

PROCUREMENT: Requesting New Suppliers

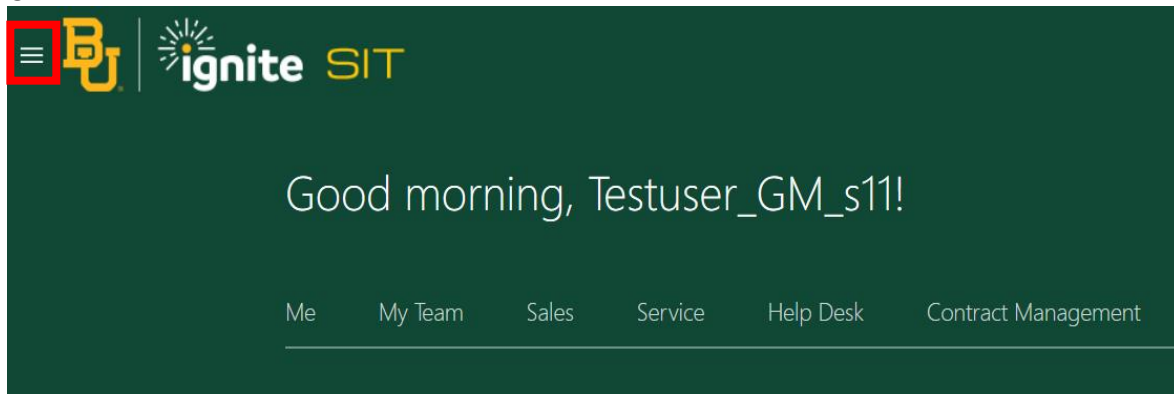
Overview

- 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

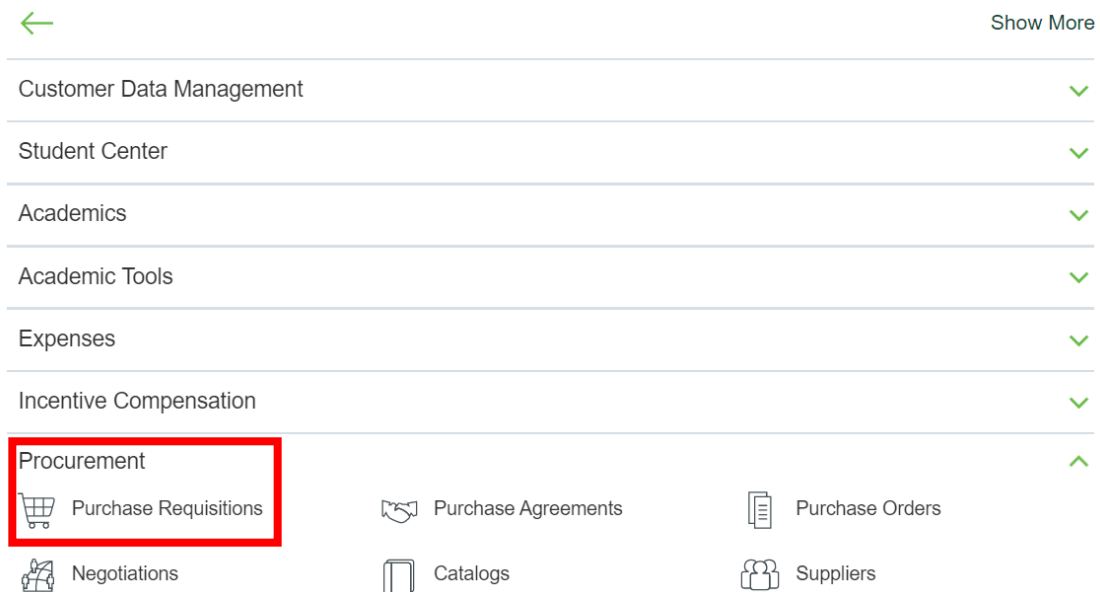
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I. Navigate to Requisition Page

- 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.

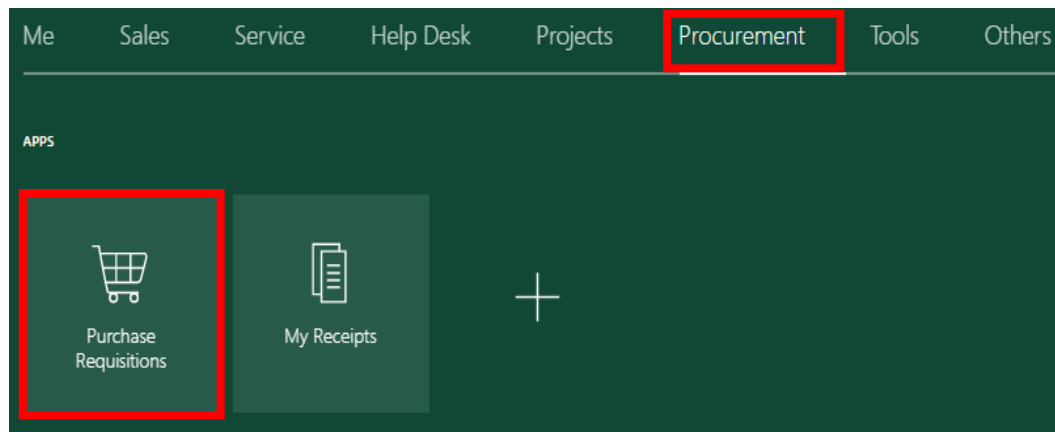


- b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



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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

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

The screenshot shows the 'Requisitions' page. At the top, there is a search bar and a 'More Tasks' dropdown menu (highlighted with a red box). The dropdown menu is open, showing the following options: 'Request New Supplier' (highlighted with a red box), 'Update Preparer and Requester', and 'Update Requisition Preferences'. To the right of the dropdown menu, there is a 'Manage Requisitions' link. Below the search bar, there is a table titled 'Recent Requisitions' with a 'View More' link.

Recent Requisitions		View More
REQ0000579	Treadmill	Pending approval
REQ0000552	test	Pending approval
REQ0000529	Test Tubes	Pending approval

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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

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
- 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

No data to display.

Columns Hidden 7

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 **Create 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**.

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

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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
 - ii. **Remit to:** to remit payments
 - iii. **RFQ or Bidding:** request for quotation

Create Address

<p>* Address Name <input type="text"/></p> <p>* Country United States ▼</p> <p>* Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Address Line 3 <input type="text"/></p> <p>* City <input type="text"/> ▼</p> <p>* County <input type="text"/> ▼</p> <p>* State <input type="text"/> ▼</p> <p>* Postal Code <input type="text"/> ▼</p>	<p>* Address Purpose <input type="checkbox"/> Ordering <input type="checkbox"/> Remit to <input type="checkbox"/> RFQ or Bidding</p> <p>Phone 1 <input type="text"/> ▼ <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Fax 1 <input type="text"/> ▼ <input type="text"/> <input type="text"/></p> <p>Email <input type="text"/></p>
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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

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

Select and Add: Contacts X

Search

Name Job Title Search Reset

View Format Wrap

Name	Job Title	Email	Phone
Bear, Betty		baylor@edu	

Rows Selected 1 Columns Hidden 1

Apply OK Cancel

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 X [icon] Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	User Account
Bear, Betty		baylor@edu	—	✓

Columns Hidden 4

Create Another OK Cancel

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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 **+** X Freeze Detach Wrap

* Classification	Subclassification	Certifying Agency
<input type="text"/>		

14. **Bank Accounts** is an optional field. If desired, 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 **+** X 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	<input type="text"/>
Bank	BANK OF AMERICA N A	Currency	<input type="text"/>
Branch	071103619		
* Account Number	111111111		

Additional Information

Account Name	<input type="text"/>	Agency Location Code	<input type="text"/>
Alternate Account Name	<input type="text"/>	Account Type	<input type="text"/>
Account Suffix	<input type="text"/>	Description	<input type="text"/>
Check Digits	<input type="text"/>		

Comments


Note to Approver

Remittance emails can be included here.

Foreign SWIFT codes can be included here.

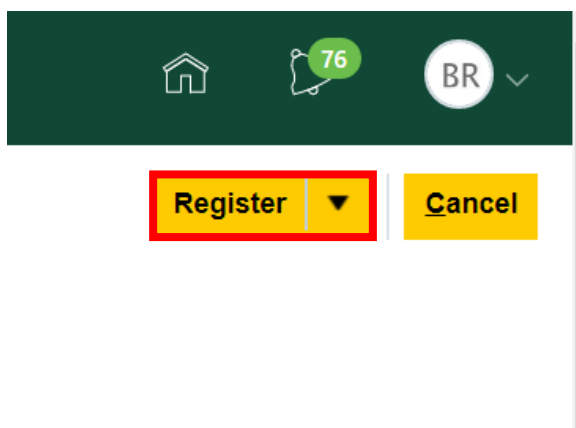
Create Another OK Cancel

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15. **Products and Services** is an optional field. If desired, click the  icon to input the information and enter the required fields.



16. Select **Register**.



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

