Option I) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

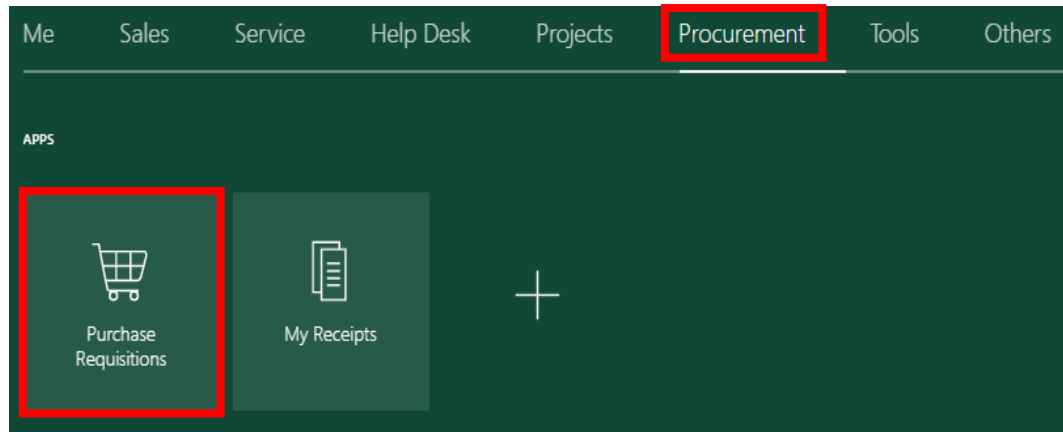


- b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



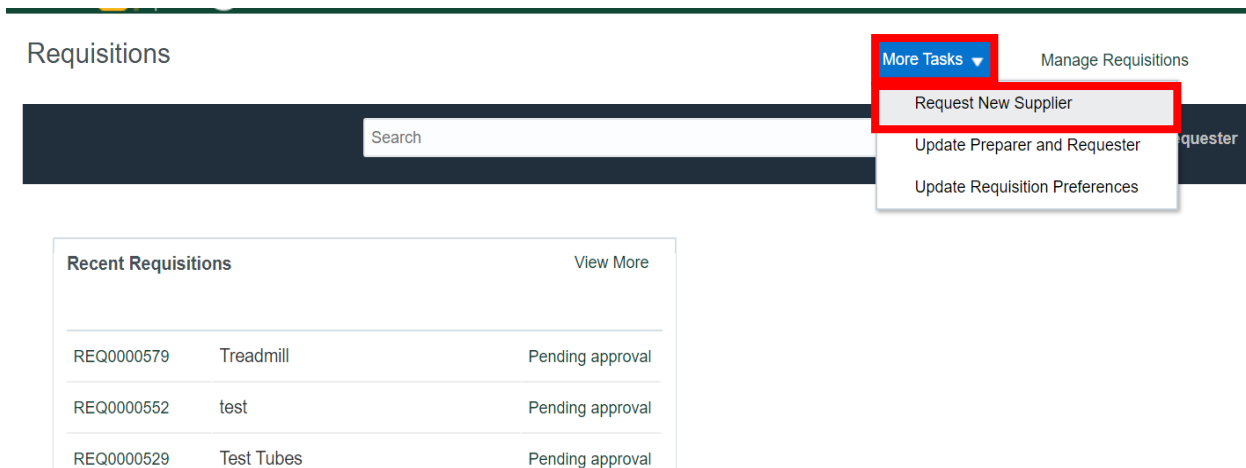
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- c. (Option 2) Under the **Procurement** heading on the home page, you can scroll down and click on the **Purchase Requisitions** tile.



## 2. Requesting New Suppliers

- I. From the **More Tasks** dropdown, select **Request New Supplier**.



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2. You will be redirected to the Request New Supplier screen. You will enter the

## Registration Details:

- a. **\*Company:** Name of the company or individual you are requesting to add
- b. **\*Request Reason:** Use the dropdown to select an option; why you are submitting the new supplier request
- c. **Justification:** Justify why are you unable to use an existing supplier. Describe the goods or services being purchased from the supplier.

### Request New Supplier

Registration Details

\* Company

\* Request Reason

Justification

3. Enter the Company Details:

- a. **\*Tax Organization Type:** select the appropriate option from the dropdown
- b. **Supplier Type:** select type of supplier from dropdown
- c. **D-U-N-S Number:** a unique nine-digit identifier for businesses
- d. **Tax Country:** country where supplier pays taxes
- e. **Taxpayer ID:** an identification number used by the IRS. Enter number without dashes. This field will assist in identifying duplicate suppliers.
- f. **Tax Registration Number:** use this field for the international tax ID, if the entity/individual is international
- g. **Attachments:** include the following as attachments to the supplier request,
  - i. **Tax documentation (required)** - typically a W-9 or W-8
  - ii. **Direct Deposit/Wire documentation:** documentation from the supplier identifying their direct deposit or wire information. Baylor's direct deposit and wires forms can be found [here](#).

### Company Details

\* Tax Organization Type

Supplier Type

Corporate Web Site

Attachments None +

D-U-N-S Number

Tax Country

Taxpayer ID

Tax Registration Number

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4. Under the **Contacts** section, click the + icon.

**Contacts**

Actions ▾ View ▾ Format ▾ **+** ✎ ✕ 📄 Freeze 📄 Detach ↩ Wrap

---

**Name**

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No data to display.

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Columns Hidden 7

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5. Enter the following information:
- Salutation**
  - \*First Name**
  - \*Last Name**
  - Job Title**
  - \*Email:** the email included here is the email to which the PO will be sent.
  - Phone Number**

## Create Contact

Salutation ▾

\* First Name

Middle Name

\* Last Name

Job Title

Administrative contact

Phone  ▾

Mobile  ▾

Fax  ▾

\* Email

6. **DO NOT** click the **checkbox** for **Request user account**. Baylor is not currently creating user accounts for suppliers.

## ▾ User Account

Request user account

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7. Select **OK** to close. If you would like to create an additional contact, select **Create Another**. Enter contact information for PO dispatch and payment remittance purposes.

Roles

Role	Description
No data to display.	

Actions ▼ View ▼ Format ▼ ✕ Freeze Detach Wrap

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

8. Navigate to the **Addresses** section and select the **+** icon.

**Addresses**

Address Name	Address
No data to display.	

Actions ▼ View ▼ Format ▼ **+** ✕ Freeze Detach Wrap

Columns Hidden 3

9. Enter the following details:
  - a. **\*Address Name:** Enter the first line of the address as the address name. You will enter this again as **Address Line 1**.
  - b. **Address Information**, which includes:
    - i. **Country:** United States
    - ii. **Address Line 1 – 3:** Vendor address, including Street Number, Street Name, etc.
    - iii. **Postal Code:** Vendor postal code (enter **Postal Code** first to auto-populate the **City, County, and State**)
    - iv. **City:** Vendor city
    - v. **County:** Vendor county
    - vi. **State:** Vendor state

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- c. **\*Address Purpose:** you may select more than one
  - i. **Ordering:** to place purchase orders. If ordering is not selected, the supplier will not appear for a Requisition.
  - ii. **Remit to:** to remit payments
  - iii. **RFQ or Bidding:** request for quotation

Create Address

\* Address Name

\* Country United States

\* Address Line 1

Address Line 2

Address Line 3

\* City

\* County

\* State

\* Postal Code

\* Address Purpose

Ordering

Remit to

RFQ or Bidding

Phone 1

Fax 1

Email

10. Under **Address Contacts**, click the **Actions** dropdown and click **Select and Add**.

## Address Contacts

Select the contacts that are associated with this address.

Actions View Format X [icon] Freeze Detach Wrap

Remove

Select and Add

Columns Hidden 4

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11. Highlight the contact you previously created and select **OK**.

Select and Add: Contacts ✕

▲ Search

Name  Job Title

View ▼ Format ▼  Wrap

Name	Job Title	Email	Phone
Bear, Betty		baylor@edu	

Rows Selected 1 Columns Hidden 1

12. If done, click **OK**. If you have other addresses, select **Create Another**.

▲ 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
Bear, Betty		baylor@edu	—	✓

Columns Hidden 4

13. **Business Classifications** is an optional field. If desired, click the + to input the information and enter the required fields.

Business Classifications

None of the classifications are applicable

Actions ▼ View ▼ Format ▼   Freeze  Detach  Wrap

* Classification	Subclassification	Ce
<input type="text"/>		



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14. **Bank Accounts** is a recommended field. Click the + and enter the following details.

Once completed select **OK**.

- Country:** country of bank account
- Bank:** bank name
- Branch:** bank routing number
- Account Number**
- IBAN:** use for international wire payments
- Note to Approver:** Enter any additional remittance information here This could include remittance email addresses or international SWIFT numbers.

Bank Accounts

Actions View Format   Freeze Detach Wrap

Account Number

No data to display.

Columns Hidden 8

**Create Bank Account**

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

* Country	United States	IBAN	
Bank	BANK OF AMERICA N A	Currency	
Branch	071103619		
* Account Number	111111111		

**Additional Information**

Account Name		Agency Location Code	
Alternate Account Name		Account Type	
Account Suffix		Description	
Check Digits			

**Comments**

**Note to Approver** Remittance emails can be included here.  
Foreign SWIFT codes can be included here.

Create Another OK Cancel



Products and Services Categories

Actions View Format  Freeze Detach Wrap

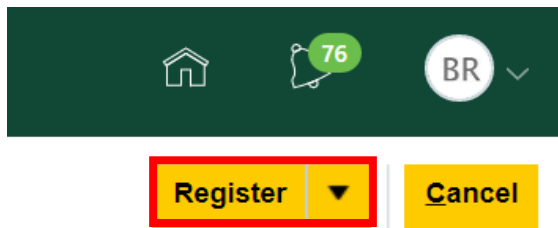
Category Name

Description

No data to display.

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16. Select **Register**.



17. On the pop-up select **OK**. The supplier has been sent for approval to the Supplier Managers.

