# CSII The California State University

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

# **CSUBUY Supplier Registration**

For: US Domestic Corporation, Multi-Member LLC, Partnership, Trust/Estate, Government, Non-Profit, Other





Review the list of documents you will need to have at hand, then click **Register Now** when you are ready.

## Before you begin the registration, please have the following information available:

- Physical, Fulfillment, and Remittance details including address, phone number, and email address
- Tax Document (W-9 or W-8)
- Basic information about your business
- · List of commodities (goods and/or services) you are offering
- · Certificates of Insurance (if applicable)
- · State of California certifications, licenses, filing documents, etc.

## When you are ready to register:

- · Ensure all the required fields and sections are completed.
  - A star indicates a required field.
  - A green check mark indicates that a section is completed.
  - · A gray triangle indicates required information is missing from a section.
- Certify and submit the registration.

## After Registration:

- You will receive a confirmation email verifying that you have submitted your completed registration.
- You will receive a message if there are any issues with the information you have provided.
- You are welcome to log back in to the portal at any time to update your company information.



Thank You,

The California State University

For access or other technical related issues, please contact JAGGAER support <u>HERE</u>. For assistance with registration related issues, please contact <u>csubuy-suppliersupport@</u> <u>calstate.edu</u>.

# **CSU**The California State University



	<b>CSU</b> The California State University
	Supplier Registration Registration Tutorial English -
	Your Contact Info
	First Name 🖈 Last Name 🖈
ete the required fields	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.



Complete the required fields then click **Create Account**.

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i JAGGAER revised its Service	<u>Privacy P</u>	olicy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Prive	icy Policy.
Speaker, Sam Change Supplier		Welcome to Supplier Registration	2
Registration <b>In Progress</b> for: The California State University <b>3 of 7</b> Steps Complete		We are excited to introduce California State University's CSUBUY Supplier Portal. We truly value our supplier relationships and are committed to improving how we engage with you. Below you will find Information on how to prepare for supplier registration and to begin the registration process. If you received this email and are not the correct contact for your organization, please let us know the updated contact by sending us an email at <u>csubuy-suppliersupport@calstate.edu</u> .	
Welcome		Before you begin the registration, please have the following information available to help speed up your data entry.	
Company Overview		Business and Remittance Address, phone number, and contact email information     Dun & Bradstreet (DUNS) Number	
Business Details	✓	<ul> <li>Tax information (W-9, W-8BEN, W-8ECI, etc.)</li> <li>Basic business information</li> </ul>	
Addresses		List of commodities you supply     Certificate of Insurances (if applicable)	
Contacts	✓	When you are ready to register,	
Insurance	~	1. Click the 'Continue with Registration' button below to begin the registration process.	Legal Company Name
Payment Information	▲	<ol> <li>Ensure all the required fields and sections are completed. Note: A green check mark indicates that a section is completed.</li> <li>Attest to the validity of the information and submit the registration.</li> </ol>	
Tax Information	A	4. Login when needed to update your profile or to add additional contact information.	Must match Line 1 of your W-9,
Certify & Submit			company name on your tax
		Required to Start Registration	return.
Registration FAQ   View History		Legal Company Name * Speaker, Sam	
		★ Required to Complete Registration Save Changes	
			Glick <b>Next</b> .

**Q** →







•	Sample Company		Business Details				?
。 企	Registration In Progress for: The California State University 1 of 7 Steps Complete		The information on this page allows us to communicate to you future sourcing oppo	track important details about the products and se rtunities with the California State University (CSU).	rvices that you provide.	Additionally, this data wil	I be used to identify and
23	Welcome		Products and Services			Select the co	odes that r company.
70	Company Overview	A	NAICS Codes * 😡	No Primary NAICS Code Selected	Edit		
5	Business Details	A	Commodity Codes *	-	Edit	/	
ш	Addresses						
ж	Contacts	A					Click <b>Next</b> to proceed to
<b>*</b> *	Insurance						the next page.
<b>\$</b>	Payment Information	A					
	Tax Information	A					
	Certify & Submit						
			★ Required to Complete Registration			Previous	Next > Save Changes

Penistration  Manage Desistration Brofile		Tou will need to provide three address types.
Speaker, Sam	Addresses	<ol> <li>Fulfillment – Address where you would like to receive your Purchase Orders</li> </ol>
Registration <b>In Progress</b> for: The California State University <b>4 of 8</b> Steps Complete	Please enter all required addresses below for your organization for us route information and commu full 9-digit zip code.	<ul> <li>Please include an email address to receiv your purchase orders via email instead.</li> </ul>
Welcome	The physical address provided should be the business address as shown on the tax return. If withhorentered.	<b>2. Physical</b> – your physical location/street address
Company Overview Business Details	<b>Required Information</b> The following address types are required to complete registration:	• Your tax documents will be sent to the physical address.
Addresses A Contacts ✓	- Fulfillment - Physical - Remittance	3. Remittance – Address where check paymen should be sent
Insurance  Payment Information Tax Information	No addresses have been entered Add Address	<ul> <li>Even if you elect ACH direct deposit as your preferred payment method later during registration, the CSU may still nee to send your payment via check for variou</li> </ul>
Supplier Classifications		reasons (explained later). Please provide valid remittance address.
egistration FAQ   View History	Click Add Addresses.	( Previous Next )

## Addresses

Please enter all required addresses below for your organization for us route information and communication correctly. Please click on the following Link to look up your full 9-digit zip code.

The physical address provided should be the business address as shown on the tax return. If withholding is applicable the 1099 will be sent to the physical address entered.



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	Registration  Manage Registration Profile		-			
2	Speaker, Sam Change Supplier	Addresses	Add Address	×	?	
щ З	Registration <b>In Progress</b> for: The California State University <b>4 of 8</b> Steps Complete	Please enter all required addresses below for your organization for full 9-digit zip code.	Address Details (Step 2 How would you like to	of 3)	look up your	Select the method you prefer for receiving
盎	Welcome	entered.	receive purchase orders for this fulfillment address? *			purchase orders.
	Company Overview	Required Information	Email Address *	samspeaker@email.com		
	Addresses	The following address types are required to complete registrat	Confirm Email *	samspeaker@email.com		
	Contacts	- Physical - Remittance	Country *	United States		Complete the
	Insurance	/	Address Line 2	123 Main St		required email and address fields.
	Payment Information	No addresses have been entered	Address Line 3		ide Inactive Addresses	
	Supplier Classifications		City/Town *	Long Beach		
	Certify & Submit		State/Province *	California 🗸		
	Depistration EAO   Mean History		Postal Code *	90840 Example: 12345 or 12345-6789		
	Registration PAQ   View Fistory		Phone	ext. International phone numbers must begin with +	Next >	
			Toll Free Phone	ext. International phone numbers must begin with +		Click <b>Next</b> .
			Fax	International phone numbers must begin with +		
			* Required to Complete Registra	tion ( Previous Next )		
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*	CSU The California State University Registration  Manage Registration F	Profile						
<b>9</b> <b>9</b>	Speaker, Sam Change Supplier		Addresses	Add Address			×?	
հղ	Registration in Progress for: The California State University 4 of 8 Steps Complete		Please enter all required addresses below for your organization full 9-digit zip code.     The physical address provided should be the business address	Primary Contact For Th	is Address (Step 3 of 3)	)	ook up your ? ddress	Enter the contact
\$	Welcome Company Overview Business Details	1	Required Information	Enter New Contact     Select additional contact	<ul> <li>Mot Applicable</li> <li>Takes Orders (fulfill)</li> </ul>	contacts page. nent)		information for the <b>Primary Contact</b> for the address(es) you
	Addresses Contacts	▲ ✓	The following address types are required to complete registra - Fulfillment - Physical - Remittance	type(s) to apply	Receives Payment (i     Other (physical)     Catalog     Corporate     Customer Care     Saloc	remittance)		have added.
	Insurance Payment Information	✓ ▲	No addresses have been entered	Contact Label * First Name *	Sam Speaker		e Inactive Addresses	
	Supplier Classifications	<b>A</b>	Add Address	Last Name * Position Title	Speaker			
	Registration FAQ   View History			Email * Phone *	samspeaker@email.con	ext.		
				Toll Free Phone	International phone numbers	ext. s must begin with +	Next >	
				Fax	International phone numbers	s must begin with +		Click Save Changes.
				* Required to Complete Registra	tion ( F	Previous Save Change		

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	Registration 🕨 Manage Registration Pro	file	
<b>2</b> 0	Speaker, Sam Change Supplier	Payment Information	CHECK: A Check Payment Method is REQUIRED for all US-based suppliers. Many of our auxiliary organizations
л ТШТ	Registration <b>In Progress</b> for: The California State University <b>5 of 8</b> Steps Complete Welcome	Information on this page is used to determine how and where you will receive payment. Please enter an ema regarding payments including invoice, date, and amount. <i>ACH is the CSU's preferred method of payment. Th</i> <i>for the goods provided and/or services rendered.</i> If your Banking or Payment information changes please remember to update your profile so there is no issue	do not have the ability to pay via ACH. Please add a cHECK Payment Method, even if you prefer ACH. This will ensure you can receive payments from all of our non-ACH organizations as well.
\$	Welcome   Company Overview   Business Details   Addresses   Contacts   Insurance   Payment Information   Tax Information   Supplier Classifications   Certify & Submit	<ul> <li>Required Information         At least one payment type is required to complete this section.     </li> <li>No payment information has been entered.         Add Payment Information         ACH         Check         Click Add Payment Information         and select Check to add a         CHECK payment method         (required). Optionally add an         Interest the section.         </li> </ul>	<ul> <li>ACH: ACH is optional but is the CSU's preferred method of payment; however, it is subject to verification and not all ACH requests will be approved. Bank account must belong to the person or business the CSU is transacting with. Payments cannot be issued to alternate payees. When approved, this payment type may expedite the payment. If not approved, you will be requested to add a Check payment method if you did not include one initially, and all payments will be issued via check instead.</li> <li>If your Banking or Payment information ever changes, please remember to update your profile. If ACH was initially not approved but you have changed banks, you can add your new ACH banking information, and it will run through our verification application again.</li> </ul>

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<b>9</b>	Speaker, Sam Change Supplier	Payment Information ?		
口 日 日 日	Registration <b>In Progress</b> for: <i>The California State University</i> <b>5 of 8</b> Steps Complete Welcome Company Overview Business Details Addresses Contacts	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. ACH is the CSU's preferred method of payment. The selection of this payment type may expedite the payment for the goods provided and/or services rendered.  If your Banking or Payment information changes please remember to update your profile so there is no issue or delay with payment.  Required Information At least one payment type is required to complete this section.  No payment information has been entered.  Payment Title *  Speaking Fee		For <b>Check</b> payment, complete the required information and select your
	Insurance Payment Information Tax Information Supplier Classifications Certify & Submit Registration FAQ   View History	<ul> <li>Add Payment Information </li> <li>Country *</li> <li>United States</li> <li>Payment Type *</li> <li>Check</li> <li>Remittance Address *</li> <li>Home (Remittance) </li> <li>Currency *</li> <li>USD </li> <li>Active</li> <li>Yes</li> <li>No</li> </ul>		remittance address.
-		Click Save Cha	anges	

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-	Registration  Manage Registration Pr	ofile					
<b>Q</b> Th	Speaker, Sam		Payment Information	Add Payment I	nformation	× ?	For <b>ACH</b> payment, complete the required
5	Registration <b>In Progress</b> for: The California State University		Information on this page is used to determine how and where	Only associated countries a	re displayed.	ogr	information and select
հր	6 of 8 Steps Complete		regarding payments including invoice, date, and amount. ACH for the goods provided and/or services rendered.	Payment Title *	Speaking Fee	payment	your remittance address.
8	Welcome		If your Banking or Payment information changes please reme	Country *	United States 🗸		
	Company Overview	~		Payment Type *	АСН		
	Business Details	~	Title  Payment Type Seeaking Eee Check	Remittance Address $\star$	Home (Remittance) 🗸		
	Addresses	~	ареакінд гее Спеск	Electronic Remittance	samspeaker@email.com	Edit	
	Contacts	~	Add Payment Information 👻	Email ?			
	Insurance	~		Currency *	USD V		
	Payment Information	×		Active	● Yes ○ No		
	Tax Information	A		Bank Account			Complete vour <b>Bank</b>
	Supplier Classifications	A		Country *	United States 🗸		Account information.
	Certify & Submit			Bank Name *	Generic Bank		ACH can only be
				Account Holder's Name *	Sample Company		processed for US-based
	Registration FAQ   View History			Account Type *	Checking 🗸	Next >	bank accounts.
				Routing/Transit Number *	121042882 What is this?		
					WELLS FARGO BANK NA		
				Account Number *	123456789000		Click Save Changes.
				Confirm Account Number $\star$	123456789000		
				Address Line 1	777 Banking Blvd	•	
Q				* Required to Complete Registrat	ion Save Changes Close		
						_	



Registration FAQ | View History

## 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. ACH is the CSU's preferred method of payment. The selection of this payment type may expedite the payment

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in your banking or Payment information changes please remember to update your prome so there is no issue or delay with payment.

•					
	Title ▽	Payment Type	Currency	Active	$\frown$
	Speaking Fee	Check	USD	Yes	Edit
	Speaking Fee	АСН	USD	Yes	Edit
~	Add Payment Information 👻				
~					
A		16			
		upo reo	our <b>Payment Informa</b> dated, you can click t open your payment de	he <b>Edit</b> button to etails.	
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				< Previous	Next >

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_	Registration  Manage Registration P	rofile		(				
	Speaker, Sam Change Supplier		Payment Information	Payment Information		Edit Payment Information *		
<b>S</b>	Registration <b>In Progress</b> for: The California State University		Information on this page is used to regarding payments including invol	determine how and where ice, date, and amount, <b>ACH</b>	Only associated countries a	re displayed.	on	
ш	6 of 8 Steps Complete		for the goods provided and/or serv	ices rendered.	Payment Title *	Speaking Fee		
<b>#</b>	Welcome		If your Banking or Payment informa	ation changes please reme	Country *	United States 🖌		
	Company Overview	~			Payment Type *	ACH		
	Business Details	~	Title 🗢	Payment Type	Remittance Address *	Home (Remittance) 🗸	Edit	
	Addresses	4	Speaking Fee	ACH	Electronic Remittance Email *	samspeaker@email.com	Edit	
	Insurance		Add Payment Information 👻		Currency *	USD V		
	Payment Information	~			Active	Yes  No		
	Tax Information	A			Bank Account		_	
	Supplier Classifications	A			Country *	United States	~	
	Certify & Submit				Bank Name *	Generic Bank		
					Account Holder's Name *	Sam Speaker		
	Registration FAQ   View History				Account Type *	Checking 🗸	Next >	
					Routing/Transit Number <b>*</b>	121042882	What is this?	
					4 <b></b>	WELLS FARGO BANK NA		
					Account Number ^	****		
					Confirm Account Number *	****		
					Address Line 1	777 Banking Blvd	•	
a					★ Required to Complete Registrati	ion Save Chang	Close	

## The Edit Payment Information

pop-up allows you to edit your payment details or deactivate a payment method if it is no longer valid.

N	CSU The California State University								
	Registration 🕨 Manage Registration Profile								
à	Speaker, Sam Change Supplier		Payment Information						
ר ג	Registration <b>In Progress</b> for: The California State University <b>6 of 8</b> Steps Comple		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. ACH is the CSU's preferred method of payment. The selection of this payment type may expedite the payment						
\$	Welcome		If your Banking or Payment information changes please remember to update your profile so there is no issue or delay with payment.						
	Company Overview Business Details	1	Title 🗢	Payment Type		Currency	Active		
	Addresses		Speaking Fee	Check		USD	Yes	Edit	
	Contacts		Speaking Fee	ACH		USD	Yes	Edit	
	Insurance	1	Add Payment Information 👻						
	Payment Information	×							
	Tax Information	▲							
	Supplier Classifications	▲							
Certify & Submit When you have completed your payment information, click Next.									
							( Pre	vious Next >	



You will need to upload a W-9.

- The CSU will currently accept the IRS 2018 or 2024 version.
- You can download a form to complete from the IRS website.
- Alternatively, the supplier portal also offers a form that is pre-populated with your profile information that you can download and then select. When using this option, please ensure that all information in your profile is accurate and aligned with IRS data.

Click the Add Tax Document drop-down and select W-9.





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	Registration  Manage Registration Pr	rofile	
	Speaker, Sam Change Supplier		Supplier Classifications
Щ С	Registration <b>In Progress</b> for: The California State University <b>7 of 8</b> Steps Complete		We strive to do business with diverse companies including Small Business (SB) and Disabled Veteran Business Enterprise (DVBE). By entering applicable diversity classifications, you will help us meet diversity spending goals for our organization. Please choose all Diversity Classifications that apply. Scroll to the bottom of the li as additional fields display as Diversity Classifications are selected.
\$	Welcome         Company Overview       ✓         Business Details       ✓         Addresses       ✓	* * *	<ul> <li>Please select the classifications that apply to your organization: *</li> <li>None</li> <li>Edit</li> <li>Edit</li> <li>Supplier Designation</li> <li>The ampletice of the desided</li> </ul>
	Contacts Insurance Payment Information Tax Information	* * * *	Public Contract Code 10111 awarded contracts and proc department is prohibited fro estimates for goods, service The data you provide on this follows: None
	Supplier Classifications	A	CA-Disabled Veteran Business Enterprise (CA-DVBE)     CA-Small Business/Micro Business (CA-SB/MB)     cation
	Certify & Submit Registration FAQ   View History		designated below or, classification, or       CA-Small Business Public Works (CA-SBPW)       signated         • For other business er       CA-Contractors State License Board (CA-CSLB)       signated         • CA-Seller's Permit (CA-SP)       CA-Department of Industrial Relations (CA-DIR)       US-Small Business (Fed-SB)         As defined in Public Contractors       US-Small Business (Fed-SB)       Done
Q, ,			Edit As defined by the Office of Management and Budget, Federal Register Notice, October 30, 1997, at http://www.whitehouse.gov/omb/fedref/1997standards.html Race Frite Required to Complete Registration (Previous Next ) Save Changes

	CSU The California State University			
	Registration 🕨 Manage Registration P			
<b>Q</b>	Addresses		None	
<b>3</b> 9	Contacts	✓	Supplier Designation The completion of this designation is <u>strictly voluntary</u> .	
ш	Insurance Payment Information Tax Information	* * * *	Public Contract Code 10111 requires state agencies to capture information on ethnicity, race and gender (ERG) of business owners on all awarded contracts and procurements to the extent that the information has been voluntarily reported to the department. The awarding department is prohibited from using this data to discriminate or provide a preference in the solicitation or acceptance of bids, quotes, or estimates for goods, services, construction and/or information technology. This information shall not be collected until after the contract award is made.	Completing the Supplier Designation section is <b>strictly voluntary</b> . Please
¥	Supplier Classifications	1	follows:	read the associated information.
	Registration FAQ   View History	-	<ul> <li>For a business that is an sole proprietorship, partnership, corporation, or joint venture at least 51 percent is owned by one or more individuals in a classification designated below or, in the case of any business whose stock is publicly held, at least 51 percent of the stock is owned by one or more individuals in a designated classification, or</li> <li>For other business entities, the owner is the person controlling management and daily operations and who "owns" the business.</li> <li>For purposes of this report, respond only if the business has its home office in the United States and which is not a branch or subsidiary of a foreign corporation, firm, or other business.</li> <li>As defined in Public Contract Code Section 2051 (c)</li> </ul>	If you choose to complete this section, click the <b>Edit buttons</b> to make your selections.
			Ethnicity Edit As defined by the Office of Management and Budget, Federal Register Notice, October 30, 1997, at http://www.whitehouse.gov/omb/fedref/1997standards.html	
			Race	
			Gender	
			As defined by Public Contract Code 1011 l(f)	
٩			Sexual Orientation Edit Kequired to Complete Registration Save Changes	Click Save Changes.
<b>→</b>		_		





- · Return to the homepage and check for any other outstanding tasks.
- Return to Registration Profile

You will receive a message indicating that your registration has been completed.

The message will include additional information and links for you to save as resources.

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## RESOURCES

Login issues or technical problems, please contact JAGGAER support.

Assistance with registration related issues: <u>csubuy-suppliersupport@calstate.edu</u>

State of California Franchise Tax Board <u>Resident & Nonresident Withholding Guidelines</u>

State of California Secretary of State Business Search

State of California BizFile

State of California Certifications