Supplier Onboarding – International Company

Indiana University (IU) is a member of the Jaggaer supplier network. To receive payment from IU, payees, referred to as “suppliers” in Jaggaer, must complete the supplier onboarding process and join the network. Once established, your supplier portal is used to manage payment information, addresses, tax forms, and more.

The Jaggaer portal is not accessible on mobile devices such as smartphones or tablets. It must be accessed from a desktop computer.

This document provides a step-by-step walkthrough of the supplier onboarding process for a non-US based company.

Before you follow the steps in this document, locate the following items:

- Indiana University supplier invitation email.
- Wire Transfer banking information.
- Scanned image of completed and signed W-8BEN-E or other tax form.

Already started the process and need to pick up where you left off? Click here.

Contents

Invitation ................................................................................................................................................................................. 2
Create Your Jaggaer Network Account ................................................................................................................................... 3
Complete and Submit Registration Information ..................................................................................................................... 4
  Welcome ............................................................................................................................................................................. 5
  Company Overview ............................................................................................................................................................. 5
  Business Details ................................................................................................................................................................... 6
  Addresses ............................................................................................................................................................................ 8
  Contacts ............................................................................................................................................................................ 10
  Insurance ........................................................................................................................................................................... 11
  Payment Information ........................................................................................................................................................ 12
    Payment via Wire Transfer ........................................................................................................................................... 12
  Tax Information ................................................................................................................................................................. 15
  Supplier Information ......................................................................................................................................................... 17
  Certify & Submit ................................................................................................................................................................ 18
  Registration Approval ........................................................................................................................................................... 20
  Continue Registration ........................................................................................................................................................... 21
Invitation

The onboarding process begins when an IU staff member requests your addition to the supplier network. IU Purchasing reviews the request, and, once approved, invites you to begin the onboarding process via email. This email invitation will come from the email address buyiu.noreply@iu.edu, have a sender name of “Indiana University,” and will look like the example below.

Click Register Now to establish your username and password.

You will also receive reminder emails from Jaggaer directly. These messages come from support@sciquest.com and contain contact information for Jaggaer’s support team.

Please contact the IU department you are working with for assistance first before contacting Jaggaer.
Create Your Jaggaer Network Account

After clicking Register Now in the email invitation, the registration page opens in a browser window. Click the drop-down in the upper right-hand corner to select a language, if desired, then Continue with Registration to proceed.

Fields marked with a star are required. Verify your first and last name and enter your phone number in the appropriate field. Update your time zone if needed.
Proceed to the **Your Login** section of the page. Confirm your email address and establish a password.

Your email address acts as your username when accessing the supplier portal. Store your username and password in a safe place! You will need this information to login to the portal and make changes in the future.

Answer the Account Recovery Question and click **Create Account** to establish your account.

Upon creating your account you will automatically be transferred the supplier portal.

**Complete and Submit Registration Information**

The supplier registration page is made up a series of sections, visible in the left-hand menu. Each section is followed by a checkmark. Completed sections are represented by green checkmarks. Sections with gray triangles require additional information.

Throughout the registration process you will see fields marked with a star.
These fields are required and must be satisfied to complete your registration. All other fields are optional.

Welcome
On the Welcome page, enter the legal company name in the appropriate fields, then click **Next**.

You are not required to complete the supplier onboarding process in one sitting. At any time, click **Save Progress** to save your work and return later.

Company Overview
In the Company Overview section, fill in the **Country of Origin**, **DUNS number (if applicable)**, **Legal Structure**, **US Tax ID Number (if applicable)**, and **Legal Structure (Non-US Based Entity)**.
Next, select 'Non-US Based Entity' from the Legal Structure drop-down menu.

If you have a US-IRS assigned EIN, enter your Employee Identification Number in the Tax ID Number field. Click Save Changes to save your work and Next to complete the Individual Overview section.

The left-hand menu updates to reflect a green checkmark once the section is complete.

Business Details
This area is mainly comprised of optional information about the company. The only required information is Commodity Codes. There may be a Commodity Code already present. If so, click Next.

Click Edit. A new window will open with a search box.
You can search keywords to locate the company commodity area. You can also manually search through the provided list.

**Helpful Search Tip:** Use simple keywords such as “food”, “equipment”, “books”.

Click the commodity code that best describes your business area.

Click **Done** to Continue.
Your selection will populate.

Click **Next** to continue

**Addresses**

We require **three** types of addresses: Fulfillment, Physical, and Remittance. They may be all the same or distinct addresses.

Click **Add Address**

A new window will appear.

Add a title for this address. Check the corresponding boxes for this address.

Click **Next**

Reminder: fields marked with a star are required. All other fields are optional.
This is where you indicate how you want purchase order distributed: email or fax.

Click **Next**

A new screen will appear.

Enter a company contact. If you click **Not Applicable**, you will be required to enter a contact on the next screen.
Click **Save Changes**

**If you added a contact here,** the Address and Contact sections

<table>
<thead>
<tr>
<th>The Sampson Project</th>
<th>Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration In Progress for</td>
<td></td>
</tr>
<tr>
<td>Indiana University TEST SITE</td>
<td></td>
</tr>
<tr>
<td>6 of 8 steps Complete</td>
<td></td>
</tr>
<tr>
<td>Welcome</td>
<td></td>
</tr>
<tr>
<td>Company Overview</td>
<td></td>
</tr>
<tr>
<td>Business Details</td>
<td></td>
</tr>
<tr>
<td><strong>Addresses</strong></td>
<td></td>
</tr>
<tr>
<td>Contacts</td>
<td></td>
</tr>
</tbody>
</table>

Please enter any addresses from which your organization does business to help us route information and communication correctly.

- Fulfillment: Where IU will send POs
- Physical: A physical address, perhaps headquarters, or your Tax Address
- Remittance: An address associated with where IU will send payment, perhaps the accounts receivable location

- **Address Types**
  - Remittance (Primary)
  - Fulfillment (Primary)
  - Physical/Tax (Primary)

- **Address**
  - 123 Main street
  - Bloomington, Colima, 47400
  - Mexico

Click **Add Address**

Click **Next**

**Contacts**

Contacts receive notifications related to orders established with IU. You are required to have one "Remittance" contact on file to satisfy this section of the registration process.

If you added a contact when adding another address this section will already be complete.

Click **Add Contact**

Kirk, James

<table>
<thead>
<tr>
<th>Contact Label</th>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
</table>

Enter contact information relevant to the company.

Reminder: fields marked with a star are required. All other fields are optional.

Click **Save Changes** to save the contact to your profile.
Repeat these steps as many times as desired to add additional contacts to your profile. Click **Next** to continue to the Payment Information section.

Click **Next**

**Insurance**

Certain services may require liability insurance. Check with your IU customer if you are unsure.

If insurance is needed, click **Add Insurance** and upload supporting documents. If insurance is not required, click **Next**
Payment Information

Non-US companies can only be paid via wire transfer. Click Add Payment Information and select Wire Transfer.

Payment via Wire Transfer

Select Wire Transfer from the drop-down menu. A new window opens where you can enter your banking information. You may select Check if your company has a US mailing address, or Direct Deposit (ACH) if your company has a US banking account. Most international suppliers should select Wire Transfer.
If you wish to receive an email notification when payment is issued via this method, enter your email address in the **Electronic Remittance Email** field. Preferred Currency is also selected here.

**Invoices received must be in the currency chosen during registration to ensure proper payment.**

Next, enter your bank account information in the **Bank Account** section.

Click **Save Changes** to save your work.

Next, Complete required questions under Additional Questions.
Once payment information is entered, click **Save Changes**.

At the bottom of the **Payment Information** section, you will upload supporting bank document(s) that verify the wire details. Click **Select File** under 'Wire Attachment Upload'. An additional, optional field for intermediary bank information is also present.

A document verifying Wire Transfer bank information is **REQUIRED**. If this is missing, the process will be delayed.
Tax Information

A completed and signed W-8BEN-E tax form is required to complete registration. Click **Add Tax Document** and select the appropriate W-8BEN tax form.

*If you do not see the option to add a tax document, ensure "Non-US Based Entity" is selected as legal classification on the Company Overview section.

Enter a name for the tax form in the **Tax Document Name** field and select the year the form was signed from the **Tax Document Year** drop-down menu.

If you already have a completed tax document on hand *with a REV date of 2021 or newer*, click **Select file** to upload the document.
If you do not have a completed W-8 form saved to your computer, click **Download Pre-populated Tax Document**. Jaggaer generates a W-8 tax form which contains information previously entered during the registration process.

You must print and sign the pre-populated document, then upload.

Print the tax form, sign and date, and scan the document. The signed document can then be uploaded by clicking **Select file**.

*The tax form MUST be signed to satisfy this requirement. Please double check and verify the form is signed and complete prior to uploading.*

Once uploaded, click **Save Changes** to upload the document to your profile.
Enter the date the form was signed in the **Tax Form Signature Date** field. You may also select the date using the calendar widget to the right of the field. Select a **Chapter 3 Status Code**.

W-8 tax forms are only valid for 3 years from the **Signature Date**.

Click **Save Changes** to save your progress and **Next** or **Proceed to Certify and Submit** to continue.

**Supplier Information**

**This section is optional for Shipping Terms**

Click **Proceed to Certify and Submit**
Certify & Submit

Finally, verify your name, title, and email address in the appropriate fields. Prior to submission, you can review or update a section by selecting it from the left-hand menu.

Once you are satisfied that the information you have entered is correct, check the box next to Certification and click Submit.

After submission, you will see a confirmation screen like the one below.

Additionally, you will receive an email confirming your submission.
Supplier Registration Complete for Indiana University

Dear The Sampson Project,

Thank you for completing your Jaggair registration profile. Your information has been submitted to Indiana University TEST SITE4 and is awaiting review. The IU Supplier Workgroup will contact you with any questions they may have.

As a reminder, you can log into your secure account by visiting Indiana University TEST SITE's Customer Portal Login Link.

In the meantime, we encourage you to review our For Suppliers page for additional information regarding the features of your new portal, including invoice submission and payment tracking. You may login to your portal at any time by visiting the Jaggair Customer Portal page.

Please contact the IU Supplier Workgroup with any questions by emailing or calling (812) 855-3720, option 1.

Thank You.

Indiana University
Registration Approval

IU Purchasing will review your information and contact you if any additional information is needed. Communication will be sent via email from the address buyiu.noreply@iu.edu or helpmeiu@iu.edu

Once your registration is approved, you will receive a confirmation email like the one below. This message will come from support@sciquest.com. This confirmation notice may take up to 48 hours to be delivered.

![Confirmation Email]

Congratulations! You are now a member of the Jaggaer supplier network and may receive payments from IU.
Continue Registration

Access your supplier registration by logging in on the Jaggaer supplier portal. Once logged in, click Indiana University in the Customer Portal Access section.

If it is the first time you’re accessing your portal after your initial login, a pop-up window will appear notifying you that you are leaving the Jaggaer portal and continuing to the Indiana University portal.

Check the box 'Don’t show me this again' and click OK to dismiss the message and continue.
In the IU portal, click **Manage Registration Profile** to continue completing the registration process.

Select a section from the left-hand menu to continue registering. Sections marked with a green checkmark are complete. Gray checkmarks represent sections which require additional information.