HOW TO REQUEST A NEW SUPPLIER OR EDIT AN EXISTING SUPPLIER IN JAGGAER

New Supplier

1) Request W9 from potential supplier
    a. Potential suppliers can create a W9 by visiting IRS.gov
       https://www.irs.gov/pub/irs-pdf/fw9.pdf
          i. If the potential supplier does not want to provide you their SSN, inform them they may list only the last four digits when sending to you. *The W9 they are required to provide in the portal must include the full SSN.*
    b. Refer to the W9 when completing the Request New Supplier form in Jaggaer
          i. Supplier Name (Line 1 of W9)
         ii. Individual or Company tax classification (Line 3a of W9)
        iii. Is the supplier a current student or employee? If Yes, STOP. Students and employees are not created in Jaggaer. Email your payment request to apinvoices@tcu.edu for processing.
         iv. Priority Supplier Request (requires VC approval)
          v. Email Address (see italicized below)
         vi. Individual Information – First and Last Name (Line 1 of W9) *only required if you select Individual.*
        vii. SSN (Individual) or Tax ID Number (Company) – Part I of W9
2) Submit request – Please DO NOT submit multiple requests for the same supplier

Email Address (item v. from above)

It is very important the email provided is for to the correct person at the supplier. Typically, this email should be someone in the supplier's Accounts Receivable department, or someone authorized to sign a W9 on behalf of the supplier.

Other areas you may consider when working with your supplier contact to identify the correct email to use in your request include:

- *Who is authorized to negotiate payment terms on behalf of the supplier?*
- *Using the supplier's Controller's email address*

Links in emails are NOT TRANSFERABLE. If the email is sent to the wrong person, you must submit an Edit Existing Supplier request. Select "Other" in the Supplier Change(s) Request box of the edit form request.

After submission

- Requester will receive an email from support@sciquest.com once Procurement sends the potential supplier an electronic invite to the supplier portal. *Allow 3 business days from day you submitted your request to receive the email.* Once *r*equester receives the

support@sciquest.com email, requester sends potential supplier the Supplier Invitation Form Letter. https://finance.tcu.edu/jaggaer-resources/managing-suppliers.php
- o Requesters cannot opt out of these emails

- Requester will receive emails from support@sciquest.com as the potential supplier progresses through the registration process. You may receive up to 5 emails in total for each New Supplier Request –
  - o Invited (x2)
  - o In Progress - Potential supplier has started the registration
  - o Profile Complete - Potential supplier has completed the registration
  - o Approved - TCU Procurement has approved the registration and the supplier is now visible in Jaggaer. *Completion times vary based on the supplier's turnaround time and volume in Procurement.*

  You may opt out of the status update emails (you cannot opt out of the first email informing you the potential supplier has been sent an invite), however doing so means you will not be notified when the supplier is visible in Jaggaer. See *How to Opt Out of Jaggaer new supplier update emails.* https://finance.tcu.edu/jaggaer-resources/managing-suppliers.php

- Requester can also view the status of the supplier's registration in detail, which may be helpful if the potential supplier thinks they have completed the registration process, but the supplier is not visible in Jaggaer. See *How to Identify the Status of a Supplier Registration https://finance.tcu.edu/jaggaer-resources/managing-suppliers.php* for ways the requester can track the status of a supplier's registration, including registration steps not completed.

If after reviewing this document you have questions completing the form, email Procurement

Continue scrolling for Edit Existing Supplier Resources

Edit Existing Supplier

1) Complete the Edit Existing Supplier form in Jaggaer
   a. *On the Details Tab, Supplier Name Field:* Enter name of supplier that needs to be edited. *Important: The name you enter here displays in the email you receive informing you a requested edit has been completed. If you do not update this field with the supplier's name, you will not know which supplier has been updated when you receive the email.*
   b. On the Questions Tab, Supplier Name: Enter name exactly how it is listed in Jaggaer
   c. Supplier Number – Locate in Jaggaer. See How to Locate Supplier Number in Jaggaer. https://finance.tcu.edu/jaggaer-resources/managing-suppliers.php
   d. Priority Supplier Request (requires VC approval)
   e. Supplier Change(s) Requested – Select all that apply
      i. PO Distribution Email (see italicized below)
   f. Attachments
      i. Invoice or Quote – The attachment depends on when you are requesting an edit. If requesting when processing a manual invoice, attach the invoice. If requesting when processing a Good or Services form, attach the quote or other document(s) from the supplier indicating their remit address (the address where they want payment sent).

PO Distribution Email (item e.i. from above)

When submitting a Goods or Services form, Jaggaer will prevent submission if the supplier's PO Distribution email is not in our system. When obtaining this email, request the supplier provide you the email where they want a Purchase Order to be sent.

After Submission
- Requester will receive an email from support@sciquest.com once the requested supplier edit has been completed. *Allow 3 business days for processing.*
  o Requesters cannot opt out of these emails

If after reviewing this document you have questions completing the form, email Procurement