Job Aid:
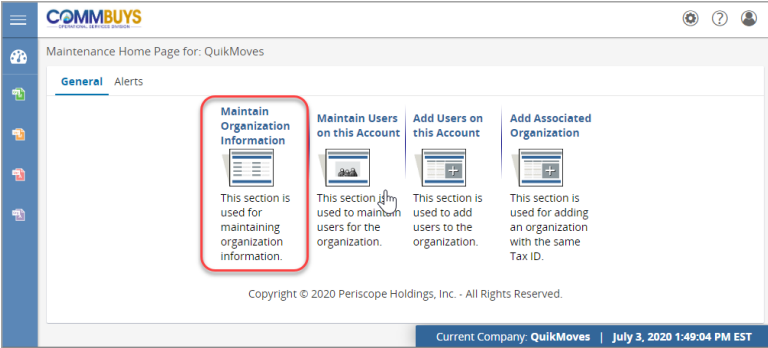## Maintain Organization Information for COMMBUYS Vendor Account

This Job Aid shows how to:

- Maintain company/organization information for COMMBUYS Vendor Account.

Of Special Note:

Only the Seller Administrator can update company/organization information such as: commodity codes, addresses, and users on the account. When entering or updating information, all asterisked (*) data fields must be completed before any information can be saved.

It is the responsibility of the Seller Administrator to maintain the company's information and ensure that the information provided is true and accurate. These instructions assume the logged in user has the Seller Administrator role. For guidance on how to get to the Seller Administrator Home Page, consult the Job Aid "Basic COMMBUYS Navigation for Vendors."

Screenshot	Directions
	Step 1: Accessing Maintenance Organization Tools 1. On the Seller Administrator home page, click on the **Maintain Organization Information** icon. 2. The **Maintain Organization Information** page displays. From here, edit and/or add information to maintain accurate records for your company. **Note:** The **Maintain Regions, Maintain Quote Attachment Repository,** and **Credit Memo List** icons are not currently being used by the Commonwealth of Massachusetts.

Screenshot	Directions

Step 2: Accessing the Organization's General Information

1. Click on **the Maintain General Organization Information** page to manage your company's default information.

2. Use the Maintain General Organization Information page to manage your company's general information including:
   - Company Name
   - Vendor Legal Name
   - Country Code for Tax ID
   - Tax ID Type (EIN or SSN)
   - Incorporation Details (State and Year of Incorporation)
   - Business Description
   - Preferred Delivery Method
   - Vendor Email
   - Vendor Fax
   - Emergency Supplier (Yes or No. If yes complete the fields listed below.)
     - Emergency Phone
     - Emergency Contact Name
     - Emergency Email
     - Emergency Info Comment

3. In the Attachments box, it is possible to add documents (5MB max). These documents are visible to buyers looking at your profile.
   - Click **Choose File**.
   - Select the file you would like to add and click **Open**.
   - Click the Upload button to attach it to your profile.

4. Click on the **Save & Exit** button to return to the **Maintain Organization Information** page.

Note: The COMMBUYS-generated Vendor ID, Tax ID, and Login ID that was entered upon initial registration cannot be modified.

The **Forms** section is not currently in use.

Screenshot	Directions

Step 3: Accessing the Organization's Addresses

Click on the **Maintain Addresses** icon on the **Maintain Organization Information** page to update current addresses or add additional addresses.

Note: Five (5) different email addresses can be added and activated for the Bid Mailing Address type. Only one (1) email address can be designated for General and PO address type.

The Remit and Sales Address types are not currently being used.

Step 4: Maintaining Addresses

1. Click on the hyperlinked address name for the address that requires updating.

2. Update the fields as needed, designate an Address Type, or add multiple email addresses, for the Bid Mailing Address.

3. Click **Save and Exit** to return to the Maintain Address page.

Screenshot	Directions

Screenshot

Directions

Step 5: Entering a New Address

1. Click on the **Add Another Address** button to add a new address.

2. Select the **Address Type** from the dropdown menu at the top of the screen.

3. In the **Name this Address** field, enter the name for the address.

4. Complete the form by filling in the required fields.

5. For the Bid Mailing Address, up to (5) emails addresses can be added. Click **Add Email.** and enter the email addresses.

6. Select the **Status** of the address. By default, the address is marked **Active**.

7. To designate the address as the default for the **Address Type** selected, check the box next to **Default address for this address type**.

8. Click **Save & Exit** to return to the **Maintain Addresses** page.

9. Click **Exit** to return to the **Maintain Organization Information** page.

Note: An organization can have as many addresses as needed, but each address type is required to have a default.

Step 6: Accessing the Commodity-EPP Maintenance Home Page

Click on the **Maintaining Commodity-EPP Codes & Services** icon on the **Maintain Organization Information** page.

Note: COMMBUYS uses the United Nations Standard Products and Services Code ® (UNSPSC) commodity classification system. All vendors must have a least one UNSPSC commodity code associated with their vendor profiles.

UNSPSC commodity codes determine which bid notifications you will receive; therefore, selecting all possible codes to cast the widest net is encouraged.

Screenshot	Directions
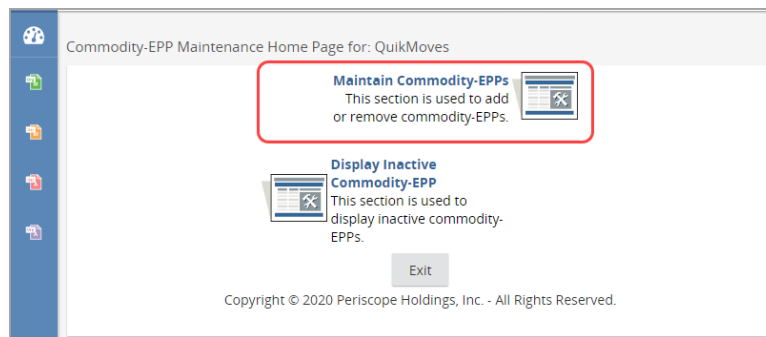
Step 7: Maintaining Commodity-EPP Codes & Services

Click on the **Maintain Commodity-EPPs** icon to add or remove commodity codes to or from the vendor profile.

Commodity-EPP Maintenance Home Page for: QuikMoves

Maintain Commodity-EPPs
This section is used to add or remove commodity-EPPs.

Display Inactive Commodity-EPP
This section is used to display inactive commodity-EPPs.

Exit

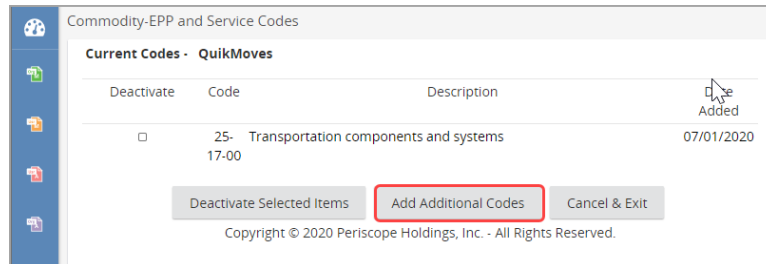Copyright © 2020 Periscope Holdings, Inc. - All Rights Reserved.

Step 8: Adding Commodity Codes

1. Click on the **Add Additional Codes** button to add more codes to the vendor profile.
2. Search for codes by using either the:
   a. **Segment-Family and Class** dropdown menus
   b. **Keyword** search field, or
   c. hyperlinked codes listed in the **UNSPSC Code Browse** section of the page

Commodity-EPP and Service Codes

Current Codes - QuikMoves

Deactivate	Code	Description	Date Added
☐	25-17-00	Transportation components and systems	07/01/2020

Deactivate Selected Items   Add Additional Codes   Cancel & Exit

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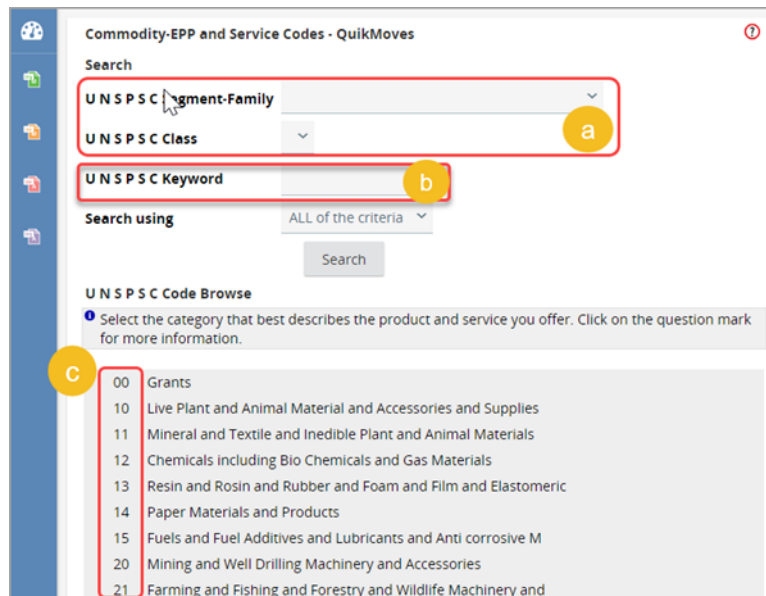
Commodity-EPP and Service Codes - QuikMoves

Search

U N S P S C Segment-Family

U N S P S C Class

U N S P S C Keyword

Search using   ALL of the criteria

Search

U N S P S C Code Browse

Select the category that best describes the product and service you offer. Click on the question mark for more information.

00	Grants
10	Live Plant and Animal Material and Accessories and Supplies
11	Mineral and Textile and Inedible Plant and Animal Materials
12	Chemicals including Bio Chemicals and Gas Materials
13	Resin and Rosin and Rubber and Foam and Film and Elastomeric
14	Paper Materials and Products
15	Fuels and Fuel Additives and Lubricants and Anti corrosive M
20	Mining and Well Drilling Machinery and Accessories
21	Farming and Fishing and Forestry and Wildlife Machinery and

Screenshot	Directions
	Step 9: Selecting Commodity Codes from Search Results 1. To select code(s) check the **Code** box next to the code(s) you wish to add. 2. Click the **Save and Add More** button to add the selected codes to the vendor profile and remain on this page to continue adding codes. 3. Click the **Save** button to add the selected codes to the vendor profile and return to the previous page. 4. Once saved, the codes will appear as current codes. 5. Click **Cancel & Exit** to return to the **Commodity-EPP Maintenance Home Page** when commodity code maintenance is complete.
	Step 10: Removing Commodity Codes 1. To remove code(s) check the **Deactivate** box next to the code(s) in **Current Codes** list. 2. Click **Deactivate Selected Items** button. 3. Once the page refreshes and the selected code(s) are removed, click on the **Cancel & Exit** button to return to the **Commodity-EPP Maintenance Home Page**.

Screenshot	Directions

Step 11: Reviewing Deactivated Commodity Codes

Click on the **Display Inactive Commodity-EPP** button from the **Commodity-EPP Maintenance Home Page**.
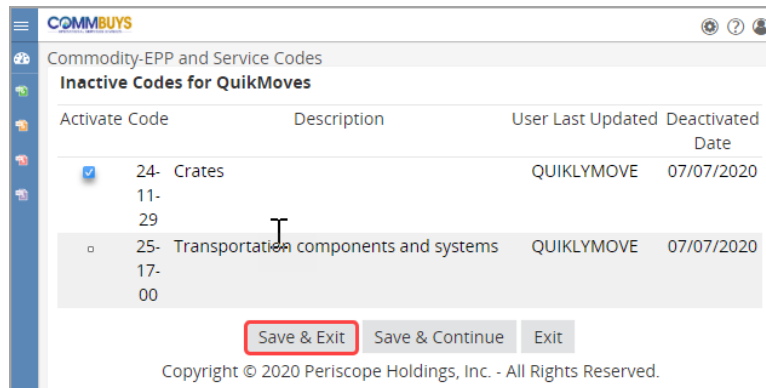
Step 12: Reactivating Commodity Codes

1. A list of commodity codes that were once active for the vendor profile is displayed.

2. To reactivate code(s) check the **Activate** box next to the code(s) that need to be reactivated.

3. Click on the **Save & Exit** button to return to the **Commodity-EPP Maintenance Home Page**.

4. Click **Exit** to return to the **Maintain Organization Information** page.
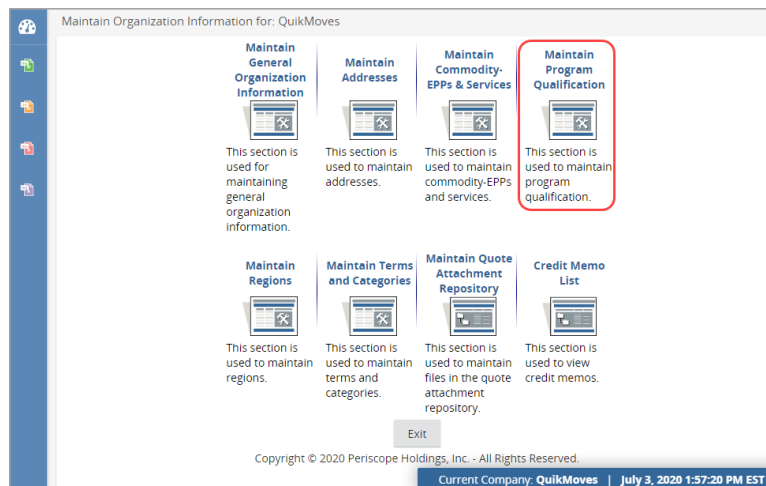
Step 13: Maintaining Program Qualification

Click on the **Maintain Program Qualification** to access messages regarding the *Small Business Purchasing Program* certification renewal or to complete the application for consideration.

Screenshot	Directions

Screenshot

Maintain Organization Information for: QuikMoves

Maintain General Organization Information
This section is used for maintaining general organization information.

Maintain Addresses
This section is used to maintain addresses.

Maintain Commodity-EPPs & Services
This section is used to maintain commodity-EPPs and services.

Maintain Program Qualification
This section is used to maintain program qualification.

Maintain Regions
This section is used to maintain regions.

Maintain Terms and Categories
This section is used to maintain terms and categories.

Maintain Quote Attachment Repository
This section is used to maintain files in the quote attachment repository.

Credit Memo List
This section is used to view credit memos.

Exit

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Current Company: **QuikMoves** | **July 3, 2020 1:57:20 PM EST**

Directions

Step 14: Accessing the Maintain Terms and Categories Page

Click on the **Maintain Terms and Categories** icon from the **Maintain Organization Information** page.

Screenshot

Terms, Categories, and Certifications - QuikMoves

Terms

Categories & Certifications

Category: Disadvantaged Business Enterprise (DBE) Certified
Description: A check in "certified" indicates you are currently certified by the Massachusetts Supplier Diversity Office (SDO) as a Disadvantaged Business Enterprise (DBE). Note that, once your COMMBUYS registration is complete, your selection will be validated against the SDO Directory of Certified Businesses. The database is available for search at the following link.   Category URL: http://www.mass.gov/sdo

☐ Not Certified
☐ DBE Certified

Category: Disability-Owned Business Enterprise (DOBE) Certified
Description: A check in "certified" indicates you are currently certified by the Massachusetts Supplier Diversity Office (SDO) or by an SDO certification partner as a Disability-Owned Business Enterprise (DOBE). Note that, once your COMMBUYS registration is complete, your selection will be validated against the SDO Directory of Certified Businesses. The database is available for search at the following link.   Category URL: http://www.mass.gov/sdo

☐ Not Certified
☐ DOBE Certified

Category: DUNS Number
Please select at most one category value

Select
☐   This is the DUNS number assigned to my Business

Notes:

Directions

Step 15: Maintaining Terms and Categories

1. To edit the categories associated with the vendor profile, check the appropriate box under the categories that need to be updated.

2. Once you are finished click **Save & Exit** at the bottom of the page to return to the previous page.

Note: Categories related to certification such as MBE and WBE certifications cannot be self-selected as they require Commonwealth approval and will be selected internally by the Commonwealth.