

# Adding a New Supplier to Gateway

UCSB Procurement Gateway — Step-by-Step Instructions

## Overview

Gateway ([gateway.procurement.ucsb.edu](https://gateway.procurement.ucsb.edu)) is UCSB's online procurement system; all purchasing functions are processed through it and it is the official record for all purchasing/receiving and invoicing. Before placing an order with a supplier that isn't already set up in Gateway, the supplier needs to be added. This document walks through how to check whether a supplier already exists, and how to submit a request to add a new one.

## Before You Start: Check If the Supplier Is Already in Gateway

1. Go to <https://gateway.procurement.ucsb.edu/> and log in with your UCSB NetID and password.
2. Navigate to the cart icon on the left sidebar, then open the "Shopping" tab dropdown, and under "Browse By" click "Suppliers."
3. Click the plus button to open the supplier filter, then search by name.
4. If the supplier appears, click on them to open their vendor page and confirm it shows "Enabled for Procurement." If it does, there's no need to add them — you can order from them as-is.
5. If the supplier doesn't appear in the search, or their vendor page doesn't show "Enabled for Procurement," you'll need to add the vendor to Gateway before you can order from them.

### By now, you should be able to identify:

- If the vendor is already in Gateway, they can be ordered from as-is.
- If the vendor is not in Gateway, they need to be added.
- If the vendor is in Gateway but cannot be ordered from there, the purchase should be made with a FlexCard instead.

## Filling Out the Business Information Form

1. Navigate to the Gateway homepage.
2. Click **"New Supplier Request Form"** on the right-hand side. It will redirect to the BFS ticket that will eventually be filled out.
3. For now, click the link for the [UCSB Business Information Form](#). The vendor needs to fill out this form.

**Note:** The vendor also needs to provide the relevant IRS form (W-9, W-8BEN, etc.), a sample invoice, and, if they selected ACH as their payment method, a scanned or voided check and a signed bank letter.

## Submitting a New Supplier Request Ticket

1. Once the vendor has filled out the form and provided the relevant documents, return to the New Supplier Request Form, fill it out, attach the relevant documents, and submit it.

### Note:

1. Which system does this vendor need to be added to? Gateway.
2. Is this a request of a revenue contract? Usually no, but if you think so, please reach out to the purchasing team.

## Quick Reference

| Topic             | Where to Go                                                                     |
|-------------------|---------------------------------------------------------------------------------|
| Log in to Gateway | <a href="https://gateway.procurement.ucsb.edu">gateway.procurement.ucsb.edu</a> |

| Topic                              | Where to Go                                                                                                                                                |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Check if a supplier already exists | In Gateway: cart icon (left sidebar) → Shopping tab → Browse By → Suppliers                                                                                |
| Get the Business Information Form  | <a href="#">UCSB Business Information Form</a>                                                                                                             |
| Submit a new supplier request      | Gateway homepage → “New Supplier Request Form” (right-hand side)                                                                                           |
| Required documentation             | Completed Business Information Form, relevant IRS form (W-9, W-8BEN, etc.), a sample invoice, and — if paid by ACH — a voided check and signed bank letter |
| Questions                          | <a href="mailto:purchasing@bfs.ucsb.edu">purchasing@bfs.ucsb.edu</a>                                                                                       |