Vendor Onboarding Guide

University Operations
www.wm.edu/buywm

buywm@wm.edu
757-221-3957
How to Register as a buyW&M Vendor
Thank you for your company’s interest in becoming a buyW&M registered vendor for William & Mary (W&M) and the Virginia Institute of Marine Science (VIMS) campuses.

For a vendor to register with buyW&M, an invitation must be created and sent to the vendor. The registration process is quick and easy; however, it will be important to be sure you have the following information to complete the registration process:

- Correct contact information and address(es) for the following within your company:
  - Accounts receivable
  - Sales
  - Fulfillment

- If your company will be coming on-site to perform services, W&M requires a certificate of insurance listing William & Mary as an additional insured and endorsed on the policy. The proper name on the certificate of insurance is: “The Commonwealth of Virginia, and the Rector and Board of Visitors of William & Mary, its officers, employees, and agents.”

Vendor Registration Tips

- This guide provides assistance for the procurement related vendor invites; however, we are paying all types of vendors in the buyW&M system – some of the information in this guide may not be what you see on your screen for registration, just move down to the next relevant portion for registration assistance
- Note that some instances (ie. electronic signature of tax form) is generated through a pop up, be sure to allow popups for this site while completing registration
- Only those fields that have a star ★ beside the field are required
- When a section is completed, you will see a green check mark ✔
- Dun & Bradstreet Number is NOT a required field. Simply note that you do not have a DUNS in the yes or no question
- **Contacts & Addresses:** There are multiple types of contacts and addresses that may be required.
  - If your address is the same for all types, note what is required in the section:
    - **Addresses**
      Please enter any physical or mailing addresses from which your organization is reachable. Address types are listed below.

      | Required Information |
      |----------------------|
      | The following address types are required to complete registration: |
      | - Fulfillment |
      | - Gerritance |

    - You can keep the select all option to allow you to enter address information for all types one time
Once the request for vendor registration is approved, your company will receive an email from buywm@wm.edu that will look similar to the following:

**Vendor Invitation for buyW&M**

Dear Atlas Kiwi,

buyW&M has invited you to register as a potential vendor. Our vendor network is a best-in-class Vendor Registration and eProcurement system that provides a one-stop, complete solution for buyer and vendor interaction.

Becoming a buyW&M network vendor 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 successful completion of your registration, you will have access to your secure portal where you can add additional details about your organization, invite colleagues to become users in your site, and more.

please register

[Register Now]

Thank You,

buyW&M

If you have any technical questions, please contact WM’s Vendor Review Team at buyW&M@wm.edu or +1 757-221-3957 for assistance and identify yourself as registering in the buyW&M Vendor Network.

Click on the “Register Now” button and set up your vendor account. You will use your vendor account routinely to receive purchase orders, submit invoices and check payment status.

Upon log in you will be on the homepage of the registration process. Please review the welcome information and be sure that your legal company name is correct before hitting “Next”.

The left-hand navigation displays the sections of information you will be prompted to complete. Upon successful completion of each section, a green will appear to the right of the section title.

All starred fields are required.
1. DBA: complete if your company has a different name it is doing business as (DBA); otherwise leave this field blank
2. Country of Origin – choose your company’s country of origin
3. DUNS – choose yes or no for whether your business has a Dun & Bradstreet number (link to website included in the registration)
   a. If Yes, you will be prompted to provide your number
4. Legal Structure – choose your company’s legal structure from the drop-down listing
   a. NOTE: The legal structure is what guides the tax form process, so if your company is not a US based company, please be sure to choose Non-US based entity or individual depending on your structure type.
5. Tax ID Number – please complete using your IRS Tax ID
6. Website – Please complete if your company has a website

Only if you choose Yes to having a DUNS number will this question populate
Additional Questions
Depending on your selection in the Company Overview section, additional questions may be required.

7. Is your company registered with eVA, the Commonwealth of Virginia’s eProcurement System? – Indicate if your company is currently registered with eVA. If so, please provide your eVA registration number/eVA vendor ID.

8. Entity Classification – choose your entity’s classification based on your company’s Legal Structure selection

9. First, Middle, Last Name – complete if your company’s legal structure is Individual/Sole Proprietor

Business Details
This section provides W&M with important details about your company, such as the areas where you operate and the products and services that you provide. Additionally, this data helps determine whether your business meets the criteria to qualify for one of Virginia’s business certification programs such as: Small, Woman-owned, and Minority-owned Businesses (SWaM), Disadvantaged Business Enterprises (DBE), and Employment Services Organizations (ESO)

- Year Established – choose the date your company was established from the calendar
- Number of Employees – indicate how many employees your company employs
- Annual Revenue/Receipts – if available, please complete for the shown years
- Sales Territories – indicate and select the areas your company services.
- Products and Services
a. **Commodity Codes** – select from the list of W&M codes specific to the products and/or services your company provides

**Commodity Codes**

Use search or browse the list to select applicable Commodity Codes. You can select multiple before clicking Done.

**0 Selected Codes**

Showing 1 - 20 of 312 results

<table>
<thead>
<tr>
<th>Commodity Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10100</td>
<td>OTH. ANIMALS</td>
</tr>
<tr>
<td>101100</td>
<td>SUP. ANIMAL, INCL. PRODUCTS</td>
</tr>
<tr>
<td>101200</td>
<td>EQUIP. ANIMAL, INCL. CONTAINMENT &amp; HABITATS</td>
</tr>
<tr>
<td>101600</td>
<td>SUP. HORTICULTURE &amp; LANDSCAPE ITEMS</td>
</tr>
<tr>
<td>101700</td>
<td>SUP. FERTILIZERS, PLANT NUTRIENTS, HERBICIDES</td>
</tr>
<tr>
<td>111600</td>
<td>SUP. FABRICS, TEXTILES &amp; FIBER IND. MATERIALS</td>
</tr>
<tr>
<td>121400</td>
<td>SUP. GASES &amp; ELEMENTS</td>
</tr>
<tr>
<td>141100</td>
<td>SUP. PRINTED PRODUCTS, OTHER</td>
</tr>
<tr>
<td>141114</td>
<td>SUP. COPY PAPER</td>
</tr>
<tr>
<td>141115</td>
<td>SUP. GIFT CARDS, CERTIFICATIONS &amp; OTHER CASH</td>
</tr>
</tbody>
</table>

b. **Keywords** – include key words for searches, separating those words by commas. This helps W&M users search for key goods/services your company provides. Example: Company ABC provides consulting services, keywords: consult, consulting, consulting services

6. **What types of products do you provide?** – select from the categories found in the list

**Additional Questions**

What types of products do you provide? *

Will your company be coming on-site to perform services? *

- Yes
- No

a. **NOTE:** Some categories will require additional questions to be answered

**Additional Questions**

What types of products do you provide? *

Contractor License *

Contractor Classification/Specialty *

Contractor License Expiration *

7. **Will your company be coming on-site to perform services?** – Select Yes or No
a. NOTE: If Yes is selected, please upload your company’s most current Certificate of Insurance (COI) for review/approval

b. The Certificate of Insurance (COI) needs to list William & Mary as an additional insured and endorsed on the policy. The proper name on the certificate of insurance is:

“The Commonwealth of Virginia, and the Rector and Board of Visitors of William & Mary, its officers, employees, and agents.”

Address for the COI:
William & Mary
PO Box 8795
Williamsburg, VA 23187

Minimum Insurance requirements for William & Mary:

<table>
<thead>
<tr>
<th>Insurance Type</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workers’ Compensation</td>
<td>Statutory requirements and benefits</td>
</tr>
<tr>
<td>Employer’s Liability</td>
<td>$100,000</td>
</tr>
<tr>
<td>Commercial General Liability</td>
<td>$1M per occurrence/$2M aggregate</td>
</tr>
<tr>
<td>Auto (if required)</td>
<td>$1M per occurrence</td>
</tr>
</tbody>
</table>

Will your company be coming on-site to perform services? *

☐ Yes

☐ No

Please provide a copy of your Certificate of Insurance *

Select file

Addresses

Your company’s fulfilment and remittance addresses are required. Please select to begin adding your addresses.

Add Address

Basic Information (Step 1 of 3)

What would you like to label this address? *

Example: Headquarters, Houston Office

Which of the following business activities take place at this address? (select all that apply) *

- ☑ Takes Orders (fulfillment)
- ☑ Receives Payment (remittance)
- ☑ Other (physical)

* Required to Complete Registration

1. Address label – include a label reference your company’s address(es)
   a. NOTE: select the address type (Fulfillment, Remittance, and/or Physical) for this entry
2. **Address Details** – complete for this address type. Select next to save and move to the next screen

3. **Primary Contact for This Address** – complete for the point of contact for the address entry then select to save this address entry
   - **NOTE:** the contact will default per the previous selected address type(s), but can also be applied to Corporate and/or Sales address types if applicable

Once all required addresses have been added to your company’s profile, please select to continue to the next section.
Contacts

Please enter contact information for any individuals at your organization who may provide valuable information or help to our company. This will help us ensure we are always contacting the correct individual. Contacts can be linked to one existing address. Any required contact types are listed in the blue box.

1. Add Contact – Please add the point of contact for the associated business activity

Diversity

This section captures your company’s diversity categories, both on the Federal level and at the Commonwealth of Virginia level. Diversity & Inclusion is an integral part of W&M’s campus community, and we value our diverse suppliers for their different perspectives, skills and backgrounds.
1. **Add Diversity Classifications** – select any of the Federal and/or State classifications under which your company is currently registered

<table>
<thead>
<tr>
<th>Small Business Status and Diversity Classifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Classification</td>
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<table>
<thead>
<tr>
<th>Federal Diversity Classifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Small Business</td>
</tr>
<tr>
<td>☐ Positive Business Development Program (PB)</td>
</tr>
<tr>
<td>☐ Other Small Business (OSB)</td>
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<tr>
<td>☐ Minority-Owned Small Business (MOSB)</td>
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<tr>
<td>☐ Service-Disabled Veteran-Owned Small Business (SDVOSB)</td>
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<tr>
<td>☐ Veteran-Owned Small Business (VOSB)</td>
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<tr>
<td>☐ Women-Owned Small Business (WOSB)</td>
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<tr>
<td>☐ Disadvantaged Business Enterprise (DBE)</td>
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<tr>
<td>☐ Service Disabled Veteran (SDV)</td>
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</tbody>
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<table>
<thead>
<tr>
<th>State Diversity Classifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ State of Virginia Employment Services Organization (VARID)</td>
</tr>
<tr>
<td>☐ State of Virginia Micro Business (VA-Micro)</td>
</tr>
<tr>
<td>☐ State of Virginia Minority-Owned Business (VA-MOB)</td>
</tr>
<tr>
<td>☐ State of Virginia Women-Owned Business (VA-WOB)</td>
</tr>
</tbody>
</table>

2. **Additional Questions** – Is your company a Virginia SWaM certified vendor? – indicate if your company is currently certified as a SWaM business with the Virginia Department of Small Business & Supplier Diversity (SBD) [https://www.sbsd.virginia.gov/](https://www.sbsd.virginia.gov/)

### Additional Questions

Is your company a Virginia SWaM certified vendor? *

- Yes
- No

**a. NOTE:** If Yes, please complete the required fields regarding your company’s SWaM certification

If your company is registered with the Virginia Department of Small Business & Supplier Diversity (SBD), please provide your company’s SWaM (small, women-owned, & minority-owned) certification number below.

<table>
<thead>
<tr>
<th>SWaM Certification Number</th>
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<td>500 characters remaining</td>
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<table>
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<tr>
<th>SWaM Expiration Date</th>
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<tr>
<td>mm/dd/yyyy</td>
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<table>
<thead>
<tr>
<th>SWaM Type</th>
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</table>

### Insurance

This section captures additional insurance documentation your company may be required to attach based on the types of products and/or services being requested. Please choose from the drop-down list and complete the required fields and upload the insurance document. If the options are not applicable to your company, please select Next and move to the next section.
Payment Information
This section determines how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.

Payment Information
Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.

No payment information has been entered.
Add Payment Information
• Check
• Wire Transfer

Also, depending on your company’s legal structure, you may be eligible to register for W&M’s ePayables program. If your company is interested in electronic payments, please select which of the two available options is best suited for your company. You will receive a system-generated email with further instructions on how to enroll.

Help for ePayables
• An Automated Clearing House (ACH) deposit is an electronic transfer of funds using the Automated Clearing House. ACH is a secure network in the United States through which banks and other financial institutions can transmit electronic transactions. An ACH deposit means that funds are electronically deposited into an account.
• A Commercial Card (CCER) payment made to vendor with a single-use virtual card number. As long as the vendor accepts credit cards as a form of payment enrollment to accept payments made through AP control is simple.

We are partnering with Wells Fargo for electronic payments. The description of the two available programs are listed above. If interested in enrolling, please select which electronic payment method will work best for your company.*

○ ACH – Automated Clearing House Deposits
○ CCER – Commercial Card Payments
○ Not Interested

Tax Information
This section captures your company’s tax information, which is required for payment. If manually uploading a tax document, it should be in a PDF format.

1. Add Tax Document – select the tax document type using the drop-down button
**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 complete this section.

No tax information has been entered

Add Tax Document

W-9

**NOTE:** If your legal structure is either Non-US Based Entity or Foreign Individual, the listing will include various international tax forms. Please select the appropriate form and complete steps 2-4.

2. **Add Tax Document** – complete the required fields based on the information in the tax document being uploaded

   Add Tax Document

   Tax Type *: W-9

   Tax Document Name *

   Tax Document Year *

   Signature Status: Not Signed

   Tax Documentation *

   Manually upload the document instead

3. **Tax Documentation** – Select Sign Document if your company wishes to use the DocuSign feature to electronically sign the tax document populated with information provided during the registration process. Once the button switches to “Complete Signing”, please select to open the form in DocuSign.

   Tax Documentation *

   Waiting to get signed document via DocuSign

   Complete Signing

   a. **NOTE:** If your company is manually uploading your tax form, please select the check box next to “Manually upload the document instead”

4. **DocuSign** – Once the form has opened in DocuSign, select Continue at the top of the screen to review and apply an electronic signature. Select Finish from the top once complete to return back to the registration.
Conflict of Interest
This section captures whether your company or someone in your company has had a relationship with W&M or VIMS in the last 6 months.

Conflict of Interest
Recent Employment Question

Have you or any owner(s) within your company worked at William & Mary or Virginia Institute of Marine Science (VIMS) within the last six (6) months? *

- Yes
- No

1. If Yes is selected, please complete the required fields to gather additional information for Human Resources to review

   Last date of employment *

   mm/dd/yyyy

   Previous Employer’s Banner Number

   Previous Employee’s First Name *

   Previous Employee’s Last Name *
Certify & Submit
This section is the last step in the company’s registration process before the profile proceeds to an internal approval process by W&M. Please ensure all information listed in the profile is correct and accurate.

1. If all check marks are colored green, then all required fields have been completed. The preparer should complete the fields listed, select the certification check box, and click “Submit”.

NOTE: If all fields are not complete when the preparer selects the Certify & Submit section, the system will indicate which fields still need to be completed before the registration can be submitted.

Registration Completion
After the profile has been certified and submitted, your profile will read Complete and your registration will be entered into the internal W&M approval flow. A member of the buyW&M team will contact you using the given preparer’s contact information if there are any issues with your profile that need to be addressed.
Once the internal review team has fully approved (1 to 2 business days) your company’s registration, an email will be sent to the preparer’s email stating the registration is complete. The email will include a link to the Customer Portal Login page where you can manage your account view orders submit invoices and view payment status.

**Vendor Registration Complete for buyW&M**

Dear Atlas Kiwi,

Thank you for completing your registration profile on buyW&M. buyW&M is a best in class Vendor Registration and eProcurement system. Accessible via the world-wide-web, buyW&M provides a one-stop, complete solution for Buyer/Vendor communications.

As a reminder, you can log into your secure account by visiting buyW&M’s ![Customer Portal Login](Customer Portal Login)

Thank You,

buyW&M

If you have any technical questions, please contact WM's Vendor Review Team at buyWM@wm.edu or +1 757-221-3957 for assistance and identify yourself as registering in the buyW&M Vendor Network.

**NOTE:** An additional email will be sent after your company’s registration has been completed from SciQuest Support. This email indicates that your company has also been approved to be in the full JAGGAER (formally SciQuest) network for other JAGGAER clients to shop with your company. This email will include a link to a separate vendor portal for a separate instance of the system. Please be aware of which portal your company is entering when retrieving orders, submitting invoices, or updating profile information.

Dear Baker's Consulting Inc,

Congratulations! Baker's Consulting Inc is now a member of the JAGGAER Supplier Network, which is a market-leading network of 150,000+ active unique suppliers. As a member of the network you will be able to:

- Store basic company information in your profile and share with all customers to expedite the on-boarding process.
- Manage communications with all JAGGAER customers through the no fee, self-service JAGGAER Supplier Network.
- Reduce invoice processing time and expense through electronic submission of invoices and the ability to check invoice status when working with JAGGAER Accounts Payable Director customers.
- Choose between punch-out and hosted catalogs for product display, and manage catalog content and pricing from one central location.
- Increase your visibility to JAGGAER customers searching for suppliers to fulfill their purchasing needs.

Within your private JAGGAER Network Portal (Network supplier website), you can enter and update basic information about your company, invite colleagues to become users of your site, and more. In order to begin taking advantage of the benefits listed above, you will first need to complete your Network Profile, which stores information about your company. It is important to complete as much information as possible in your Network Profile to ensure buyers can connect with you as a potential supplier.

As a reminder, you can log into your secure account by visiting the link below. We recommend that you bookmark this page in your internal browser for future access. For information about using the portal, visit the Online Training and Support located on the JAGGAER Network Portal home page.

![JAGGAER Supplier Network Login Page](JAGGAER Supplier Network Login Page)