



Department of the Treasury
Division of Purchase and Property



Quick Reference Guide

VENDOR PROFILE
UPGRADE CHECKLIST

Seller Administrators

Revised & Updated



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1. Purpose

Until you have successfully completed all of the items on this checklist, your NJSTART online vendor profile will not be fully ready for your use in conducting business with the State of New Jersey.

On October 19, 2015 a significant upgrade was made to your NJSTART online vendor profile. NJSTART has now been connected to the New Jersey Comprehensive Financial System (NJCFS). This is one of the final steps in preparing NJSTART for commencement of purchasing operations.

Now that the interface is operational, the State's purchasing system (NJSTART) and the State's financial and accounting system (NJCFS) instantly send vendor and purchasing data to each continuously. The effect that this connection has had on your NJSTART vendor profile is different, depending on whether your company has done business with the State of New Jersey in the past, as follows:

1.1 If You Are Seeking to Do Business with the State for the First Time

If you have never done business with the State of New Jersey before then no information about your company has been stored in NJCFS. That also means that no actions are necessary to reconcile your NJSTART profile information with the State's accounting system.

However, actions on your part are still required to complete the setup of your NJSTART profile. These actions vary depending upon when you completed your registration in NJSTART.

1.1.1 If You Completed Your Registration in NJSTART BEFORE October 19

If you registered in NJSTART prior to October 19, 2015 and your company has not done business with the State of New Jersey before, then your NJSTART vendor profile may be incomplete. This is because, prior to October 19th, completing OMB certification information and the establishment of a remittance address (both of which are now mandatory) were not required for registration in NJSTART.

You must take action to enter any mandatory OMB certification or remit address information missing from your profile. Step-by-step instructions are provided for you in [Section 2.1](#).

1.1.2 If You Completed Your Registration in NJSTART AFTER October 19

If you registered your company in NJSTART after October 19, 2015, which was after the connection with NJCFS was established, then your OMB certifications were validated as properly completed during registration.

However, additional actions may be required concerning your vendor profile address information and the (optional) establishment of an EFT-enabled remit address. Step-by-step instructions are provided for you in [Section 2.2](#).



1.2 If You Have Previously Done Business with the State

When you previously conducted business with the State of New Jersey, information about your company was stored in NJCFS. Prior to connecting the two systems, some of the information contained in NJCFS was transferred to your NJSTART vendor profile, including:

1. Your previous responses to mandatory OMB vendor categories,
2. All of your previous addresses, and
3. The banking information that you previously used to set up electronic payments to your remit addresses, if you had any.

You must take action to review and edit the information that NJCFS has added to your profile. Step-by-step instructions are provided for you in [Section 3](#).

1.3 Perform This Checklist Only On a Weekday between 7:00 AM and 7:00 PM

You can access your NJSTART vendor profile whenever you like, 24/7, but the NJCFS system is only available on weekdays between 7:00 AM and 7:00 PM. In order to complete any of the actions specified in this checklist the NJCFS system must be available. Accordingly, you should only attempt the steps presented in this guide during those hours of operation.

1.4 If You Need Help

If you have questions regarding this vendor profile upgrade, you may contact a New Jersey State vendor administrator at (609) 341-3500 or email njstart@treas.nj.gov.

Note. There is a small possibility that a particular combination of validation errors may lock your profile and prevent you from making any needed corrections. If that occurs, contact a New Jersey State vendor administrator using the information provided above.

2. Instructions for Vendors Seeking to Do Business with the State for the First Time

This section only applies to vendors who have never done business with the State of New Jersey. If you have done business with the State before, skip this section and proceed to Section 3.

2.1 Instructions for Vendors Who Registered in NJSTART Prior to October 19, 2015

If you have not done business with the state before – and you registered in NJSTART before October 19, 2015 – you must call vendor support at (609) 341-3500. An NJSTART vendor administrator will assist you in the completion of this checklist. Ask for assistance with your “reference vendor status”.

There are no further actions contained in this guide for you to take, other than calling vendor support. You must complete this call before your vendor profile will be set up properly for use.



2.2 Instructions for Vendors Who Registered in NJSTART After October 19, 2015

2.2.1 Checklist

This checklist summarizes the actions that are necessary to prepare your NJSTART profile for use.

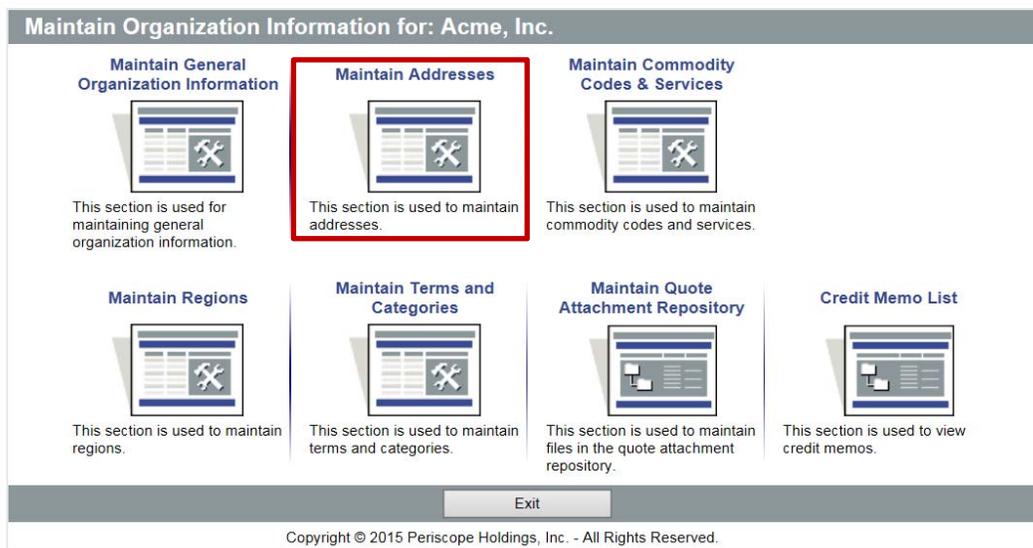
- Take note of any Red validation errors that appear on your home screen. These will be cleared in the remaining steps.
- Review all of your addresses and complete any missing fields, if necessary.
- Establish at least one Remit address has added to your vendor profile, if necessary.
- If you wish to exercise your option of setting up electronic funds transfer (EFT) payment capability for one or more of your remit addresses, follow the instructions in Section 2.2.5

2.2.2 Login to NJSTART and Select the Seller Administrator Role

These steps should be carried out in the sequence described in this guide. Login to the Seller Administrator Home Page. Ensure the **Seller Administrator** user tab is selected. Take note of any red validation errors.

2.2.3 Review Your Address Information

Navigate to the Maintain Organization Information Screen and click on the Maintain Addresses function, as indicated below in **red**.



Select each of your addresses, one at a time, and enter any missing information – especially for field names marked by an asterisk (*). You will not be able to save any edits to your address if any mandatory fields are left blank.



2.2.4 Add a Remit Address

You must have at least one remit address in order to receive payments. If you have not set one up yourself, it is likely that NJSTART has created one for you based upon the company’s mailing address that you set up during registration. Regardless, verifying that your address information is complete and correct will require your personal attention.

NJSTART provides for several types of mailing address, including: general mailing address, purchase order mailing address, and remit to address. You can create as many addresses of each address type as you wish, but you must designate one address for each type as the default address using the checkbox shown in red in the example below.

Select Remit Address using the dropdown for the **Address Type** field, as shown in the following example.

Complete all remaining data fields. Remember, all fields, indicated with an asterisk (*) are mandatory. You will not be able to save this address unless all mandatory fields are completed.

2.2.5 Creating an EFT-enabled Remit Address

Note: If you have never done business with the state before, setting up your remit address to receive electronic payments is a two-step process. After adding or editing your remit addresses you must logout and then login again. When you log back in to continue setup, NJSTART will find the remit addresses in the accounting system and update them with the EFT information that you enter using the instructions provided below.



If you want to enable any (or all) of your remittance addresses for electronic payments, then click the **EFT Enabled?** box and enter the applicable banking information as shown in the following example. Do this for each remittance address for which you want to receive payments electronically.

EFT Enabled?
 Description*:
 Country*:
 Branch Name*:
 Account Type*:
 Routing Number*:
 Account Number*: Show
 IAT Flag: ⓘ

Note: The IAT (International ACH Transactions) Flag checkbox should be checked ONLY if the financial institution receiving your electronic funds payment is a foreign bank or is acting as an agent of a foreign bank on your behalf.

Note. Remember, to receive electronic payments for any of your remittance addresses you must also complete Category 4 Electronic Funds Transfer Certification as shown in Section 4.3.

Once you are finished adding EFT-enabled remittance address, click on **Save and Exit**.

2.2.6 Removing an Address from Your Vendor Profile

Most entries made in NJSTART cannot, strictly speaking, be deleted. However, if you no longer want to use an address that you have added to your vendor profile you can change its status to “Inactive” using the dropdown in the address STATUS field on any of your NJSTART address (see example below). NJSTART ignores any entry in your profile with a status other than “Active”.

Status: Inactive ▼ Web Address:
 Default address for this address type (Begin with http:// or https://)

Save & Exit
Reset
Cancel & Exit

2.2.7 Complete the Checklist

If you have completed all the steps in this checklist, and all red warnings have cleared, then all required actions are complete.



3. Instructions for Vendors that Have Previously Done Business with the State

If you have never done business with the State before, skip this section and return to Section 2.

The following is a list of the items in your NJSTART vendor profile that must be reviewed by your Seller Administrator and then corrected, where necessary.

3.1 Checklist

This checklist summarizes the actions that are necessary to prepare your NJSTART profile for use.

- Take note of any Red validation errors that appear on your home screen. These will be cleared in the remaining steps.
- It is unlikely that you have any errors regarding the mandatory OMB categories, since these have been pre-populated for you, if necessary, from the answers in NJCFS that you previously provided. Review your entries and make any necessary edits.
- Review each of the Remit addresses NJCFS has added to your vendor profile. Additional entries made by you are required to complete the setup of each remit address in NJSTART.

3.2 Login to NJSTART and Select the Seller Administrator Role

These steps should be carried out in the sequence described in this guide. Login to the Seller Administrator Home Page. Ensure the **Seller Administrator** user tab is selected. Take note of any red validation errors.

3.3 Navigate to the Maintain Terms and Categories Screen

Review each of the four mandatory categories (indicated by the words “Mandatory Field” in the heading) to ensure they are current and correct. Make changes as necessary.

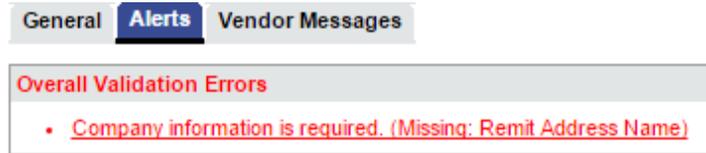
Note. Category 4 – Electronic Funds Transfer Certification value selection must match the following example if you intend to receive electronic payments. Your EFT-enabled remit address will not work if the first option is not checked.

Category: 4. Electronic Funds Transfer Certification (MANDATORY FIELD)	
Description: I certify that I am an appointed agent of the vendor referenced and that I hereby authorize the State of NJ to initiate payments to the bank acct and bank named in the electronic funds transfer (if and when the information is provided). This authority is to remain in full force and effect until the State of NJ receives notification of any changes, and in such a manner as to afford the State of NJ a reasonable opportunity to Act.	
Please select exactly one category value	
Select	
<input checked="" type="checkbox"/>	Select if you intend to enter the data for EFT payment and agree with the statement above. To enter banking data, you must log in after the initial registration process has been completed, add or edit a Remit address, and check the EFT Enabled box.
<input type="checkbox"/>	Select if the financial institution referenced in your electronic funds transfer information is a foreign bank or is acting as an agent for a foreign bank.
<input type="checkbox"/>	Select if you have not elected to receive payment via EFT. Any banking information entered as part of your remittance address will be disregarded and remain inactive.
Notes:	
<div style="border: 1px solid black; height: 30px;"></div>	



3.4 Navigate to the Maintain Addresses Screen

It is very likely that you will have the following red validation error displayed on your screen:



This error occurs because NJSTART requires more information about a remit address than NJCFS requires. For each remit address, ensure you have entries in all of the mandatory (*) fields.

Frequently, remit addresses based on NJCFS data will require you to complete entries in the fields indicate in red in the following exhibit.

- You must name each remit address. Name it whatever you wish, but do not leave it blank.
- Enter a valid email address.
- Select one remit address as the default for that address type. If you only have one remit address, make sure this box is checked.

3.5 Enabling a Remit Address for Electronic Payments

If your vendor profile has been synchronized with NJSTART, and you have previously done business with the State of New Jersey before, banking data for any previous remit address that had been enabled for electronic fund transfer (EFT) may be added to your profile automatically.

If that is the case, you will need to carefully review the banking information each remit address (see example below) to ensure that the values in all of the fields are current and correct. At a minimum, ensure that each of the following mandatory banking information fields have been properly entered:

- Country*
- Branch Name*



If you want to enable any (or all) of your remit addresses for electronic payments, then click the **EFT Enabled?** box and enter the applicable banking information as shown in the following example. Do these steps for each remit address that you want to receive your payments electronically.

<input checked="" type="checkbox"/> EFT Enabled?
Description*: The Bank
Country*: US - United States of America
Branch Name*: Princeton
Account Type*: Business Checking
Routing Number*: 012345679
Account Number*: ●●●●●●●●●● Show <input type="checkbox"/>
IAT Flag: <input type="checkbox"/> ⓘ

Note: The IAT (International ACH Transactions) Flag checkbox should be checked ONLY if the financial institution receiving your electronic funds payment is a foreign bank or is acting as an agent of a foreign bank on your behalf.

Note. Remember, to receive electronic payments for any of your remit addresses you must also complete Category 4 Electronic Funds Transfer Certification as shown in Section 3.3.

Once you are finished enabling your remit address for EFT, click on **Save and Exit**.

3.6 Removing an Address from Your Vendor Profile

Most entries made in NJSTART cannot, strictly speaking, be deleted. However, if you no longer want to use an address that you have added to your vendor profile you can change its status to “Inactive” using the dropdown in the address STATUS field on any of your NJSTART address (see example below). NJSTART ignores any entry in your profile with a status other than “Active”.

Status: Inactive ▼	Web Address: <input type="text"/>
<input type="checkbox"/> Default address for this address type	(Begin with http:// or https://)
<input type="button" value="Save & Exit"/> <input type="button" value="Reset"/> <input type="button" value="Cancel & Exit"/>	

3.7 Complete the Checklist

If you have completed all the steps in this checklist, and all red warnings have cleared, then all required actions are complete.

If you continue to see red warnings, click on each warning and you will be taken to the screen in NJSTART that needs your attention. Follow the on-screen instructions to remedy the warning. Repeat these steps until all warnings are cleared.

If you need assistance, contact the vendor help desk using the information provided in Section 2.1.