

## How a Supplier Completes the Registration Process

Once a registration invitation is sent to the Supplier's email, the Supplier will receive an email and appropriate link to begin the registration process.

1. Once the email invitation is received and opened, **Select the Register Now Button ❶** to start the process as shown below in **Figure 1**.



Figure 1

2. After clicking on the **Register Now Button ❶** in **Figure 1, Page 1** on the welcome page will open as shown in **Figure 2** below, then **click on Continue with Registration ❶** after reviewing the appropriate information from RFCUNY.

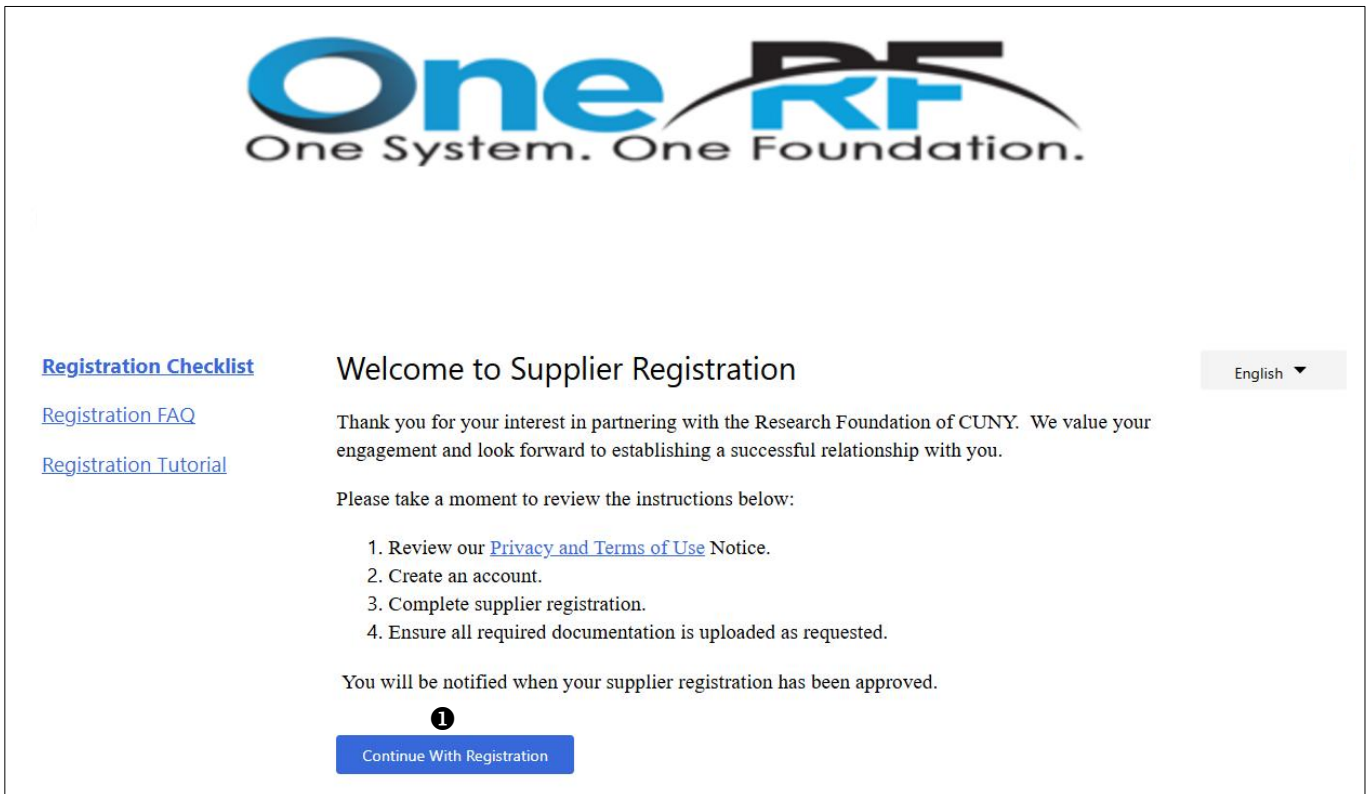


Figure 2

3. Next, create a **Supplier Account**. Start by completing the Supplier Registration. Complete the **Contact** and **Login** information to create the **Supplier Account** as shown in **Figure 3** below.

Select **Create Account** **1** when complete.

The screenshot shows the 'Create Account' page for One RF. At the top is the One RF logo and tagline 'One System. One Foundation.'. Below the logo, the page title is 'Create Account' with a link to 'Registration Tutorial' and a language dropdown set to 'English'. A bolded instruction states: 'This is the only way for you to access and update your supplier account information once registered.' Below this is a note: 'Fields marked with a ★ are required to complete registration'. The form asks 'What company are you with?' and has a text input field. Below that is the label 'Legal Company Name ★' with a text input field. Next is a dropdown menu for 'Employer Identification Number'. Below that is the label 'Tax ID Number Type (US Only) 1' with a text input field containing the text 'account, please provide the details below.'. This is followed by an empty text input field. Then is the label 'Email ★' with a text input field. Below that is the label 'Confirm Email ★' with a text input field. Next are two password input fields: 'Password ★' and 'Re-Enter Password ★', each with a visibility toggle icon. Below the password fields is a checkbox labeled 'I am a user in need of accessibility assistance'. At the bottom, there is a section for 'Terms and Conditions' with a checkbox labeled 'I have read and accepted JAGGAER's Terms and Conditions'. A circled '1' icon is positioned above the 'Create Account' button.

Figure 3

4. After clicking **Create Account ①** in **Figure 3, Page 3**, the **Welcome to Supplier Registration** screen will appear as shown below in **Figure 4**. Here is where you will start the registration process. On the far-left side are the steps **①** you will need to complete. In the **Welcome Step**, fill in the **Legal Company Name ②**. You can click **Save Changes** or **Next ③**. We recommend clicking **Save Changes** then click **Next** to go to the second step **Company Overview**. This will ensure your changes are saved, and you can go back at any time without losing your information.

**MI Pop Tarts**

Registration In Progress for:  
Research Foundation CUNY  
2 of 8 Steps Complete

**Welcome ①**

- Company Overview ▲
- Business Details ✓
- Addresses ▲
- Contacts ▲
- Locations ▲
- Insurance ✓
- Payment Information ▲
- Tax Information ▲
- Certify & Submit

**Welcome to Supplier Registration** ?

Thank you for your interest in partnering with the Research Foundation of CUNY. We value your engagement and look forward to establishing a successful relationship with you.

Please take a moment to review the instructions below:

1. Review our [Privacy and Terms of Use Notice](#).
2. Create an account.
3. Complete supplier registration.
4. Ensure all required documentation is uploaded as requested.

You will be notified when your supplier registration has been approved.

**Required to Start Registration**

Legal Company Name \* ②

★ Required to Complete Registration

**③**

Next > Save Changes

Figure 4



If your **Business** has a **DUNS Number** ❶, is clicked **YES**, **Legal Structure** and **Tax Id Number** ❷ will appear as shown in **Figure 6** below. Choose from the drop-down menu v to complete these boxes. Also complete the **Tax ID Number** ❸.

### Company Overview ?

The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date information in our system.

Doing Business As (DBA) ?

Country of Origin \* ?  v

Does your business have a DUNS number? \* ?  Yes  No

The Data Universal Numbering System or DUNS Number is a nine-digit identification number assigned to over 100 million businesses worldwide.

**Need a DUNS Number?**  
Visit [Get a D&B Number](#) to obtain more detailed instructions on applying for your DUNS Number.

Dun & Bradstreet Number (DUNS) \* ?

**US Resident**

1. Choose Individual Sole Proprietor as your legal structure
2. Select social security number as your tax ID number type
3. Enter your Social Security number in the Tax ID Number field

**Non-US Resident:**

1. Select Foreign Individual as your legal structure
2. Enter your ITIN number.

If you do not possess a Social Security Number (SSN) or an Individual Taxpayer Identification Number (ITIN), please select 'NRA' as your legal structure.

Legal Structure \* ?  v

Tax ID Number Type ?  v

Note: Use numeric characters only. Do not include spaces, hyphens or special characters.

**Tax ID Number** \* ? ❸



**Website**  

Figure 6

- After completing step 2, **Company Overview**, and clicking **Next** step 3 **Business Details** will appear as shown in **Figure 7** below. This step is not required and does not need to be filled out. Click **NEXT 1**.

### Business Details

The information on this page allows us to track important details about your company, such as the areas where you operate and the products and services that you provide. Additionally, this data is used to determine whether or not your business meets the small business size standards as defined by the U.S. Small Business Administration. The SBA standards are based on your NAICS code and annual revenue, or number of employees.

Year Established  

Business Description

#### Annual Revenue/Receipts

2024 Annual Revenue/Receipts	<input type="text"/>	USD
2023 Annual Revenue/Receipts	<input type="text"/>	USD
2022 Annual Revenue/Receipts	<input type="text"/>	USD

#### Products and Services

NAICS Codes ⓘ *No Primary NAICS Code Selected*

Commodity Codes -

★ Required to Complete Registration

**Next >**

Figure 7

7. After clicking **Next** in step 3 **Business Details** in **Figure 7, on Page 7**, step 4 **Addresses** will appear as shown in **Figure 8** below. Click on **Add Address ❶**. The **Add Address** screen will appear as shown in **Figure 9** below. Fill in the Name of the address **❶** such as **Headquarters** etc. and click on all applicable business uses of the address, then click **Next ❷**.

**Addresses** ?

Please enter any physical or mailing addresses from which your organization does business to help us route information and communication correctly. Any required address types are listed below.

**Required Information**  
The following address types are required to complete registration:

- Fulfillment
- Physical
- Remittance

No addresses have been entered **❶**

**Add Address** [Hide Inactive Addresses](#)

[Previous](#) [Next](#)

Figure 8

**Add Address** ×

**Basic Information** (Step 1 of 4) ?

**❶**  
What would you like to label this address? \*

Example: Headquarters, Houston Office

Which of the following business activities take place at this address? (select all that apply) \*

- Takes Orders (fulfillment)
- Receives Payment (remittance)
- Other (physical)

**❷**  
[Next >](#)

\* Required to Complete Registration

Figure 9

After clicking **Next** in **Figure 9** on **Page 8**, the **Add Address** pop-up box will appear; you will need to complete it as shown in **Figure 10** below. Complete Numbers **1**, **2**, **3**, **4**, **5**, and **6**. Then click **Next** **7**.

**Please Note: The How would you like to receive purchase order for the fulfillment address?** The question is important as this information will be used for the purchase order receipt.

Figure 10

After clicking **Next** in **Figure 10**, on **Page 9**, the **Add Address** for the **Primary Contact** for the address pop-up box will appear, you will need to complete as shown in **Figure 11** below. Complete Numbers **1**, **2**, **3**, **4**, **5**, and **6**. Then click **Next 7**.

**Add Address** ✕

**Primary Contact For This Address** (Step 3 of 4) ?

You can also update and add Contacts later from the Contacts page.

Enter New Contact     Not Applicable

Select additional contact type(s) to apply

- Takes Orders (*fulfillment*)
- Receives Payment (*remittance*)
- Other (*physical*)
- Corporate
- PO Failure

Contact Label ★ **1**

First Name ★ **2**

Last Name ★ **3**

Position Title **4**

Email ★ **5**

Phone ★ **6**   ext.   
International phone numbers must begin with +

Toll Free Phone   ext.   
International phone numbers must begin with +

Fax   
International phone numbers must begin with +

★ Required to Complete Registration

◀ Previous Next ▶ **7**

Figure 11

After clicking **Next** in **Figure 11**, on **Page 10**, the **Add Address** for the **Assign this Address to a Location** pop-up box will appear as shown in **Figure 12** below. Complete **What would you like to label this location** ❶, **Location Type** ❷ is prefilled and **Description** ❸.

Then click **Save Changes** ❹.

**Add Address** ×

**Assign this Address to a Location** (Step 4 of 4) ?

You can also update and add Locations later from the Locations page.

Locations represent the various places in which your business operates. Some examples of locations are regional offices, fulfillment centers, divisions, etc. If your organization only operates out of one location, please enter "Main Office" for the Location Label.

Enter New Location

What would you like to label this location? \*

❶

Location Type \* ❷

Headquarters ▾

Description ❸

700 characters remaining

\* Required to Complete Registration 4

< Previous Save Changes

Figure 12

8. After clicking **Save Changes** in **Figure 12**, on **Page 11**, step 5 **Contacts** will appear as shown in **Figure 13** below. If you want to add more contacts, click **Add Contact 1** and follow the steps you did earlier otherwise click **Next 2**.

### Contacts ?

Please enter contact information for any individuals at your organization who may provide valuable information or help to our company. This will help us ensure we are always contacting the correct individual. Contacts can be linked to one existing address. Any required contact types are listed below.

**Required Information**

The following contacts are required to complete registration:

- Corporate

Contact Label	Contact Types	Name	Email	
Headquarters	Other (Primary) Fulfillment (Primary) Remittance (Primary)	Doe, John	Abc@aol.com	Edit ▾

**1**

Add Contact ▾

[Show Inactive Contacts](#)

**2**

Next >

< Previous
Next >

Figure 13

9. After clicking **Next** in **Figure 13**, above, step 6 **Locations** will appear as shown in **Figure 14** below. If you want to add more Locations, click **Add Location 1** and follow the steps you did earlier; otherwise, click **Next 2**.

### Locations ?

Locations can be used to organize contacts and addresses. For instance, if your company operates from multiple addresses in one vicinity on the East Coast, you can create an East Coast location and designate appropriate contacts and locations.

Location Label ▾	Location Type	
New Label Address	Headquarters (Primary)	Edit ▾

**1**

Add Location ▾

[Hide Inactive Locations](#)

**2**

Next >

< Previous
Next >

Figure 14

10. After completing step 6 **Locations Figure 14**, and clicking **Next** on **Page 12**, step 7 **Insurance** will appear as shown in **Figure 15** below. This step does not need to be filled out, click **NEXT 1**.

The screenshot shows a form titled "Insurance" with a help icon. Below the title is a paragraph: "Our organization wants suppliers to maintain appropriate insurance coverage. Listing your insurance policies helps us determine if you have the appropriate level of coverage for our future product and service needs." Below this is a message: "No Insurance has been entered." and a blue button labeled "Add Insurance" with a dropdown arrow. At the bottom right, there are two buttons: "Previous" and "Next" with a circled "1" icon next to it.

Figure 15

11. After clicking **Next** in **Figure 15**, above, step 8 **Payment Information** will appear as shown in **Figure 16** below. **Read the screen thoroughly. Especially what is highlighted.** Click on **Add Payment Information 1**. A drop-down menu will appear **2**, and select your payment type.

The screenshot shows a form titled "Payment Information" with a help icon. Below the title is a paragraph: "Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount." Below this is another paragraph: "While selecting Direct Deposit is not a requirement, it is highly advisable. Check payments can take up to 3 weeks to be received via USPS. The account holder must be the individual receiving payment. In addition to completing this portion you are required to include either a voided check or bank statement that includes your name, account no. and routing number no." Below these paragraphs are two highlighted orange boxes: "Please identify your default payment type." and "The Payment Title must include the word 'Default'". Below these is a light blue box titled "Required Information" with the text: "At least one payment type is required to complete this section." Below this is a message: "No payment information has been entered." and a blue button labeled "Add Payment Information" with a dropdown arrow and a circled "1" icon. Below this is a section titled "Additional Questions" with the text: "Select Payment Type that you have registered with \*". Below this is a dropdown menu with a circled "2" icon next to it, showing a list of options: "Direct Deposit (ACH)", "Check", and "Wire Transfer". At the bottom right, there are three buttons: "Previous", "Next", and "Save Changes".

Figure 16

After selecting from the **Add Payment Information** ❶ drop-down menu ❷ in **Figure 16**, on **Page 13** the **Add Payment Information** pop-up box will appear as shown in **Figure 17** below. Complete **all the information in this box**. Then click **Save Changes** ❶.

**Please Note:** Your payment title must include the word “**Default**” for your preferred method of payment type.

**Add Payment Information** ✕

Only associated countries are displayed.

Payment Title \*

Country \*

Payment Type \* Direct Deposit (ACH)

Remittance Address \*

Currency \*

Active  Yes  No

**Bank Account**

Country \*

Bank Name \*

Account Holder's Name \*

Account Type \*

Account Number Type \*

\* Required to Complete Registration

**1** Save Changes Close

Remember, the Payment Title you must enter **Default**

Figure 17

After clicking **Save Changes ①** in **Figure 17**, on **Page 14**, a **New Payment Information** screen will appear as shown in **Figure 18** below. Click on **Select Payment Type ①** that you have registered with and a drop-down menu will appear and select your choice. They are **ACH**, **Wire Transfer**, **Other** and **Check**. If you choose **ACH** a pop-up box will appear as shown in **Figure 19** where you need to attach ① a voided **Bank Check**, **Bank Letter** or **Redacted Bank Statement**.

After completing that step, click **Save Changes ②** in **Figure 18**.

### Payment Information ?

Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.

While selecting Direct Deposit is not a requirement, it is highly advisable. Check payments can take up to 3 weeks to be received via USPS. The account holder must be the individual receiving payment. In addition to completing this portion you are required to include either a voided check or bank statement that includes your name, account no. and routing number no.

**Please identify your default payment type.**

**The Payment Title must include the word "Default"**

Title ▾	Payment Type	Currency	Active	
Default ①	Direct Deposit (ACH)	USD	Yes	<input type="button" value="Edit"/>

▾

#### Additional Questions

Select Payment Type that you have registered with \*

▾

②

Figure 18

#### Additional Questions

Select Payment Type that you have registered with \*

▾

Voided Bank Check, Bank Letter, or Redacted Bank Statement \*

Select file Drop file to attach, or browse.

Figure 19

12. After clicking **Save Changes** in **Figure 19**, on **Page 15**, step 9 **Tax Information** will appear as shown in **Figure 20** below. Click on **Add Tax Document 1**. A drop down menu will appear and select **W-9**. After selecting **W-9** the **Add Tax Document** pop-up box will appear as shown in **Figure 21** below. Complete all the requested information and attach the **W-9**. Then click **Save Changes 1**. If this was a foreign company the option would show a **W-8**.

### Tax Information ?

We are legally obligated to collect specific tax-related information from you to establish you as a vendor. This information is used for compliance with U.S. income tax reporting requirements.

Please provide a completed copy (signed and dated) of Form W8 (foreign individuals) or Form W9 (US citizens, US nationals, or permanent resident). An updated W8/W9 is required if there is a change to your address or classification

**Foreign Suppliers**

1. **Business entities:** To avoid withholding and be eligible to claim a tax treaty exemption, you must have a US Employer Identification Number (EIN) and/or a Foreign Tax ID and must provide a completed copy of IRS Form W-8BEN-E, W-8ECI, W-8EXP, or W-8IMY as applicable.
2. **Individuals:** To avoid withholding and be eligible to claim a tax treaty exemption for scholarship/fellowship payments, you must have a US TIN (Social Security Number or Individual Taxpayer Identification Number) and must provide a completed copy of IRS Form W-8BEN. To avoid withholding and be eligible to claim a tax treaty exemption for independent personal services/royalty payments, you must have a US TIN (Social Security Number or Individual Taxpayer Identification Number) and/or a Foreign Tax ID and must provide a completed copy of IRS Form W-8BEN and a completed copy of Form 8233 (Independent Personal Services only).

**Required Information**  
At least one tax document is required to complete this section.

*No tax information has been entered*

Add Tax Document 1

W-9

Document Sign Date

mm/dd/yyyy

← Previous
Next →
Save Changes

Figure 20

### Add Tax Document ×

Tax Type \* W-9

Tax Document Name \*

Tax Document Year \*

Tax Documentation \* 

Select file
Drop file to attach, or browse.

[Download Pre-populated Tax Document](#)

\* Required to Complete Registration

Save Changes
Close

Figure 21

After clicking **Save Changes** in **Figure 21**, on **Page 16** a **Tax Information** screen will appear as shown in **Figure 22** below. Click **Save Changes**, then **Next 1** if you're not editing. An upload documents screen will appear as shown in **Figure 23** below. If no documents need to be attached click **Save Changes**, then **Next 1**.

### Tax Information

We are legally obligated to collect specific tax-related information from you to establish you as a vendor. This information is used for compliance with U.S. income tax reporting requirements.

Please provide a completed copy (signed and dated) of Form W8 (foreign individuals) or Form W9 (US citizens, US nationals, or permanent resident). An updated W8/W9 is required if there is a change to your address or classification

Foreign Suppliers


1. Business entities: To avoid withholding and be eligible to claim a tax treaty exemption, you must have a US Employer Identification Number (EIN) and/or a Foreign Tax ID and must provide a completed copy of IRS Form W-8BEN-E, W-8ECI, W-8EXP, or W-8IMY as applicable.
2. Individuals: To avoid withholding and be eligible to claim a tax treaty exemption for scholarship/fellowship payments, you must have a US TIN (Social Security Number or Individual Taxpayer Identification Number) and must provide a completed copy of IRS Form W-8BEN. To avoid withholding and be eligible to claim a tax treaty exemption for independent personal services/royalty payments, you must have a US TIN (Social Security Number or Individual Taxpayer Identification Number) and/or a Foreign Tax ID and must provide a completed copy of IRS Form W-8BEN and a completed copy of Form 8233 (Independent Personal Services only).

Tax Document Name	Tax Type	Tax Document Year	Tax Documentation
Pop Tart W-9	W-9	2024	<a href="#">View Document</a> <span>Edit</span>

[Add Tax Document](#)

### Additional Questions

Document Sign Date

  
mm/dd/yyyy

< Previous
Next >
Save Changes

Figure 22

### Uploaded Documents

This Section is for any uploaded documents

Sensitive Document

*Drop file to attach, or browse.*

Upload document 2

*Drop file to attach, or browse.*

Uploaded Documents

*Drop file to attach, or browse.*

★ Required to Complete Registration

< Previous
Next >
Save Changes

Figure 23

13. After clicking **Save Changes** in **Figure 23**, on **Page 17**, step 10 **Certify and Submit** will appear as shown in **Figure 24** below. Check **I certify that all information provided is true and accurate ①**. Then click **Submit ②**. This will send a notification back to RFCUNY to finish the review and approval process.

### Certify & Submit

Please type your initials in the box below acknowledging that you are a company official and that all information is correct. It is the Supplier's responsibility to ensure company information is accurate and that company information is kept current. Inaccurate company information may result in payment delays.

Additionally, by submitting this registration, you certify all information provided is true and accurate. Knowingly providing false information may result in disqualifying you or your company from doing business with us.

Preparer's Initials \*

Preparer's Name \*

Preparer's Title \*

Preparer's Email Address \*

Today's Date 11/26/2025

Certification \* **①**  I certify that all information provided is true and accurate.

★ Required to Complete Registration

**②**

Figure 24