



Stony Brook University

Title: New Supplier Request Form	Audience Category: External Users
Responsibility: Procurement Office	Author: ARP
Publication Date: 4/2/2024	Update Date: 5/2/2024

Procurement Department

New Supplier Request Form

The Procurement Office has released a new process for users to request new Suppliers to get added to WolfMart. This form can be found in the new Procurement Help Center.

******BEFORE FILLING OUT THE FORM, PLEASE GATHER THE FOLLOWING INFORMATION******

- Confirm that the Supplier accepts Purchase Orders. If the Supplier does not accept Purchase Orders, please contact the Procurement Office at 631-632-6010.
- For domestic Suppliers, please obtain a completed, recent, signed, and dated Substitute W9 form.
- For foreign Suppliers, please obtain a completed, recent, signed, and dated W8BEN (for an individual) or W8BEN-E form.
- For foreign Suppliers, please obtain a completed Foreign Vendor Registration Request form.

****NOTE**** If your order is a low-dollar, one-time purchase, please consider using a P-Card for your order.



To get to the New Supplier Request form, visit the Procurement Help Center.

1

Click “Make a Request”.

[Browse Services](#) | [View Your Tickets](#) | [IT System Status](#)

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HOW CAN PROCUREMENT HELP YOU?

Search Our Services...



MAKE A REQUEST

*SEARCH AVAILABLE SERVICES



VIEW YOUR TICKETS








*VIEW STATUS OF YOUR OPEN TICKETS

2

Select “Supplier File”.

Service Catalog

Categories (7)

 <p><u>Requisitions/Purchase Orders</u> Services related to changes in WolfMart Requisitions and Purchase Orders, as well as requests for WolfMart Training</p>	 <p><u>Supplier File</u> Services related to Suppliers</p>
 <p><u>WolfMart Profile Management</u> Services related to WolfMart Profile Settings</p>	 <p><u>Contracts</u> Services related to Contracts</p>
 <p><u>Sourcing</u> Services related to Sourcing and Sourcing Events</p>	 <p><u>Systems Access</u> Services related to requesting various access and permissions</p>
 <p><u>Troubleshooting</u> Services related to troubleshooting WolfMart issues</p>	

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Under “Services” select “Supplier Set Up and Updates”.

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[Service Catalog](#) / [Supplier File](#)

 **Supplier File**

Services related to Suppliers

Services (1)

Supplier Set Up and Updates
Requests related to WolfMart Suppliers are controlled by the Supplier File

4

Select "Request to Add a New WolfMart Supplier".

Supplier Set Up and Updates

request • vendor • supplier • add • modify

What Is The Supplier File?

The Supplier File is the list of all approved Suppliers available within the WolfMart system.

Who Can Submit a Request to Update the Supplier File?

Any WolfMart user can request modifications to the Supplier File.

What Kinds of Changes Can Be Made to the Supplier File?

The kinds of changes that can be made to the Supplier File include, but are not limited to: Address updates, contact information updates, removal/merging of duplicate supplier records, and other changes.

What Kinds of Information Would Be Helpful to Have Before Submitting a Ticket?

To complete the form, you will need:

- Supplier's W9 form OR W8BEN/W8BEN-E (for foreign Suppliers)

Request to Add a New WolfMart Supplier

Share

Edit Service

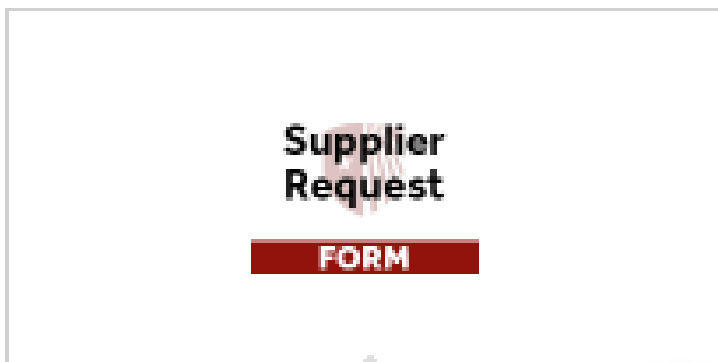
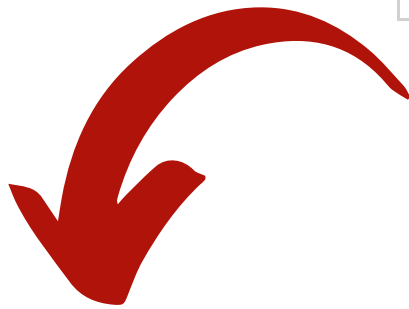
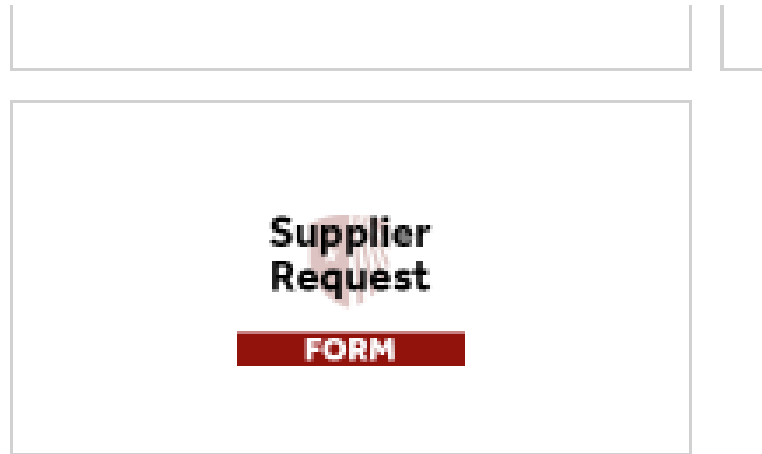
Add Service Offering

Add to Favorites

Details

5

Alternatively, you can access the New Supplier Request form by clicking the sticker under “Special Requests” on the WolfMart homepage.



SUNY AT STONY BROOK

[External Supplier Page](#)

****VERY IMPORTANT****

When you click the “Supplier Request Form” sticker, make sure to select “External Supplier Page”, as this will take you to the New Supplier Request form.

SECTION 1: REQUESTER INFORMATION

6 Your name will be populated in the “Requestor” field. There is no need to manually enter it.

Requester Information


Requestor *  

This is an individual that is listed as the person asking for service detailed within the ticket. If used as a filter in a report, the filter allows for a lookup search.

Allison Parrish



7 Type your Department in the “SBU Departments” field, select it when it populates underneath.

SBU Departments * 

Please choose your department.

Start typing...

Proc

Pediatric Special Procedure

Procurement

Please add Gavitt's Gadgets LLC to your cart



SBU Departments * 

Please choose your department.

Procurement

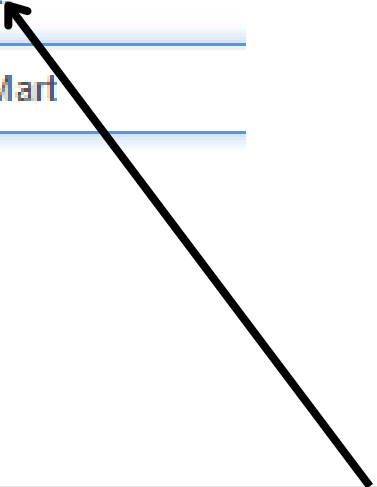
8

Fill in a title describing the nature of your request. For a New Supplier, put “Please add Supplier X to WolfMart”.

Title * 

A short description to explain the nature of a ticket

Please add Bombay & Ducksworth Inc. to WolfMart



HELPFUL TIP: If you aren't sure what to put in a particular field, there is helpful information below the ? to guide you. You can click on the ? to show it or hide it.

SECTION 2: SUPPLIER INFORMATION

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**Enter the Supplier's Legal Name.
If the Supplier has a DBA (Doing
Business As) Name, put that in
the appropriate field.**

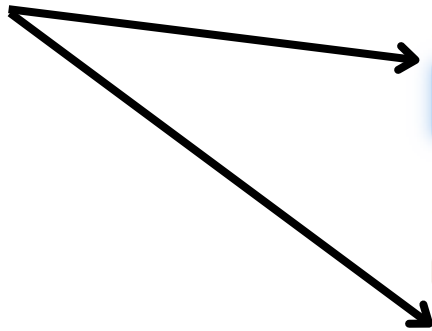
Supplier Information

Supplier Legal Name *

Bombay & Ducksworth Inc.

Supplier DBA Name (If Applicable) ?

Please enter the Supplier DBA (Doing Business As) Name, If Applicable.



10

Enter the Supplier's Shipping Address. Choose the state from the drop-down menu. If the Supplier is foreign, select "Other/Foreign" in the State drop-down menu.

Shipping Address * ?

Please enter the Shipping Address.

123 Street

Shipping Address 2 ?

Shipping Address 2

Suite 123

Shipping Address City * ?

Please enter the city of the Shipping Address.

Minneapolis

Shipping Address State * ?

Please choose the state or territory of the Shipping Address. If the Supplier is foreign, please choose "Other/Foreign."

Start typing...

MN

MN

12345

11

If the Supplier has more than one Shipping Address, enter all the other Shipping Addresses in the text box.

Shipping Address (Other Sites) ?

If there are multiple Shipping sites, please list the remaining Addresses here.

Gavin's Gadgets
123 Street
Suite ABC
Townsville, State
67890

****NOTE**** Most fields will have light-gray sample text in them. This is simply to demonstrate what type of information needs to go in the field and can be typed over.

12

Enter the Supplier's Remit Address. Choose the state from the drop-down menu. If the Supplier is foreign, select "Other/Foreign" in the State drop-down menu.

Remit Address * ?

Please enter the Remit Address.

456 Avenue

Remit Address 2 * ?

Remit Address 2

Suite 123

Remit Address City * ?

Please enter the city of the Remit Address.

Minneapolis

MN

MN

Start typing...

Remit Address Zip Code * ?

Please enter the zip code of the Remit Address.

12345

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Enter the Supplier's phone number. Enter an email address to send Purchase Orders to (PO Distribution).

Supplier Phone Number * ?

Enter the supplier's phone number.

(123) 456-7890

Email Address (PO Distribution) * ?

Enter an email address for purchase order distribution.

sales@bombayducks.com

SECTION 3: CONTACT INFORMATION

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Enter the Name, Phone Number, and Email Address of a Contact at the Supplier. This contact must be able to make all changes to the State Financial System.

Contact Information

Contact Name * ?

Please enter the name of a Contact at the Supplier. This person must be able to make all changes to the State Financial System.

Gordon Bombay

Contact Phone * ?

Please enter the phone number for the Contact.

(123) 456-7890

Contact Email * ?

Please enter the Contact's email address.

gbombay@bombayducks.com

Supplier Website ?

Supplier website link (optional).

www.bombayducks.com

HELPFUL TIP: You can also enter the Supplier's website into the appropriate field if you so choose. It is an optional choice and not mandatory.

SECTION 4: ITEM/SERVICE INFORMATION

15

Enter in the text box the item and/or service the Supplier will be providing.

Item/Service Information

Requested Item/Service * 

Please enter the item/service requested. If you have a Supplier's quote, please attach it to the request (attachments are located at the bottom of this form).

Athletic Equipment

****CRITICAL INFORMATION** SOURCING LEADERSHIP REVIEW (ASSISTANT DIRECTOR EXEMPTION) & PROCUREMENT TEAM**

- To answer the next questions, you will need to consult the Buyer Commodity Cheat Sheet provided by the Procurement Office.
- *Buyer Commodity* is the overall category of the purchases that will be made from the Supplier. Most categories need to be reviewed by Procurement Sourcing Leadership. However, some categories make the Supplier exempt from review by Procurement Sourcing Leadership. Consult the Buyer Commodity Cheat Sheet and choose the most appropriate Buyer Commodity for your requested Supplier, and look under the column "Exempted from New Supplier Review?" If the column says "Yes" for that Buyer Commodity, please choose "Yes" as the answer to the Sourcing Leadership Review ("Assistant Director Exemption") question. If the column is blank, please choose "No".

Please use the following information to answer the next question:

Buyer Commodity is the overall category of the purchases that will be made from the Supplier. Some categories make the Supplier exempt from review by Procurement Assistant Directors. Please consult the Buyer Commodity Cheat Sheet and choose the most appropriate Buyer Commodity for your Supplier, and look under the column "Exempted from New Supplier Review?" If the column says "Yes" for that Buyer Commodity, please choose "Yes" as the answer to this question. If the column is blank, please choose "No."

Assistant Director Exemption * 

Please indicate, based on Buyer Commodity, if the requested Supplier would be exempt from Assistant Director Review.

Start typing...

16 Consulting the Buyer Commodity Cheat Sheet, I am choosing “Athletic Equipment, Apparel, & Supplies” as the Buyer Commodity for the Supplier I am requesting.

Buyer Commodity	Buyer Name	Procurement Team	Exempted from
Accreditation - STB	Carol Maher	Administrative Services	Yes
Administrative Services Subscriptions - STB	Deborah Marcus	Administrative Services	
Advertising, Design & Marketing - STB	Deborah Marcus	Administrative Services	
Animals, Animal Care, & Veterinary Products - STB	Sherrell Cordova	Campus & Research Operations	
Antibodies & Cell Culture Media - STB	Irene Wagner	Campus & Research Operations	
Appliance Repair - STB	Cathy Choi	Campus & Research Operations	
Architectural & Engineering Design Services - STB	Marie Titone	Construction, Trade & Transportation Services	
Art Equipment & Supplies - STB	Sherrell Cordova	Campus & Research Operations	
Article & Periodical Publishing - STB	Thomas Ferrari	Campus & Research Operations	Yes
Athletic Equipment, Apparel & Supplies - STB	Michele Rindos	Construction, Trade & Transportation Services	
Audio-Visual (A/V), Projectors and Cameras (Including Installation) - STB	Ieri Sentowski	Information Technology & Software	
Audit Services - STB	Carol Maher	Administrative Services	

17 The “Exempted from New Supplier Review?” column for this Buyer Commodity is *BLANK*. This means I will choose “NO” to the Sourcing Leadership Review (“Assistant Director Exemption”) question on my New Supplier Request Form. Choose from the drop-down menu.

Assistant Director Exemption * ?

Please indicate, based on Buyer Commodity, if the requested Supplier would be exempt from Assistant Director Review.

Start typing...

No

Yes



Assistant Director Exemption * ?

Please indicate, based on Buyer Commodity, if the requested Supplier would be exempt from Assistant Director Review.

No

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Because I chose “NO” for Sourcing Leadership Review (“Assistant Director Exemption”), I now have to choose a Procurement Team for this Supplier. This information can also be found on the Buyer Commodity Cheat Sheet, under “Procurement Team”.

Buyer Commodity	Buyer Name	Procurement Team	Exempted from
Accreditation - STB	Carol Maher	Administrative Services	Yes
Administrative Services Subscriptions - STB	Deborah Marcus	Administrative Services	
Advertising, Design & Marketing - STB	Deborah Marcus	Administrative Services	
Animals, Animal Care, & Veterinary Products - STB	Sherrell Cordova	Campus & Research Operations	
Antibodies & Cell Culture Media - STB	Irene Wagner	Campus & Research Operations	
Appliance Repair - STB	Cathy Choi	Campus & Research Operations	
Architectural & Engineering Design Services - STB	Marie Titone	Construction, Trade & Transportation Services	
Art Equipment & Supplies - STB	Sherrell Cordova	Campus & Research Operations	
Article & Periodical Publishing - STB	Thomas Ferrari	Campus & Research Operations	Yes
Athletic Equipment, Apparel & Supplies - STB	Michele Rindos	Construction, Trade & Transportation Services	
Audio-Visual (A/V), Projectors and Cameras (Including Installation) - STB	Teri Sentowski	Information Technology & Software	
Audit Services - STB	Carol Maher	Administrative Services	

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Choose the appropriate Procurement Team from the drop-down menu.

My chosen Buyer Commodity for my Supplier is handled by the “Construction, Trade, & Transportation Services” Procurement Team.

Procurement Team ⓘ

If the answer to the previous question was "No" please select the Procurement Team that would handle purchases from this Supplier. If you are unsure, please refer to the Buyer Commodity Cheat Sheet from the previous question and select the appropriate Buyer Commodity for this Supplier, then look at the "Procurement Team" column to see the Procurement Team to whom the Supplier would be assigned.

Start typing...

- Administrative Services
- Construction, Trade & Transportation Services
- Information Technology & Software
- Campus & Research Operations



Procurement Team ⓘ

If the answer to the previous question was "No" please select the Procurement Team that would handle purchases from this Supplier. If you are unsure, please refer to the Buyer Commodity Cheat Sheet from the previous question and select the appropriate Buyer Commodity for this Supplier, then look at the "Procurement Team" column to see the Procurement Team to whom the Supplier would be assigned.

Construction, Trade & Transportation Services

****NOTE**** If you are not sure which Procurement Team to choose, consult the Buyer Commodity Cheat Sheet, choose the most appropriate Buyer Commodity for your requested Supplier, and look in the “Procurement Team” column!

SECTION 5: PO INFORMATION, BUSINESS CLASSIFICATION, & FUNDING SOURCE INFORMATION

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Choose from the drop-down menu approximately how many purchase orders you expect to process with the Supplier over the next year.

****NOTE**** If this is for a one-time, low-dollar purchase, consider using a P-Card!

PO Information, Business Classification, & Funding Source Information

Expected PO Quantity * ?

Approximately how many POs do you expect to process with this supplier over the next year?

Start typing...

One-Time Purchase

- 2-5
- 5-10
- 10+

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Choose from the drop-down menu your approximate total spend with this Supplier over the next year.

Anticipated Total Spend * ?

Your anticipated total spend with this supplier over the next year.

Start typing...

- \$0.00-\$499.99
- \$500.00-\$999.99
- \$1,000.00-\$2,499.99
- \$2,500.00-\$14,999.99
- \$15,000.00-\$24,999.99
- \$25,000.00-\$49,999.99
- \$50,000.00+

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If applicable, indicate if the Supplier is a type of certified Minority Owned business. If not applicable, select “None of the Above”.

Please use the following information to assist in answering the next question regarding New York State Certified Minority/Women-Owned Business Enterprise (MWBE) and Certified Service-Disabled Veteran-Owned (SDVOB) Businesses:

MWBE Companies - <https://ny.newnycontracts.com/>

You do not need to log in to access the MWBE Directory; scroll down to the "NYS Directory of Certified Firms" section and click on the blue "Search the Directory" button. This will provide NYS certification information and is the only MWBE certification that SBU can accept. Be sure to scroll to the bottom of the page to complete the reCAPTCHA box after entering the company's name.

SDVOB Companies - <https://sdves.ogs.ny.gov/business-search>

This website brings you into the SDVOB Directory. It allows filtering by company name or region; click to "Select Filter" to select "Business Name" and enter the company's name.

Minority Owned * 

Please indicate the type of certified minority owned business, if applicable.

- Small Business (Certified)
- State of New York Certified Minority-Owned Business Enterprise (NY-MBE)
- State of New York Certified Women-Owned Business Enterprise (NY-WBE)
- State of New York Certified Minority Woman-Owned Business Enterprise (NY-MWBE)
- State of New York Service-Disabled Veteran-Owned Business (NY-SDVOB)
- None of the Above

****NOTE**** If you are not sure whether your requested Supplier is certified as an MWBE or SDVOB Supplier, there are two links provided on the form that link to New York State Directories where you can search. If, after searching, you are still not sure, you can contact the Procurement Office at 631-632-6010 for assistance.

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Select the appropriate checkbox indicating whether you will be using State or Research funds for your requested Supplier. If you will be using both, check both boxes.

Funding Source * ?

Please indicate whether you will be using State and/or Research funds with this Supplier.

- State
- Research



Funding Source * ?

Please indicate whether you will be using State and/or Research fu

- State
- Research

SECTION 6: CONFLICT OF INTEREST INFORMATION

Suppliers are required to disclose any and all potential conflicts of interest to Stony Brook University for appropriate review and disposition. Examples include, without limitation, an SBU employee having an ownership interest in the business, the business being owned by a relative of an SBU employee, and the business sponsoring speaking engagements or other activities with which SBU faculty or staff are involved. Suppliers' obligation with regard to the disclosure of conflicts of interest is ongoing, therefore we ask that you promptly notify us should you become aware of any potential conflict.

Indicate, to the best of your ability, if you are aware of any relationship between the Supplier and an SBU employee which could result in potential personal gain for the SBU employee, or which could enable the SBU employee to influence the Supplier relationship for perceived personal gain.

Conflict of Interest Information


Conflict of Interest

Suppliers are required to disclose any and all potential conflicts of interest to Stony Brook University for appropriate review and disposition. Examples include, without limitation, an SBU employee having an ownership interest in the business, the business being owned by a relative of an SBU employee, and the business sponsoring speaking engagements or other activities with which SBU faculty or staff are involved. Suppliers' obligation with regard to the disclosure of conflicts of interest is ongoing, therefore we ask that you promptly notify us should you become aware of any potential conflict.

Are you aware of any relationship between the Supplier and an SBU employee which could result in potential personal gain for the SBU employee, or which could enable the SBU employee to influence the Supplier relationship for perceived personal gain?

No x ▲

No

Yes 

Employee Name

Please input the employee's name.

Employee Relationship

Please indicate the relationship to the employee.

- Self
- Spouse
- Immediate Family (Parents, Siblings)
- Extended Family (In-laws, grandparents, aunts, uncles, cousins, etc.)
- Friend
- Other

****NOTE**** A “Yes” answer will trigger two more questions asking you to name the employee, as well as your relationship to them.

SECTION 7: ATTACHMENTS & FOREIGN SUPPLIER INFORMATION

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Choose from the drop-down menu if the requested Supplier is a foreign Supplier. If the Supplier is foreign, a W8BEN/BEN-E and a Foreign Vendor Registration Request form will be required in the next section “Attachments”.

Attachments & Foreign Supplier Information

Foreign Supplier? * ?

Please indicate if the Supplier is a foreign Supplier. If the answer is Yes, please attach both the Supplier's completed, recent, signed, and dated W8BEN (for an individual) or W8BEN-E (for a company) form and completed Foreign Vendor Registration Request form in the "Attachment" section of this form.

Start typing...

No
Yes

form. You can also upload the Supplier's quote, if applicable. To upload multiple documents, hold down the CTRL key on your keyboard while selecting your files.



Attachments & Foreign Supplier Information

Foreign Supplier? * ?

Please indicate if the Supplier is a foreign Supplier. If the answer is Yes, please at W8BEN-E (for a company) form and completed Foreign Vendor Registration Requi

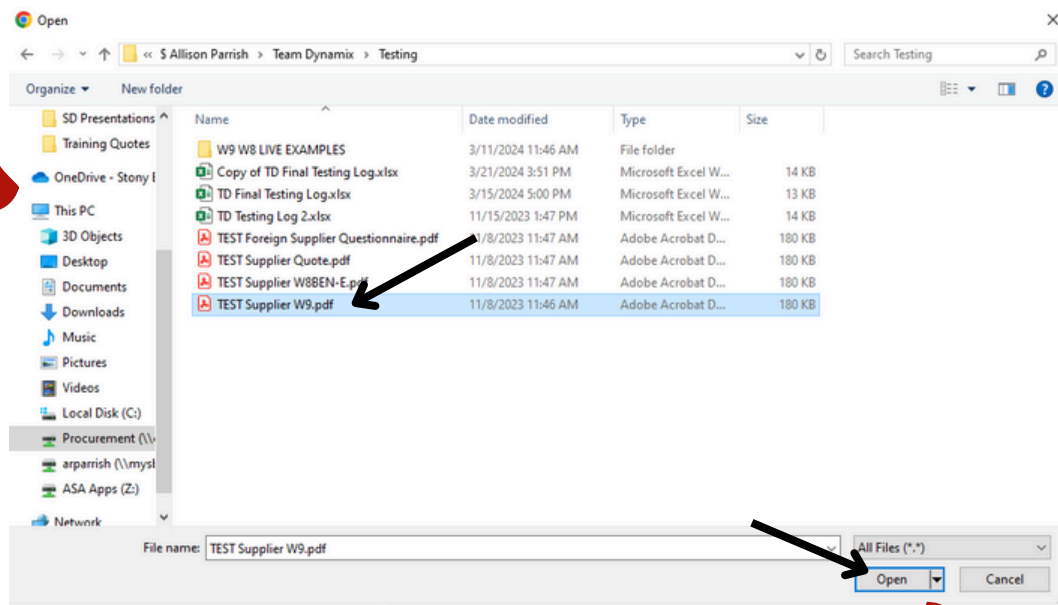
No

Upload any and all attachments associated with the requested Supplier. A completed, recent, and signed Substitute W9 form for domestic Suppliers, or completed, recent, and signed W8BEN (for an individual) or W8BEN-E (for a company) form for foreign Suppliers, is required. Foreign Suppliers also require a completed Foreign Vendor Registration Request form.

Attachment * ?

Please upload any and all attachments associated with this Supplier. A completed, recent, and signed Substitute W9 form for domestic Suppliers, or completed, recent, and signed W8BEN (for an individual) or W8BEN-E (for a company) form for foreign Suppliers, is required. Foreign Suppliers also require a completed Foreign Vendor Registration Request form. You can also upload the Supplier's quote, if applicable. To upload multiple documents, hold down the CTRL key on your keyboard while selecting your files.

Browse... No file chosen



HELPFUL TIP:
To upload multiple attachments, hold down the CTRL key on your keyboard when selecting your files.

Attachment * ?

Please upload any and all attachments associated with this Supplier. A completed, recent, and signed W8BEN (for an individual) or W8BEN-E (for a company) form for foreign Suppliers, is required. Foreign Suppliers also require a completed Foreign Vendor Registration Request form. You can also upload the Supplier's quote, if applicable.

Browse... TEST Supplier W9.pdf

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Click "Submit." A screen will appear with your Ticket ID Number. You will also receive an email from Team Dynamix that Procurement has received your Ticket Request.

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✓ Request Created Successfully!

Service Request ID: 51668

What do you want to do now?

[Create another request of this type](#)

[View the request you just created](#)

[View your ticket requests](#)

Everything else

Allison Parrish

TeamDynamix Service Request 51668 Created (TEST--Please add Bombay & D... - Ticket Received We received the below ticket. Service Request Creation D...



TeamDynamix Service Request 51668 Created (TEST--Please add Bombay & D...)



Allison Parrish
to me

Ticket Received

We received the below ticket.

Service Request Creation Details

Ticket ID:
51668

Title:
TEST--Please add Bombay & Ducksworth Inc. to WolfMart

Status:
New

Description:

Requestor Details:
Allison Parrish - allison.c.parrish@stonybrook.edu - Stony Brook University

Responsibility / Responsible Group:
/

Priority:
Medium

Urgency:

Impact:

Creation Details:
Created by Allison Parrish on Thu 4/4/24 4:44 PM Eastern Daylight Time

Location: