Drexel University Procurement Services

Individual Supplier Registration Guide

How to Navigate through the Drexel University Supplier Registration Portal.

Any questions or concerns can be directed to the Procurement Support Team. They can be reached Monday thru Friday from 9am-4pm (EST) at **askprocure@drexel.edu**.

Thank you for your interest in doing business with Drexel!

Drexel University Supplier Required Registration for The Drexel University Smart Source Supplier Portal Index X

Drexel University Supplier Portal <askprocure@drexel.edu> to me • Sep 9, 2020, 9:36 AM



Supplier Portal

Supplier Invitation for The Drexel University Smart Source

Drexel Procurement Support will email the request to register; you will receive an email with this header.

If you do not see it in your main inbox, please check both your junk and spam folders. The email will be coming from our system host provider Jaggaer, however, the sender's email address will state askprocure@drexel.edu. Dear The SOLE MoverEXELC

The Drexel University Smart Source Supplier Portal is inviting you to register because a requester wishes to **place an order** with you OR has asked us to **issue payment** to you. Registration is required in order to do business with Drexel University.

The Drexel University Smart Source Supplier Portal is free, easy and it only takes a few minutes to join By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon acceptance and approval of your registration, you will be notified and can access the portal to:

- · Maintain your own data (addresses, contacts, banking information)
- Add Tax and Insurance documents
- Track Purchase Orders (POs) we issue to you
- · Flip POs to invoices
- Track invoicing and payments

Please, if you experience any issues, contact Procurement Services via email <u>askprocure@drexel.edu</u> or phone 215-895-2876 option 4 for assistance.

Register Now The "Register Now" link that will take the user into Drexel's supplier portal.

Thank You,

The Drexel University Smart Source Supplier Portal

If you have any technical questions, please contact Procurement Support Team at <u>askprocure@drexel.edu</u> or +215 (895) 2876 for assistance and identify yourself as registering in the The <u>Drexel</u> University Smart Source Supplier Portal Supplier Network.

If you still do not see the email, your firewall could be preventing you from receiving it. The email contains a link that is needed to register in our Drexel Supplier portal.

Please check that we are "whitelisted" so that incoming emails can be received. If after having us whitelisted, you are still having trouble receiving this email, please contact <u>askprocure@drexel.edu</u>.



The link in the email will take you to the Welcome Page. Select "Continue With Registration" to begin registering.

Jane	Doe				
First Name 🛪	Last Name 🛪				
				61 1 1	
Title		Here you will I	begin to setup your	profile, including crea	ting a
6095551212	ext.	a recovery que	estion. Anything ma	arked with a 🗙 is a m	anda
Phone Number 🛪					
International phone numbers must b	egin with +				
EDT/EST - Eastern Standard T	ime (US/Eastern)				
Preferred Time Zone *					
Your Login					
Total Login					
williams.wendi.b@gmail.com					
Fmail *	Confirm Email	*			
201001-0	Commit Enter				
	۲		۲		
Password *	Re-Enter #	assword *			
What was the name of your e	elementary school?		•		
Account Recovery Question *					
Answer *	Confirm A	nswer *			
Terms and Conditions					
	IACCATE's Terms and Court's				
i nave read and accepted	UNGGREK 5 Terms and Condit	ions 🕒 🗧			

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ĩ		Welcome to Supplier	Registration			?				¥ I	
	Registration Manage Registration Profile		5								
0	Doe, Jane	Welcome to the Drexel Univ As each section is complete	ersity Supplier Portal. The registra	tion process will take approxima	tely 15 minutes or less to comple	ete and contains 6 sections.					
、	Registration In Progress for:	Ann Gold moderal mith a +	i, i win oe market win a green en								
2	The Drexel University Smart Source	Any field marked with a *1	is a mandatory field. Tou will be un	able to successfully complete yo	our registration if all the required	information is not provided.					
	Supplier Portal	The registration contains the	following sections:								
_	3 Of 4 Steps Complete	Welcome Page									
ш		 weicome rage This is where weicher 	on begin the registration process:								
	Welcome	 Enter you 	ir name within the First Name and I	Last Name fields.							
		 Individual Overview ((Individual Information)								
	Individual Overview	 Select your Cou 	intry of Origin; this should be the c	ountry you use for tax purposes (US Citizens and Permanent Resi	idents should select "United					
	Addresses	States")									
	Audicaaca	 Enter your Tax. Address Information 	ID number								
	Payment Information	 Address information This section will 	I require you enter one address. Th	is should be the address where in	mortant documents are received						
	ay none intornation	Payment Information	n require you enter one address. Th	is should be the address where if	aportant documents are received.	L.					
	Tax Information	 This section will 	ll allow you to choose to receive vo	ur payment as a check or as a di	rect deposit (ACH).						
		 Tax Information 			•						
	Certify & Submit	 In this section, 	you will upload your completed, sig	gned W-9 (rev Oct 2018) or W8-	BEN (for foreign individuals).						
		 Certify & Submit 									
		 In this section, y 	you will review and confirm the inf	formation you entered is correct.							
		After each section is finishe	d, you will receive a system genera	ted email confirming your regist	ration has been submitted success	sfully. Your information will					
	Registration FAQ View History	be reviewed by the Drexel P	rocurement Support Team to ensur	e everything has been properly c	ompleted and/or uploaded. If the	re is any additional					
		information required, the Dr	exel Procurement Support Team or	your Drexel University Busines	s Partner will contact you.						
		If you need to pause and cor	ne back at a later time to complete	your registration, use this link to	access the portal: Drexel Univer-	rsity Supplier Portal. Please					
		be sure to click "Save Chang	ges" at the bottom, right hand corne	r of the page prior to leaving the	site. We recommend that you uti	ilize either Google Chrome					
		or Mozilla Firefox to access	your Drexel supplier profile.								
		If you are in need of assistan	ice with password issues or other tr	ouble accessing your account in	ease contact Jaggaer, our 3rd part	ty system provider on their					
		support site here: Jaggaer Su	apport or you can call them at 1-800	0-233-1121 and select Option 2 f	or assistance.	ing against provider, on their					
		If you are in used of activity	an in completing this serietertion .	nlance refer to our Denuel Court	Providentian Ich Aid						
		ii you are in need of assistar	ice in completing this registration, j	piease refer to our Drexel Suppli	er roegistration 300 Ald.						
		You can also receive assistan	nce by reaching out to one of our D	rexel Procurement Support team	members at askprocure@drexel.	.edu.					
		Thank you for your interest	in doing business with Drexel Univ	ersity!							
				* -							
		Required to Start Registr	ation								
		First Name *	lane								
			Jane								
		Last Name *	Doe								
		* Required to Complete Regi	stration	Nexto	Proceed to Certify and Su	ubmit » Save Changes					
									2		
	As each	section gets complete	d it will be indicated with	a green check mark	Anything marked with	a 🛧 is a mandatory f	ield You	< Need help			1
,	Asedul	be able to complete	ia, it will be indicated with		ion is not one ideal. The		iciu. Tou	Powered	by JAGGAER	Privacy Policy	\mathbf{v}
	will not	be able to successfully	complete your registratio	on it all require informat	ion is not provided. The	Payment information	n				
	automat	tically defaults to rece	iving your payment by che	eck and is already check	ed off. You will have the	e option of entering yo	our				
	direct de	eposit (ACH) informati	on in a later section.								

Registration Manage Registration Pro	le de la constante de la const
Doe, Jane	Individual Information ?
Registration In Progress for: The Drexel University Smart Source Supplier Portal	To complete this section, please provide the following information:
3 of 4 Steps Complete	 Select your Country of Origin; this should be the country you use for tax purposes.
Welcome	(US Citizens and Permanent Residents should select "United States")
Individual Overview	• Enter your Tax ID number.
Addresses	✓
Payment Information	Country of Origin 😨
Tax Information	Tax ID Number
Certify & Submit	
Registration FAQ View History	Country of Origin should be the country you use for <i>tax purposes</i> . (US Citizens and Permanent Residents should select "United States") Tou ID Number about the select Security Number (SCN) areas

Need Help?

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Registration Manage Registration Pro	file				
Doe, Jane		Addresses	?		
Registration In Progress for: The Drexel University Smart Sourc Supplier Portal	e	Your address should be where important documents are received (i.e., tax forms, utility bills, etc.).	address should be where important documents are received (i.e., tax forms, utility bills, etc.). rill be asked to label your address. When labeling your addresses, you can use anything that makes it easy to identify name such as "Main" or e". e clearly identify your street name, apartment, or suite numbers.		
3 of 4 Steps Complete		You will be asked to label your address. When labeling your addresses, you can use anything that makes it easy to identify name such as "Main" or "Home".			
Welcome		Please clearly identify your street name, apartment, or suite numbers.			
Individual Overview	<	It is permissible to use a PO Box address.			
Addresses	×				
Payment Information	× .				
Tax Information	\checkmark	Required Information			
Certify & Submit		At least one address is required to complete this section.			
		No addresses have been entered			
Registration FAQ View History		Add Address Hide Inactive Ad	ddresses		

< Previous

Next >

Your address should be where important documents are received (i.e., tax forms, utility bills, etc.) Please clearly identify your street name, apartment, or suite numbers. It is permissible to use a PO Box address.

Seed Help?

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10	Registration + Manage Registration Profile	<u>Policy</u> effective May 25, 2018. B	Add Address		×	rsonal information as described in our Service Privacy Policy.	
ö	Doe, Jane	Addresses	Address Details (Step	o 1 of 1)	?	2	
Шı	Registration In Progress for: The Drexel University Smart Source Supplier Portal	Please enter an address to	What would you like to label this address? *	Evample: Headquarters, Houston Office			
\$	2 of 5 Steps Complete	Required Information	Country *		- 1	When labeling your addresses,	
	Welcome	At least one address is r	Address Line 1 *		- 1	you can use anything that makes it easy to identify name such	
	Individual Overview 🖌	No addresses have been e	Address Line 2		- 1	as "Main" or "Home" . Please keep in	
	Addresses 🛷	Add Address	Address Line 3		- 1	mind, any field marked with a \bigstar is	
	Payment Information		City/Town *		- 1	required.	
	Tax Information		State/Province		- 1		
	Certify & Submit		Postal Code		- 1		
	seiny assault		Phone *	ext.			
				International phone numbers must begin with +			
			Toll Free Phone	ext.	•	< Previous Next >	
			* Required to Complete Regis	tration Save	Changes		
Q,						Need Help?	

Registration Manage Registration	Payment Information	?
Doe, Jane	Drevel University's preferred method of payment is direct deposit (ACH)	
Registration in Progress for: The Drexel University Smart Sou Supplier Portal	Issuing payments through direct deposit ensures your payment will be delivered to you in an efficient and timely manner.	
4 of 4 Steps Complete	For foreign individuals with whose bank is outside of the US, please select check and ensure your wire transfer information is provided on your	
Welcome	invoice. It is critical to ensure the information provided for the direct denosit (ACH) navment is accurate. Incorrect information will cause delays in receiving	
Individual Overview	 payment. 	
Addresses	✓ When completing this section please include:	
Payment Information	 Payment Title This is a name to identify your direct deposit (ACH) information. (i.e., "Direct Deposit", "TD Bank Checking") 	
Tax Information	 Bank account and routing information Mailing address of your banking institution 	
Certify & Submit	 An email address You will receive a notification detailing the specifics of your payment such as invoice #, date, and amount 	
have been been been been been been been be	Please Note: If you do not wish to utilize the direct deposit option, the system will default to mailing out a paper check. A check can take up to 30 days to process and are mailed via USPS. We cannot guarantee a specific delivery date.	
registration PAQ View history		
	No payment information has been entered.	
	Add Payment Information 👻	
	Direct Deposit (ACH)	_
	< Previous Next > Proceed to Certify and Submit >	>
In the "D	aumont Information" soction you can ont to add your banking information to have your payment delivered via direct denosit (A	CH)
in the Pa	It is critical to ensure that your mailing address and/or your banking information for direct deposit is accurate.	сп).
	incorrect mormation will cause delays in receiving payment.	

Please Note: If you do not wish to utilize the direct deposit option, the system will default to mailing out a paper check. A check can take up to 30 days to process and are mailed via the US Postal Service. We cannot guarantee a specific delivery date.

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Registration • M	Manage Registration Prof	
Doe, Jane	e	Tax Information ?
Registration In The Drexel Uni Supplier Portal 4 Of 4 Steps (n Progress for: niversity Smart Source al complete	A copy of your W-9 (or W-8 for foreign individuals) is necessary to create supplier record so we can issue your payment. We can only accept the most recent version of the W-9 form (currently, the Rev. Oct 2018 version). Foreign individuals should submit the W8-BEN tax form.
Welcome		These forms can be found on the IRS website.
Individual Ove	verview	To complete this section, click the "Add Tax Document" button to attach your completed, signed and dated W-9 (Rev Oct 2018) or W8-BEN(rev July 2017) for foreign individuals.
Addresses		A window will appear and will require the following information:
Payment Info	ormation	Tax Document Name o Choose a name to identify the form (ex. "W9 2018 rev.")
Certify & Sub	bmit View History	 Tax Document Teal The year you signed the document (ex. 2020) Tax Documentation You can either upload your W-9 or W-8 form you previously had on file or use the "Download the Pre-populated Tax Document" option. If you select the option to "Download the Pre-populated Tax Document". this will auto-populate the W-9 or W-8 form using the information provided during registration. (This is optional) PLEASE NOTE: When opting to "Download the Pre-populated Tax Document", the W-9 will automatically populate your data based on the information you supplied in the Individual Profile and Address sections of the supplier registration. Please ensure that you verify all your information is accurate and complete. You will still need to select the appropriate federal tax classification on line 3 and ensure you sign and date the form prior to uploading into this section. We do accept electronic signatures. Incomplete forms will delay the processing of your payment. Please ensure the form is completed, signed, and dated.
		No tax information has been entered Add Tax Document
CI 20	Click the "Ac 2018) or W8	d Tax Document" button to attach your W-9 (Rev Oct BEN (rev July 2017) for foreign individuals. hese forms can be found on the IRS website.

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6	Her stration + Manage Regionation Profile	hiev effective May 25, 2018. By closing this ha	mer vou admowledne that when you use our Solution, we process your personal information as described in our Service Privacy Policy.
	UNGOAL MENSEL IS SERVICE PINES PO	<u>ancy</u> enective may 20, 2010, by closing this be	The, you downowedge that when you use our solution, we process your personal information as described in our service privacy poincy.
<u>e</u>	Doe, Jane	Tax Information	3
հր	Registration In Progress for: The Drexel University Smart Source Supplier Portal	Tax information is used for payment and th	e tax document should be uploaded using a PDF format.
8	3 of 5 Steps Complete	Required Information	Add Tax Document
	Welcome	At least one tax document is required to	
	Individual Overview	No tax information has been entered	Tax Type * W-9
	Addresses 🗸	Add Tax Document 💌	Tax Document Name * W9 2018 rev
v	Request for Tax	vnaver la s	Tax Document Year 2021
Farm Prev. Octor Department Internal Rev	Identification Number and of the Treasury The Treasury In Go to www.in.gov/FormW9 for instruction	nd Certification Give Form to the requester. Do not send to the IRS.	Tax Documentation *
1	Name (as shown on your income tas return). Name is required on this line; do not lea so, Jamo Rusiness name/disregarded entity name, if different from above	ave this line blank.	There is also an option to "Download the Pre-
8 -	Check appropriate box for federal tax classification of the person whose name is entitioning seven boxes.	and on line 1. Check only one of the 4 Exemptions (codes apply only to cartain entries, not individuals; see	CLICK THE LINK [±] Download Pre-populated Tax Document populated Tax Document". This will auto-populate
aduo sa	Individualitable proprietor or C Corporation S Corporation	Partnership Tsustiestate Exempt payee code (if any	the W-9 form for you.
int or by	Limited liability company. Enter the tax classification (C+C corporation, S+S corporation, S+S corporation, C+C corporation, S+S corporation, C+C+C corporation, S+S corporation, C+C+C+C+C+C+C+C+C+C+C+C+C+C+C+C+C+C+C+	contion, Pu-Partnership ingle-member owner. Do not check Exemption from FATCA reporting code (if any)	* Required to Complete Registration Save Changes Close
100	is designed of the the design of the back the appropriate box for the tax design is designed of the the come should check the appropriate box for the tax design Other (see instructions) •	Economica, a temperamitari ELC tran fication of its owner. playties transmits ministered antikiste UR) Economication of difference into formati	
8 20	0 Walt Whiteman Ave #775 City, state, and 2P code		< Previous Next >
Ar T	ytown, NJ G803-4 ist account number(i) here (optional)		
Part I Enter you	Taxpayer Identification Number (TIN) TIN in the appropriate box. The TIN provided must match the name given	n on line 1 to avoid Social security number	
resident a entities, it TIN, later.	ternologi, For individuals, this is generally your local sectory humber (o lies, sole provider, or disregarded entity, see the instructions for Part (, li is your employer identification number (EIN). If you do not have a number	and, Protection, for a transformer and the second s	When opting to "Download the Pre-populated Tax Document", the W-9 will
Note: If the Number 1	is account is in more than one name, see the instructions for line 1. Also a to Give the Requester for guidelines on whose number to enter.	see What Name and Employer identification number	automatically populate your data based on the information you supplied in the
Part II Under pe	Certification ratise of perjury, I certify that:		automatically populate your data based on the mornation you supplied in the
1. The nu 2. Lam ro Service	mber shown on this form is my correct taxpayer identification number (or i it subject to backup withholding because: (a) I am exempt from backup wit (IRS) that I am subject to backup withholding as a result of a failure to rep we subject to backup withholding: and	I am waiting for a number to be issued to mel; and thholding, or (b) I have not been notified by the Internal Revenue port all interest or dividends, or (c) the IRS has notified me that I am	Individual Profile and Address sections of the supplier registration. Please ensure to
3. I am al	U.S. citizen or other U.S. person (defined below); and TCA code/u) entered on this form (if any) indicating that I am exernot from	FATCA reporting is correct.	verify all of your information is accurate.
Certificat you have t acquisitio	ion instructions. You must cross out item 2 above if you have been notified b laied to report all interest and dividends on your tax return. For real estate tran or abandonment of secured property, cancellation of debt, contributions to a pleasest and individent, was not reading to som the carditrative but your	by the IRS that you are currently subject to backup withholding because reactions, item 2 does not apply. For mortgage interest paid, an individual retrement arrangement (IRA), and generally, payments must remide ware covert TMI. See the instructions to Put II later.	Then sign, date, and save this document for your records. Once saved, upload form
Sign Here	Signature of U.S. genone	Date +	ista a succidate this document for your records once succid upload form
Gene	ral Instructions	rm 1099-DIV (dividends, including those from stocks or mutual b)	into your registration.
Section n noted. Future de	ferences are to the Internal Revenue Code unless otherwise Por proc welopments. For the latest information about developments . Ex-	rm 1099-MISC (various types of income, prizes, awards, or gross seds) m 1099-B (stock or mutual fund sales and certain other	
related to after they	Form W-9 and its instructions, such as legislation enacted trans were published, go to www.ix.gov/FormW9. For	ractions by broken) m 1095-5 (proceeds from real estate transactions)	
An individ informatio	set or rofffit wal or entity (Form W-9 requester) who is required to file an or entity with the IPS must obtain your correct taspayer 1099	rm ruse-s, priectant card and third party network transactions) rm 1098 (home mortgage interest), 1098-E (student loan interest), 8-7 (sution)	

Electrostation in unit here they be a formula to pose activities being-were (SSN), includent languages identification number (FIN), adoption tappager identification number (ATRN, or employer identification number (FIN), to regort on an information return the amount apid to you, or other amount reportable on an information return. Examples of information miturns includes, but are not imfeed to, the tolowing. Form 1099-INT (interest earned or paid)

Cat. No. 10231X

 Form 1099-C (canceled debt) Form 1099-A (acquisition or abandonment of secured property) Porm Toter-N (acquation or autocomment or security pagenty) Use Form VM-6 only if you are a U.S. person (including a maillent aller), to provide your correct TW.
 If you do not sharn Form VM-9 to the requester with a TM, you might be subject to backup withholding. See What is backup withholding, bater.

Form W-9 (Rev. 10-2018)

		4
Registration Manage Registration Profile		
Doe, Jane	Certify & Submit ?	
Registration In Progress for: The Drexel University Smart Source Supplier Portal 4 of 4 Steps Complete Welcome Individual Overview Addresses Payment Information Tax Information Certify & Submit	Preparer's InitialsJDPreparer's Name *Jane DoePreparer's Email Address *janedoe2021@gmail.comToday's Date2/19/2021Certification *I certify that all information provided is true and accurate.	
Registration FAQ View History	★ Required to Complete Registration	
	Need Help?	
Please review the Pro "Submit" button to a	eparer's info ensuring your information is correct. Once this is completed, you can click the complete your registration.	

This completes your supplier registration, and you will receive a system generated email confirming your registration has been submitted.

Your information will be reviewed by the Procurement Support Team to ensure everything has been properly completed and/or uploaded. If there is any additional information required, the Procurement Support Team or your Drexel University Business Partner will contact you.

Thank you for being a Drexel business partner!