

New Supplier

New Supplier Creation

In order to purchase any item or service or reimburse or pay a person or supplier, We must first have a 10-digit Supplier ID created within NU Financials. This process takes 24-48 hours once the proper documents are procured.

Supplier ID Example

0000016649	THERMO FISHER SCIENTIFIC
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Needed Forms

- A W-9 (or W-8 for a foreign vendor) must be filled out on the most current version the government has provided: <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
 - Most companies/individuals will already have this on file and it must be the most current version of the form from the IRS
 - The form must be signed within the last 12 months to be accepted by Vendor Processing
- A Conflict of Interest Form (COI) must be submitted which is filled out by the person requesting the Supplier be added to the system: <https://www.northwestern.edu/financial-operations/policies-procedures/purchasing/conflict-of-interest-certification-statement.pdf> We sign as the submitter into the portal, only sign as the selector (wet or digital signature w/date/time stamp)
 - This form must have a wet signature or a certified signature with a time/date stamp (e.g. Adobe certified signature process)
 - Please provide an email address to accept PO's (Usually found on their website if you do not already have an established contact)
- Please provide the reasoning for the request (e.g. item(s)/services being requested and why)
- If a vendor is inactive for an extended period of time, it must be reactivated and go through the same process as a new supplier

Additional Information

- Adding a Supplier: <https://www.northwestern.edu/procurement/purchasing/vendor-file-management/add-a-supplier.html>
- Modifying a Supplier: <https://www.northwestern.edu/procurement/purchasing/vendor-file-management/modify-existing-supplier.html>
- Shipping Information: <https://www.northwestern.edu/procurement/policies-forms/resources/shipping-guide.html>
- Employee vs Independent Contractor: <https://hr.northwestern.edu/for-managers/payroll-administration/independent-contractor/distinguishing-contractor-work.html>
- Independent Contractors: <https://hr.northwestern.edu/for-managers/payroll-administration/independent-contractor/>
- Contracted Services Form for IC: <https://www.northwestern.edu/financial-operations/policies-procedures/forms/contractedservices.pdf>
- Some suppliers will require credit references and proof of 501(c)(3) status, please contact the Business Office for these items

New Supplier

New Supplier Submission

Once the forms have been secured:

- Navigate within NU Financials to Menu>Suppliers>Supplier Registration>Register Suppliers
 - This page will take a long time to load, that is normal
- The first page will need to have the 'Supplier/Independent Contractor' radio button selected (below, left) then press 'Next.'
- The second page (below, right) will need the Tax ID, Entity Name (legal name NOT nickname), Classification selected as 'Supplier,' and the justification for the supplier addition written inside the 'Comments' box.
- Add attachments on this second page – the W9/W8 and the COI then press 'Next.'

Welcome - Step 1 of 4

New Supplier Registration

Use this online form to register new suppliers (including individuals/reimbursements) that will be paid through Accounts Payable.

Begin by selecting an activity in the box below.

Downloadable Forms:

- [W-9](#)
- [W-9 \(Foreign Entities\)](#)
- [Conflict-of-Interest Form](#)
- [Individual Worker Classification Form](#)
- [Visitor Travel & Expense Report](#)
- [Statement of Services](#)

Information and Resources:

- [Policies and Procedures](#)
- [Job Aid: Add a New Supplier / Independent Contractor](#)
- [Job Aid: Add a New Refund/Reimbursement Supplier](#)
- [Job Aid: Review or Edit an Existing Request](#)
- [eLearning Course: Supplier Registration](#)
- [e-Payment Solutions for Vendors and Individuals](#)

Now Available: Electronic Payments for Individuals (Not Companies) via Zelle and ACH. If applicable, please provide the necessary contact information as requested.

Refer to the instructions at the top of each page. Be sure to upload all necessary forms and documentation.

Need Help? Please contact Vendor File Management at 847-491-4707 (1-4707).

Select an activity below:

- Start a new registration form
What type of entity do you represent?
 - Supplier/Independent Contract
 - Refund/Reimbursement
- Continue from where you left

Required field

Identifying Information - Step 2 of 4

Use the Add Attachment link (right of the Supplier name) for the following required documents:

- For Reimbursements: Visitor Expense Rept, Receipt, etc
- For Independent Contractors: W9/W8, COI, & Indiv Worker Classification
- For Businesses: W9/W8 & COI

Unique ID & Company Profile

* Tax Identification Number

* Entity Name [Add Attachment](#)

http://URL [Open URL](#)

* Classification

Profile Questions

If this is an Independent Contractor, select the Payment Purpose(s).

If this is an Independent Contractor with a U.S. address and a U.S. bank account, do they wish to be paid electronically?

For electronic payments (individuals only) enter email address.

***Comments**

* Required field

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New Supplier Submission

- On page 3 (directly to right), please fill in the address for remittance of payment. For the email, include the email all PO's should go to (try to get a general email, NOT a person-specific email address. Then press 'Next.'
- On page 4 (below, right), click the Terms of Agreement box and then 'Submit'
- Once submitted, a confirmation email will be sent to you
- It typically takes 24-48 hours to process these. One processed, you will receive an email saying it was denied along with the reasoning or the approval email.
- Once it has been approved, it will give you the new Supplier ID, please forward this email to Andre/Olga and they will ensure it is added to ChemPO as well. The ID is ready for use after this.

The screenshot shows the 'Addresses - Step 3 of 4' form. At the top, there is a progress bar with four steps: 'Welcome', 'Identifying Information', 'Addresses', and 'Submit'. The 'Addresses' step is currently active. Below the progress bar, there are navigation buttons: 'Exit', 'Save for Later', 'Previous', and 'Next'. The main heading is 'Addresses - Step 3 of 4'. A note states: 'Note: If you selected Supplier as the Classification on the previous page, please provide a company email address for receiving Purchase Orders from NU.' The form is divided into two sections: 'Primary Address' and 'Other Addresses'. The 'Primary Address' section includes a dropdown for 'Country' (set to USA), and input fields for 'Address 1', 'Address 2', 'Address 3', 'City', 'Country', 'Postal', 'State', and 'Email for PO'. The 'Other Addresses' section has a heading and a note: 'Check boxes below to indicate addresses that are different from your Primary Address above:'. It contains two checkboxes: 'Remit To Address' (with subtext 'Address for remitting payment') and 'Invoice Address' (with subtext 'Address from which you send invoice'). At the bottom, there are 'Exit', 'Save for Later', 'Previous', and 'Next' buttons.

The screenshot shows the 'Submit - Step 4 of 4' form. At the top, there is a progress bar with four steps: 'Welcome', 'Identifying Information', 'Addresses', and 'Submit'. The 'Submit' step is currently active. Below the progress bar, there are navigation buttons: 'Exit', 'Save for Later', 'Previous', and 'Next'. The main heading is 'Submit - Step 4 of 4'. The form contains the following text: 'Select the "Review" button to review the registration information. Click the "Submit" button to submit your registration after reviewing and accepting following Terms of Agreement . Email communication regarding this registration will be sent to:'. Below this is an input field containing the email address 'brandon.kendrick@northwestern.edu'. There is a section titled 'Terms and Conditions' with a note: 'Make sure you read terms of agreement fully before submitting your registration.' Below this note is a checkbox labeled 'Select to accept the Terms of Agreement below.' and a link for 'Terms of Agreement'. At the bottom of this section are 'Review' and 'Submit' buttons. At the very bottom of the form, there are 'Exit', 'Save for Later', 'Previous', and 'Next' buttons.