

Supplier/Payee Portal - Entity Registration Guide

Thank you for your interest in becoming part of the Princeton University Community.

Below are instructions on completing your entity registration with Princeton University's Supplier/Payee Portal. Click on the "register now" link from your invitation email. New suppliers will be asked to establish an account. Once you have created an account, you can then login at any time to update information through [Princeton University Supplier/Payee Portal](#).

Enter your login credentials and click [Login](#). If you do not remember your password select the [Trouble logging in?](#) link.

Food Werx	
Supplier Number: 000009122	
Registration Complete for: Princeton University	
Welcome	
Company Overview	✓
Business Details	✓
Addresses	✓
Contacts	✓
Locations	✓
Diversity	✓
Insurance	✓
Payment Information	✓
Tax Information	✓

Each area that is required will be indicated on the left panel of the registration screen (areas with a green check are complete). If an area is missing required information, the check mark will be greyed out. These areas will need attention before your registration is complete.

Below is information about each step in the registration process. Your information is automatically saved.

Once an area has been updated you can use the [Next >](#) button at the bottom of the screen.

Welcome

This step provides information related to registration requirements and information you will need during the registration process.

Enter your **Legal Company Name**

- Note: this is the name that will be entered on all Sourcing Events, Purchase Orders, and Payments

Company Overview

Enter details about your company.

- **Doing Business As (DBA)**
- Enter your **Country of Origin**
- **Does your business have a DUNS number?**
 - o You will be prompted to enter your DUNS number if you answer yes.
- Enter your **Legal Structure**
 - o The selection entered in the Legal Structure field will determine which (if any) tax documents will be available during the registration process.
- Enter your **Tax ID Number** (domestic suppliers). For independent contractors, you can enter your SSN)
- **Website** (if applicable)
- Enter **Additional Questions**
 - o Are you an independent contractor?
 - If you are an independent contractor, you will be asked a series of questions to confirm this status.
 - o Please confirm registrant is doing business with the University as an entity/independent contractor.

Business Details

This step provides information related to your company, such as the type of services/good provided as well as NAICS/commodity code.

- **Year Established**
- **Number of Employees**
- **Business Description**
- **Annual Revenue/Receipts** – this section is optional and can be used to determine small business classification.
 - o Enter the last 3 calendar years annual revenue
- **Products and Services** – enter commodity codes, or items related to the primary type of work done by your business. This information helps us to invite appropriate suppliers to solicitation events as well as report on types of goods/services purchased. For each selection indicated below click to access available options.
 - o **NAICS ([North American Industry Classification System](#))**
 - We recommend using the search feature to determine your NAICS code. Enter text related to the type of business you do. To get the most complete list of available options enter just 1 keyword related to the kind of business.
 - Example: Entering “Contractor” in the search
 - 238910 - Site Preparation Contractors
 - 238350 - Finish Carpentry Contractors
 - The expandable tree is also available to help determine the primary type of work and which code to use.
 - o **Commodity Code**
 - This list is a shortened/condensed version of commodity codes used internally by Princeton University.
- **Additional Product/Service Information**
- **Additional Questions**
 - o **Trade Union Status:** If you are a design and construction supplier, please enter Union, Non Union or Open/Merit Shop.

Addresses

At least **one** fulfillment (order), remittance and physical (permanent) address are required to complete registration. For multiple fulfillment (order), remittance and/or physical addresses, please indicate **one** as primary.

- Click [Add Address](#) - **Basic Information** (*Step 1 of 4*)
- In the required field “What would you like to label this address?” Enter a title (label) for the address
- Using check boxes, indicate which of the following activities take place at this address – select all that apply: Takes Orders (fulfillment), Receive Payments (remittance), Other (physical))
- Click [Next >](#) - **Address Details** (*Step 2 of 4*)
- Indicate How you would like to receive Purchase Orders for this fulfillment address (Email or Fax)
 - a. Email Address or Fax Number
- Complete the details of this address
 - a. Country, Address Line 1 (Address Lines 2 and 3 are optional) , City/Town, State/Province, Postal Code
 - b. Phone, Toll Free Phone and Fax are optional.
- Click [Next >](#) - **Primary Contact for this Address** (*Step 3 of 4*)
- Enter a **Contact** or select **Not Applicable**
 - a. Additional contacts could include
 - i. Remittance (who should we contact if there are questions regarding invoices received or payment issues)
 - ii. Sales (these individuals will get notifications about sourcing events)
- Click [Next >](#) - **Assign this Address to a Location** (*Step 4 of 4*)
- Assign the address to a location. For each **unique** fulfillment (order) address, you **must** create a **unique** location. You can associate the **same** remittance and physical address to one or more locations.
 - a. Use Existing Location, pick Location from the dropdown
 - b. Enter New Location – In the required field “What would you like to label this location”, enter a text description of the location. A location description is optional.
- Click [Save Changes](#)

Contacts

If you did not enter a contact in the previous step you will be required to do so here. A remittance contact is required to complete your registration.

- Click [Add Contact](#)
- Enter a title (label) for the Contact
- Enter First Name, Last Name, Email and Phone
- Position Title, Phone and Fax are optional
- Click [Save Changes](#)
- Click [Next >](#)

Locations

The address wizard lets you create a **single** location. You can associate fulfillment, remittance and physical address to a **single** location if you use a **single** address for all your business needs. Please provide a **unique** location for each fulfillment (order) address. If you have **multiple** fulfillment (order) locations, you will need to create them here. Follow the steps in the Address section to create additional fulfillment, remittance and physical addresses.

- Click [Add Location](#)
- In the Required field "Location Label" Enter in a text description of the location
- Using check boxes, indicate what type of business activities occur at this address (Takes Orders (fulfillment), Receive Payments (remittance), Other (physical))
- Click [Next >](#)
 - a. For each **unique** fulfillment (order) address, you **must** create a **unique** location. You can associate the **same** remittance and physical address to one or more locations.
 - b. In the Required field "What would you like to label this location?" Enter in a text description of the address (this can be the same as entered in #2 above)
- Click [Save Changes](#)
- Click [Next >](#)

Diversity

Princeton University is committed to making supplier diversity an integral part of the way it does business, consistent with its commitment to a diverse and inclusive university community that advances its teaching and research mission. Our commitment is driven by the belief that engaging a diverse supply base is mutually beneficial; fostering competition, opportunity, and generating considerable value by broadening the pool of supplier expertise, perspectives, and capabilities. The University's procurement practices aim to provide competitive access to sourcing opportunities and to promote diverse supplier participation. Princeton also seeks suppliers that share our commitment by embracing diversity within their own organizations and supply base in the delivery of goods and services to the University.

- Enter a response for [Does Your Business Qualify as a Diverse Supplier? *](#)
 - a. Yes, No/Non-Us Based, Decline to Answer
- Click [Add Diversity Classification](#) You can enter multiple diversity codes when applicable.
 - a. Please complete additional questions. If you are certified as a diverse supplier, you will be required to upload a copy of the certificate.
- Click [Next >](#)

Insurance

Princeton University requires outside parties who will be performing work or providing services to the University, or those using University facilities to provide evidence of certain types of insurance coverage at specified minimum limits. In most cases, outside parties are required to name the University as an additional insured and to provide certificate of insurance (COI) before commencing work or before using a University facility. Information regarding University insurance requirements can be found [here](#).

- Click **Add Insurance**. If you have an umbrella policy, you will need to upload your certificate for each type of insurance included.
- Enter the Policy Number, Insurance Limit, Expiration Date and Insurance Provider
- Agent and Insurance Provider Phone are optional.
- Upload Certificate of Insurance
- Click **Save Changes**
- Repeat for additional insurance.
- Click **Next >**

Payment Information

Please provide a single preferred method of payment. We do not offer multiple payment methods. More information on the University's payment terms can be found [here](#).

- Payment method of check has default payment terms of Net 45.
- When choosing payment method of Credit Card (ePayables), approved suppliers will receive a unique credit card number which they use to settle approved invoices. Payment terms are immediate.
- When choosing payment method of ACH, please specify preferred ACH payment terms.
- Princeton does not offer domestic wire transfers.

- Click **Add Payment Information** Choose Direct Deposit (ACH), Credit Card (ePayables) or Check
- Add Payment Information (Direct Deposit - ACH)
 - a. Enter **Payment Title**
 - b. Enter **Electronic Remittance Email** and **Currency**
 - c. Enter Bank Account Details:
 - i. Enter Bank - **Country, Bank Name, Account Holder's Name, Account Type, Routing Number, Account Number, Bank - Address Line 1, Bank - City/Town, Bank - State/Province, Bank - Postal Code**
 - d. Additional Questions – **Specify Payment Terms**
- Add Payment Information (Credit Card - ePayables)
 - a. Enter **Payment Title**
 - b. Enter **Electronic Remittance Email** and **Currency**
- Add Payment Information (Check)
 - a. Enter **Payment Title**
 - b. Enter **Currency**
- Click **Save Changes**








- Click 

Tax Information

Princeton University is unable to provide advice on completing tax forms as these forms are governed by the IRS. If you have questions about how to complete a W9 or W8 form please visit www.irs.gov.

- Domestic suppliers and independent contractors will need to provide a current tax document.
- If you have already completed and signed your tax document click upload.
- If you choose to download the pre-populated document tax document, please save the completed file to your computer.
- You can e-Certify using your portal password in lieu of a signed document.

Princeton University recommends that you use the system generated tax document, which will pre-populate the information you previously provided in your registration into the appropriate area of the tax document. Below are instructions for using the pre-populated document and electronic signature:

- Click 
 - Select your document type from the drop down list – (W-9, W-8BEN, W-8BEN-E)
- Click 
 - Save the completed file on your computer (**do not insert anything in the signature line or date line – the following steps will walk you through electronic signature option below**)
- Enter **Tax Document Name**
 - Example: W-9 2015
- Enter **Tax Document Year**
- Tax Documentation
 - Upload The Tax Document
 - Click 
 - Enter **Title** (Example: “W-9” or “W-8”)
 - Click  to locate the file on your computer to be included as your tax document, follow your prompts to select and include the file you saved in step 2a above
 - Click 
- To e-Certify, check I certify this tax document box
 - Enter your Supplier/Payee portal password (this is the password you used to log onto the Supplier Portal)
- Click 
- Click 

Certify & Submit

If any required fields have not been completed during the registration process you will be prompted to complete them. The below is an example of the type of message that will appear for any required fields missing. You can click on the hyperlinks which will take you directly to the section and field missing information.



Once all required fields have been completed and you have read the statement.

- Enter the **Preparer's Name, Preparer's Title** and **Preparer's Email Address**
- Click the box for "I certify that all information provided is true and accurate."
- Click

You will receive an email when you have submitted a completed registration profile. Your registration will be reviewed by Procurement Services. If any additional information is needed, you will be contacted.

Still have questions? Please contact Princeton University (Financial Service Center) at finance@princeton.edu or +1 (609) 258-3080 for assistance.