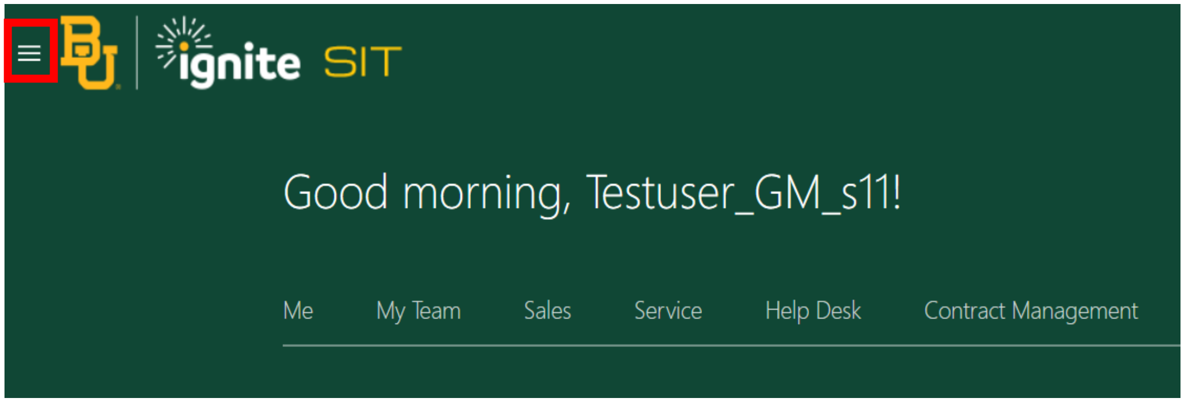
PROCUREMENT: Requesting New Suppliers

Overview

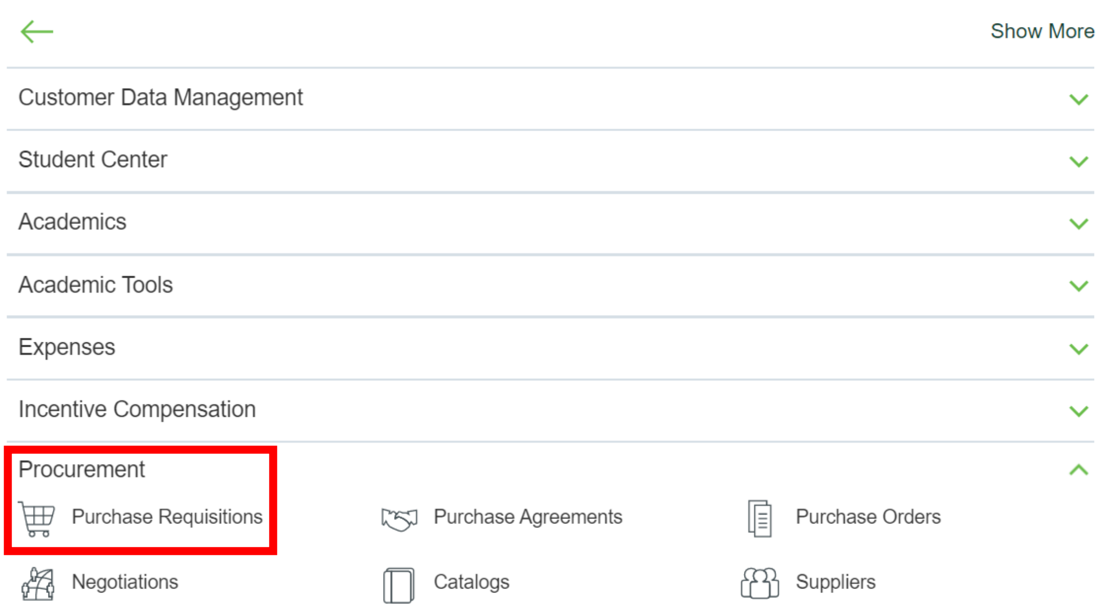
1. This job aid is intended for Department Approvers that must request registration of a new supplier.
    a. Please note: It is recommended to utilize the Marketplace and existing contracted suppliers for most Baylor University ordering. If there is not an existing supplier arrangement already in place 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.

1. Navigate to Requisition Page

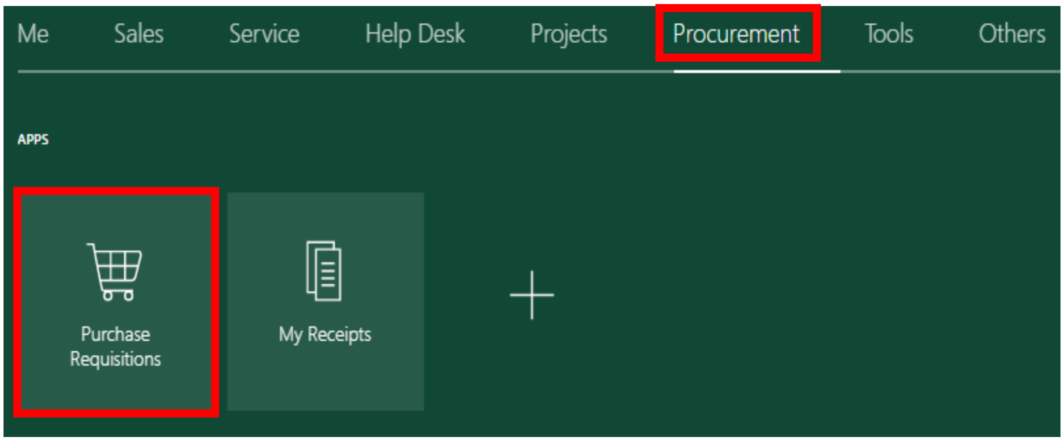
1. You can access the **Purchase Requisitions** task in two ways:
   a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



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

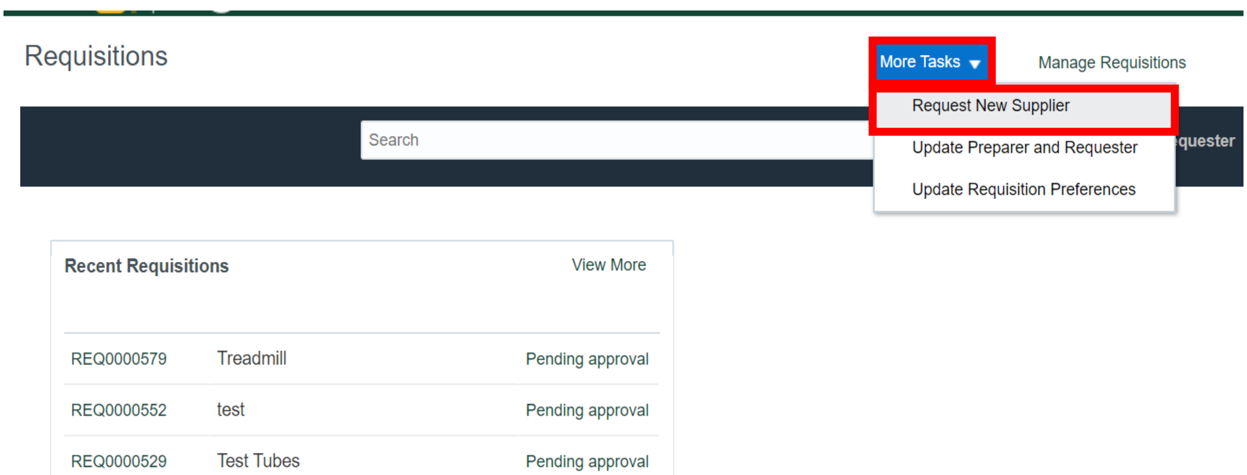


c. (Option 2) Under the **Procurement** heading on the home page, you can scroll down and click on the **Purchase Requisitions** tile.



2. Requesting New Suppliers

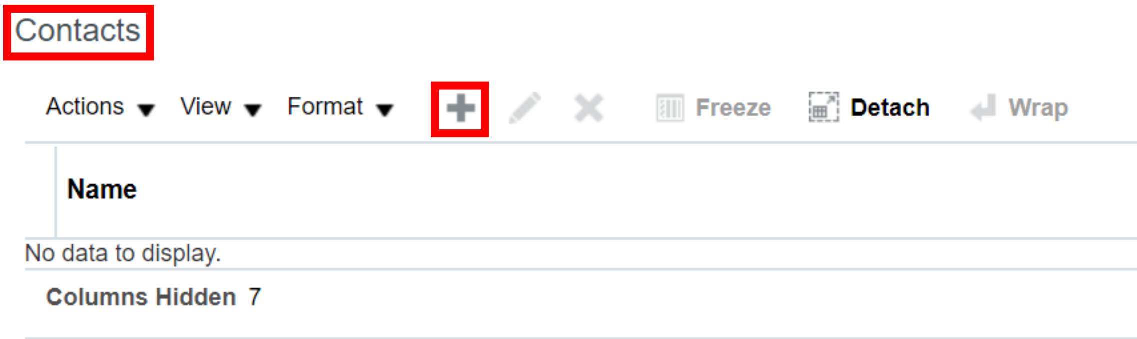
1. From the **More Tasks** dropdown, select **Request New Supplier**.



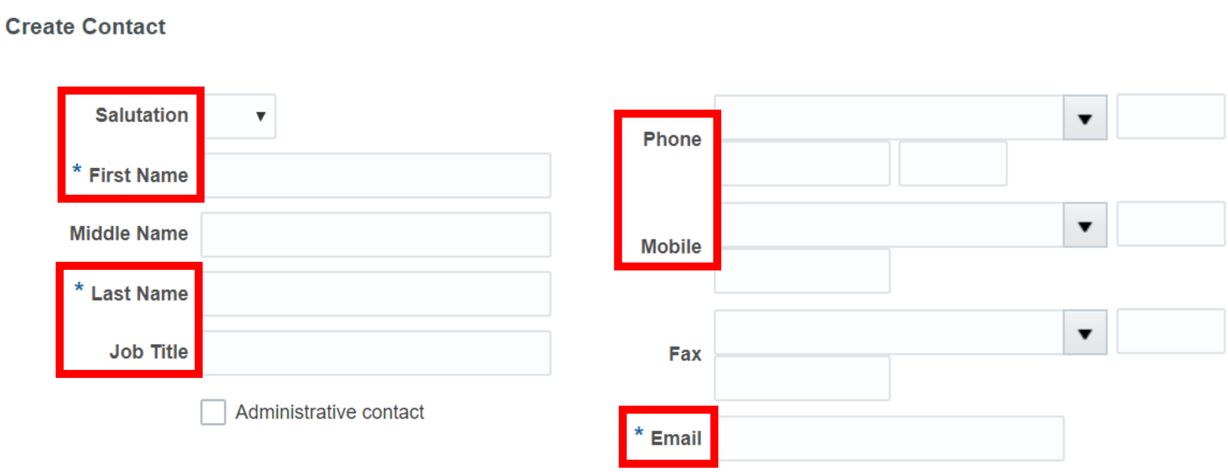
2. You will be redirected to the Request New Supplier screen. You will enter the **Registration Details**:
    a. ***Company**: Name of the company or individual you are requesting to add
    b. ***Request Reason**: Use the dropdown to select an option; why you are submitting the new supplier request
    c. **Justification**: Justify why are you unable to use an existing supplier. Describe the goods or services being purchased from the supplier.

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.

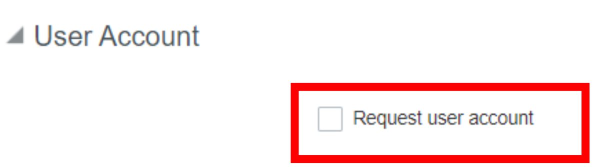
4. Under the **Contacts** section, click the **+** icon.



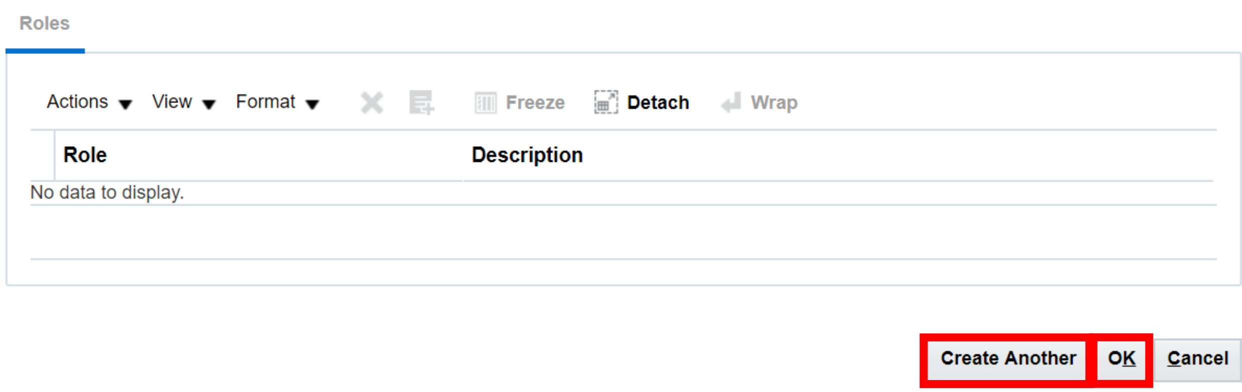
5. Enter the following information:
    a. **Salutation**
    b. ***First Name**
    c. ***Last Name**
    d. **Job Title**
    e. ***Email:** the email included here is the email to which the PO will be sent.
    f. **Phone Number**



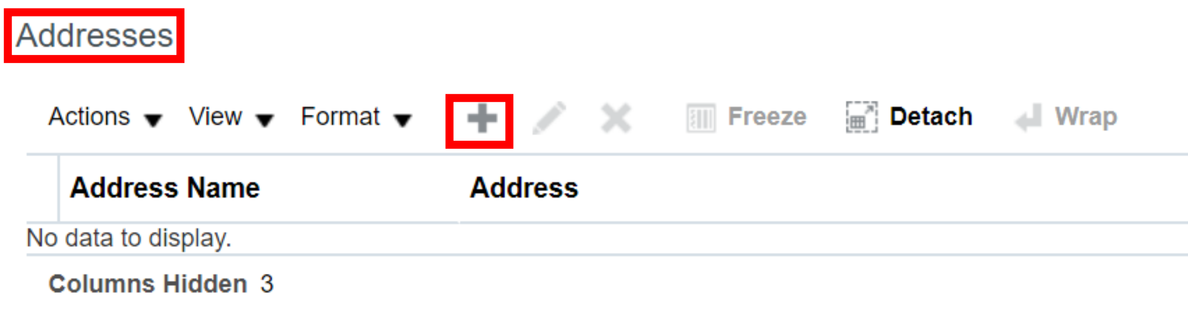
6. **DO NOT** click the **checkbox** for **Request user account**. Baylor is not currently creating user accounts for suppliers.



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.

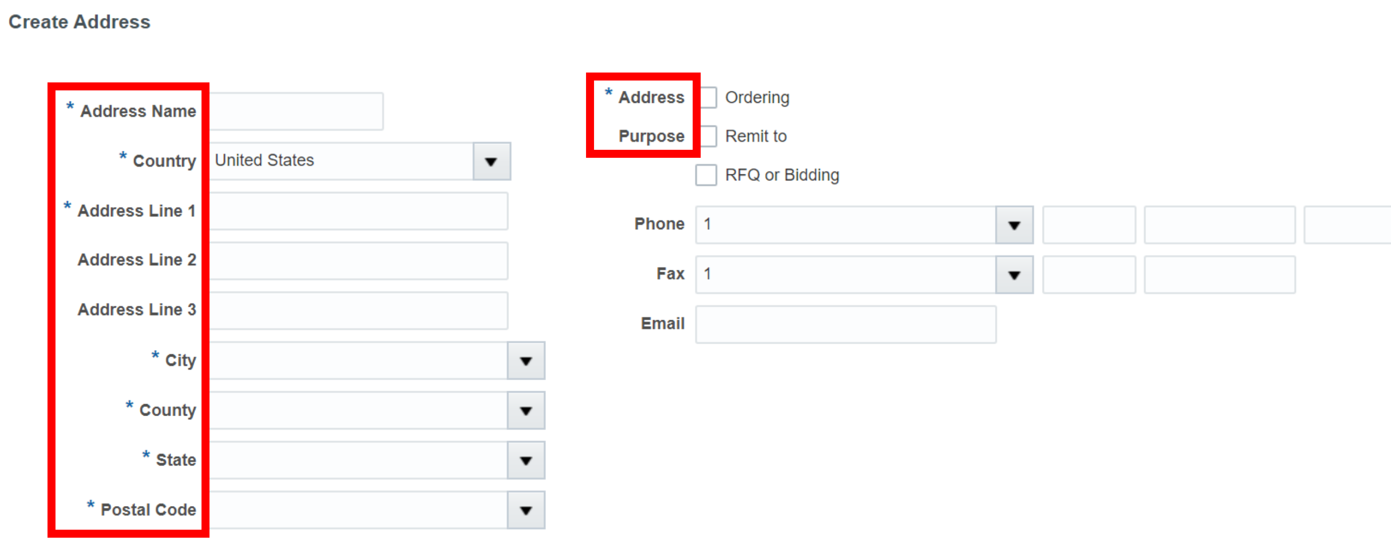


8. Navigate to the **Addresses** section and select the **+** icon.

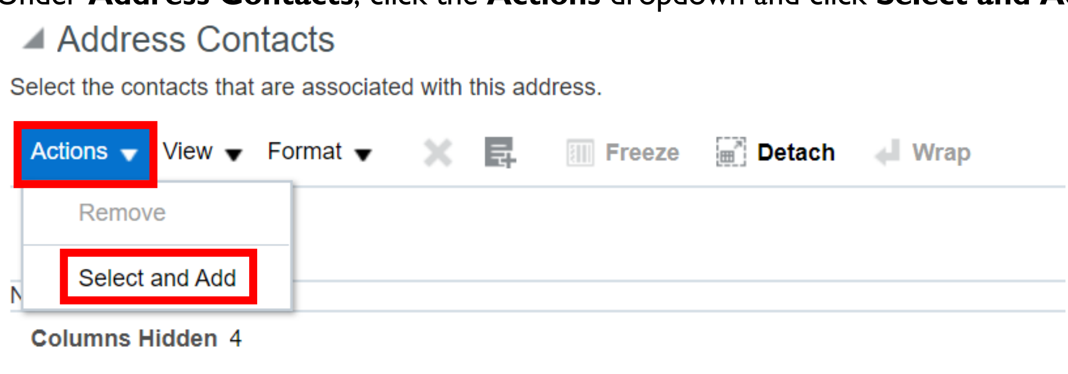


9. Enter the following details:
   a. ***Address Name:** Enter the first line of the address as the address name. You will enter this again as **Address Line 1**.
   b. **Address Information**, which includes:
      i. **Country:** United States
      ii. **Address Line 1 – 3:** Vendor address, including 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

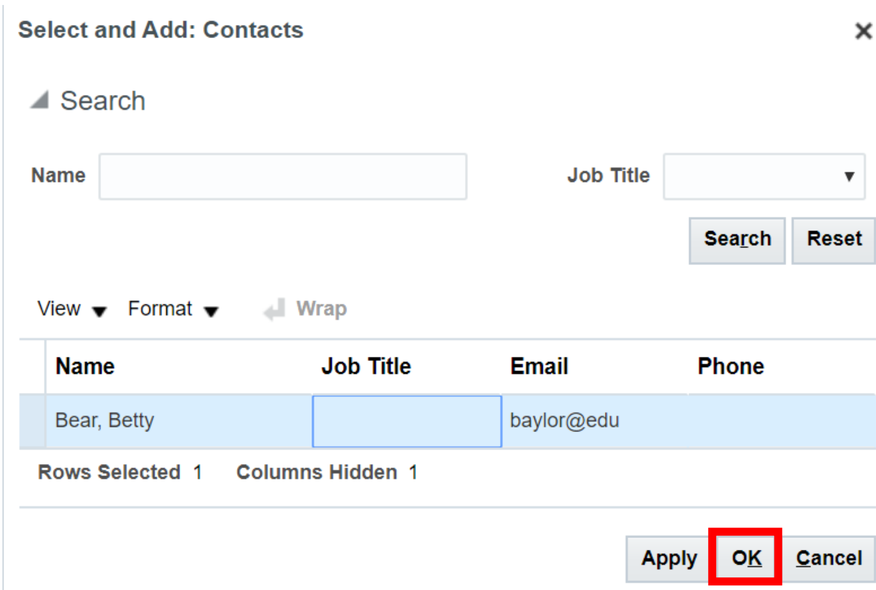
c. ***Address Purpose**: you may select more than one
   i. **Ordering**: to place purchase orders. If ordering is not selected, the supplier will not appear for a Requisition.
   ii. **Remit to**: to remit payments
   iii. **RFQ or Bidding**: request for quotation



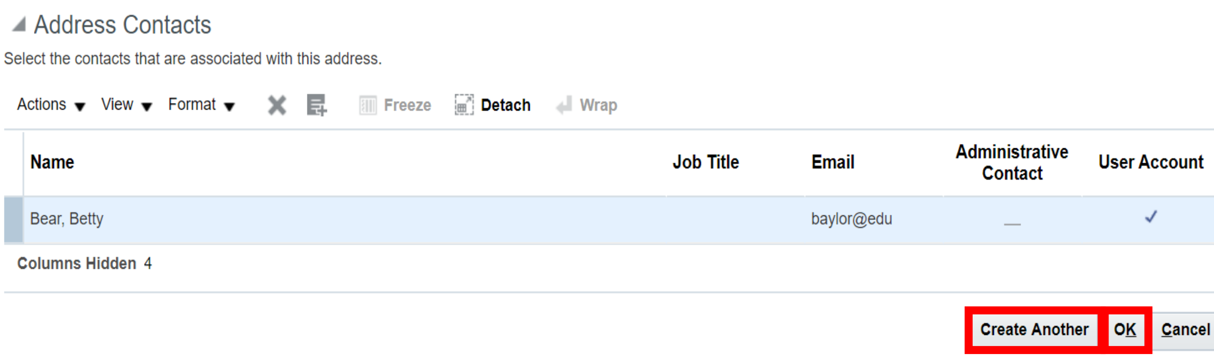
10. Under **Address Contacts**, click the **Actions** dropdown and click **Select and Add**.



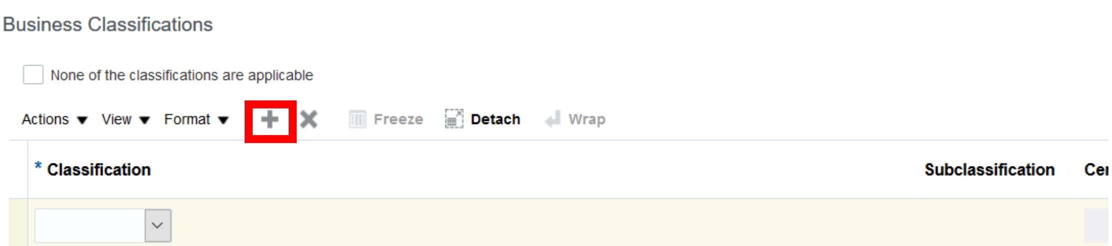
11. Highlight the contact you previously created and select **OK**.



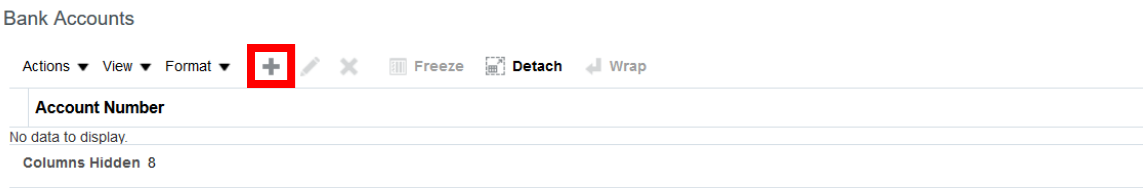
12. If done, click **OK**. If you have other addresses, select **Create Another**.

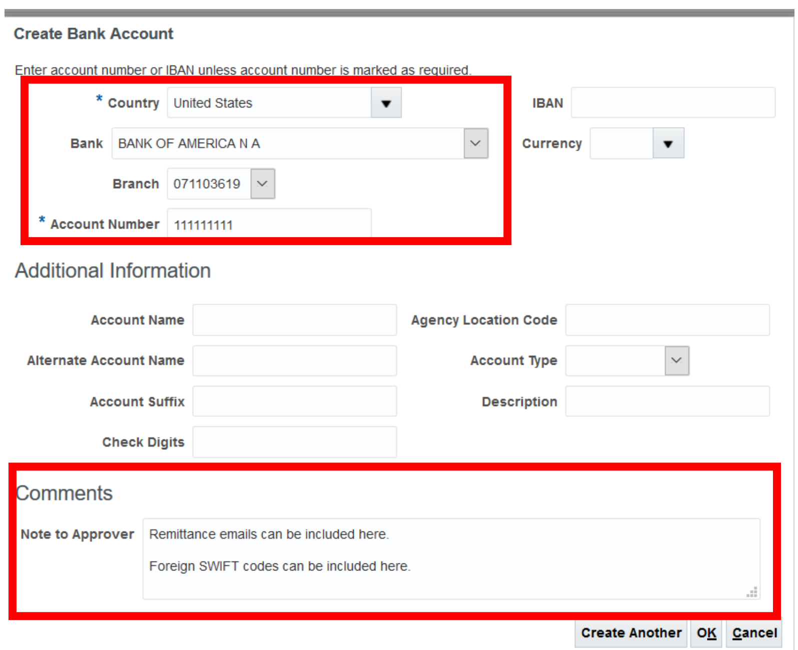


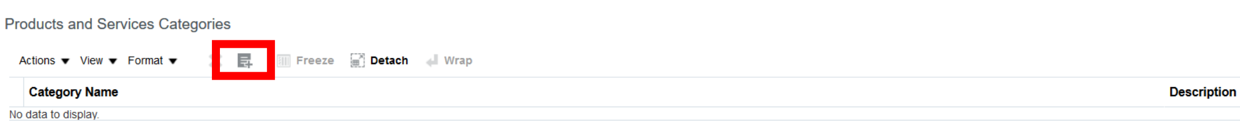
13. **Business Classifications** is an optional field. If desired, click the + to input the information and enter the required fields.



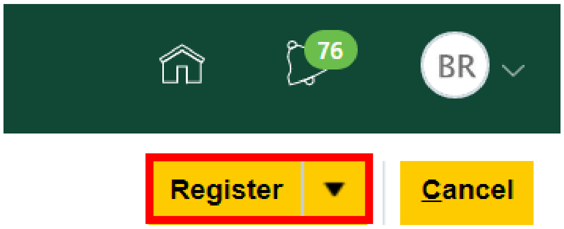
14. **Bank Accounts** is a recommended field. Click the + and enter the following details. Once completed select **OK**.
    a. **Country:** country of bank account
    b. **Bank**: bank name
    c. **Branch:** bank routing number
    d. **Account Number**
    e. **IBAN**: use for international wire payments
    f. **Note to Approver**: Enter any additional remittance information here This could include remittance email addresses or international SWIFT numbers.







16. Select **Register**.



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