

## Job Aid: Add an Associated Organization

### This Job Aid shows how to:

- Add an associated organization/company

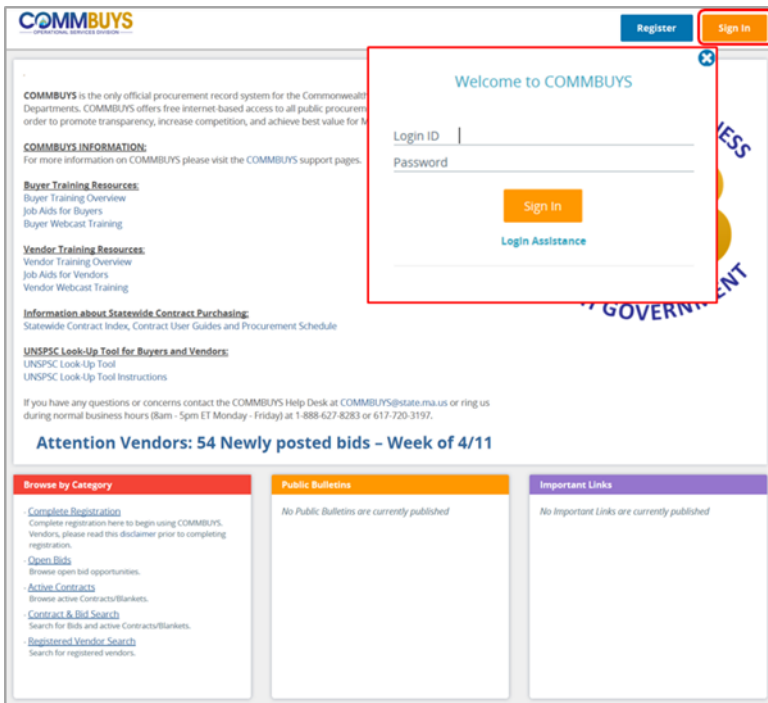
### Of Special Note:

Seller Administrators can add associated organizations in COMMBUYS. This is a useful feature for large companies/organizations with multiple business units and points of contact to operate separately while using the same Tax ID. Associated organizations act almost as standalone vendors in COMMBUYS. *It is suggested that users considering adding an Associated Organization first read Appendix A for further guidance.*

Only a Seller Administrator has the ability to add an associated organization. These instructions assume the logged in user has Seller Administrator credentials.

### Screenshot

### Directions



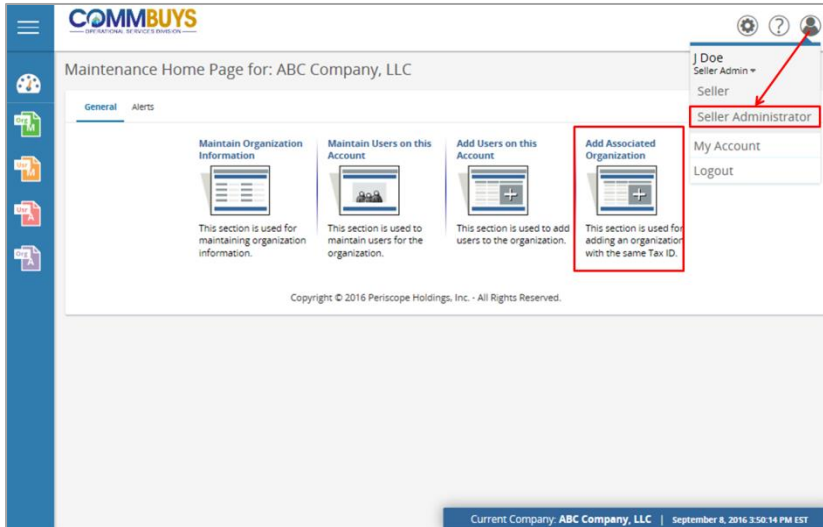
### Step 1: Launching COMMBUYS

1. Enter the uniform resource locator (URL) address for COMMBUYS (<https://www.commbuys.com>) or ([commbuys.com](https://commbuys.com)) in your browser.
2. Once the COMMBUYS landing page displays click on the **Sign In** button.
3. Enter your **Login ID** and **Password** and sign in to COMMBUYS.

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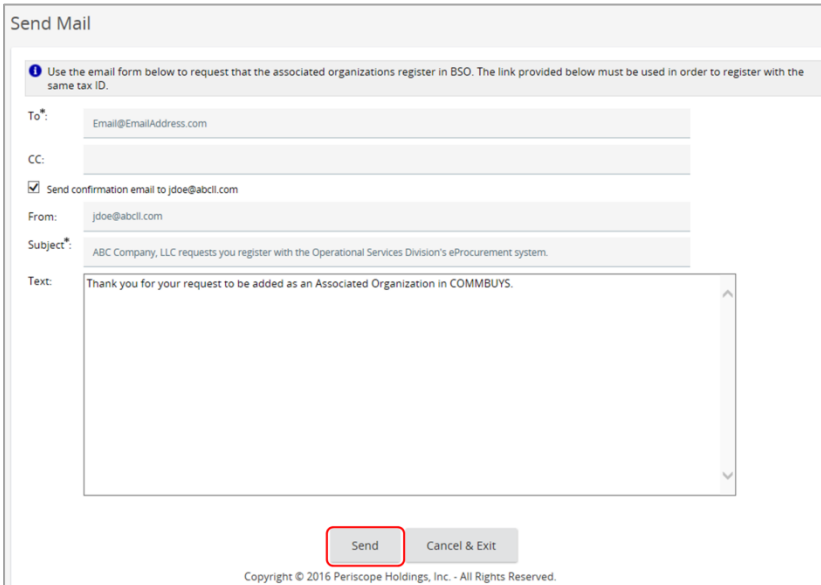
### Screenshot

### Directions



#### Step 2: Accessing the Add Associated Organization Home Page

1. Click on the **Account** icon to ensure you are logged in as the Seller Administrator.
2. If not, select **Seller Administrator** from the dropdown found within **Account** icon.
3. From the Seller Administrator Homepage, click on **Add Associated Organization** icon.



Send Mail

Use the email form below to request that the associated organizations register in BSO. The link provided below must be used in order to register with the same tax ID.

To\*: Email@EmailAddress.com

CC:

Send confirmation email to jdoe@abctl.com

From: jdoe@abctl.com

Subject\*: ABC Company, LLC requests you register with the Operational Services Division's eProcurement system.

Text: Thank you for your request to be added as an Associated Organization in COMMBUYS.

Send Cancel & Exit

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#### Step 3: Sending Registration Link to Associated Organization

1. Enter the email address to the organization you wish to add as an associated organization into the **To** field. This is a required field.
2. To receive a confirmation email, check the box next to **Send confirmation email**.
3. The **Subject** line auto-populates. However, this is an editable field. Customize the **Subject** line as you see fit. This is a required field.
4. Entering data into the **Text** field is not required. However, OSD recommends customizing the message to provide guidance to the person receiving it. (See Appendix A).
5. Click **Send**.

## Job Aid: Add an Associated Organization

### Screenshot

### Directions

#### Add Associated Organization

Subject: Associated Organization confirmation

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#### Email Recipients

Delivery Date: 10/04/2016 03:59:38 PM

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#### Additional Email Notifications

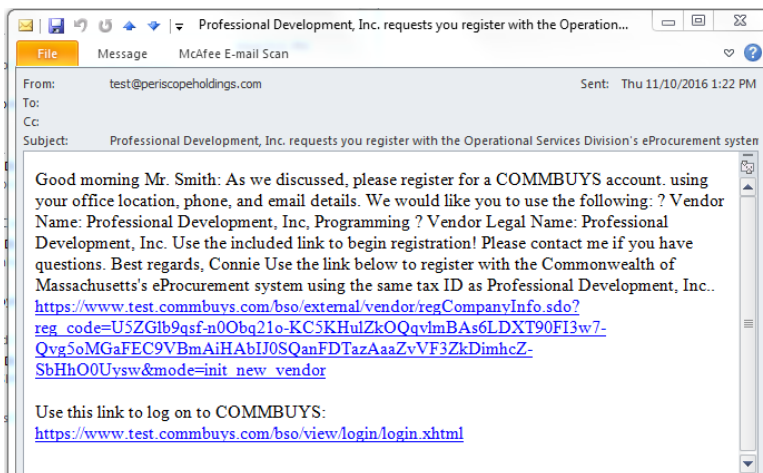
Email Address
jdoe@abcll.com

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#### Step 4: Confirming Delivery of Registration Link

1. A message window displays confirming the email was sent to the recipient.
2. Click **OK** to return to the Seller Administration Homepage.

**Note:** The recipient will receive an email similar to the email shown here. The email will contain your customized message as well as a link they must use to continue the registration process. They will then follow the standard COMMBUYS vendor registration process.



## Job Aid: Add an Associated Organization

### Appendix A

COMMBUYS Buyers often conduct searches in COMMBUYS when looking for particular vendors or products and services. It is easier for Buyers to review search results and find what they need if Vendors use a consistent naming convention for Associated Organizations. In addition, Buyers want to make sure that Vendors on contract receive Purchase Orders quickly, and that the right Vendor contact receives notifications.

#### Make a Plan for Associated Organizations

##### Select Your Naming Convention

Think in advance about a naming convention that could be utilized for each entity that might be designated as an Associated Organization. For example, universities with multiple campuses should consider selecting a single standard name for the initial Seller organization in COMMBUYS (i.e., University of Massachusetts, UMass), and a naming convention for each campus (i.e., University of Massachusetts – Amherst, University of Massachusetts – Dartmouth). Remember, although the Tax ID for the Vendor organization cannot be changed by the Seller Administrator in COMMBUYS once submitted through the initial registration process, the Company Name and Vendor Legal Name can be updated.

##### Customize Invitations to Register as an Associated Organization

The Seller Administrator for the initial Seller organization to register in COMMBUYS has the ability to invite other departments (or campuses, etc.) to register in COMMBUYS as an Associated Organization under the same Tax ID. Through the invitation process, the Seller Administrator will enter information into an email form to be sent to a contact in another department or campus.

We recommend that each Seller organization customizes the message, providing the recipient with naming convention information to use in completing the registration process. Direction should be given specifically for:

- Vendor Name, and
- Vendor Legal Name

To continue the University of Massachusetts example, if an Associated Organization invitation is being sent from the Amherst campus to a contact at the Dartmouth campus, the message would include text instructing Dartmouth to use “University of Massachusetts – Dartmouth” as the Company Name and Vendor Legal name when they proceed through the registration process.

See Step 4 of this job aid for example of an email received, with an invitation to register in COMMBUYS.