

CSU The California State University

CSU **BUY** 

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

User Management

Instructions to add users: Start at page 3

Instructions for newly added users: Start at page 9



Users can be added to a supplier's profile in the CSUBUY supplier portal

The Supplier Support Contact is the individual who completed the supplier registration process and is the only individual that can add new users to the supplier profile.

Common Reasons that the Supplier Support Contact may want to add new users to the portal include:

- Additional profile coverage for various tasks
- Role changes/additions within the organization

When adding new users, the Supplier Support Contact should consider whether the new users are equipped to answer questions about the supplier's tax, accounting, and address information.

Welcome to the California State University's Supplier Portal!

All suppliers can view and access sourcing events for all campuses including the Chancellor's office.

Suppliers invited by the first wave Procure-to-Pay (P2P) campuses can update and/or maintain information, review purchase orders and create or submit electronic invoices. The first wave P2P Campuses include:

- Bakersfield
- Chico
- Chancellor's Office
- Fresno
- Humboldt
- San Marcos
- San Luis Obispo
- Sonoma

Customer Contact

Name CSUBUY
Email csubuy-suppliersupport@calstate.edu

Quick Links to Common Tasks

[Manage Registration Profile](#)

Sourcing Events

Show

Opening or Closing Soon

[Go to Public Opportunities](#)

No Results

No Results

[View All Events](#)

Contracts

No Results

[View All Contracts](#)

Create Invoice / Credit Memo

Type

Invoice Credit Memo

Invoice No.

Invoice Date

08/01/2024 
mm/dd/yyyy

PO Number


Currency


US Dollar

[Create](#)

From the CSU Customer Portal Home Page:

- **Select** your user profile in the top right corner of the page

Kathryn Keely 

 [Return to JAGGAER Supplier Network](#) [Logout](#)

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Customer Contact

Name CSUBUY
Email csubuy-suppliersupport@calstate.edu

Create Invoice / Credit Memo

Type Invoice Credit Memo

Invoice No.

Invoice Date 
mm/dd/yyyy

PO Number

Currency

[Create](#)

From your user profile:

- **Select** Return to JAGGAER Supplier Network.

This will bring you to the JAGGAER Supplier Portal Home Page.

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Kathryn's Custom Closets Inc

JAGGAER Network ID 1004143133

[Manage catalogs and price files for your JAGGAER customers](#)

[View Your Company's Network Profile](#)

[Manage Customer Registrations](#)

[Send New User Registration Request](#)



Find Invoice

[Advanced Search](#)

To check payment status of an invoice or send a message to a customer regarding an invoice, please enter the invoice number then click the "Search" button.

Invoice Number(s)



Multiple values can be separated by a comma(,).


Need Assistance?

Help

Customer Portal Access

| Customer | Registration Status | Customer Contact |
|---|---------------------|------------------------|
| The California State University | In Progress | CSUBUY |

Did you know?

What the  icon means?

Whenever you see this icon on the page, specific training is available for that section. Click on the icon to learn more.

[Don't show me this again](#)

Sourcing Events

No Results

[View All Events](#)

JAGGAER Support

Still have questions? [Contact Us](#)

To add a new user to the profile, the Supplier Support Contact will need to send the new user a registration request.

- **Select Send New User Registration Request**



Sending a user registration request

To send a registration request to a new user, please enter the user's contact information. Select the role that you would like the user to be assigned. An email will be sent to the email address below with instructions on how to register. Pending registrations can be viewed on the [registrations](#) page.

User Identification

First Name *

Last Name *

Title

Phone Number * ext.
International phone numbers must begin with +

Mobile Phone Number
International phone numbers must begin with +

E-mail Address *

Role

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

- **Enter** the required information (marked with an *) in the User Identification Fields:
 - First Name
 - Last Name
 - Title
 - Phone Number
 - Email Address
- **Assign** a role for the new user from the pull-down menu. (To assist with assigning the best role for the new user a detailed description of the roles and permissions is available on the next page.)
- **Select** the Send User Request button

Send User Request

Roles and Permissions in the JAGGAER Supplier Network

*Roles highlighted in **Red** are part of CSUBUY Phase I and are currently the only two available to be selected by the Supplier Support Contact when adding a new user

| Roles | Permissions |
|------------------------------|---|
| Manage All Portal Activities | Grants user full access to the supplier portal and all editable fields. Individual may create new users, update profile information, manage contracts, etc. |
| Manage Bid Opportunities | Individual can respond to sourcing events and event-related questions. |
| Manage Company Profile | Allows the individual to edit supplier profile information, including tax forms and banking information. |
| Manage Content/Pricing | Used by catalog suppliers. Allows the user to update/add catalog items and pricing. |
| Manage Contracts | Allows users to view and manage contracts customers have shared in the portal. |
| Manage Orders/Invoices | Individual can view and create Sales Invoices/Credit Memos and review and close Sales Orders. |
| Support Customer Questions | Able to view and edit their own profile and respond to customer questions |
| View Reports Only | User can view and edit their own profile and access supplier portal reports but has no edit or creation permissions. |

View Pending User Registrations

Create User Request

Actions ▾

| Name ▲ | Phone | Email ▲ | Role | |
|-----------------|-----------------|----------------------|--------------------------|-------------------------------------|
| Kuhn, Jackie | +1 302-221-4830 | jjk@aol.com | Manage Bid Opportunities | <input type="checkbox"/> |
| McBride, Margot | +1 302-221-4833 | mmartin@calstate.edu | Manage Company Profile | <input checked="" type="checkbox"/> |

Once the Supplier Support Contact has sent the User Request, the View Pending User Registrations screen will display the names of users they have invited.

- **Select** the new user you would like to add to the CSUBUY portal and send them a registration link through the Actions menu.

Register as a Kathryn's Custom Closets Inc User

Dear Margot McBride,

Kathryn's Custom Closets Inc has invited you to become a user for their JAGGAER Supplier Network account. As a member of the JAGGAER Supplier Network, Kathryn's Custom Closets Inc serves JAGGAER customers with sourcing and procurement needs through an online supplier portal. As a portal user, you can help manage their information.

Becoming a user is easy and it only takes a few minutes to register. By selecting the "Register Now" button below, you will be routed to a secure website to create a password and enter some basic information about yourself.

Ready to get started?

[Register Now](#)

Kathryn's Custom Closets Inc
Kathryn Keely

Is this email difficult to read? You may choose to receive plain text emails instead by logging into your organization's site and updating your preferred email format on the user identification tab under User Settings in your profile.

The new user will receive an email from the JAGGAER Supplier Network prompting them to **Register Now.**

The new user must complete the required fields (marked with an *) in the New User Registration.

- **Click Create Account.**

JAGGAER
Supplier Network

New User Registration [Registration Tutorial](#) English ▾

Welcome, You have been invited to help manage a supplier's data. Please fill out the fields below to register a new user in the JAGGAER Supplier Portal.

Your Contact Info

First Name ★ Last Name ★

Title

Phone Number ★

International phone numbers must begin with +

Preferred Time Zone ★

Your Login

You are creating a JAGGAER One Login account. Once the account is created, you will be able to use this to access all JAGGAER applications using the same credentials. If you already have an account, please provide the details below.

Phone Number ★

International phone numbers must begin with +

Preferred Time Zone ★


Your Login

You are creating a JAGGAER One Login account. Once the account is created, you will be able to use this to access all JAGGAER applications using the same credentials. If you already have an account, please provide the details below.

Email ★
mmartin@calstate.edu

Password ★ Re-Enter Password ★

I am a user in need of accessibility assistance

I am human  [Privacy - Terms](#)

←

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Margot McBride

User Name mmartin@calstate.edu

User Profile and Preferences <

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

Update Security Settings >

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

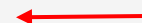
User's Name, Phone Number, Email, etc. ?

| | |
|-----------------------|--|
| First Name * | <input type="text" value="Margot"/> |
| Last Name * | <input type="text" value="McBride"/> |
| Title | <input type="text" value="COO"/> |
| Phone Number * | <input type="text" value="+1 302-221-4833"/> <input type="text" value="ext."/> <small>International phone numbers must begin with +</small> |
| Mobile Phone Number | <input type="text"/> <small>International phone numbers must begin with +</small> |
| E-mail Address * | <input type="text" value="mmartin@calstate.edu"/> <input type="button" value="Change E-mail Address"/> |
| Authentication Method | Local |

★ Required

The profile will be pre-populated with the name and contact information for the new user.

- **Click Save Changes**



Success
Successfully Saved Changes

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Margot McBride

User Name mmartin@calstate.edu

User Profile and Preferences <

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

Update Security Settings >

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

User's Name, Phone Number, Email, etc. ?

First Name *

Last Name *

Title

Phone Number *
International phone numbers must begin with +

Mobile Phone Number
International phone numbers must begin with +

E-mail Address * [Change E-mail Address](#)

Authentication Method Local

★ Required

Once the Save Changes button is selected, a green **Success** pop-up will appear at the top of the page indicating the changes were successfully saved.

Save Changes

RESOURCES

Login issues, technical problems, identifying your organization's portal administrator: [JAGGAER support](#)

Assistance with registration related issues: csubuy-suppliersupport@calstate.edu

[Reset your password](#)

[Portal Login](#)