SUPPLIER REQUEST TRAINING GUIDE

New Supplier Request Instructions

To request registration of a **NEW** supplier, click the link below to Start a **New Supplier Request**.

A **new supplier** is one that is not currently registered in the Jaggaer system. If you are unsure whether or not the supplier already exists, please use Search Existing Suppliers feature prior to submitting requesting a new supplier set up.

ATTENTION: If you receive a blue bar pop warning about a potential duplicate supplier, please refer to the **Edit Existing Supplier** tile for further action.

If the supplier **already exists** and you need to make changes, use the **Edit Existing Supplier** tile instead. If the supplier **does not exist** then proceed with the link to **Start a New Supplier Request**.

The request process is not automatic. **The process is as follows:**

1. **You initiate the vendor request in Jaggaer, as you've already done.**
2. **Procurement then sends an invitation to the vendor via Jaggaer.**
3. **The vendor's representative completes the supplier registration form.**
4. **Once registration is complete, you'll receive an email notification confirming it.**
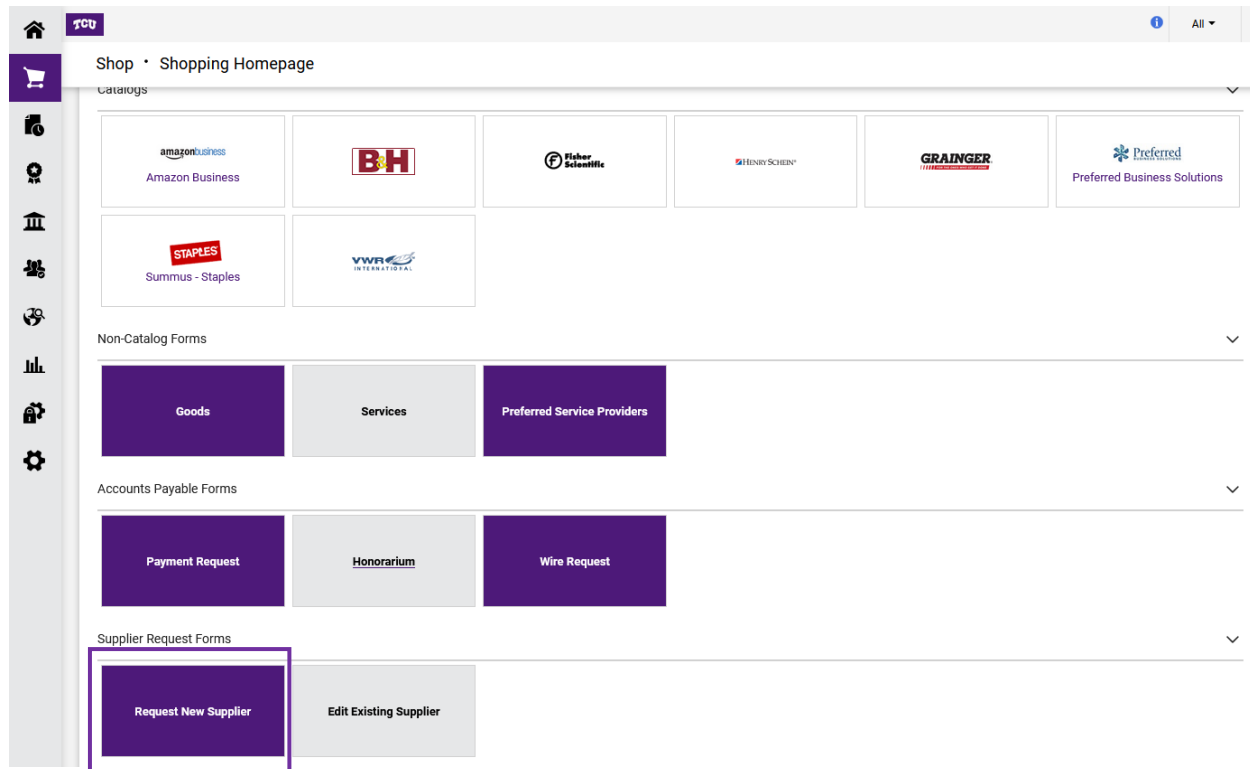
Form · New Request Supplier

Request a New Supplier   ⑦

Request a New Supplier   Click Here to Start a New Supplier Request ⧉

Search Existing Suppliers   ⑦

Existing Supplier

Enter Supplier ★   [Select Supplier   🔍]

Enter the individual's or company's name then click on "Submit".

Request New Supplier

Supplier request form   Basic Supplier Request

Supplier name ★   [   ]

Submit

All information with a "star" must be completed. Toggle between Individual or Company as appropriate.

If "Individual" is selected, Last and First Name will be required. Tax Number is required on both.

There is an option for "Priority Request" although will require VC approval.

Once all information is filled in select "next".

June 30 Test 1

Template	**New Supplier Request**
Request Status	**Incomplete**

Questions ✓

Requester Contact Inform...

Review and Complete

Supplier Request Workflow

Questions - Company Overview

⌄ **Company Information**

Is the Supplier an Individual or Company? *

[⌄]

Supplier Name *

[June 30 Test 1]

Email Address *

[ ]

Tax ID Number *

[ ]

Payment Type: *

☐ Awards   ☐ Education   ☐ Medical Services   ☐ Non-Profit
☐ Other   ☐ Purchase of Goods   ☐ Royalty Payment   ☐ Services Performed

Priority Supplier Request ❓

⊗

Priority Instructions

Priority registration request requires Vice Chancellor approval. All approvals are required before processing.

The information with a "star" will need to be provided if Individual is selected.

Frog Testing 8.22

Template	**New Supplier Request**
Request Status	**Incomplete**

Questions

Requester Contact Inform...

Review and Complete

Supplier Request Workflow

Questions - Company Overview

Print Request | History | | ?

ℹ️ Potential matching suppliers have been found in your network based on information given. Click here to view the list of potential matching suppliers.

∨ Company Information

Is the Supplier an Individual or Company? *

[Individual ∨]

Supplier Name *

[Frog Testing 8.22]

Email Address *

[ ]

Tax ID Number *

[ ]

Payment Type: *

☐ Awards   ☐ Education   ☐ Medical Services   ☐ Non-Profit
☐ Other   ☐ Purchase of Goods   ☐ Royalty Payment   ☐ Services Performed

Priority Supplier Request ❓

☐ Yes

∨ Individual Information

Last Name

[ ]

First Name

[ ]

Last 4 of SSN *

[   ] ▲▼

Requester's Name, Email and Department will be automatically populated. If not, enter information. Select "Next".

Ensure two sections are complete (will have a green check mark). Select the Certification box and then select Complete Request.

Select "Yes" to confirm

Edit Existing Supplier Instructions

This tile is only to be used to edit/update an existing Jaggaer supplier for example their E-mail, Remit/other addresses, Supplier's Name/DBA or Other.

To proceed select "Next".

In the Form Name field, be sure to insert the Supplier's individual or company name. The select "Next".

All information with a "star" must be completed. Toggle between Individual or Company as appropriate.

Information needed for "Individual". All information with a "star" must be completed.

Individual Information

First Name *

Last Name *

Last 4 of SSN *

Supplier Change(s) Requested

What Needs to be Edited/Updated? *

☑ PO Distribution Email   ☑ Remit Address   ☑ Supplier Name/DBA   ☑ Other

New Email Address for PO Distribution *

New Remit Address *

Name/DBA Change *

After confirming, the request will go to Supplier Registration desk for approval and will send out invitation to supplier for to provide all of Supplier's information to finalize the registration.