

# How to Complete the CMU Supplier Onboarding Form

Learn how to navigate the WSS portal to successfully submit your onboarding information. This guide covers entering business details, banking info, and contact settings to ensure your account is correctly registered with Colorado Mesa University.

## Supplier Profile Access

1

From the link send by email, please log into the Workday Strategic Sourcing home page.

ne, tally YOUR SUPPLI

PROFILE REQUESTS

You have 1 new request

ISSUING COMPANY	SUPPLIER COMPANY	STATUS	ACTIONS
Colorado Mesa University	Rowdy Maverick	Not started	<a href="#">MANAGE</a> <a href="#">VIEW PUBLIC EVENT</a>

ITEMS PER PAGE 10

RESPONSES

REQUESTS 0 RESPONDED 0 ARCHIVED 0

ISSUING COMPANY	TYPE	TITLE	SUPPLIER COMPANY	DUE	STATUS
No items available.					

ITEMS PER PAGE 10

## 2 Click 'Manage' on the appropriate Profile Request.

egic Sourcing HOME SUPPORT T TALLY DANIELSON

e, Tally YOUR SUPPLIER PROFILE

### PROFILE REQUESTS

You have 1 new request

ISSUING COMPANY	SUPPLIER COMPANY	STATUS	ACTIONS
Colorado Mesa University	Rowdy Maverick	Not started	<span>MANAGE</span> <span>VIEW PUBLIC EVENT...</span>

ITEMS PER PAGE 10

### RESPONSES

REQUESTS 0 RESPONDED 0 ARCHIVED 0

ISSUING COMPANY	TYPE	TITLE	SUPPLIER COMPANY	DUE	STATUS
No items available.					

ITEMS PER PAGE 10

## 3 Click 'Edit' to begin filling out the onboarding form.

egic Sourcing HOME SUPPORT T TALLY DANIELSON

Colorado Mesa University NOT STARTED

### ONBOARDING INFORMATION

MESSAGE CENTER EDIT

Dear Supplier:

This is the CMU Standard Supplier Onboarding Form.

Please fill out all required fields on this Supplier Onboarding Form. Once you have fully filled out the Supplier Onboarding Form and you have attached your W9, please press the blue SUBMIT button at the top of the screen to send this Form back through the supplier portal for approval by our organization. Once the Onboarding Form is approved by both the Procurement and Finance groups, you will become an Approved and Active Supplier in our Workday system.

NOTE: please be sure to include your payment remit-to address in the address section of the Form. You may also add other addresses for your organization by using the "ADD ADDRESS" button on the Form and then indicating the address type for each one. You may also do the same for any contact people at your supplier organization by using the "ADD CONTACT" button on the Form.

Thank you,  
Procurement Team

### SUPPLIER INFORMATION

SUPPLIER NAME*	WEBSITE
Rowdy Maverick	
SUPPLIER CATEGORY*	
(empty)	

# Supplier Information

4

Fill out the supplier information fields. All required fields will have an asterisk near the title. Choose a supplier category that best fits your service and provide a brief description.

Strategic Sourcing

HOME SUPPORT TALLY DANIELSON

< BACK Colorado Mesa University NOT STARTED

General Profile Forms

Dear Supplier:

This is the CMU Standard Supplier Onboarding Form.

Please fill out all required fields on this Supplier Onboarding Form. Once you have fully filled out the Supplier Onboarding Form and you have attached your W9, please press the blue SUBMIT button at the top of the screen to send this Form back through the supplier portal for approval by our organization. Once the Onboarding Form is approved by both the Procurement and Finance groups, you will become an Approved and Active Supplier in our Workday system.

NOTE: please be sure to include your payment remit-to address in the address section of the Form. You may also add other addresses for your organization by using the "ADD ADDRESS" button on the Form and then indicating the address type for each one. You may also do the same for any contact people at your supplier organization by using the "ADD CONTACT" button on the Form.

Thank you,  
Procurement Team

Edit your [Supplier Profile](#) to enable autofill

AUTOFILL FORM

**SUPPLIER INFORMATION**

SUPPLIER NAME\* Rowdy Maverick WEBSITE www.cmurowdy.com

SUPPLIER CATEGORY\* ...

DESCRIPTION\* Supplier description text

## Address Configuration

5

Please enter an accurate address. If this is your primary address, please mark it as such.

The screenshot shows a web form with a sidebar on the left containing 'General Profile' and 'Forms'. The main content area is titled 'SUPPLIER INFORMATION' and contains the following fields:

- SUPPLIER NAME\***: Rowdy Maverick
- WEBSITE**: www.cmurowdy.com
- SUPPLIER CATEGORY\***: Professional Services (with a dropdown arrow)
- DESCRIPTION\***: Providing School Spirit to Colorado Mesa University

6

Select the usage of the address. You may select multiple usage types for the same address.

This screenshot shows the 'BUSINESS INFORMATION' section of the form, specifically the 'ADDRESSES' part. The 'Primary Address' checkbox is checked. The 'ADDRESS COUNTRY\*' is set to 'United States of America'. The 'USAGE\*' dropdown menu is open, showing several options: Billing, Mailing, Other - Business, Payroll Tax Form, Procurement (highlighted with an orange circle), Remit T, Shipping, Storage, and Street Address. The 'DESCRIPTION\*' field from the previous screenshot is also visible at the top of the form.

7

To add another address to your information, click 'Add Address'. You may add as many addresses as you like and specify the usage for each address.

egic Sourcing HOME SUPPORT TALLY DANIELSON

Colorado Mesa University NOT STARTED

BUSINESS INFORMATION

ADDRESSES

REQUIRED\*

Primary Address

ADDRESS COUNTRY\* United States of America X v USAGE\* Procurement X v

ADDRESS LINE 1\* 1100 North Ave ADDRESS LINE 2

CITY\* Grand Junction STATE\* Colorado X v

POSTAL CODE\* 81501 COUNTY

DELETE

## Contact and Tax Details

8

Once you are happy with your address fields, please fill out your phone information. You may add more than one phone number if needed.

< BACK Colorado Mesa University NOT STARTED

General Profile Forms

PHONES

REQUIRED\*

Primary Phone

PHONE COUNTRY\* Select country INTERNATIONAL CALLING CODE (empty)

EMAIL ADDRESSES

REQUIRED\*

Primary Email

EMAIL ADDRESS Enter email address tallydanielson@gmail.com

DELETE

ADD PHONE

ADD EMAIL ADDRESS

9 Fill out the email address field and select a usage for your email.

PHONES ADD PHONE

REQUIRED\*

Primary Phone

PHONE COUNTRY\* INTERNATIONAL CALLING CODE

United States of America X v +1

PHONE DEVICE TYPE\* PHONE NUMBER\*

Mobile X v 970-248-1020 DELETE

EMAIL ADDRESSES ADD EMAIL ADDRESS

REQUIRED\*

Primary Email

EMAIL ADDRESS

rowdy@coloradomesa.edu

EMAIL USAGE\* Select Usage

- Billing
- Procurement
- Remit To
- Shipping

TAX INFORMATION

REQUIRED\*

10 NOTE: You will need the 'Procurement' usage to be added to at least one email address.

PHONES ADD PHONE

REQUIRED\*

Primary Phone

PHONE COUNTRY\* INTERNATIONAL CALLING CODE

United States of America X v +1

PHONE DEVICE TYPE\* PHONE NUMBER\*

Mobile X v 970-248-1020 DELETE

EMAIL ADDRESSES ADD EMAIL ADDRESS

REQUIRED\*

Primary Email

EMAIL ADDRESS

rowdy@coloradomesa.edu

EMAIL USAGE\* Select Usage

- Procurement X
- Billing
- Remit To
- Shipping

TAX INFORMATION ADD TAX ID

REQUIRED\*

11

Fill out your tax information. You will be asked to attach your documents to the bottom of the form.

The screenshot shows a web interface with a sidebar on the left containing 'General Profile' and 'Forms'. The main content area is divided into sections. The 'EMAIL ADDRESSES' section includes a 'REQUIRED\*' checkbox for 'Primary Email' (checked), an 'EMAIL ADDRESS' field with 'rowdy@coloradomesa.edu', and an 'EMAIL USAGE\*' dropdown menu with options 'Procurement X', 'Shipping X', 'Billing X', and 'Remit To X'. A 'DELETE' button is present. Below this is the 'TAX INFORMATION' section, which is highlighted with an orange circle. It includes a 'REQUIRED\*' checkbox for 'Primary Tax ID' (unchecked), a 'TAX COUNTRY\*' dropdown menu with 'United States of America X', and a 'TAX ID TYPE\*' dropdown menu with 'Select type'. A 'TAX ID\*' field is partially filled with a grey bar. A 'DELETE' button is also present.

12

Select the contact email for PO issuance. If the 'Default PO Issue Email' field is not populating, please refer to 'Step 10' and make sure an email usage is set to procurement.

The screenshot shows the same web interface as above. The 'TAX INFORMATION' section is now partially obscured. The 'PROCUREMENT OPTIONS' section is highlighted with a yellow border and includes a 'DEFAULT PO ISSUE EMAIL\*' dropdown menu with 'rowdy@coloradomesa.edu' selected, which is circled in orange. To its right is a 'PO ISSUE OPTION\*' dropdown menu with 'Select...' selected. Below this is the 'BANKING INFORMATION' section, which includes a 'BANK ACCOUNTS' section with an 'ADD BANK ACCOUNT' button and a 'REQUIRED\*' section with a 'BANK ACCOUNT PAYMENT TYPES' dropdown menu set to 'Select payment types'. A 'DELETE' button is visible at the bottom of the 'TAX INFORMATION' section.

13 Select a PO issue option.

The screenshot shows a web form with several sections. The 'PROCUREMENT OPTIONS' section is highlighted with a yellow border. It contains two fields: 'DEFAULT PO ISSUE EMAIL\*' with the value 'rowdy@coloradomesa.edu' and 'PO ISSUE OPTION\*' with a dropdown menu open. The dropdown menu lists several options: EDI, EDI Auto, Email (highlighted in blue), External, Phone, Print, Supplier Portal, XML, and XML Auto. An orange circle highlights the 'Email' option. Above this section, the 'TAX COUNTRY\*' is set to 'United States of America' and 'TAX ID TYPE\*' is set to 'SSN or ITIN'. Below the 'PROCUREMENT OPTIONS' section is the 'BANKING INFORMATION' section, which includes 'BANK ACCOUNTS' and 'REQUIRED\*' fields.

14 Enter your banking information. You may add multiple bank accounts to your profile if needed.

The screenshot shows the same web form as in step 13, but now the 'BANKING INFORMATION' section is expanded. The 'BANKING INFORMATION' header is highlighted with an orange circle. Below it, the 'BANK ACCOUNTS' section is visible, featuring a blue 'ADD BANK ACCOUNT' button. The 'REQUIRED\*' section contains a 'BANK ACCOUNT PAYMENT TYPES' dropdown menu. Below that, the 'ACCOUNT DETAILS' section includes 'BANK ACCOUNT COUNTRY\*' and 'BANK ACCOUNT TYPE\*' dropdown menus. The 'PAYMENT' section is partially visible at the bottom, showing a 'DEFAULT PAYMENT TERM' field.

15 If unsure what to choose for a default payment term, select 'Net 30'.

The screenshot shows a web form for a 'General Profile'. The left sidebar contains 'General Profile' and 'Forms'. The main content area has several sections: 'ROUTING TRANSIT NUMBER\*' (123456789), 'BANK ACCOUNT\*' (123456), 'BIC\*' (1234567), and 'BANK NAME\*' (Example Bank). A red error message states: 'Error: Bank Identification Code (BIC) incorrectly formatted. Refer to SWIFT guidelines for correct format'. A 'DELETE' button is visible. Below this is the 'PAYMENT' section, which includes a 'DEFAULT PAYMENT TERM' dropdown menu. The dropdown is open, showing options: 'Net 10', 'Net 30' (highlighted in blue), 'Net 45', and 'Upon Receipt'. Below the dropdown are 'PAYMENT TYPES\*' (Check X) and 'DEFAULT PAYMENT TYPE\*' (Check X). At the bottom is the 'CONTACTS' section with 'FIRST NAME\*' and 'LAST NAME\*' fields and an 'ADD CONTACT' button.

16 Choose a preferred payment type from the drop down list and set it as your default.

The screenshot shows the same web form as above, but with the 'PAYMENT TYPES\*' dropdown menu open. The dropdown is titled 'Select payment types' and lists several options: 'Check', 'Credit Card', 'Direct Debit', 'Direct Debit Manual', 'Direct Deposit', 'EFT/ACH' (highlighted in blue), 'Manual', 'Virtual Card', and 'Wire'. The 'DEFAULT PAYMENT TERM' is now set to 'Net 30'. The 'ACCEPTED CURRENCIES\*' dropdown is set to 'USD X', and the 'DEFAULT PAYMENT CURRENCY' is 'USD'. The 'LAST NAME\*' field is now populated with 'Danielson'. The 'ADD CONTACT' button is still present.

# Onboarding Completion

17

Fill in your contact information. You may add more than one contact to your profile.

The screenshot shows a web interface for adding contact information. On the left is a sidebar with a back arrow, 'General Profile', and 'Forms'. The main content area is titled 'CONTACTS' and has an 'ADD CONTACT' button. The form fields are as follows:

FIRST NAME*	LAST NAME*
Tally	Danielson
CONTACT INFORMATION	
EMAIL*	JOB TITLE
tallydanielson@gmail.com	Manager
CONTACT TYPE*	
Procurement X	X
PHONE COUNTRY	PHONE*
United States of America +1	9702481020
PHONE DEVICE TYPE	
Mobile	X

Below the form is an 'ATTACHMENTS' section with the text: 'All suppliers must attach the following forms:'. Below this text, there is a partially visible line of text: 'A copy of this W-9 form has to be submitted with the Onboarding Form through the MGS Supplier Portal. Please attach your W-9'.

18

Attach your W9 and COI. CMU Students do not need to attach a COI. Click 'Submit' when you're done.

**ATTACHMENTS**

All suppliers must attach the following forms:

1. a copy of their W-9 form here prior to submission of the Onboarding Form through the WSS Supplier Portal. Please attach your W-9 Form below.

Supplier W9 Instructions: If you need a copy of a W9 Form, please download the W9 Form at the link below. Once the W9 Form is filled out completely by your company, please upload it as an attachment here and submit it with your onboarding/registration form into the supplier portal.

For W9 Form Template: <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

2. a copy of the current Certificate of Insurance (COI).

Thank you,  
Procurement Team

REQUIRED\*

FILE NAME	FILE SIZE	UPLOAD DATE	UPLOADED BY	FILE TYPE
No items available.				

DRAG/DROP DOCUMENTS or [BROWSE FILES](#)



**CMU Students and Independent Contractors:** This form is designed to collect information from all suppliers working with CMU. Some fields may not seem applicable to your situation—please complete them to the best of your ability. If any information appears incorrect or requires clarification, CMU will follow up with you directly.