

Step-by-Step Guide

Suppliers: Registering in CU's Supplier Portal

In This Guide

Welcome to CU's Supplier Portal! This guide provides information and tips for each step of the registration process.

If you are an individual or sole proprietor, you may not be required to complete every step.

Registration Process

1. Before you begin, gather the needed information as outlined in the welcome message. This will make the registration process faster and easier!
2. Begin by creating your supplier account. **Each supplier can have only one account, and only one login for that account.**

Enter the required information – noted by an asterisk (*) – and click the **Create Account** button.

The portal saves your progress after each step, when you click the **Next** button. If you need to complete your registration at a later time, log into your supplier account to pick up where you left off.

3. The **Welcome to Supplier Registration** page appears. Review your Legal Company Name; this is the name entered, by your CU department contact, onto your portal invitation. Update to your company's actual legal name, if needed.
Click the **Next** button.
4. The registration process has seven steps. If you are an individual or sole proprietor, you may not be required to complete every step.

STEP #1: COMPANY OVERVIEW

Enter the required information, as noted by an asterisk (*):

- Legal Structure
- Tax ID Number

Additionally, if you do business using a name different from your legal name, enter that in the DBA field.

Click the **Next** button.

The screenshot shows the 'Company Overview' form with the following fields and text:

- Doing Business As (DBA)**: Text input field containing 'GF Delights'.
- Dun & Bradstreet Number (DUNS)**: Text input field.
- Legal Structure ***: Dropdown menu.
- Tax ID Number ***: Text input field.
- Website**: Text input field with a help icon.
- Legal Structure *** (Note): A paragraph explaining that legal structure is used by the IRS to classify business organizations and determine tax requirements. It includes a link to www.irs.gov.
- * Required to Complete Registration**: A note at the bottom of the form.
- Navigation**: '< Previous' button on the left and 'Next >' button on the right.

Step-by-Step Guide

Suppliers: Registering in CU's Supplier Portal

5. **STEP #2: BUSINESS DETAILS**

Not required for some individuals or sole proprietors – only required if you see this step on the left side of your screen.

Business details are needed to determine if your business qualifies as a small business per the U.S. Small Business Administration.

Enter the required information, as noted by an asterisk (*):

- Year Established
- Number of Employees (including yourself)
- Currency
- Annual Revenue/Receipts for the past three years (enter 0 for any year you didn't have revenue/receipts)
- NAICS Code(s)
- Commodity Code(s)

To search for your NAICS and Commodity Codes, click the **Edit** button. In the pop-up that appears, search using keywords. Select all codes that are appropriate for your company.

Payment Plus is a program which offers payment in net 10 days electronically instead of net 30 days by paper check. Check the Payment Plus box if you would like to become part of the program.

Click the **Next** button.

6. **STEP #3: ADDRESSES**

Add your company's Order/Fulfillment, Remit, and Physical addresses. These addresses can be the same.

Note: Be sure to add your Order address first.

Business Details ?

The following data is used to determine whether or not your business meets the small business size standards as defined by the U.S. Small Business Administration. The SBA standards are based on your NAICS code and annual revenue, or number of employees.

Year Established * yyyy

Number of Employees *

Annual Revenue/Receipts

Enter total revenue/receipts information for the past three years. For any year that you did not have revenue/receipts, enter 0.

Currency *

2013 Annual Revenue/Receipts *

2012 Annual Revenue/Receipts *

2011 Annual Revenue/Receipts *

Products and Services

NAICS Codes * Primary NAICS Code Selected Edit

722320 - Caterers Remove

1 Secondary NAICS Codes Selected Edit

722310 - Food Service Contractors Remove

Commodity Codes * 1 Commodity Codes Selected Edit

07 (Food Related Products & Services) Remove

Additional Questions

Here is a link to the definition of [Payment Plus](#)

☐ Are you interested in alternative payment methods - Payment Plus

Add Address ×

Basic Information (Step 1 of 4)

What would you like to label this address? *

Example: Headquarters, Houston Office

Which of the following business activities take place at this address? (select all that apply) *

☒ Takes Orders (fulfillment)

☒ Receives Payment (remittance)

☒ Other (physical)

* Required to Complete Registration Next >

Step-by-Step Guide

Suppliers: Registering in CU's Supplier Portal

To add an address, click the **Add Address** button. In the pop-up window that appears, enter a label for your address and check the box for each activity that takes place at this address. Click the **Next** button.

Add Address (Step 2 of 4)

Country * United States

Address Line 1 * 1234 Main St

Address Line 2

Address Line 3

City * Denver

State/Province * Colorado

Postal Code * 80203

Phone (303) 333-3333 ext.

Toll Free Phone (800) 888-8888 ext.

Fax

* Required to Complete Registration

< Previous Next >

Assign this address to a location. Enter a location label and select how your company would like to receive purchase orders for this location – preferably by fax or email. If you select *Fax* or *Email*, fields will appear to enter the fax number or email address.

Click the **Save Changes** button.

When ready to move on to the next step, click the **Next** button.

Enter the required information, as noted by an asterisk (*):

- Country
- Complete Address

Click the **Next** button.

You may enter a contact for this address, if appropriate. (You must enter a sales contact later in the registration process.) Select the *Not Applicable* radio button if there are no contacts for the address and click the **Next** button.

Add Address (Step 4 of 4)

You can also update and add Locations later from the Locations page.

Locations represent the various places in which your business operates. Some examples of locations are regional offices, fulfillment centers, divisions, etc. If your organization only operates out of one location, please enter "Main Office" for the Location Label.

☒ Enter New Location

What would you like to label this location? * Main Office

Description

700 characters remaining

How would you like to receive purchase orders for this location? * Email

Email Address * heather.hoyer@company.net

Confirm Email * heather.hoyer@company.net

* Required to Complete Registration

< Previous Save Changes

Step-by-Step Guide

Suppliers: Registering in CU's Supplier Portal

7. **STEP #4: CONTACTS**

Add your company's sales contact, along with other contacts (such as billing or fulfillment) as appropriate.

To add a contact, click the **Add Contact** button and select the type of contact. A pop-up window appears. Enter, at minimum, the required information, as noted by an asterisk (*):

- Contact Label
- First Name
- Last Name
- Email address
- Phone number

Click the **Save Changes** button.

When ready to move on to the next step, click the **Next** button.

8. **STEP #5: LOCATIONS**

You already added a location when you added an address (step #3). Click the **Next** button.

9. **STEP #6: DIVERSITY**

Not required for some individuals or sole proprietors – only required if you see this step on the left side of your screen.

Based on your entries for Step #2: Business Details, the portal has already determined whether your company is a diverse supplier by being a Small Business Enterprise (SBE).

Step-by-Step Guide

Suppliers: Registering in CU's Supplier Portal

If your business does not meet the small business designation, you can use the radio buttons to select *No/Non-US Based* or *Decline to Answer*.

To add diversity classifications, click the **Add Diversity Classification** button and select the appropriate classification.

When ready to move on to the next step, click the **Next** button.

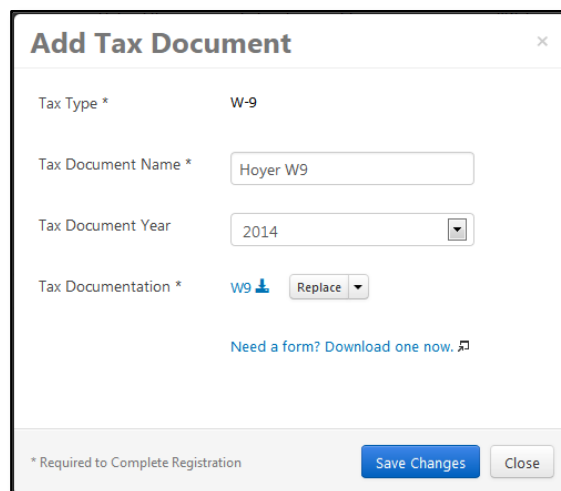
10. **STEP #7: TAX INFORMATION**

Upload the appropriate IRS tax document for your company, such as a W-9, in a PDF format.

Click the **Add Tax Document** button and select the appropriate form. Enter a name for your document and, if desired, year. Click the **Upload** button; enter a title, browse for your file, and click the **Add** button.

Click the **Save Changes** button.

When ready to move on to the next step, click either the **Next** button or the **Proceed to Certify and Submit** button.



The screenshot shows a web form titled "Add Tax Document" with a close button (X) in the top right corner. The form contains the following fields and options:

- Tax Type ***: A dropdown menu with "W-9" selected.
- Tax Document Name ***: A text input field containing "Hoyer W9".
- Tax Document Year**: A dropdown menu with "2014" selected.
- Tax Documentation ***: A section with a "W9" icon, a "Replace" button, and a dropdown arrow.
- Below the "Tax Documentation" section is a link: "Need a form? Download one now." with a PDF icon.
- At the bottom, there is a note: "* Required to Complete Registration".
- At the bottom right, there are two buttons: "Save Changes" (in blue) and "Close" (in grey).

11. **CERTIFY & SUBMIT**

Read the certification statement at the top of this page. Then, complete the bottom half of the page and click the **Submit** button.

You have successfully registered your company within the CU Supplier Portal!

You will receive an email confirming your registration. Keep this email – you will need it to access the portal in the future and keep your supplier account information current.