McMaster University – MacBuy

Supplier Management System and Portal

Registration and Help Guide

Questions? Please contact macbuyhelp@mcmaster.ca

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Portal Overview

McMaster University recently implemented a cloud-based procure-to-pay tool including a supplier management system and portal (MacBuy), powered by Jaggaer (formerly SciQuest). MacBuy offers University staff and faculty an integrated (shopping cart) marketplace for purchasing activities, including automated payment processes and supplier portal.

The supplier portal allows suppliers to collaborate with McMaster in a secure, on-line environment.   There are several benefits to conducting business via the portal:

- Efficient receipt of purchase orders;
- Ease of purchase orders invoice submissions;
- Access to view the status of invoices along with information about purchase orders;
- Secure online access 24/7 to self-register your company and manage your information.

Suppliers will receive an email invitation (similar to the one below) from McMaster University's MacBuy Support Team to register as a McMaster supplier. McMaster will not be accepting unsolicited registrations. The email invitation will contain a link to create your secure portal account. Completion of the registration form should take less than fifteen (15) minutes. The supplier will be asked to provide information about their company, including contact information, addresses and preferred payment method.

Supplier Invitation for McMaster University - MacBuy

Dear ABC Company,

McMaster University - MacBuy has invited you to register as a potential supplier. Our supplier network is a best-in-class Supplier Registration and eProcurement system that provides a one-stop, complete solution for buyer and supplier interaction.

Becoming a McMaster University - MacBuy network supplier is free, easy and it only takes about 15 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 24/7 access to your secure MacBuy portal where you can add or update details about your organization.

Register Now

Thank You,
McMaster University - MacBuy Supplier Portal

Questions? Please contact MacBuy Support at: macbuyhelp@mcmaster.ca
Please identify yourself as registering in the McMaster University - MacBuy Supplier Network.

Registration

To begin the registration process click **Register Now** in the invitation email.

A Registration FAQ and Registration Video Tutorial are available. These pages provide suppliers with specific information and instructions. There is also a language selection option in the upper right corner.

If **you do not have an account in the Jaggaer Supplier Network** (JSN), the first step in the Registration will be to create one.

Within the 'Your Login' section, the email address and password created here will be used as the login to access McMaster's MacBuy Supplier Portal and the Jaggaer Supplier Network (JSN). Please complete the required fields and click 'Create Account'.

If you have a JSN account the first step will be to login. Issues with login or password resets should be directed to Jaggaer Support at 1(800)233-1121.

Once you complete the Create Account or Login process, you will be directed to McMaster's MacBuy registration site.

To complete your registration profile, ensure all required fields on the left side bar have green check mark (✔). Required fields are denoted with an asterisk (★). It is recommended that you [Save Changes] before moving to the next page.

Some information may be prepopulated with data during the invitation process. Please review this information for accuracy and make changes where needed.
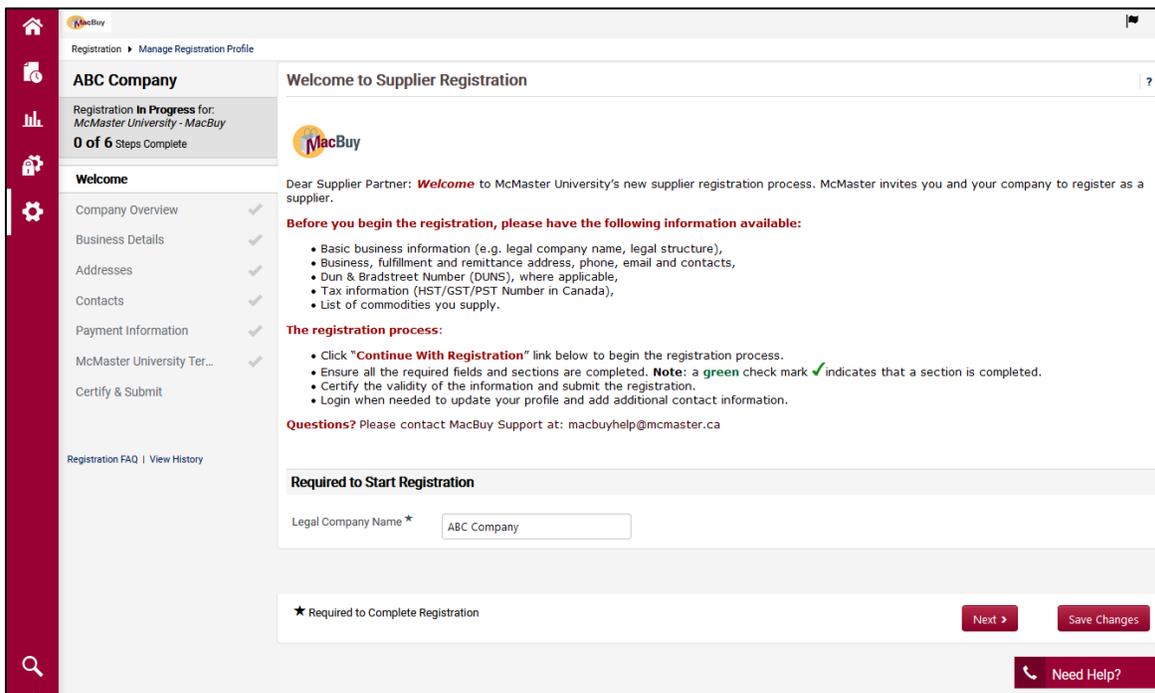
Note: Click on ❓ for additional help information.

1. Welcome
    a. Confirm your company name ★
        i. The supplier name should be the Legal/Incorporated name that will appear on the Purchase Order and Remittance.
    b. Click Save Changes, then Next.

2. Company Overview
    a. Provide Doing Business As (DBA) name, if applicable.
    b. Country of Origin ★

c. Select Yes if your company has a DUNS (Dun and Bradstreet) number; No if not. ★
d. Select the Legal Structure of your company ★
    i. Choose "Other" if you are unclear which option to select.
e. Enter your website information, if applicable.
f. Select Yes if your company charges VAT (e.g. HST, GST, PST, QST) and enter number when prompted. Select No is you do not charge VAT on your invoices.
g. Select Yes if your invoice includes a labour component, otherwise select No.

3. <u>Business Details</u>
    a. Business Description ★
        i. Please provide a brief description of the goods or services your company supplies.
    b. Products and Services
        i. Commodity Codes ★ Click on [Edit] Use the Search or browse functionality to find the commodity code that best reflects the goods or services you company supplies and click 'Done'.
    c. Enter keywords, if applicable but not required.

4. <u>Addresses</u> ★
If your company is an existing supplier with McMaster University some address information may appear here. If so, please verify for accuracy and completeness.

    a. Click 'Add Address' to begin completing this section.
    b. Enter an 'Address Label', e.g. Headquarters. ★
    c. If your Fulfillment address and your Remittance address are the same location, select both. If the Fulfillment address and the Remittance address are different, please complete one address at a time.
        i. Fulfillment address is the location purchase orders will be issued to and is the address the goods are shipped from.
        ii. Remittance address is the physical location payments are sent to or where your Accounts Receivable personnel reside.
    d. Purchase orders will be dispatched by email. ★
    e. Complete the remaining fields marked with an asterisk. ★
    f. Enter contact information for your Sales representative. ★

5. <u>Payment Information</u>
   Information on this page is used to determine how and where your company will receive payment. Please select only **ONE** payment option and only **ONE** currency.

   McMaster suppliers may select from several payment options. The payment terms are dependent upon the payment option the supplier selects.

   The preferred and quickest payment option is ePayables (Approve to Pay (A2P)). If your company accepts credit card as payment, we recommend you select the ePayables option. There are two settlement methods that are offered using ePayables. The supplier may choose to process the transaction themselves with a virtual card number that is sent to them, or, the funds can be deposited to the supplier's bank account.

   McMaster University Standard Payment Terms:
   ePayables – 0 to 5 business days from receipt of invoice
   EFT (direct deposit), cheque and foreign currency wire payment will be paid in net 30 days.

   Note:
   - When selecting ePayables, McMaster's Accounts Payable will follow up with your company to initiate the enrollment process.
   - At this time, only payment in CAD is available through ePayables and EFT.

   1. Click on 'Add Payment Information' to select payment method. ★
   2. Payment Category ★
      a. Please select from the drop down the payment type that best describes the supplies or services you provide (e.g. Goods).

How to Read a Canadian Cheque:
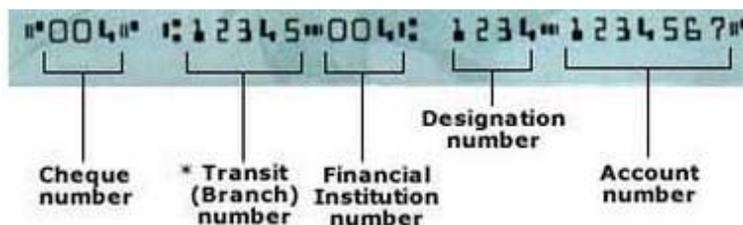
Bank account information:

Please enter the Canadian Tansit Number using the following format (only number and no spaces or dashes are allowed): 0YYYYXXXXX
- 0 – The Canadian Transit Number must begin with a leading number zero (0)
- YYY – This is the three-digit bank Institution Number
- XXXXX – This is the five-digit Branch Number

If you are unsure of your banking information, please contact your bank.

6. McMaster Terms and Conditions ★
   By clicking 'I Accept' you confirm that you have read the Purchase Order Terms and Conditions, you understand them and that you agree to be bound by them.

   Upon checking 'I Accept', please click on 'Proceed to Certify and Submit'.

7. Proceed to Certify and Submit ★
   a. Ensure all required fields have green check marks ✔.
   b. Ensure your name and contact details are accurate.

   c. Select 'I certify' and 'Submit' to complete the registration process.

   Note: By Certifying and Submitting the registration form, you are agreeing that the information provided in accurate and true. It is the supplier's responsibility to ensure their company's information is kept up-to-date.
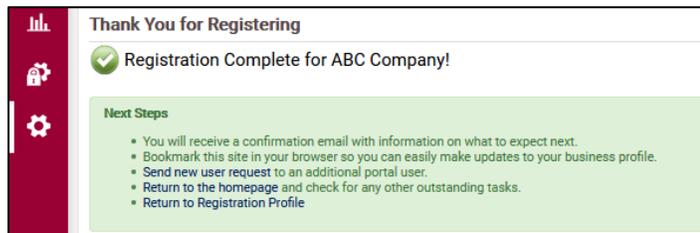
Following successful submission, the registration form will receive a couple of email communications.

1. The email below confirms submission of the registration form. It also provides a link to return to the secure McMaster MacBuy Supplier Portal.
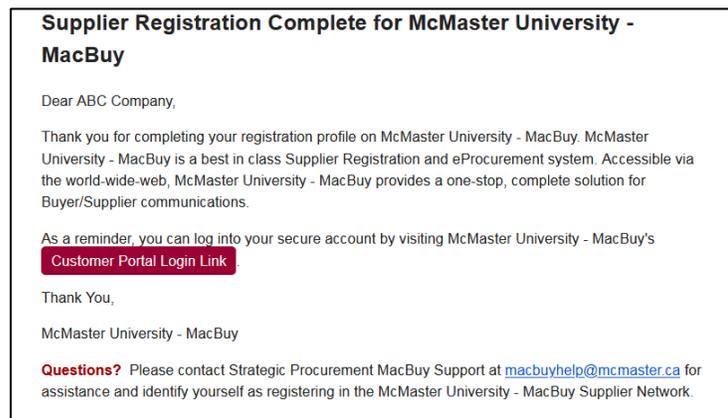
2. Once your company has been added to the Jaggaer Supplier Network (JSN) you will receive an email directly from Jaggaer (SciQuest) Support providing support contact information.
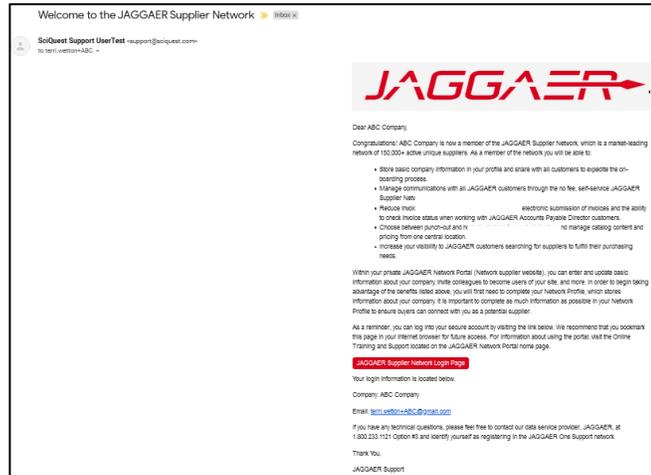
Creating and Monitoring PO Invoice

In order to submit an invoice through the McMaster University – MacBuy portal your company must have received an official purchase order. The purchase order number will begin with "MB". If you have not received a MacBuy purchase order, please continue to submit your invoice how you have been (e.g. via email to Accounts Payable).

1. Log into the MacBuy supplier portal with your login ID and password.
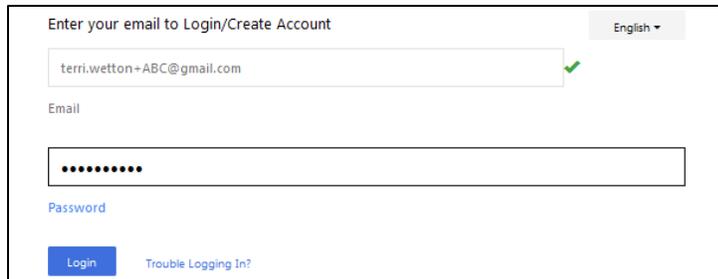
2. From this HOME page you can
   a. Manage your registration profile
   b. Find an invoice
   c. Create an invoice
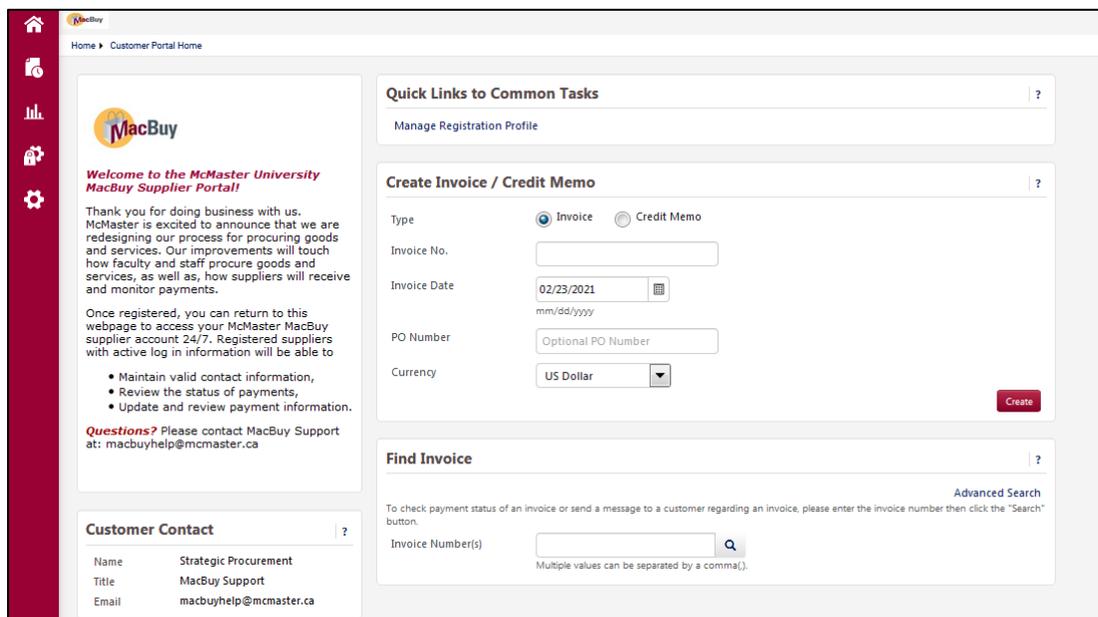
3. Click "Orders" from the main menu on the left side bar.

4. Click "Sales Order and Shipments"; then 'Search for Sales Orders".
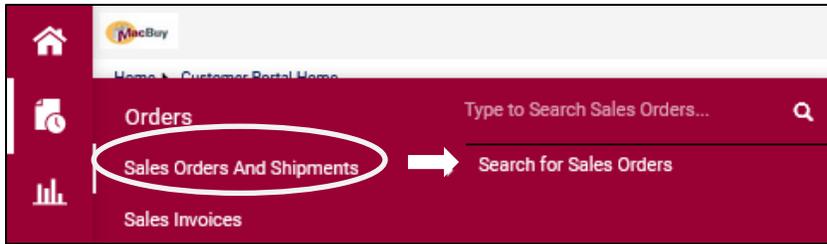
5. Click on the "Sales Order Number" that relates to the PO you wish to invoice.
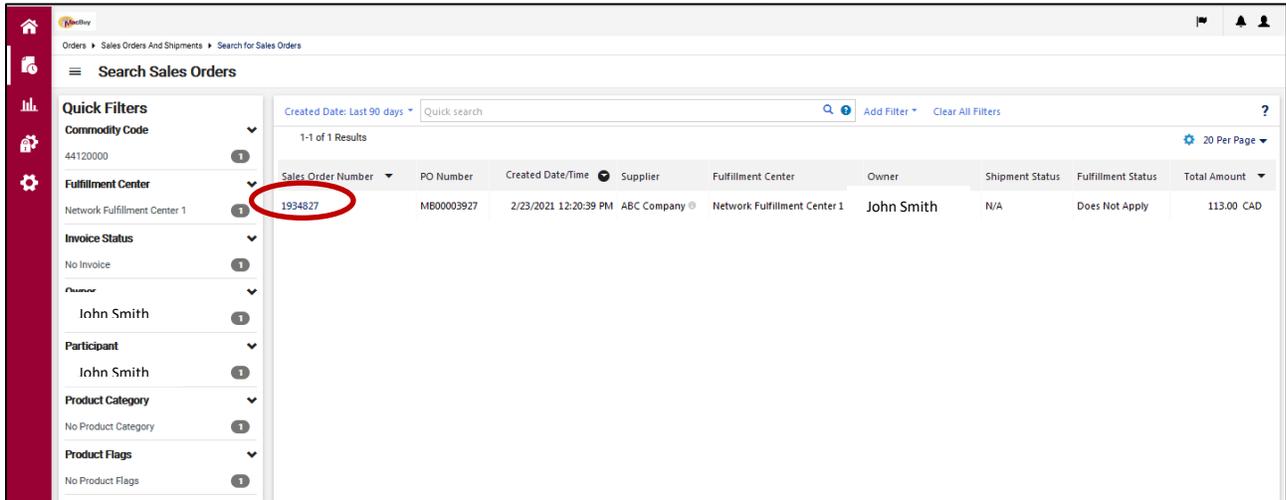
6. Go to 'Available Actions', top right of the Sales Order. Click the down arrow to select 'Create an Invoice' or 'Create a Credit Memo'. Click 'Go' to initiate the action.

7. Add or edit any applicable values:
   a. Invoice No.
   b. Invoice Date
   c. Quantity
   d. Unit Price
   e. Taxes
   f. Shipping
   g. Attachments, if applicable

8. 'Save' and 'Send to Customer'.

NOTE:

The first time you create an invoice you may encounter the following error message.
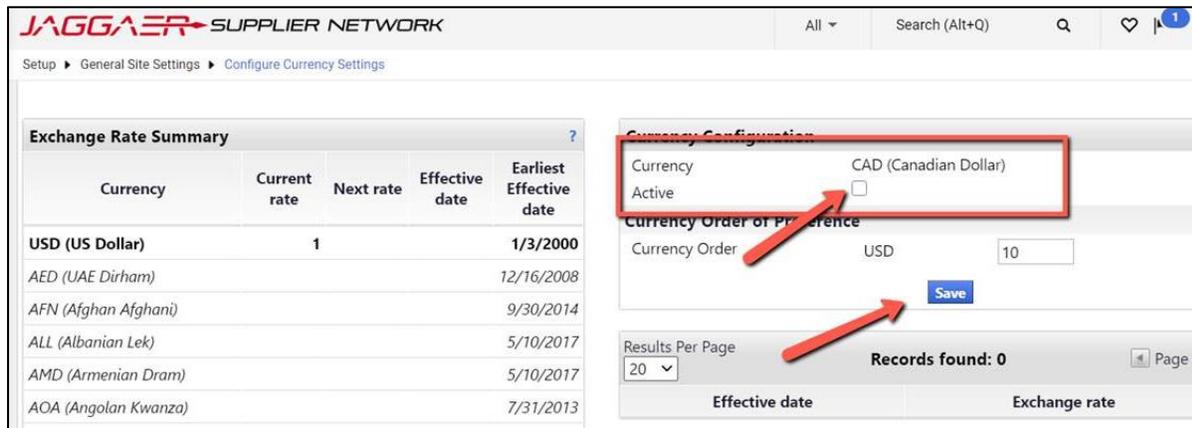

If so, click of your profile, top right, and 'Return to JAGGAER Supplier Network'.

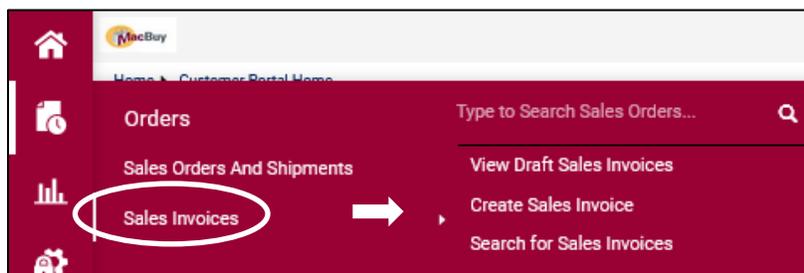Then, go to Set Up > General Site Settings > Configure Currency Settings
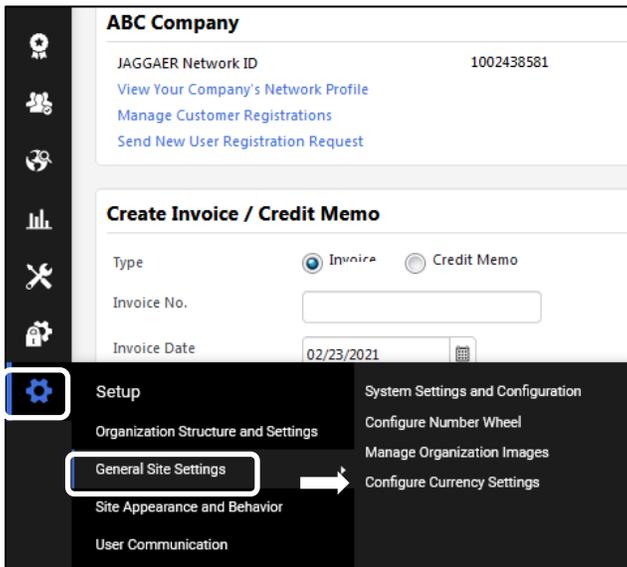
Select the currency from the drop down list, Activate and Save.

To check or review the status of an invoice navigate to 'Orders'.

Then, click on 'Sales Invoices' and 'Search for Sales Invoices'.

The 'Search Sales Invoices' provides Quick Filters and details on the status of a particular invoice.

    a. The Pay Status could be
        a. In Process
        b. Payable (invoice is fully matched and ready for payment in accordance with the University's net terms)
        c. Paid

Adding New Users to the Portal

It is recommended that at least two individuals from your company have access to manage your company's portal.

1. Log into the McMaster University – MacBuy supplier portal.

2. Navigate to 'Administer' in the left side bar.

3. Click on 'Manager Users', then 'Send New User Request'.

4. Enter the new user's name and contact information. All fields delineated with an asterisk ★ are required.

5. Ensure you specify the 'Role' the new user should be assigned.

Manage All Portal Activities
Manage Bid Opportunities
Manage Company Profile
Manage Content / Pricing
Manage Contracts
Manage Orders / Invoices
Support Customer Questions
View Reports Only

6. Click 'Send User Request' to submit the request.