



**New Jersey Department of the Treasury
Division of Purchase and Property**



**Reference Guide:
Vendor Profile Management
COMPANY INFORMATION & USER ACCESS**

For use by Seller Administrators



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1. Purpose

This Reference Guide is one of several that provides step-by-step instructions on how to manage your company's NJSTART Vendor Profile and applies only to those vendors who have completed NJSTART registration. This guide addresses the following NJSTART Seller Administrator functions:

- Maintaining general organization information about your company, such as preferred means of contacting you, addresses, commodity codes, and service codes.
- Managing access to NJSTART by other employees of your company, to include: adding new users, managing user account information, assigning user roles and privileges, and removing access from employees who are no longer authorized.

If you have any questions about the terminology or function of what you see on your screen, click on the question mark icon (?) present on the top right hand corner of every screen. A drop-down list will appear containing choices in the User Manual. To locate the section of the Manual that pertains to maintaining organization information and other topics, find the Seller Administration heading in the Table of Contents.

Reference Guides for registering your company in NJSTART, managing your Vendor Profile, and many other topics can be found at the NJSTART Vendor Support Page at: <https://www.state.nj.us/treasury/purchase/vendor.shtml>.

If you have additional questions, you may contact a New Jersey State Vendor Administrator at (609) 341-3500 or email njstart@treas.nj.gov.

2. Certain NJSTART Functions Only Available During Weekday Hours

You can access your NJSTART vendor profile whenever you like, 24/7, to begin the registration process, edit your general organization information, create and set up quotes, manage your company's user access, complete and attach forms, conduct searches, and update non-financial categories and certifications.

However, certain NJSTART functions require validation through the New Jersey Comprehensive Financial System (NJCFS). NJCFS is only available each weekday from 7:00 a.m. until 7:00 p.m. and is unavailable on weekends. As a result, the following NJSTART functionality is limited to weekday hours:

- Completing registration in NJSTART;
- Entering or editing values in any of the mandatory OMB categories, as described in Reference Guide: *Vendor Categories and Certifications*;
- Adding or editing an address: as described in Section 5;
- Conducting business with the State to process purchase orders.

Attempting to use any of the functions listed on the previous page during periods when NJCFS is not available will not harm your vendor profile in any way. Instead, you will receive the following red system error messages:

```
System Error(s)
• com.periscope.service.ServiceException: Unexpected error processing vendor message: BrokerError Interface: NEWJERSEY
• java.lang.RuntimeException: com.periscope.service.ServiceException: Unexpected error processing vendor message: BrokerError...
```

The failed transactions **will not be processed or stored**, and NJSTART will not automatically try to send the transaction again the next day when NJCFS comes back online.



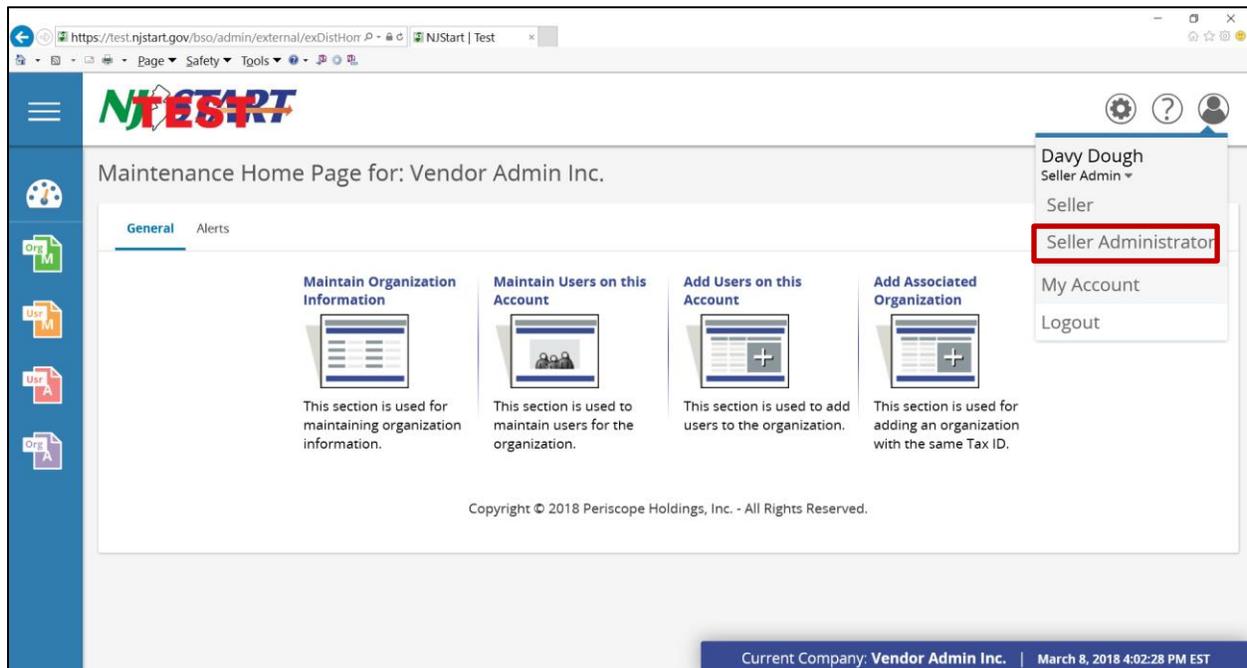
Simply close NJSTART and log in again during weekday hours. The next time you log into the system, error messages will clear automatically.

3. Login and User Role Selection

You must be logged in to NJSTART to perform any of the actions described in this guide. This section provides an overview on how to maintain your company information in your NJSTART.

3.1. Verify that the Seller Administrator Role Is Selected

The activities described in this section require the user to have Seller Administrator privileges. Select the Seller Administrator role by clicking the icon and selecting the correct role from the drop-down list as indicated in red in the following screenshot.



If you cannot select the Seller Administrator role or see the screenshot shown above, then you do not have the necessary privileges to perform Seller Administrator management tasks. To remedy this, you may request that the necessary privileges be granted to you by your company's Seller Administrator.

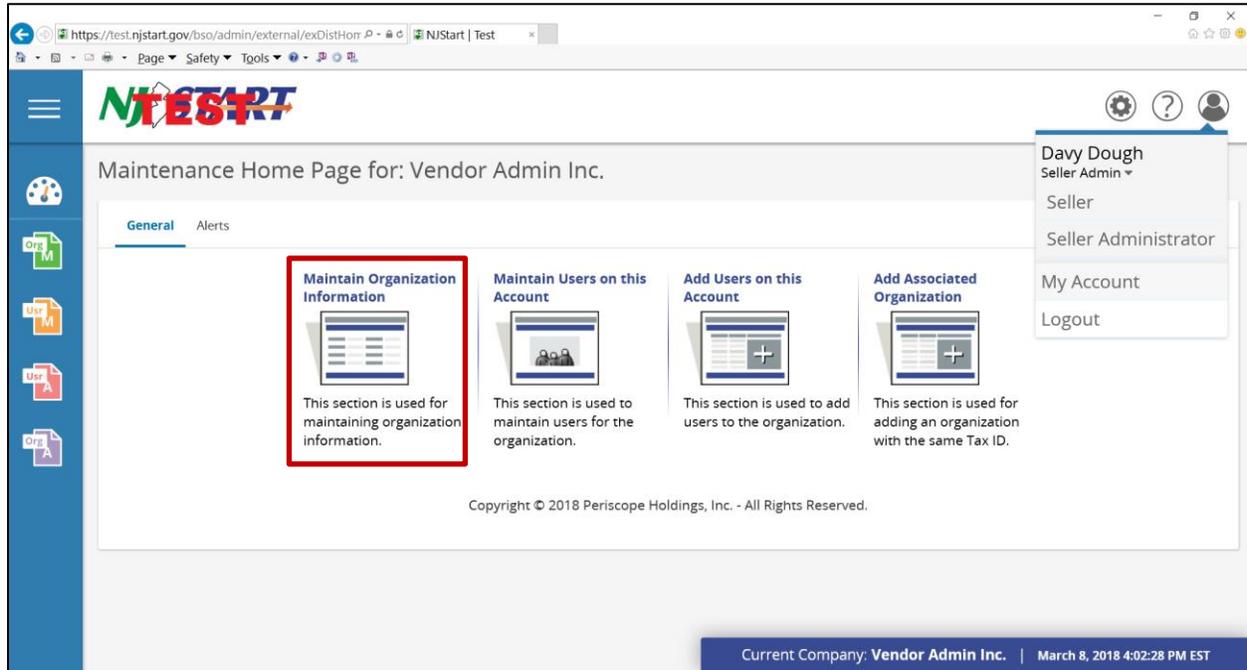
Note: If you see a red **"Overall Validation Errors"** message on your home page, click on it. Then click on **"Maintain Addresses."** Once there, review each Remit Address, ensure it has a Name or add one if it's missing (e.g., Main Remit Address, Corporate Remit, etc.). You will also have to add an email address in the designated field, and select one remit address as the Default address.



3.2. Vendor Profile navigation

Once you're logged in and have selected the correct user role, the Seller Administrator **Maintenance Home Page** opens as shown on the next page.

Seller Administrator **Maintenance Home Page**:



All of the information about your company contained in your NJSTART Vendor Profile is maintained using the first function on this screen: **Maintain Organization Information** (indicated in red above).

The second and third functions on the **Maintenance Home Page** screen are used to add and maintain user access accounts for other employees in your company and are discussed in detail in section 6 of this guide.

The last function, **Add Associated Organization**, is described in Reference Guide: *Establishing a Doing Business As (DBA)*.

Click on **Maintain Organization Information** in the following screen. This control panel will give you access to all of your organization's information and is divided into seven functional categories.

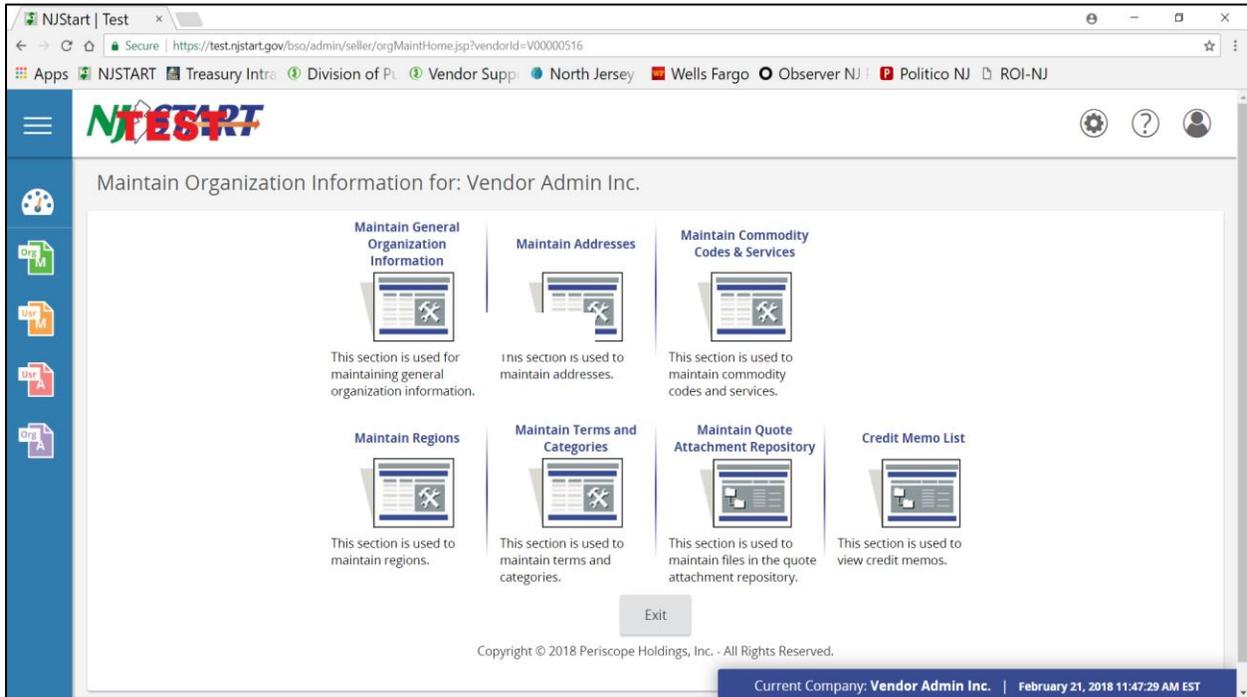
This guide will describe how to maintain four Vendor Profile information functional categories on this screen. They are:

- Maintain General Organization Information;
- Maintain Addresses;
- Maintain Commodity Codes & Services; and
- Maintain Quote Attachment Repository.

Note: Maintain Regions and Credit Memo List are not currently used in NJSTART.

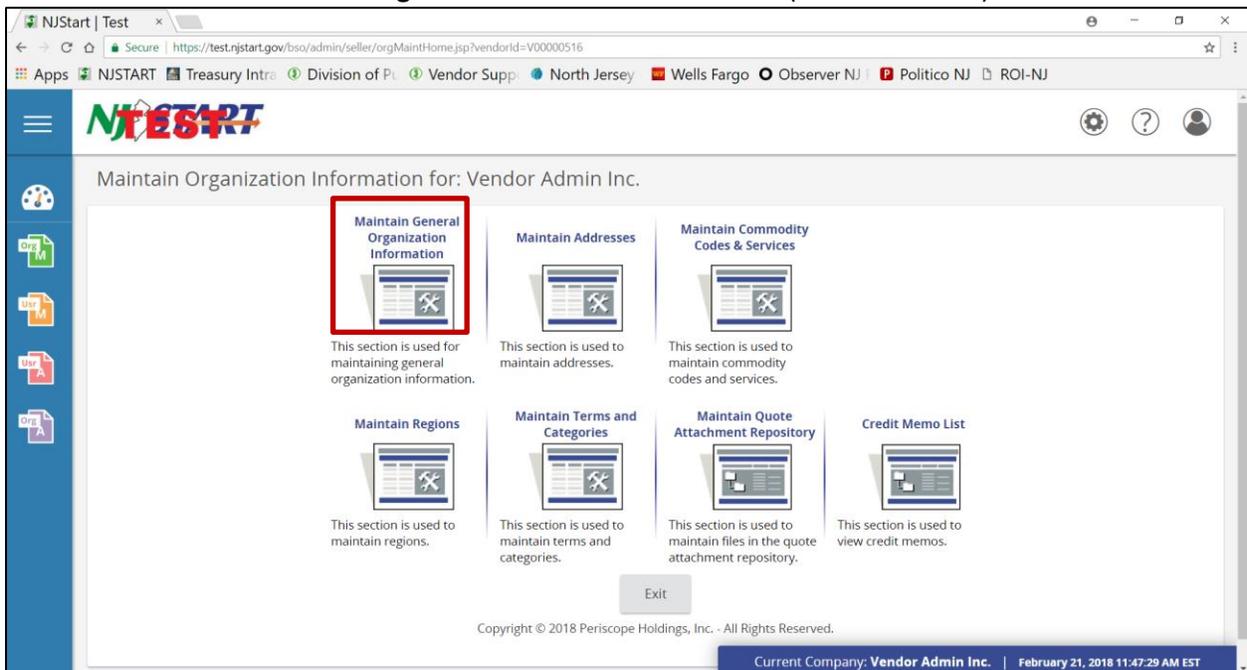


The **Maintain Terms and Categories** function, in the bottom row below, is described in the Reference Guide titled *Categories and Certifications*.



4. Maintain General Organization Information

Click on the **Maintain General Organization Information** function (indicated in red).





The **Maintain General Organization Information** screen appears as shown below:

The screenshot shows a web browser window with the URL <https://test.njstart.gov/bsa/admin/seller/maintOrgInfo.sdo?vendorId=V00000516>. The page title is "Maintain General Organization Information". The form contains the following fields and values:

- Vendor ID: V00000516
- Company Name*: Vendor Admin Inc.
- Vendor Legal Name*: Vendor Admin Inc.
- DBA for Vendor:
- Tax ID #: 000015630
- 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: [blank] Year of Incorporation: 0
- Business Description: Customer service
- Preferred Delivery Method: Email
- Vendor Email: test@periscopeholdings.com
- Vendor Fax: [blank]
- Emergency Supplier:

At the bottom right, it says "Current Company: Vendor Admin Inc. | February 21, 2018 11:48:37 AM EST".

This screen contains information about your company's identity, the nature of your business, the preferred means of contacting you, etc. All of your company's General Organization Information can be changed, as necessary, except for your **Vendor ID** and your **Tax ID #**.

Your company name must be entered correctly so that your NJSTART records can be found by using the vendor search tools. In addition, your entry in the **Vendor Legal Name** field must match the *Taxpayer Name* on your State of New Jersey Business Registration Certificate, before you can be awarded a contract, issued a purchase order, or receive payments.

After you've entered all your changes, click on **Save & Exit** or **Save & Continue** on the bottom of the screen.

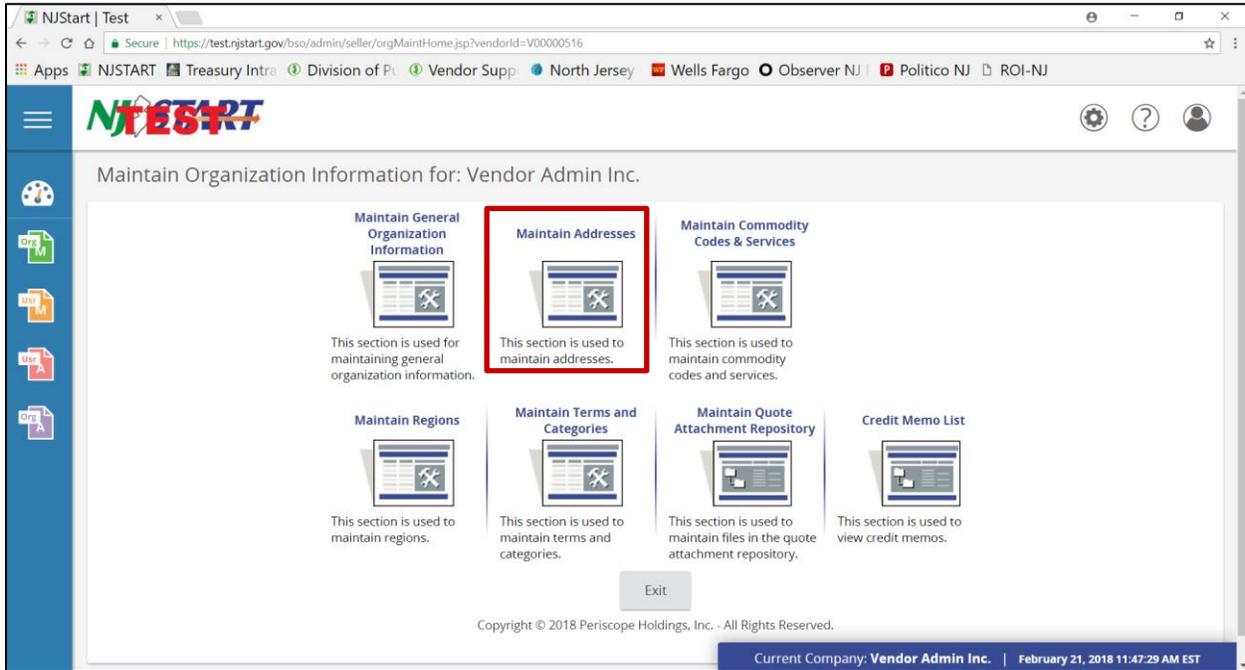
The purpose of the **Attachments** section on the **Maintain General Information** screen is addressed in the Reference Guide titled *Attaching Files*, which is available at: <https://www.state.nj.us/treasury/purchase/vendor.shtml>



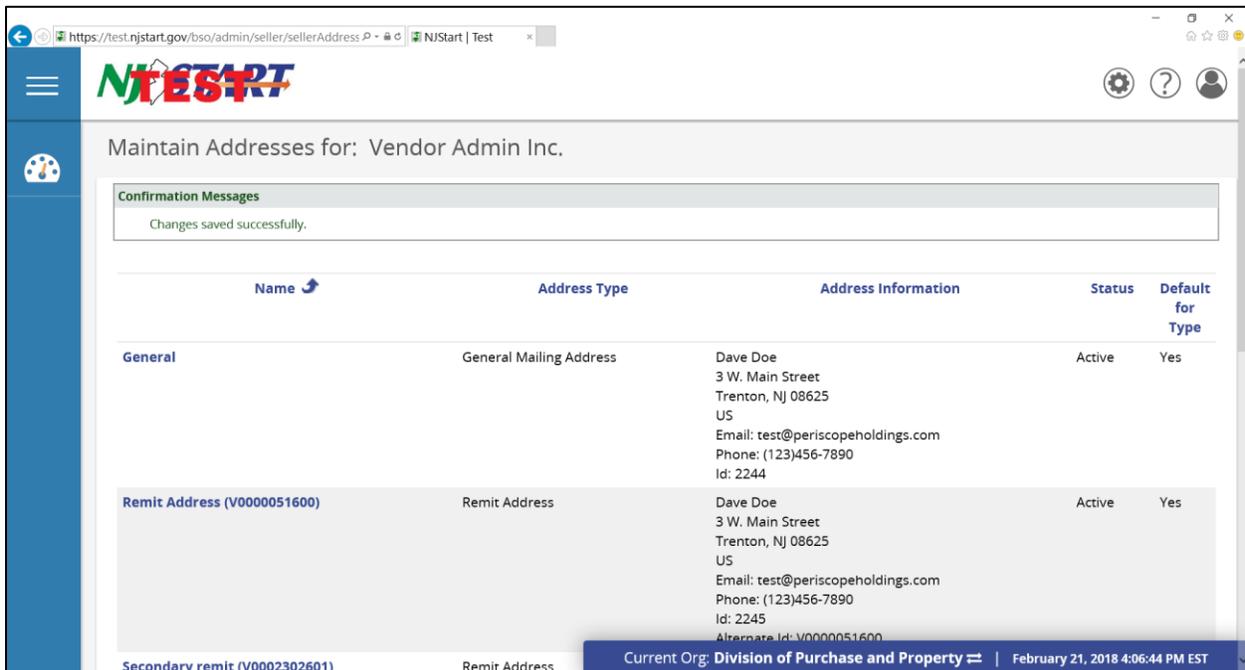
5. Maintain Addresses

NOTE: Adding addresses, or editing current addresses, can be completed only during weekday hours (7:00 AM – 7:00 PM). Please refer to Section 2.0 for additional information. If you see a red “Overall Validation Error” message, refer to the bottom of page 4.

To add, change or delete any of your organization’s addresses, click the **Maintain Addresses** function (indicated in red below) on the Maintain Organization Information control panel:



The following screen will appear:

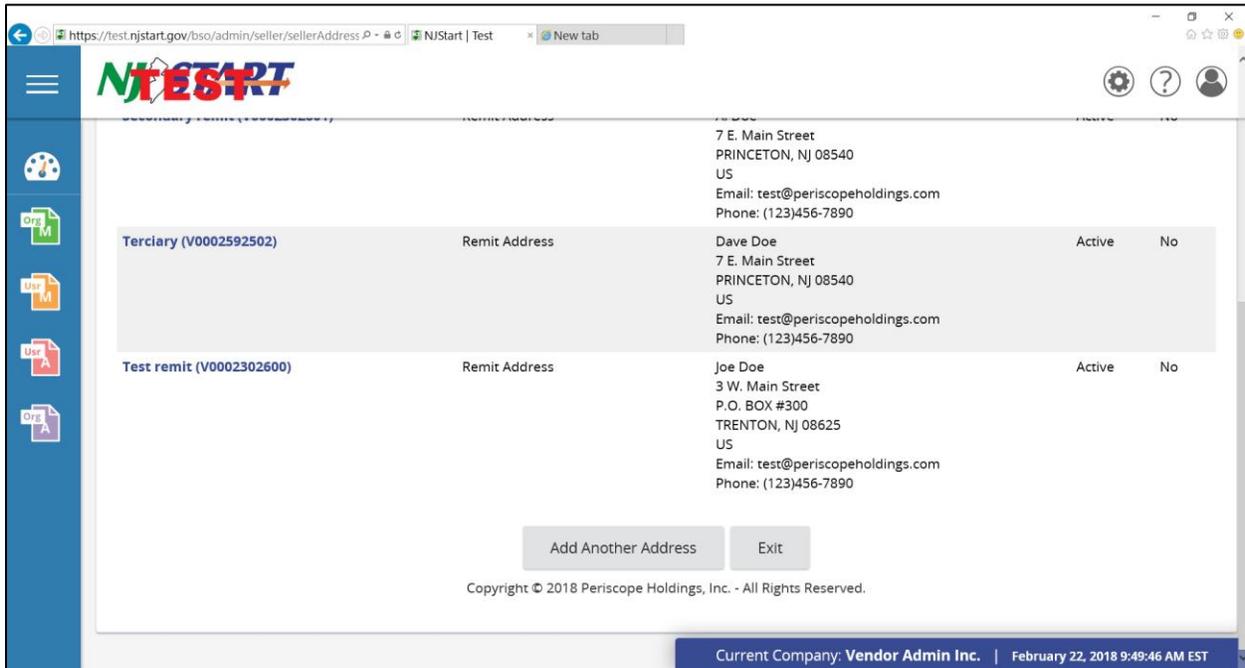




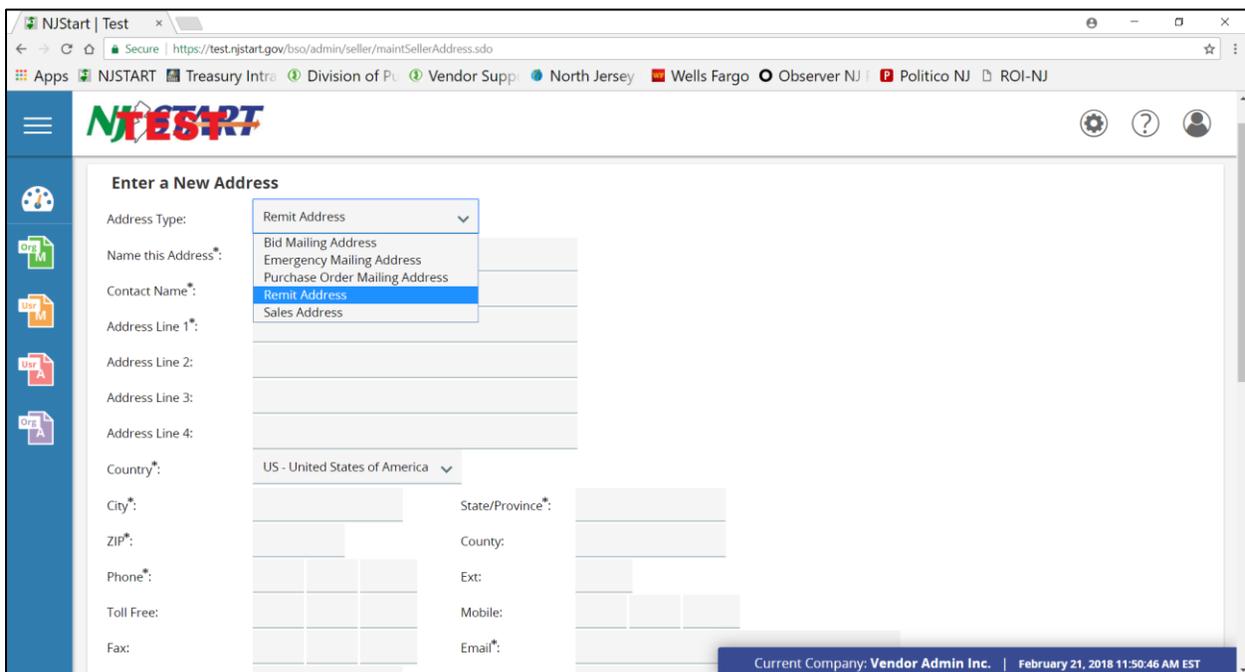
This view allows you to see all of your company’s addresses that are currently in NJSTART. To see the details of a particular address, click on the link in the Name column. The details for that address will appear in a separate screen. Make whatever edits you wish, and when you’re finished, click **Save & Exit**.

5.1. Adding another address

Click on the **Add Another Address** button at the bottom of the screen.



The following blank new address screen appears.





The first step in adding a new address is determining the address type. The following options are available:

- Bid Mailing Address;
- Emergency Mailing Address;
- Purchase Order (PO) Mailing Address;
- Remit Address; and
- Sales Address.

Note: Address Line 1 has a limit of 25 characters, including spaces.

You may have multiple addresses of the same type, but each type will have one address as the default. For example: there may be two PO Mailing Addresses, but when creating a PO, only the default will appear on the PO. However, State procurement staff can select other addresses in your profile, if necessary, when issuing a purchase order.

Once you have finished entering the information for the address, click the **Save & Exit** button.

5.2. Enabling a Remit Address for Electronic Payments

First, navigate to the **Maintain Terms and Categories** section of your Vendor Profile and ensure that the EFT payment option for Category 4 (Electronic Funds Transfer Certification) has been selected and saved. This is required in order to receive electronic payments.

Second, navigate to the **Maintain Addresses** section and select the Remit Address to which you want to add banking information by clicking on the link in the Name column to the left of each address. You may add banking information to multiple Remit Addresses, but you can only modify one at a time. Note:

The details for each address will appear in a separate screen. Scroll down towards the bottom of the screen and check the box next to **“EFT Enabled?”** to access the additional banking fields (see screenshot below).

Enter your banking information into each of the required fields marked with an asterisk and then click the **Save & Exit** button.

The screenshot displays the NJSTART interface for editing a Remit Address. At the top, the address is listed as 33 W. State Street, Trenton, NJ 08625, US, with contact information for test@periscopeholdings.com and phone number (123)456-7890. A red box highlights the 'EFT Enabled?' checkbox, which is currently checked. Below this, several fields are marked with an asterisk as required: Description*, Country* (with a dropdown arrow), Branch Name*, Account Type* (with a dropdown arrow), Routing Number*, Account Number* (with a 'Show' button), and IAT Flag (with a checkbox and a small icon). At the bottom of the form are three buttons: 'Save & Exit', 'Reset', and 'Cancel & Exit'. The footer contains the copyright notice: 'Copyright © 2018 Periscope Holdings, Inc. - All Rights Reserved.'

NOTES: If you find that a password has been saved in the Account Number field within NJSTART inadvertently, disable your browser's auto-populate or form fill feature, try clearing your browser's cache, or use a different browser. Then re-enter your account number, Save & Exit, or Save & Continue. Log back into NJSTART to double-check the account number and ensure that the correct account number has been saved.

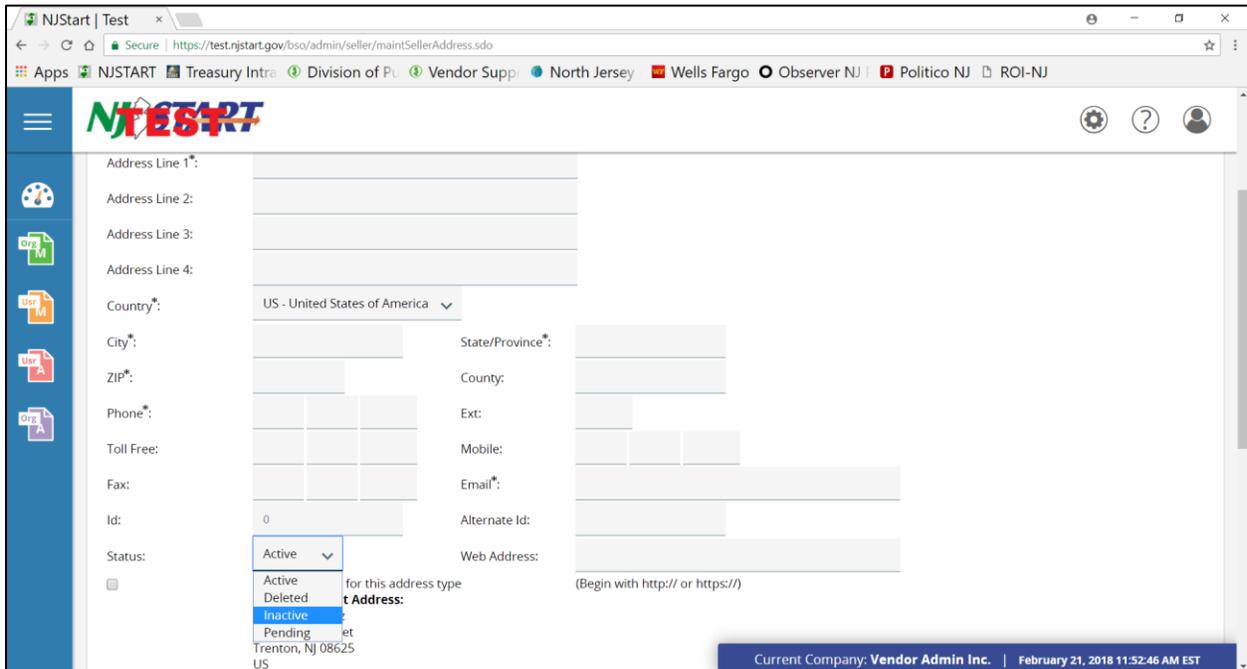


The IAT (International ACH Transactions) Flag checkbox at the bottom of the page should be checked ONLY if the financial institution receiving your electronic funds payment is a foreign bank or is acting as an agent of a foreign bank on your behalf.

5.3. Making an Address Inactive

NJSTART does not permit users to delete information from the system, but it does allow you to inactivate an address, if it is no longer in use. To do this, select the address you wish to deactivate from the Maintain Addresses. When the address details screen opens, find the status field near the bottom of the screen, as shown below.

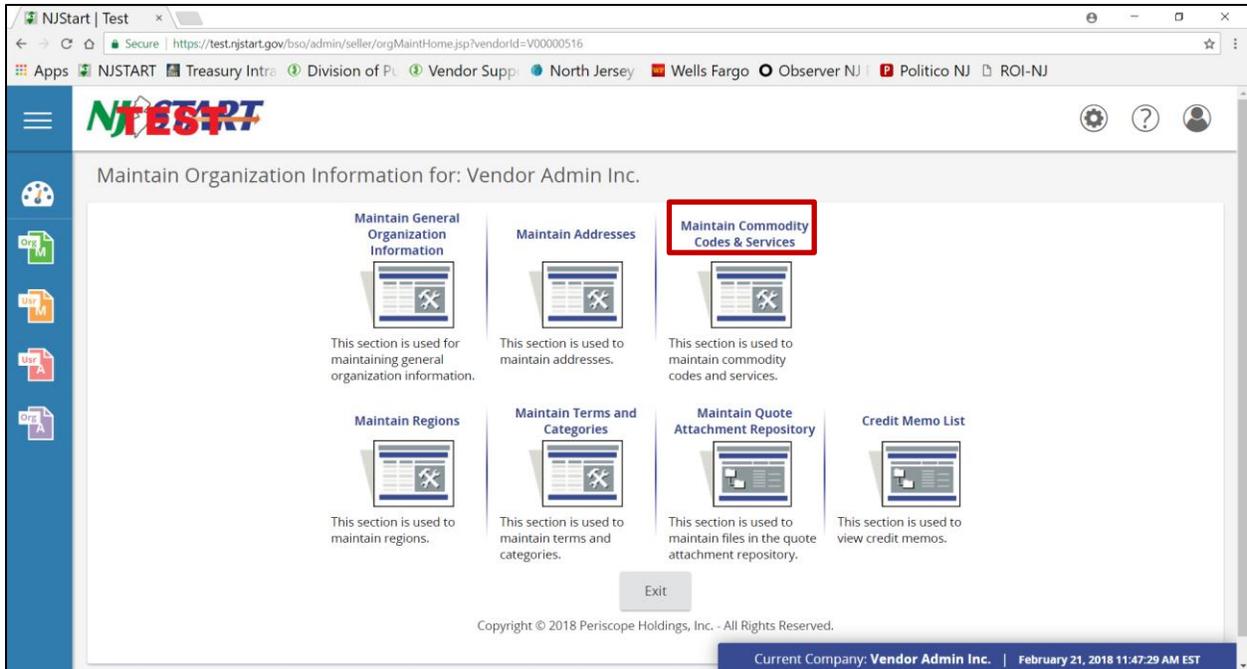
Click the drop-down box in the Status Field (indicated in blue), and set this value to Inactive. Then click **Save & Exit**. The State will no longer use an address if its status is set to Inactive.



6. Maintain Commodity Codes and Service Codes

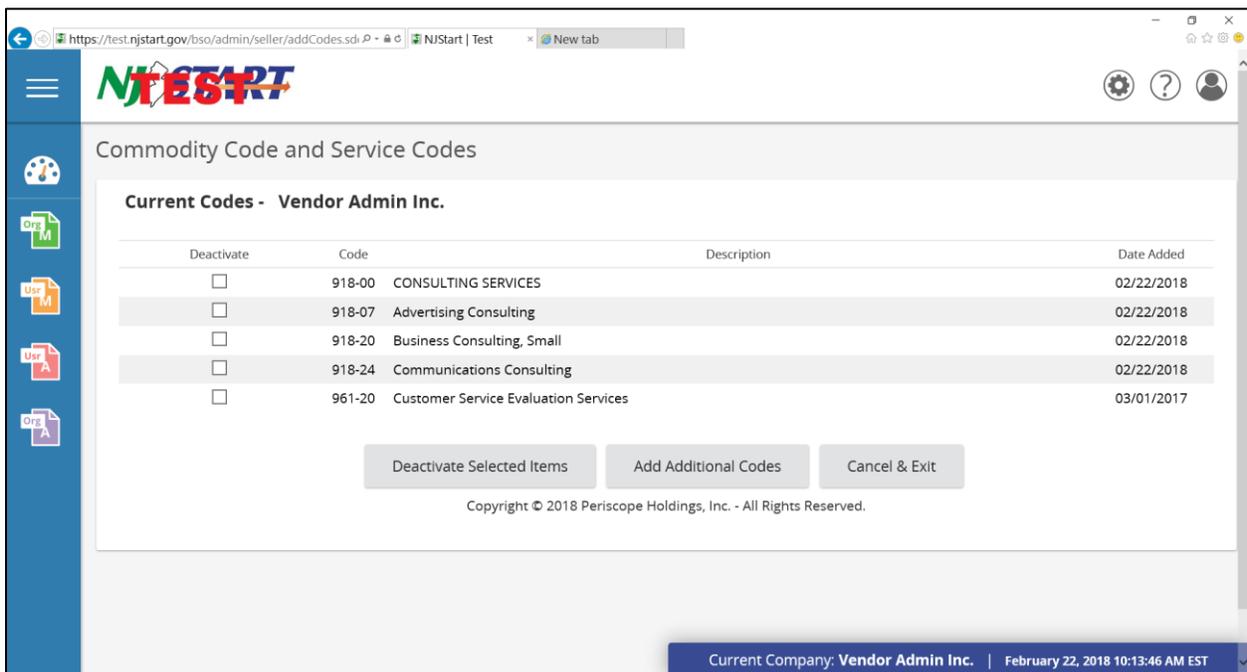
During NJSTART registration, your organization was required to select at least one NIGP (National Institute of Governmental Purchasing) commodity or service code. This section provides step-by-step instructions on how to add, deactivate or reactivate NIGP codes.

You can maintain commodity codes and service codes by clicking on that function on the Maintain Organization Information control panel (indicated in red on the next page).



The following screen appears. Click on **Maintain Commodity Codes**.

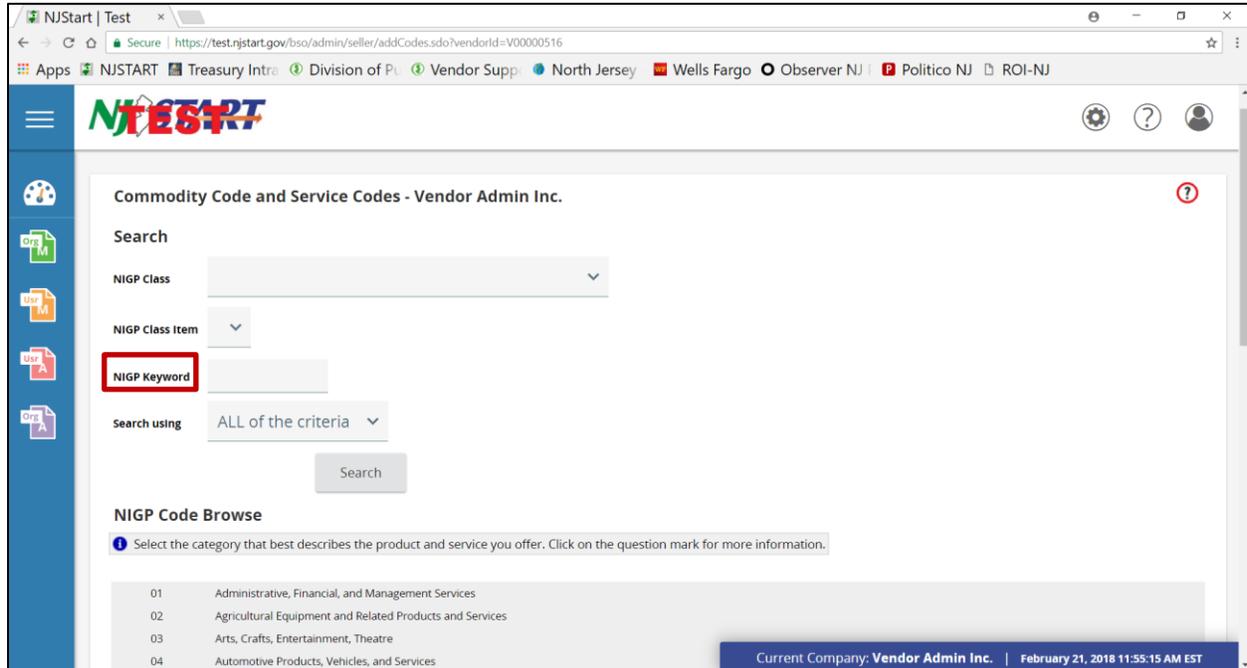
The **Current Codes** screen appears as shown below.





6.1. Adding commodity codes

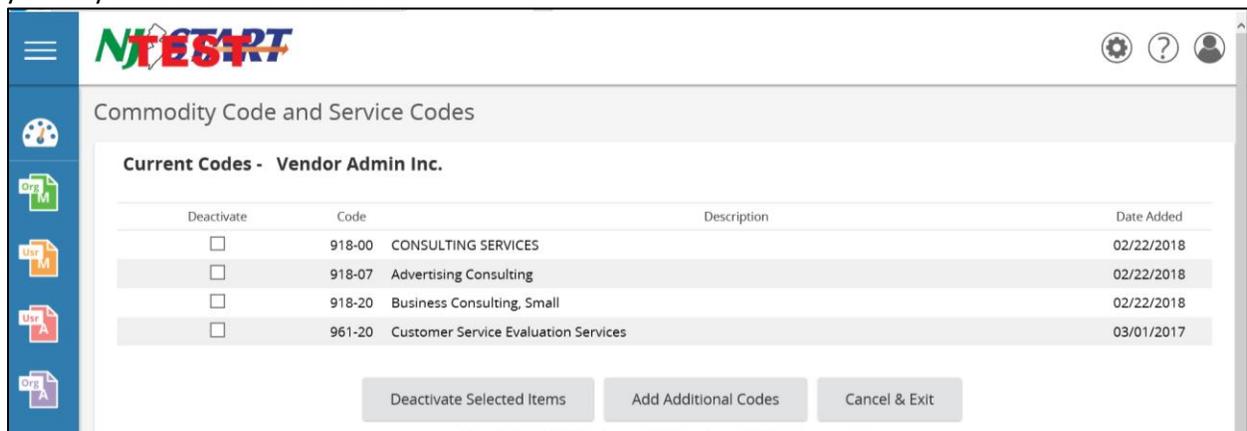
Clicking on the **Add Additional Codes** button opens the following screen. To add NIGP codes to your profile, you may use the keyword search or the drop-down links listed for NIGP Class and NIGP Class Item.



For more information about NIGP, you may visit <https://www.nigp.org/>. NOTE: If you cannot find an NIGP code, check your Inactive NIGP codes.

6.2. Deactivating Commodity Codes

This screen also allows you to add or deactivate NIGP codes. At the bottom of your screen you will find buttons enabling you to deactivate the selected NIGP codes. Deactivated commodity codes will no longer be displayed in your profile. If you have added more than one page of NIGP codes to your profile, you may have to scroll down to see them all.

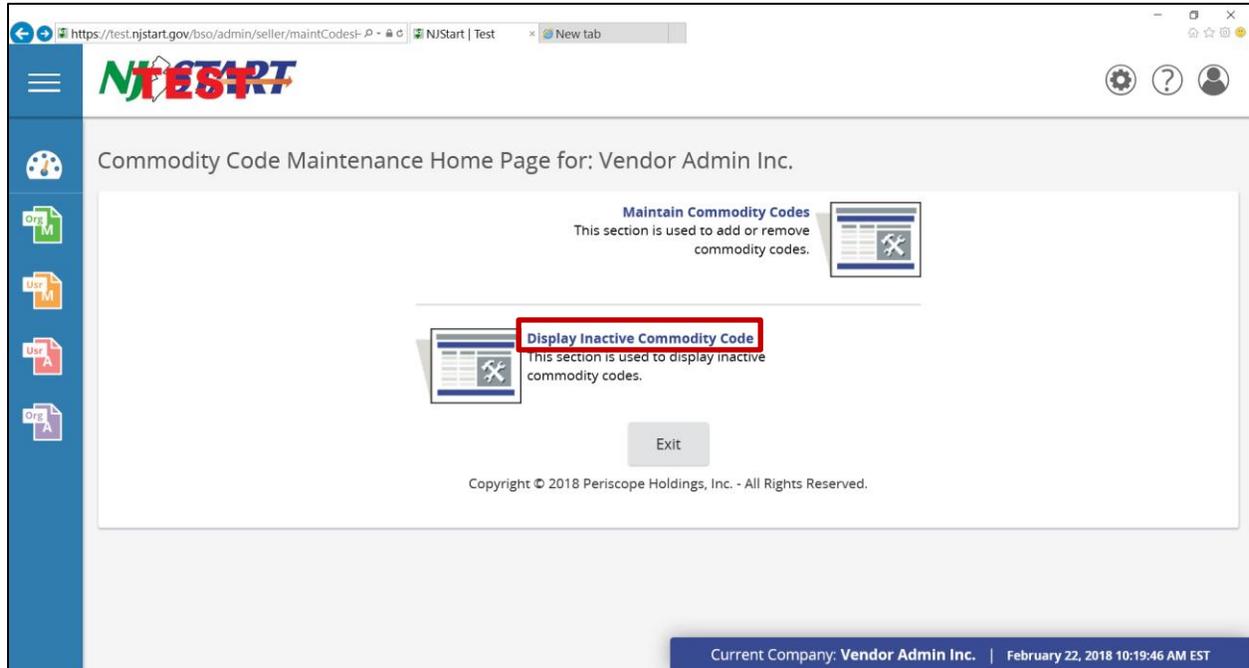




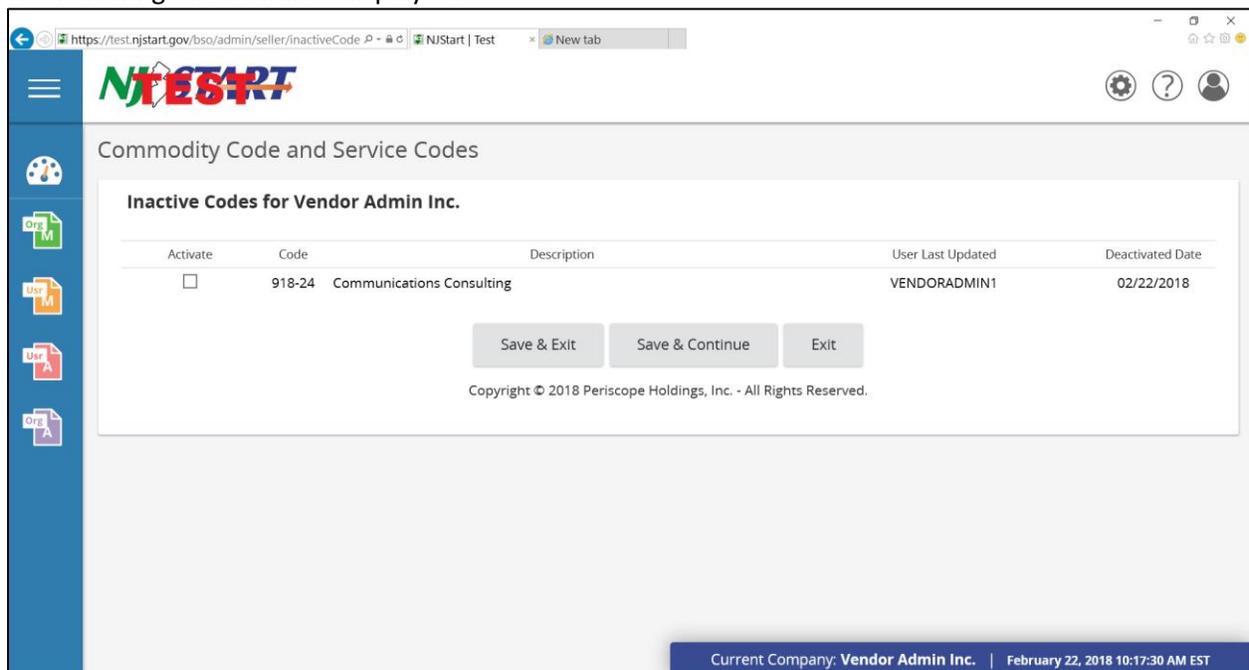
6.3. Display Inactive Commodity Codes

Deactivated codes cannot be added to your profile again as new codes, but they can be activated.

To view commodity codes that have been deactivated, click on the **Display Inactive Commodity Codes** function, as shown below:



The following screen will be displayed:



Click on the Activate box for the code that you want to restore and then click **Save & Exit**.

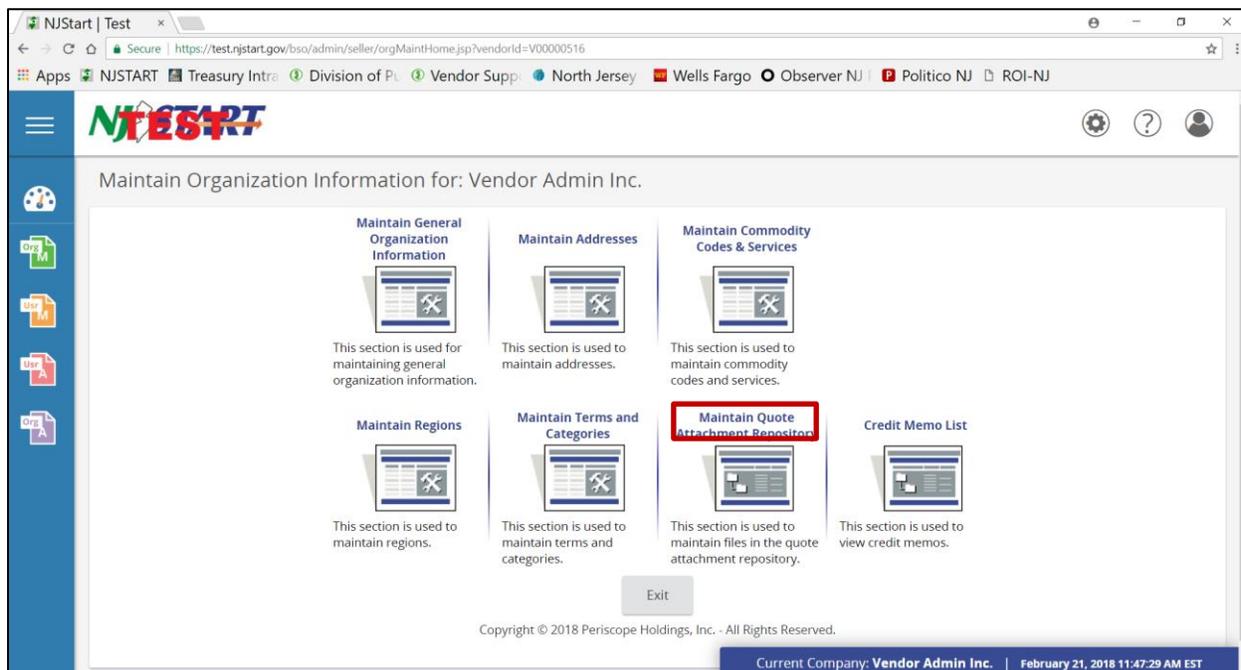


7. Maintain Quote Attachment Repository

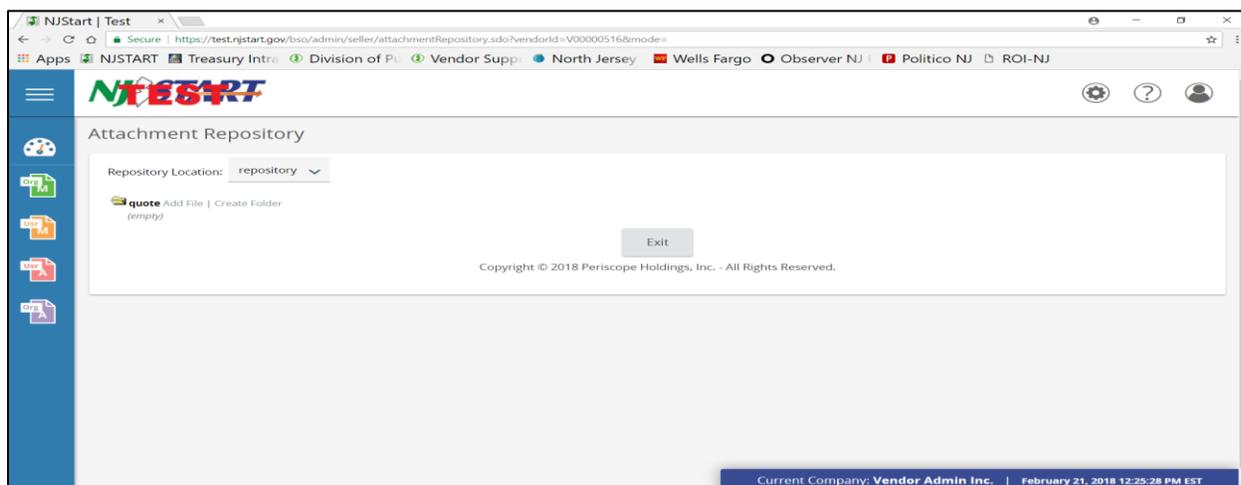
You can maintain attachments for your quotes in the NJSTART Quote Attachment Repository. Final versions of your quote attachments, or other files of your choosing, can be uploaded into a secure and permanent storage for your use. When needed, documents can be downloaded to your PC and then attached to your Quote or other records you create in NJSTART.

7.1. Access the Attachment Repository

To access this feature, click on the **Maintain Quote Attachment Repository** function (indicated in red).



The **Attachment Repository** screen appears:

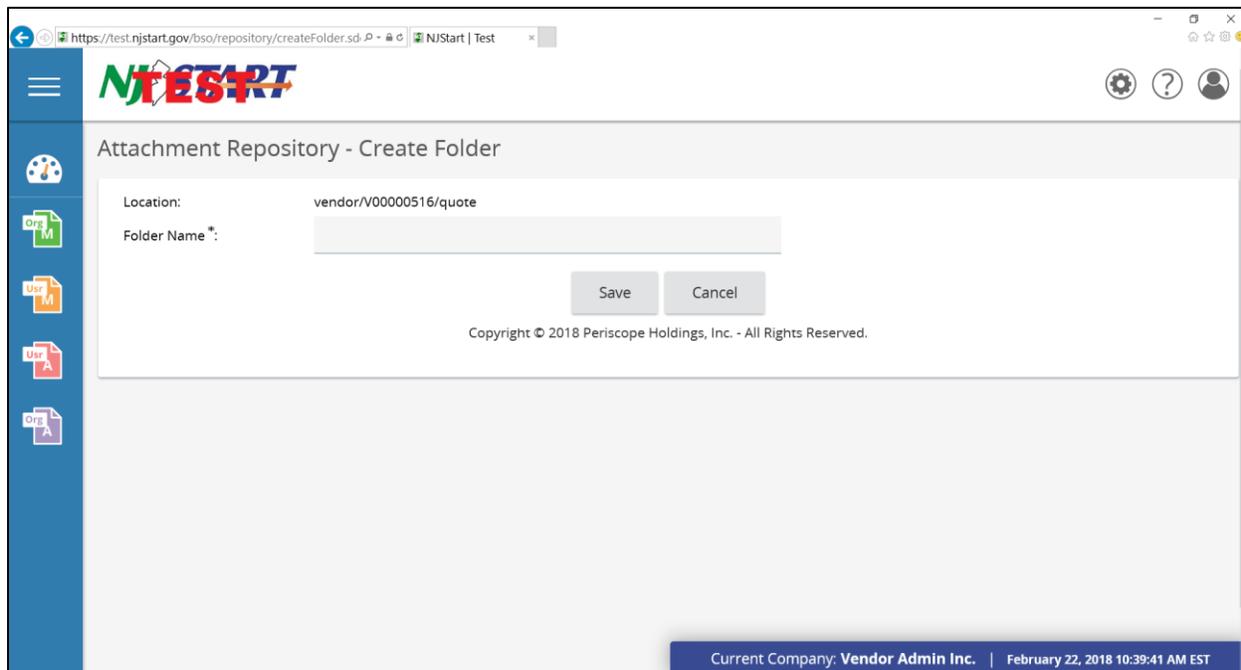


*Note: Files and Folders added to the **Quote Attachment Repository** cannot be edited or deleted.*



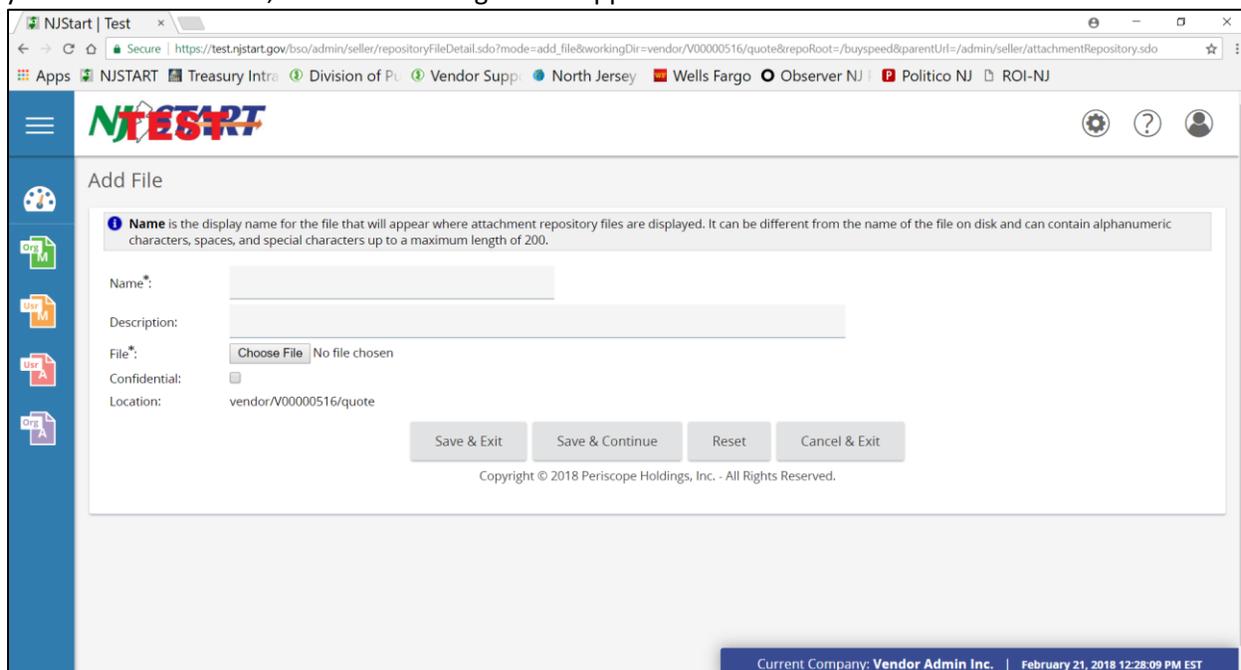
7.2. Creating Folders in the Repository

The repository consists of nested folders. You can create additional folders within existing folders, including the root “quote” folder, by clicking on **Create Folder** next to the folder of your choice. The **Create folder** screen will appear. Enter a folder name, and then click **Save**.



7.3. Adding Files to the Repository

To upload and attach a file to your Attachment Repository, click **Add File** next to the name of the folder you want to store it in, and the following screen appears.



Type a **Name** and **Description** for the file you are adding to the repository, and then click **Choose File**.



Select the chosen file, and then click **Open**. The file is then uploaded into the **Add File** screen. If you change your mind, you can click **Reset** and start over with a blank **Add file** screen, or click **Cancel** and return to the main **Attachment Repository** screen.

7.4. Saving and Exiting the Repository

When you are satisfied, click **Save & Exit**; or, if you wish to add additional files to same folder, click **Save & Continue**.

8. Maintain and Add Users to Your Company's Vendor Profile

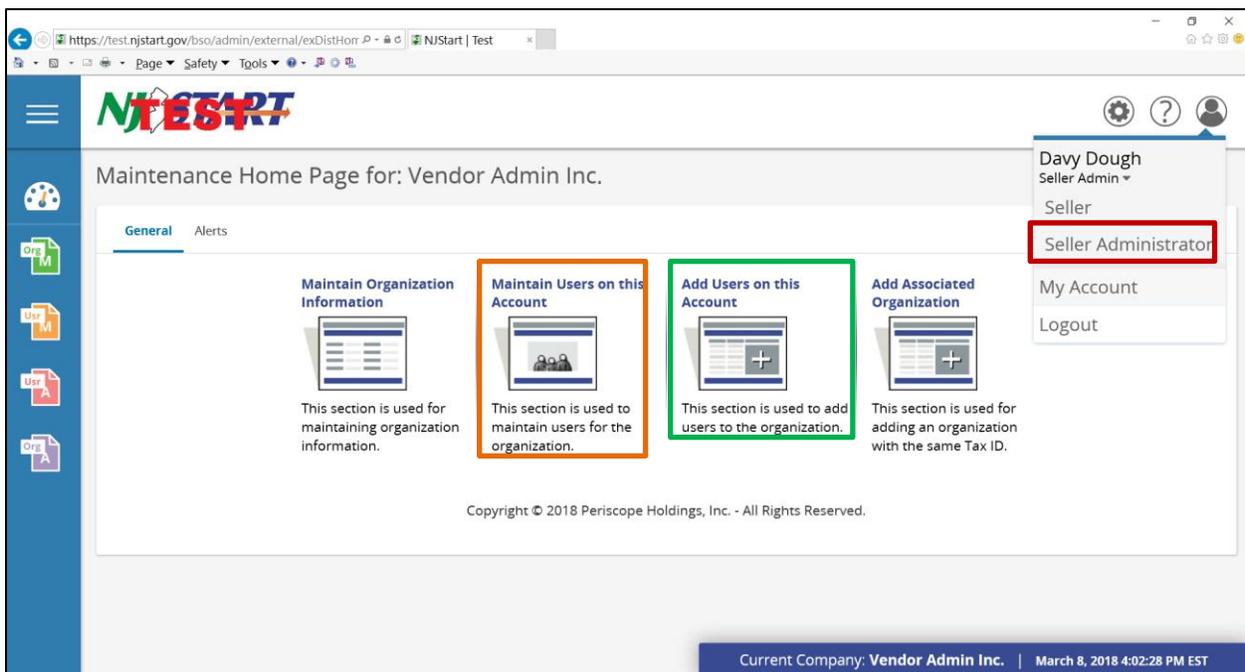
As a registered NJSTART vendor you own the information contained in your vendor portal profile. During registration, you established an employee of your company as a Seller Administrator. The person serving in this role has the ability to grant access to your NJSTART profile to additional employees. You may establish as many users as you wish to keep the information in your profile up-to-date and to use the functions available in the NJSTART Vendor Portal to conduct business with the State.

The self-service features in the NJSTART Vendor Portal enable you to update your profile information when your company makes changes, such as changing your address when you relocate or open branch offices, updating your commodity codes and service codes when you make changes to your business lines, etc. Keeping your profile up-to-date will help the State's procurement specialists find you when they are searching for suppliers of the goods and services that you offer.

8.1. Verify That You Have Seller Administrator Privileges

After login, you'll see the following home screen. Verify that you have Seller Administrator privileges by clicking on the icon in the upper right-hand corner of the screen (indicated in red below).

The following screen will appear. You will recognize this from the instructions provided in Section 3 regarding user maintenance, which shows two functions in the middle of this screen.



If you do not see the screen above, confirm that you are in your Seller Administrator role (found in the top right-hand corner of your screen).



If you do not have Seller Administrator privileges, you must request those rights from your organization's Seller Administrator. From this screen, you can initiate the following actions:

- Maintain existing employee user accounts by clicking on **Maintain Users on this Account** function (indicated in **orange above**);
- Add employee user accounts by clicking on **Add Users on this Account** function (indicated in **green above**).

8.2. Add Users to Your NJSTART Profile

Click **Add Users on This Account** and the following screen will appear:

The screenshot shows the NJSTART user creation interface. It features a blue sidebar with navigation icons and a main content area with a form. The form has the following fields and options:

- Salutation: dropdown menu
- First Name*: text input
- Last Name*: text input
- Job Title*: text input
- Department: text input
- Phone*: text input with a hyphen separator
- Email*: text input
- Login ID*: text input
- Status*: dropdown menu (set to Active)
- New Password*: text input
- Confirm Password*: text input
- Login Question*: dropdown menu
- Login Answer*: text input
- BidSync: Link to an existing BidSync Account. Questions about BidSync?
- BidSync Username: text input with a "Forgot Bidsync Username" link
- BidSync Password: text input with a "Forgot Bidsync Password" link
- Roles: section with checkboxes for:
 - Seller
 - Seller Administrator
 - Can Create Blanket Change Orders
 - Can Upload Contract

At the bottom right, it displays "Current Company: Vendor Admin Inc." and "February 21, 2018 12:31:10 PM EST".

You must complete all required fields (marked with an asterisk*) and select at least one role (see definitions below).

When you have completed your entries, click the **Save & Exit** button.

NOTE: Once you have created the Login ID, it cannot be edited. If you need to change the Login ID, then you should inactivate the incorrect account and create another account to correct the error.



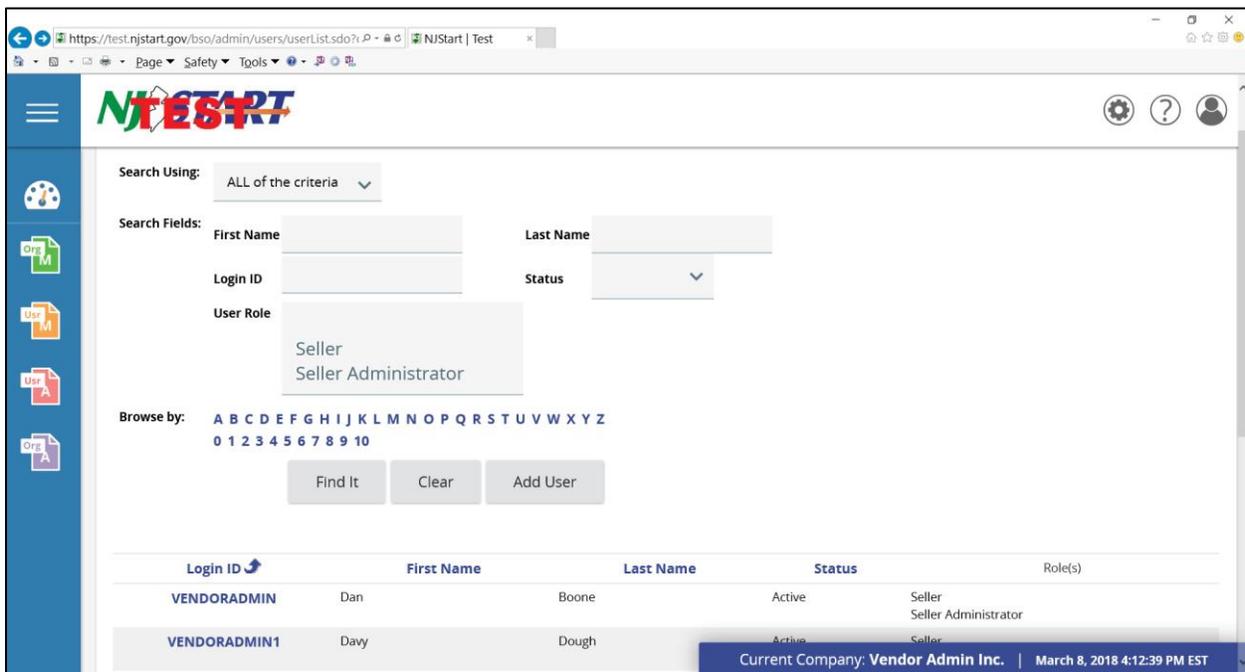
8.3. NJSTART user roles

Your NJSTART Vendor Profile supports the following user roles and abilities:

USER ROLE	ROLE ABILITIES
Seller	The Seller role serves as the transactional role and should be given to users who will do one or more of the following: <ul style="list-style-type: none"> View and respond to bid opportunities (including creating quote documents); and View purchase orders or any change orders.
Seller Administrator	The Seller Administrator role serves as the administrator of your organization’s information including the following: <ul style="list-style-type: none"> Maintaining addresses, commodity codes, etc.; Adding and maintaining additional users; and Adding Doing Business As (DBA) organizations, only if applicable.
Can create blanket change orders	Checking this box enables this user to create blanket change orders.
Can upload contract	This role is not in use currently at the State of New Jersey.

8.4. Maintain Users on This Account

Click **Maintain Users on this Account** and the following screen will appear:



If your company has many users, you can search for a particular user using the features shown on the screen. To see a list of all users, leave the search terms blank and just click on the **Find It** button.



Select the user whose profile you wish to edit/change by clicking on that Login ID in the left-hand column. A user maintenance screen will appear as shown below. You will be able to see and edit the user's profile information. The Login ID is the only field that cannot be changed. This is also the way an existing profile can be changed for an employee who is no longer with the organization, once access to the account has been granted.

https://test.njstart.gov/bsa/admin/users/userVendorPr... NJStart | Test

Page Safety Tools

NJSTART

User Maintenance: Davy Dough - Vendor Admin Inc.

Salutation: [v]

First Name*: Davy Last Name*: Dough

Job Title*: Administrator Department:

Phone*: 609 633 6613 - Email*: test@periscopeholdings.com

Login ID: VENDORADMIN1 Status*: Active [v]

New Password*: [masked] Confirm Password*: [masked]

Login Question*: What is your favorite food? [v] Login Answer*: pizza

Roles

Seller Can Create Blanket Change Orders

Current Company: Vendor Admin Inc. | March 8, 2018 4:11:55 PM EST

When all of your changes have been entered, click the **Save & Exit** button. This will return you to the **User Maintenance** Page.

This concludes the Reference Guide titled *Company Information & User Access*.

For a complete list of downloadable Reference Guides for managing your NJSTART Vendor Profile, visit the NJSTART Vendor Support Page at <http://www.nj.gov/treasury/purchase/njstart/vendor.shtml> .

If you have additional questions, you may contact a New Jersey State Vendor Administrator at (609) 341-3500 or email njstart@treas.nj.gov