



## Supplier Portal Registration Guide

Below are instructions on completing your registration with the University of Colorado's (CU) Supplier Portal.

In order to begin the creation of your account you must click on the "register now" link received via email. If you need a new invitation/email generated please send an email request to [cusupplier@cu.edu](mailto:cusupplier@cu.edu).

- NOTE: if you go to our website and create a new account CU will not be able to issue PO or make payment to you. Creating an account from our public webpage only allows you to respond to solicitations. You must be invited by a CU employee and respond via the "register now" link in the invitation email to receive POs or payments.

Once you have created an account through the invitation email you can then login at any time to update information at [www.cu.edu/psc/supplierlogin](http://www.cu.edu/psc/supplierlogin)

Enter your login credentials and click 

- If you do not remember your password select the [Trouble logging in?](#) link


### B&B Plumbing Inc.

Registration **In Progress** for:  
University of Colorado (TEST)  
1 of 7 Steps Complete

#### Welcome

Company Overview	✓
Business Details	✓
Addresses	✓
Contacts	✓
Locations	✓
Diversity	✓
Tax Information	✓
Certify & Submit	

Each area that is required will be indicated on the left panel of the registration screen (areas with a green check are complete). If an area still has missing required information the check mark will be greyed out, these areas will need attention before your registration is complete.

Below is information about each step in the registration process, however depending on your registration type you may not have all areas listed below. Once an area has been updated you can use the  button at the bottom of the screen.

*All required fields are indicated with an asterisks (\*)*

## Welcome

This step provides information related to registration requirements and information you will need during the registration process.

### Enter your Legal Company Name

- Note: this is the name that will be entered on all Solicitation Responses, Purchase Orders, and Payments
- If you have a DBA name you will be prompted for this on the next page.
- If you are an individual that is being paid personally then you will enter your legal name. This name needs to match what is on your social security card

## Company Overview


Here enter details about your company.

- Note: The selection entered in the Legal Structure field will determine which (if any) tax documents will be available during the registration process.



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## Business Details

Products and Services – enter commodity codes, or items related to the primary type of work done by your business. This information helps us to invite appropriate suppliers to solicitation events as well as report on types of goods/services purchased. For each selection indicated below click  to access available options.

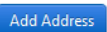




- NAICS
  - o We recommend using the search feature to determine your NAICS code. Enter text related to the type of business you do. To get the most complete list of available options enter just 1 keyword related to the kind of business.
  - o EXAMPLE: by Entering the word “Drywall” in the search 2 options appear –
    - 238310 Drywall and Insulation Contractors
    - 423320 Brick, Stone, and Related Construction Material Merchant Wholesalers
  - o The expandable tree is also available to help determine the primary type of work and which code to use.
- Commodity Code
  - o This list is a shortened/condensed version of commodity codes used internally by CU. There are only 20 selections. You must select one.

Additional Questions – Information about our Payment Plus is available. If you are interested in learning more please check the box and a CU representative will contact you with more details.

## Address

Enter the address(es) for your business.

Please note that depending on your registration type the types of addresses required will vary. The information section at the top of the page will indicate all required address types that are remaining. You must enter the address and select the appropriate “type” in order to satisfy the system requirements, entering text in a description field will not satisfy requirements.

1. Click 
2. Enter a title for the address
3. Using check boxes, indicate what type of business activities occur at this address (Takes Orders, Receives Payments, Other)
4. Click 
5. Indicate How you would like to receive Purchase Orders (Email or Fax)
6. Complete the details of this address
7. Click 
8. Enter a contact or select Not Applicable
  - a. Additional contacts could includes
    - i. **Sales Reps** (these individuals will get notifications about solicitations) – this is a required field in the next step
    - ii. Customer Care (who does CU employees call for customer assistance)
    - iii. Remittance (who should CU contact if there are questions about invoices received or payment)
9. Click 
10. Assign this address to a location
  - a. This is a requirement for CU to add your organization to our system. In the Required field “What would you like to label this location?” Enter in a text description of the address (this can be the same as entered in #2 above)
11. Click 




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## Contacts

If you did not enter a **Sales Rep** contact in the previous step you will be required to do so here. This type of contact is required to complete your registration.

## Diversity

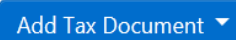





CU strives to do business with diverse companies, although this does not guarantee, nor preclude any business transaction. However, we do want to know if you are diverse.

1. Enter a response for **Does Your Business Qualify as a Diverse Supplier? \***
  - a. This may include Disabled Veteran Owned Business, Minority Large Business, Indian Tribe, Woman Owned Large Business, or others
  - b. If you select Yes you will be prompted to indicate your Diversity Classification
  - c. If you select No you will be considered a Large Business
  - d. If you select Decline to Answer you will be considered a Large Business
2. Are you considered a Small Business?
  - a. Enter Yes or No
3. Click 

## Tax Information

Here you will be required to upload your tax document (this may be a W9 or version of the W8). CU is unable to provide advice on completing tax forms as these forms are governed by the IRS. If you have questions about how to complete a W9 or W8 form please visit [www.irs.gov](http://www.irs.gov).

CU recommends that you use the system generated tax document, which will pre-populate the information you previously provided in your registration into the appropriate area of the tax document. Below are instructions for using the pre-populated document and electronic signature:

1. Click 
  - a. Select your document type from the drop down list
2. Click  **Download Pre-populated Tax Document**
  - a. Save the completed file on your computer (**do not insert anything in the signature line or date line – the following steps will walk you through electronic signature options, step 5e below**)
3. Enter Tax Document Name
  - a. Example: W9 2015
4. Enter Tax Document Year
5. Upload The Tax Document
  - a. Click 
  - b. Enter Title
    - i. Example: "W-9" or "W8"
  - c. Click  to locate the file on your computer to be included as your tax document, follow your prompts to select and include the file you saved in step 2a above
  - d. Click 
  - e. Check the e-signature box
  - f. Enter portal password
    - i. This is the password you use to log in to the system. Each user sets their own portal password and CU has no way to look this information up for you.
  - g. Click 



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6. Click [Next >](#)

## Certify & Submit

If any required fields have not been completed during the registration process you will be prompted to complete them. The below is an example of the type of message that will appear for any required fields missing. You can click on the hyperlinks which will take you directly to the section and field missing information.

 **The list below needs to be addressed before your registration can be submitted.**

Company Overview

- [Legal Structure](#)
- [Tax ID Number](#)

Business Details

- [NAICS Codes](#)
- [Commodity Codes](#)

Addresses

- [Click here to identify missing required items](#)

Contacts

- [Click here to identify missing required items](#)

Diversity

- [Click here to identify missing required items](#)

Once all required fields have been completed and you have read the statement. Complete your contact information and click [Submit](#)

**Your registration is now complete and will be reviewed by a member of the PSC-Vendoring team. If there are any questions or concerns you will be contacted. Otherwise the system will send you an email once your registration has been approved**