

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 Inbox x

Drexel University Supplier Portal <askprocure@drexel.edu>
to me ▾

Sep 9, 2020, 9:36 AM



Supplier Invitation for The Drexel University Smart Source Supplier Portal

Dear The SOLE Mover, LLC

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 askprocure@drexel.edu 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

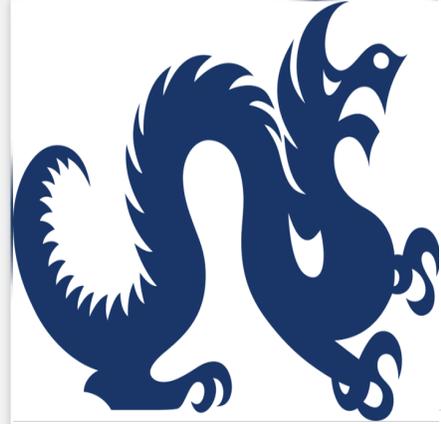
If you have any technical questions, please contact Procurement Support Team at askprocure@drexel.edu or +215 (895) 2876 for assistance and identify yourself as registering in the The Drexel University Smart Source Supplier Portal Supplier Network.

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.

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 askprocure@drexel.edu.



Drexel University Smart Source Procurement Services

[Registration Checklist](#)

Welcome to Supplier Registration

English ▾

[Registration FAQ](#)

[Registration Tutorial](#)

[Continue With Registration](#)

Please contact Procurement Support Team at askprocure@drexel.edu or +215 (895) 2876 for assistance.

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JAGGAER

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

Supplier Registration

[Registration Tutorial](#)

English ▾

Your Contact Info

First Name *

Last Name *

Title

Phone Number *

International phone numbers must begin with +

Preferred Time Zone *

Your Login

Email *

Confirm Email *

Password *

Re-Enter Password *

Account Recovery Question *

Answer *

Confirm Answer *

Terms and Conditions

I have read and accepted JAGGAER's [Terms and Conditions](#)

Here you will begin to setup your profile, including creating a password and a recovery question. Anything marked with a ★ is a mandatory field.



Registration > Manage Registration Profile

Doe, Jane

Registration **In Progress** for:
The Drexel University Smart Source
Supplier Portal

3 of 4 Steps Complete

- Welcome**
- Individual Overview ✓
 - Addresses ✓
 - Payment Information ✓
 - Tax Information ✓
 - Certify & Submit

[Registration FAQ](#) | [View History](#)

Welcome to Supplier Registration

Welcome to the Drexel University Supplier Portal. The registration process will take approximately 15 minutes or less to complete and contains 6 sections. As each section is completed, it will be marked with a green check.

Any field marked with a ★ is a mandatory field. You will be unable to successfully complete your registration if all the required information is not provided.

The registration contains the following sections:

- Welcome Page
 - This is where you begin the registration process:
 - Enter your name within the First Name and Last Name fields.
- Individual Overview (Individual Information)
 - Select your Country of Origin; this should be the country you use for tax purposes (US Citizens and Permanent Residents should select "United States")
 - Enter your Tax ID number
- Address Information
 - This section will require you enter one address. This should be the address where important documents are received.
- Payment Information
 - This section will allow you to choose to receive your payment as a check or as a direct deposit (ACH).
- Tax Information
 - In this section, you will upload your completed, signed W-9 (rev Oct 2018) or W8-BEN (for foreign individuals).
- Certify & Submit
 - In this section, you will review and confirm the information you entered is correct.

After each section is finished, you will receive a system generated email confirming your registration has been submitted successfully. Your information will be reviewed by the Drexel Procurement Support Team to ensure everything has been properly completed and/or uploaded. If there is any additional information required, the Drexel Procurement Support Team or your Drexel University Business Partner will contact you.

If you need to pause and come back at a later time to complete your registration, use this link to access the portal: [Drexel University Supplier Portal](#). Please be sure to click "Save Changes" at the bottom, right hand corner of the page prior to leaving the site. We recommend that you utilize either Google Chrome or Mozilla Firefox to access your Drexel supplier profile.

If you are in need of assistance with password issues or other trouble accessing your account, please contact Jaggaer, our 3rd party system provider, on their support site here: [Jaggaer Support](#) or you can call them at 1-800-233-1121 and select Option 2 for assistance.

If you are in need of assistance in completing this registration, please refer to our [Drexel Supplier Registration Job Aid](#).

You can also receive assistance by reaching out to one of our Drexel Procurement Support team members at askprocure@drexel.edu.

Thank you for your interest in doing business with Drexel University!

Required to Start Registration

First Name ★

Last Name ★

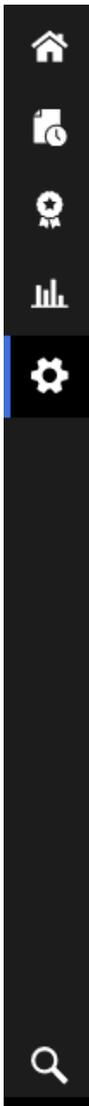
★ Required to Complete Registration

[Next >](#) [Proceed to Certify and Submit >>](#) [Save Changes](#)

As each section gets completed, it will be indicated with a green check mark ✓. Anything marked with a ★ is a mandatory field. You will not be able to successfully complete your registration if all require information is not provided. The **Payment information** automatically defaults to receiving your payment by check and is already checked off. You will have the option of entering your direct deposit (ACH) information in a later section.

[Need Help?](#)

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Doe, Jane

Registration **In Progress** for:
The Drexel University Smart Source
Supplier Portal

3 of 4 Steps Complete

Welcome

Individual Overview ✓

Addresses ✓

Payment Information ✓

Tax Information ✓

Certify & Submit

Individual Information ?

To complete this section, please provide the following information:

- Select your **Country of Origin**; this should be the country you use for tax purposes. (US Citizens and Permanent Residents should select **“United States”**)
- Enter your Tax ID number.

Country of Origin ⓘ

Tax ID Number

Country of Origin should be the country you use for *tax purposes*.
(US Citizens and Permanent Residents should select "United States")

Tax ID Number should be a US Social Security Number (SSN) or an Employer Identification Number (EIN).

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Next >

Save Changes

Registration | Manage Registration Profile

Doe, Jane

Registration **In Progress** for:
The Drexel University Smart Source
Supplier Portal

3 of 4 Steps Complete

- Welcome
- Individual Overview ✓
- Addresses** ✓
- Payment Information ✓
- Tax Information ✓
- Certify & Submit

Registration FAQ | View History

Addresses

Your address should be where important documents are received (i.e., tax forms, utility bills, etc.).

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".

Please clearly identify your street name, apartment, or suite numbers.

It is permissible to use a PO Box address.

Required Information
At least one address is required to complete this section.

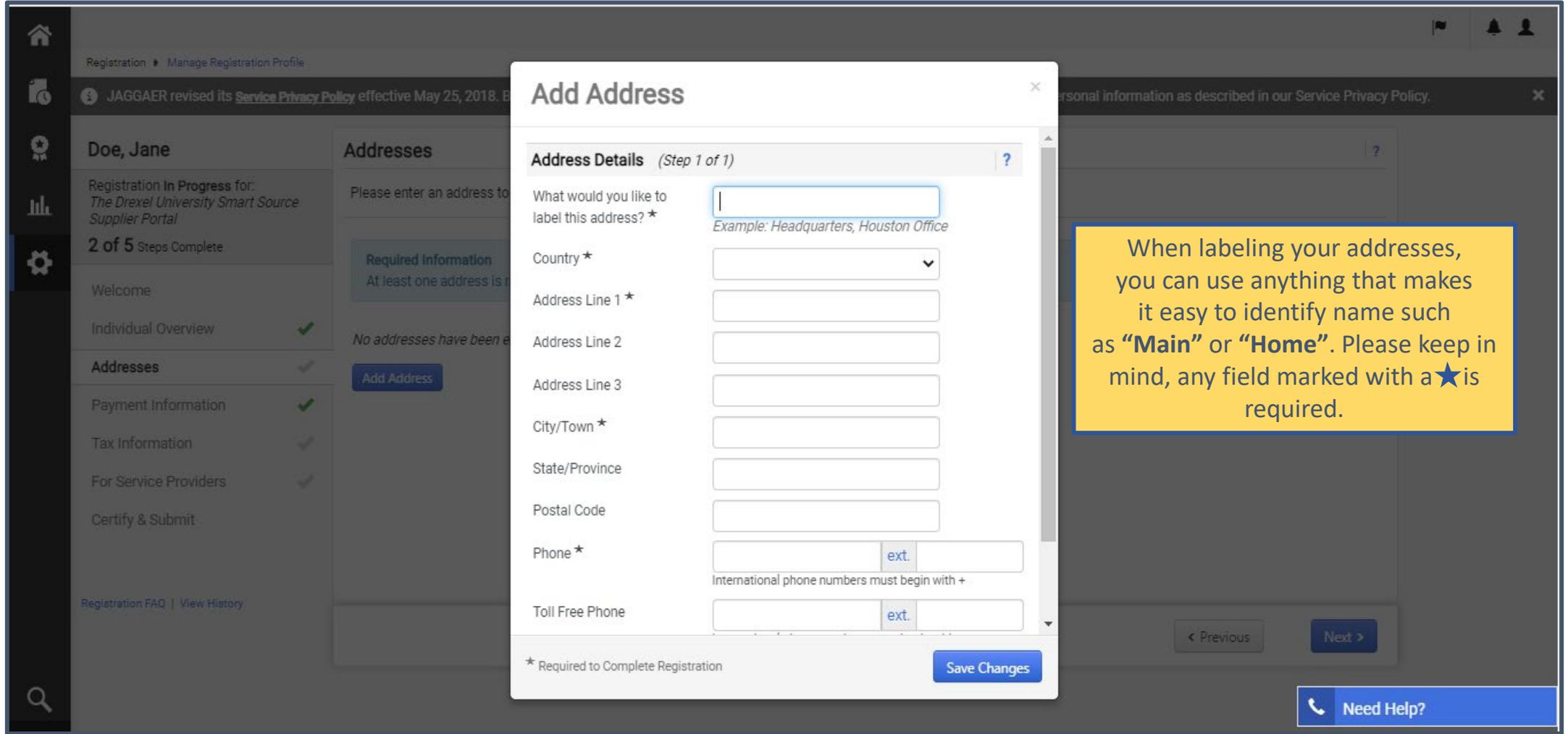
No addresses have been entered

[Add Address](#) Select "Add Address" [Hide Inactive Addresses](#)

[< Previous](#) [Next >](#)

[Need Help?](#)

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.



Add Address

Address Details (Step 1 of 1)

What would you like to label this address? *

Example: Headquarters, Houston Office

Country *

Address Line 1 *

Address Line 2

Address Line 3

City/Town *

State/Province

Postal Code

Phone *

International phone numbers must begin with +

Toll Free Phone

* Required to Complete Registration

Save Changes

When labeling your addresses, you can use anything that makes it easy to identify name such as "Main" or "Home". Please keep in mind, any field marked with a ★ is required.

Need Help?

Registration ▶ Manage Registration Profile

Doe, Jane

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](#)

[Registration FAQ](#) | [View History](#)

Payment Information

Drexel University's preferred method of payment is direct deposit (ACH).

Issuing payments through direct deposit ensures your payment will be delivered to you in an efficient and timely manner.

For foreign individuals with whose bank is outside of the US, please select check and ensure your wire transfer information is provided on your invoice.

It is critical to ensure the information provided for the direct deposit (ACH) payment is accurate. Incorrect information will cause delays in receiving payment.

When completing this section please include:

- Payment Title
 - This is a name to identify your direct deposit (ACH) information. (i.e., "Direct Deposit", "TD Bank Checking")
- Bank account and routing information
- Mailing address of your banking institution
- An email address
 - You will receive a notification detailing the specifics of your payment such as invoice #, date, and amount

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.

No payment information has been entered.

[Add Payment Information](#)

- Direct Deposit (ACH)
- Check

[< Previous](#) [Next >](#) [Proceed to Certify and Submit >>](#)

In the "Payment Information" section you can opt to add your banking information to have your payment delivered via direct deposit (ACH). It is critical to ensure that your mailing address and/or your banking information for direct deposit is accurate. Incorrect information 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.



Doe, Jane

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](#)

[Registration FAQ](#) | [View History](#)

Tax Information

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.

These forms can be found on the [IRS website](#).

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.

A window will appear and will require the following information:

- Tax Document Name
 - Choose a name to identify the form (ex. "W9 2018 rev.")
- Tax Document Year
 - 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](#)

Click the **"Add Tax Document"** button to attach your **W-9 (Rev Oct 2018)** or **W8-BEN (rev July 2017)** for foreign individuals.

These forms can be found on the [IRS website](#).

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Proceed to Certify and Submit >>



Need Help?

Registration > Manage Registration Profile

JAGGAER revised its [Service Privacy Policy](#) effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.

Doe, Jane

Registration In Progress for:
The Drexel University Smart Source Supplier Portal

3 of 5 Steps Complete

Welcome

Individual Overview

Addresses [Add Tax Document](#)

Tax Information

Tax information is used for payment and the tax document should be uploaded using a PDF format.

Required Information
At least one tax document is required to

No tax information has been entered

Add Tax Document

Tax Type * W-9

Tax Document Name *

Tax Document Year

Tax Documentation * Drop file to attach, or browse.

[Download Pre-populated Tax Document](#)

* Required to Complete Registration

There is also an option to “Download the Pre-populated Tax Document”. This will auto-populate the W-9 form for you.

CLICK THE LINK

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 to verify all of your information is accurate. Then sign, date, and save this document for your records. Once saved, upload form into your registration.

W-9 Request for Taxpayer Identification Number and Certification

Form 1099-REV-2018 (Rev. October 2018)

Go to www.irs.gov/Form999 for instructions and the latest information.

1 Name (as shown on your income tax return. Name is required on this line. Do not leave this line blank.)
Doe, Jane

2 Business name (disregarded entity name, if different from above)

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following boxes.

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

5 Address (number, street, and apt. or suite no.) (see instructions.)
200 Wall Whitman Ave #775

6 City, state, and ZIP code
Anytown, NJ 08004

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN, later.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am awaiting for a number to be issued to me); and

2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and

3. I am a U.S. citizen or other U.S. person (defined below); and

4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form999.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you may be subject to backup withholding. See What is backup withholding, later.

Cat. No. 15221X Form **W-9** (Rev. 10-2018)

Registration ▸ [Manage Registration Profile](#)

Doe, Jane

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

[Registration FAQ](#) | [View History](#)

Certify & Submit ?

Preparer's Initials

Preparer's Name *

Preparer's Email Address *

Today's Date 2/19/2021

Certification * I certify that all information provided is true and accurate.

★ Required to Complete Registration

[Submit](#)

[Need Help?](#)

Please review the Preparer's info ensuring your information is correct. Once this is completed, you can click the "Submit" button to 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!