The Supplier's View of Onboarding in UMarketplace

First, the department will need to complete and submit a New Supplier Request form. Then the form will route to Purchasing for approval. This document highlights the next step, when the supplier receives an email invite and can begin completing the online application steps. This document can not be used as an application. After the supplier submits their application, the Purchasing Data Team can add the supplier into Workday.

Before the invitation process begins the "New Supplier Request" form must be completed by the department and approved by Supply Chain Services. The request form can be found under the "UM QuickLinks" on the Workday Homepage. Once approved by Supply Chain Services the supplier will receive an email invite from UMiami@sciquest.com to complete. Below is an example of the supplier's process.

2018-02-16 15:30 GMT+01:00 University of Miami <UMiami@sciquest.com>:

Supplier Invitation for University of Miami

Dear [Supplier Name],

The University of Miami (UM) is pleased to invite you to register for its new supplier management system, UMarketplace, an integrated solution to transmit purchase orders and invoices electronically.

To register for access, please click on the "Register Now" button below. Your application must be complete in order to be submitted. You will be notified via email once your application has been received and approved. Once your application is submitted and approved, you will have access to your secure information where you can add additional details about your organization, grant access to colleagues within your organization, and more.

Register Now

Thank You,

University of Miami Supplier Onboarding Team

If you have questions, please email UM Supply Chain Services at: supplychain.supplierapp@miami.edu or by phone at +1 305-284-5751 .

Thank you.

The steps below must be completed by the supplier. Then the UM onboarding approval process can begin.

1. Welcome

2. Company Overview

3. Business Details

ANN WENDSCHUH LLC

Registration **In Progress** for:
University of Miami

9 of 10 Steps Complete

Welcome
Company Overview ✔
Business Details ✔
Addresses ✔
Contacts ✔
Diversity ✔
Insurance ✔
Payment Information ✔
Tax Information ✔
Independent Contractor ✔
Additional Attachments ✔
Certify & Submit

Business Details   ?

The information on this page allows us to track important details about your company, such as the areas where you operate and the products and services that you provide. Additionally, this data is used to determine whether or not your business meets the small business size standards as defined by the U.S. Small Business Administration. The SBA standards are based on your NAICS code and annual revenue, or number of employees.

Year Established   [   ] 🗓
                        yyyy

Number of Employees   [   ]

Business Description *   [   ]
                        2488 characters remaining

Annual Revenue/Receipts

[   ]

Currency   [USD   ▼]

2017 Annual   [   ] USD
Revenue/Receipts

2016 Annual   [   ] USD
Revenue/Receipts

2015 Annual   [   ] USD
Revenue/Receipts

Sales Territories

Is Your Business a Local Supplier?   ● Yes   ○ No
Is Your Business a National Supplier?   ○ Yes   ● No
U.S. Service Area   Florida   [Edit]
International Service Area   –   [Edit]

Products and Services

NAICS Codes * ⓘ   **Primary NAICS Code Selected**   [Edit]
                                                             [Remove]

★ Required to Complete Registration   [< Previous] [Next >] [Save Changes]

4. Address

ANN WENDSCHUH LLC

Registration **In Progress** for:
University of Miami

9 of 10 Steps Complete

Welcome
Company Overview ✔
Business Details ✔
Addresses ✔
Contacts ✔
Diversity ✔
Insurance ✔
Payment Information ✔
Tax Information ✔
Independent Contractor ✔
Additional Attachments ✔
Certify & Submit

Addresses   ?

Address Label	Address Types	Address	
South Miami office space			[Edit ▼]

[Add Address]   Show Inactive Addresses

                                              [< Previous] [Next >]

5. Contacts

ANN WENDSCHUH LLC

Registration **In Progress** for:
University of Miami

9 of 10 Steps Complete

- Welcome
- Company Overview ✔
- Business Details ✔
- Addresses ✔
- **Contacts** ✔
- Diversity ✔
- Insurance ✔
- Payment Information ✔
- Tax Information ✔
- Independent Contractor ✔
- Additional Attachments ✔
- Certify & Submit

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 below.

Contact Label	Contact Types	Name	Email	
				Edit ▼

Add Contact ▼

Show Inactive Contacts

< Previous   Next >

6. Diversity

ANN WENDSCHUH LLC

Registration **In Progress** for:
University of Miami

9 of 10 Steps Complete

- Welcome
- Company Overview ✔
- Business Details ✔
- Addresses ✔
- Contacts ✔
- **Diversity** ✔
- Insurance ✔
- Payment Information ✔
- Tax Information ✔
- Independent Contractor ✔
- Additional Attachments ✔
- Certify & Submit

Diversity

We strive to do business with diverse companies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.

Diversity Classification	Additional Information	
Small Business Enterprise (SBE)		Edit ▼
Minority Owned Small Business (MOSB)		Delete

Add Diversity Classifications

< Previous   Next >

7. Insurance

ANN WENDSCHUH LLC

Registration **In Progress** for:
University of Miami

9 of 10 Steps Complete

Welcome
Company Overview ✔
Business Details ✔
Addresses ✔
Contacts ✔
Diversity ✔
Insurance ✔
Payment Information ✔
Tax Information ✔
Independent Contractor ✔
Additional Attachments ✔
Certify & Submit

Insurance   ?

Our organization wants suppliers to maintain appropriate insurance coverage. Listing your insurance policies helps us determine if you have the appropriate level of coverage for our future product and service needs.

NOTE: Do not attach declaration pages or insurance bills as certificates, these are not accepted. **University of Miami shall be listed as the certificate holder and as an additional insured under the general liability policy in the document.** If you have questions about the certificate holder address or insurance limits, please refer to the link presented in this page. All necessary requirements are there.

University of Miami Insurance requirements

http://business-services.miami.edu/departments/risk-management/vendor-insurance/index.html

> **Required Information**
> At least one insurance policy is required to complete this section.

No Insurance has been entered.

Add Insurance ▾

Additional Questions

Will you be providing on-site services? *

○ Yes
● No

From the list below, please select all that apply; if none are applicable, then choose "None of the Above" *

2 Values Selected   Edit

< Previous   Next >   Save Changes

8. Payment Information

ANN WENDSCHUH LLC

Registration **In Progress** for:
University of Miami

9 of 10 Steps Complete

Welcome
Company Overview ✔
Business Details ✔
Addresses ✔
Contacts ✔
Diversity ✔
Insurance ✔
Payment Information ✔
Tax Information ✔
Independent Contractor ✔
Additional Attachments ✔
Certify & Submit

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.

All suppliers will default to payment by check. The University of Miami may also issue paymen by credit card*.

Please email epay@miami.edu **to request enrollment in ePayables (payment by credit card). As part of your request, include your Company Name as listed in the Supplier Application and your Tax ID.**

*The Credit Card payment method is the University of Miami's ePayables payment solution where suppliers receive an email authorization to charge a credit card number for outstanding invoices.

Title ▽	Payment Type	Currency	Active	
Ann Wendschuh LLC	Check	USD	Yes	Edit

Add Payment Information ▾

< Previous   Next >

9. Tax Information

ANN WENDSCHUH LLC

Registration **In Progress** for:
University of Miami

9 of 10 Steps Complete

- Welcome
- Company Overview ✔
- Business Details ✔
- Addresses ✔
- Contacts ✔
- Diversity ✔
- Insurance ✔
- Payment Information ✔
- **Tax Information** ✔
- Independent Contractor ✔
- Additional Attachments ✔
- Certify & Submit

Tax Information |?

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

Tax Document Name ▽	Tax Type	Tax Document Year	Tax Documentation	
Ann Wendschuh LLC	W-9	2018	⬇ View Document	Edit ▼

Add Tax Document ▼

< Previous   Next >

10. Independent Contractor

ANN WENDSCHUH LLC

Registration **In Progress** for:
University of Miami

9 of 10 Steps Complete

- Welcome
- Company Overview ✔
- Business Details ✔
- Addresses ✔
- Contacts ✔
- Diversity ✔
- Insurance ✔
- Payment Information ✔
- Tax Information ✔
- **Independent Contractor** ✔
- Additional Attachments ✔
- Certify & Submit

Independent Contractor

Have you been an employee of the University Miami in the past 12 months? ★
- ○ Yes
- ◉ No

Are any of your immediate family members employees of the University of Miami? ★
- ○ Yes
- ◉ No

Are any significant stock holders (10% or more of the current authorized stock), partners or employees in a decision making capacity of your organization employees of the University of Miami? ★
- ○ Yes
- ◉ No

★ Required to Complete Registration

< Previous   Next >   Save Changes

11. Additional Attachments

ACADEMY OF LEGAL STUDIES IN BUSINESS

Registration **Invited** for:
University of Miami
1 of 10 Steps Complete

- Welcome
- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts ✓
- Diversity ✓
- Insurance ✓
- Payment Information ✓
- Tax Information ✓
- Independent Contractor ✓
- **Additional Attachments** ✓
- Certify & Submit

Additional Attachments

> To save changes, you must first click **Get Started** on the **Welcome** page to accept the terms and conditions.

Please add below any additional attachments you would like to provide during the registraiton process.

Attachment 1

[Select file]

Attachment 2

[Select file]

Attachment 3

[Select file]

Attachment 4

[Select file]

Attachment 5

[Select file]

★ Required to Complete Registration

[< Previous] [Next >] [Save Changes]

12. Certify & Submit

ACADEMY OF LEGAL STUDIES IN BUSINESS

Registration **Invited** for:
University of Miami
1 of 10 Steps Complete

- Welcome
- Company Overview ✓
- Business Details ✓
- Addresses ✓
- Contacts ✓
- Diversity ✓
- Insurance ✓
- Payment Information ✓
- Tax Information ✓
- Independent Contractor ✓
- Additional Attachments ✓
- **Certify & Submit**

Certify & Submit

> To save changes, you must first click **Get Started** on the **Welcome** page to accept the terms and conditions.

Please type your initials in the box below acknowledging that you are a company official and that all information is correct. It is the Supplier's responsibility to ensure company information is accurate and that company information is kept current. Inaccurate company information may result in payment delays.

Additionally, by submitting this registration, you certify all information provided is true and accurate. Knowingly providing false information may result in disqualifying you or your company from doing business with us.

Preparer's Initials ★ [   ]

Preparer's Name ★ [   ]

Preparer's Title ★ [   ]

Preparer's Email Address ★ [   ]

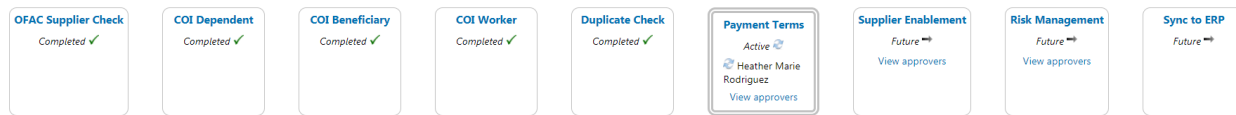Today's Date   4/3/2018

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

★ Required to Complete Registration

[Submit]

After the steps above are completed by the supplier, the UM onboarding approval process can begin. See example below.

OFAC Supplier Check	COI Dependent	COI Beneficiary	COI Worker	Duplicate Check	Payment Terms	Supplier Enablement	Risk Management	Sync to ERP
Completed ✓	Completed ✓	Completed ✓	Completed ✓	Completed ✓	Active ↻ ↻ Heather Marie Rodriguez View approvers	Future ➡ View approvers	Future ➡ View approvers	Future ➡

The supplier can be used when "Completed" and the date appear.

Sync to ERP
Completed ✓

✓
Completed
3/18/2017
9:22 AM