

## Job Aid:

### Maintain Organization Information for COMMBUYS Vendor Account

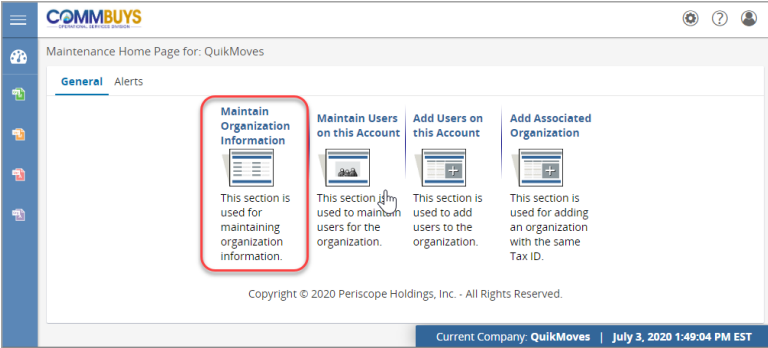

#### This Job Aid shows how to:

- 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
	<p><b>Step 1: Accessing Maintenance Organization Tools</b></p> <ol style="list-style-type: none"> <li>On the Seller Administrator home page, click on the <b>Maintain Organization Information</b> icon.</li> <li>The <b>Maintain Organization Information</b> page displays. From here, edit and/or add information to maintain accurate records for your company.</li> </ol>
	<p><b>Note:</b> The <b>Maintain Regions</b>, <b>Maintain Quote Attachment Repository</b>, and <b>Credit Memo List</b> icons are not currently being used by the Commonwealth of Massachusetts.</p>

**COMMBUYS**

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 1:36:08 PM EST

Maintain General Organization Information

Vendor ID: 00044553

Company Name: QuikMoves

DBA for Vendor: Vendor Legal Name: QuikMoves

Tax ID #: 346773458 Country Code for Tax ID: US - United States of America

Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)?

EIN - SSN

Incorporation Details: State: Year of Incorporation: 0

Business Description: OSD

Preferred Delivery Method: Email

Vendor Email: quikmoves@noemail.com

Vendor Fax:

Emergency Supplier:

Yes/No

Emergency Phone: Ext:

Emergency Contact Name:

Emergency Email:

Emergency Info Comment:

User Last Updated: Quniton Diddley

Date Last Updated: 07/01/2020 03:57:25 PM

**Attachments**

No Attachments

File: Choose File No file chosen

Description: Upload

**Forms**

Click Add Form to add form attachments.

No Form Attachments

Add Form Save & Exit Save & Continue Reset Cancel & Exit

## 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.)
    - o Emergency Phone
    - o Emergency Contact Name
    - o Emergency Email
    - o 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.

Maintain Organization Information for: QuikMoves

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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

### 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.

Maintain Addresses for: QuikMoves

Name	Address Type	Address Information	Status	Default for Type
Bids	Bid Mailing Address	Sama Dee 14 Wishing Well St Boston, MA 02474 US Email: galgadol@quikmoves.com;samad@quikmoves.com;trombone@quikmoves.com Phone: (616)502-8855	Active	Yes
General	General Mailing Address	Quinton Diddle 10 Wishing Well St Boston, MA 02474 US Email: quikmoves@noemail.com Phone: (617)502-8855	Active	Yes

Add Another Address Exit

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Current Company: **QuikMoves** | July 3, 2020 2:00:45 PM EST

### 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.

Address Book - QuikMoves

**Bid Mailing Address**

Name this Address: Bids

Contact Name: Sama Dee

Address Line 1: 14 Wishing Well St

Address Line 2:

Address Line 3:

Address Line 4:

Country: US - United States of America

City: Boston

State/Province: MA

ZIP: 02474

County:

Phone: 616 502 8855

Ext:

Toll Free:

Mobile:

Fax: 441.44

Id: Active

Alternate Id:

Status: Active

Web Address:

(Begin with http:// or https://)

Default address for this address type

Email Address galgadol@quikmoves.com Remove Email

Email Address samad@quikmoves.com Remove Email

Email Address trombone@quikmoves.com Remove Email

Email: Add Email Remove Email

Save & Exit Save & Continue Reset Cancel & Exit

Maintain Addresses for: QuikMoves

Name	Address Type	Address Information	Status	Default for Type
Bids	Bid Mailing Address	Sama Dee 14 Wishing Well St Boston, MA 02474 US Email: galgadot@quikmoves.com;samad@quikmoves.com;trombone@quikmoves.com Phone: (617)502-8855	Active	Yes
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Current Company: QuikMoves | July 3, 2020 2:00:45 PM EST

Address Book - QuikMoves

**Enter a New Address**

Address Type: Purchase Order Mailing Address

Name this Address: Bid Mailing Address

Contact Name: Emergency Mailing Address

Address Line 1: Purchase Order Mailing Address

Address Line 2: Remit Address

Address Line 3: Sales Address

Address Line 4:

Country: US - United States of America

City:  State/Province:

ZIP:  County:

Phone:  Ext:

Toll Free:  Mobile:

Fax:  Email:

Id: 0 Alternate Id:

Status: Active Web Address:

☒ **Active** Default address for this address type (Begin with http:// or https://)

☐ Deleted

☐ Inactive

☐ Pending

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### 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.

Maintain Organization Information for: QuikMoves

<b>Maintain General Organization Information</b>  This section is used for maintaining general organization information.	<b>Maintain Addresses</b>  This section is used to maintain addresses.	<b>Maintain Commodity-EPPs &amp; Services</b>  This section is used to maintain commodity-EPPs and services.	<b>Maintain Program Qualification</b>  This section is used to maintain program qualification.
<b>Maintain Regions</b>  This section is used to maintain regions.	<b>Maintain Terms and Categories</b>  This section is used to maintain terms and categories.	<b>Maintain Quote Attachment Repository</b>  This section is used to maintain files in the quote attachment repository.	<b>Credit Memo List</b>  This section is used to view credit memos.

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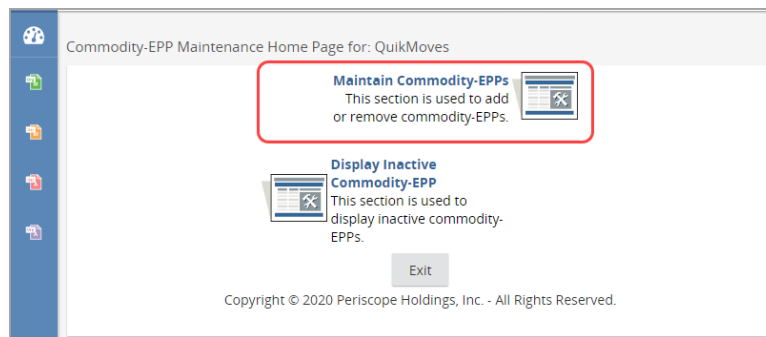
Current Company: QuikMoves | July 3, 2020 1:57:20 PM EST

### Step 6: Accessing the Commodity-EPP Maintenance Home Page

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

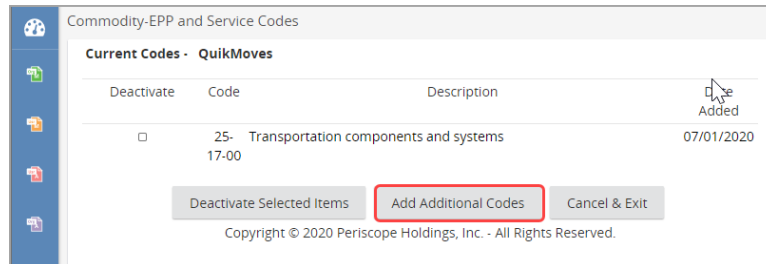
**Note:** COMMBUYS uses the United Nations Standard Products and Services Code ® (UNSPSC) commodity classification system. All vendors must have a least one UNSPSC commodity code associated with their vendor profiles.

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



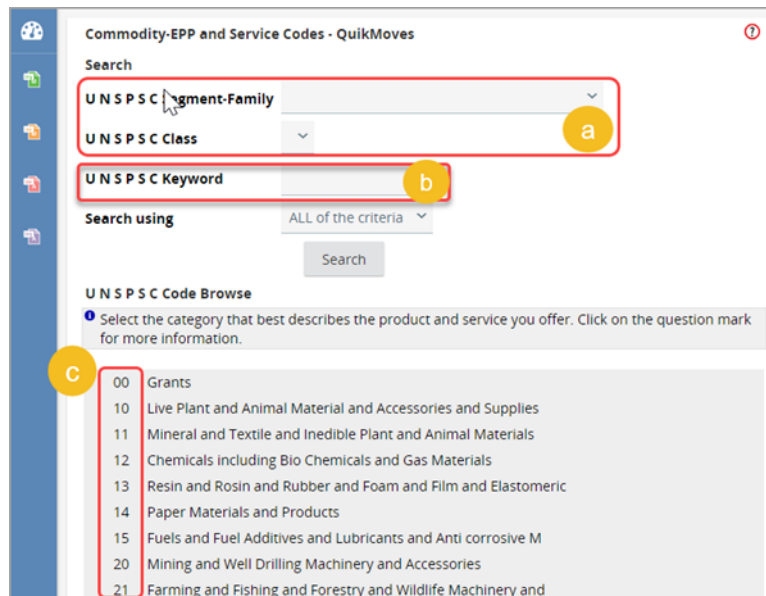
### Step 7: Maintaining Commodity-EPP Codes & Services

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



### 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 - QuikMoves

Search

UNSPSC Segment-Family

UNSPSC Class

UNSPSC Keyword: container

Search using: ALL of the criteria

Search

UNSPSC Code Browse Show Categories

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

Code	Description
23-25-19	Metal container manufacturing machinery and equipment
<input checked="" type="checkbox"/> 24-11-00	Containers and storage
24-11-15	Bags
24-11-18	Tanks and cylinders and their accessories
24-11-20	Bins and baskets
24-11-21	Casks and barrels and drums
24-11-22	Cans and pails
24-11-24	Storage chests and cabinets and trunks
24-11-25	Corrugated and other boxes for distribution
24-11-26	Liquid containers
24-11-27	Pallets
<input checked="" type="checkbox"/> 24-11-28	Freight containers
<input checked="" type="checkbox"/> 24-11-29	Crates
24-11-30	Slip sheets
41-10-41	Specimen collection and transport containers and supplies
41-12-33	General laboratory storage containers and cabinets
42-22-17	Intravenous and arterial infusion bags and containers and re
47-12-17	Waste containers and accessories
52-15-20	Domestic dishes and servingware and storage containers
<input checked="" type="checkbox"/> 78-14-19	Transport container rental services

Save Save and Add More

Commodity-EPP and Service Codes

Current Codes - QuikMoves

Deactivate	Code	Description	Date Added
<input type="checkbox"/>	24-11-00	Containers and storage	07/03/2020
<input type="checkbox"/>	24-11-28	Freight containers	07/03/2020
<input type="checkbox"/>	24-11-29	Crates	07/03/2020
<input type="checkbox"/>	25-17-00	Transportation components and systems	07/01/2020
<input type="checkbox"/>	78-14-19	Transport container rental services	07/03/2020

Deactivate Selected Items Add Additional Codes Cancel & Exit

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### 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**.

COMMBUYS

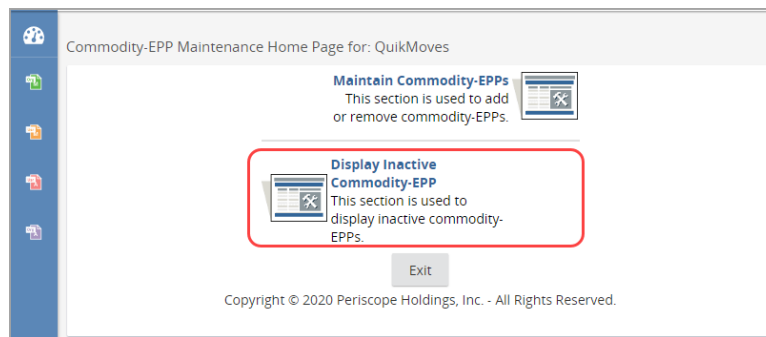
Commodity-EPP and Service Codes

Current Codes - QuikMoves

Deactivate	Code	Description	Date Added
<input type="checkbox"/>	24-11-00	Containers and storage	07/03/2020
<input type="checkbox"/>	24-11-28	Freight containers	07/03/2020
<input checked="" type="checkbox"/>	24-11-29	Crates	07/03/2020
<input checked="" type="checkbox"/>	25-17-00	Transportation components and systems	07/01/2020
<input type="checkbox"/>	78-14-19	Transport container rental services	07/03/2020

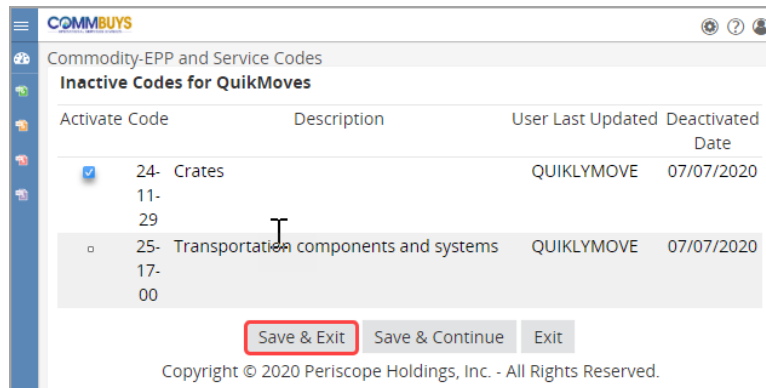
Deactivate Selected Items Add Additional Codes Cancel & Exit

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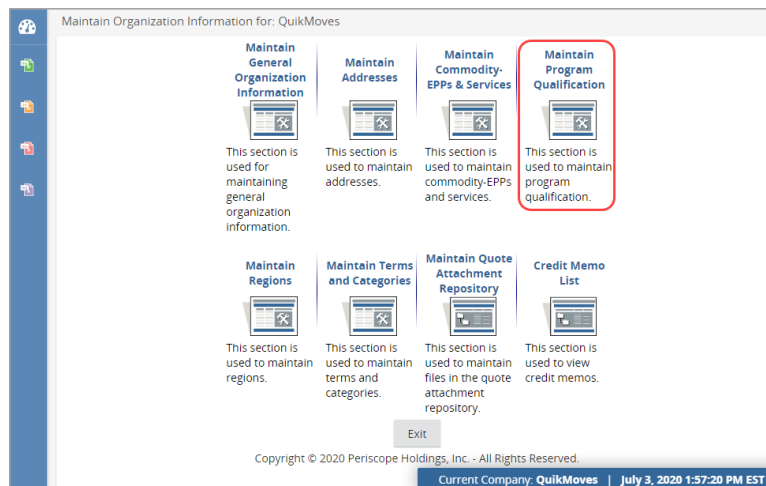
### Step 11: Reviewing Deactivated Commodity Codes

Click on the **Display Inactive Commodity-EPP** button from the **Commodity-EPP Maintenance Home Page**.



### Step 12: Reactivating Commodity Codes

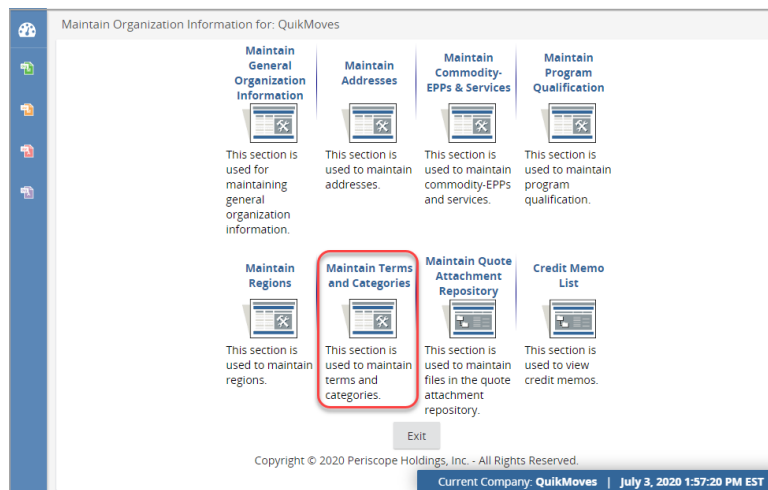
1. A list of commodity codes that were once active for the vendor profile is displayed.
2. To reactivate code(s) check the **Activate** box next to the code(s) that need to be reactivated.
3. Click on the **Save & Exit** button to return to the **Commodity-EPP Maintenance Home Page**.
4. Click **Exit** 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.





## Step 14: Accessing the Maintain Terms and Categories Page

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

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:

## 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.