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1. **Introduction**

The purpose of this document is to serve as a reference guide on how to register as a supplier on the Central Supplier Database (hereafter referred to as the CSD).

Suppliers will be required to have a valid e-mail address, cellphone number and bank account to register on the CSD.

Recommended browsers include:

- Chrome from version 40
- Firefox from version 36
- Internet Explorer from version 11
- Opera from version 26
- Safari from version 7

Note that Google’s reCAPTCHA service is used to prevent irrelevant or unsolicited messages sent over the Internet. Therefore the browser must be able to connect to the following url: [https://www.google.com/recaptcha](https://www.google.com/recaptcha)

2. **Access to the CSD**

Suppliers will be required to have access to the internet.

The [www.csd.gov.za](http://www.csd.gov.za) URL needs to be entered in the user’s web browser to access the CSD.

3. **Typographical conventions and icons**

The typographical conventions used in this document are illustrated in the table below:

<table>
<thead>
<tr>
<th>Convention / Icon</th>
<th>Object or term</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Button, link, message wordings or tab on screen or toolbar</td>
<td>Click on <strong>Register</strong></td>
</tr>
<tr>
<td><img src="image" alt="Automatic verification" /></td>
<td>The CSD verifies supplier information with third party interfacing systems e.g. SARS, CIPC etc.</td>
<td>If supplier is a CIPC company e.g. Private Company Pty (Ltd) then the CSD verifies the supplier’s business registration and ownership information with CIPC.</td>
</tr>
<tr>
<td><img src="image" alt="Note" /></td>
<td>Look out for important information.</td>
<td>A password must contain a minimum of 8 characters and include a capital letter, a lower case letter, a number and a special character</td>
</tr>
<tr>
<td>Convention / Icon</td>
<td>Object or term</td>
<td>Example</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>---------</td>
</tr>
<tr>
<td>System task</td>
<td>Tasks which are performed by the CSD application – in the background.</td>
<td>When registering on the CSD, the system sends an activation e-mail and One Time Pin (OTP) to the user.</td>
</tr>
</tbody>
</table>

### 4. CSD Supplier Management Process

The CSD supplier management process outlines from when a user registers a new account on the CSD to when the organs of state access the verified supplier information on the CSD.

![CSD Supplier Management Process](image)

*Figure 1 – CSD Supplier Management Process*

### 5. Supplier User Registration Process

The following section describes the user registration process in more detail.
## 5.1. Register a new CSD account

A new CSD account must be registered in order for a user to create and maintain other users and suppliers. Various security functions have been built into the CSD to ensure that the registration process of a CSD account is secure. In order to register, a user must have a valid e-mail address and cellphone number.

<table>
<thead>
<tr>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Enter <a href="http://www.csd.gov.za">www.csd.gov.za</a> in web browser</td>
</tr>
<tr>
<td>2. Click on Register on the menu bar on the CSD Home Page</td>
</tr>
<tr>
<td>3. Enter your:</td>
</tr>
<tr>
<td>• E-mail address</td>
</tr>
<tr>
<td>• Name</td>
</tr>
<tr>
<td>• Surname</td>
</tr>
<tr>
<td>• Cellphone number</td>
</tr>
<tr>
<td>4. Select an identification type in the identification type dropdown</td>
</tr>
<tr>
<td>5. Enter identification number</td>
</tr>
<tr>
<td>A warning message will be displayed if a foreign passport number or foreign ID number is entered then a work permit number must also be entered</td>
</tr>
<tr>
<td>6. Enter a password</td>
</tr>
<tr>
<td>7. Confirm password</td>
</tr>
<tr>
<td>8. Select and complete 3 security questions</td>
</tr>
<tr>
<td>9. Check the I am not a robot Captcha</td>
</tr>
<tr>
<td>10. Check the I accept the terms and conditions</td>
</tr>
<tr>
<td>11. Click on the Register button</td>
</tr>
</tbody>
</table>
Welcome to the Central Supplier Database for South African government.

The Central Supplier Database maintains a database of organisations, institutions and individuals who can provide goods and services to government. The CSD will serve as the single source of key supplier information for organs of state from 01 April 2015 providing consolidated, accurate, up-to-date, complete and verified supplier information to procuring organs of state.

Prospective suppliers interested in pursuing opportunities within the South African government are encouraged to self-register on the Central Supplier Database. This self-registration application represents an expression of interest from the supplier to conduct business with the South African government. Once submitted, your details will be assessed for inclusion on the Central Supplier Database.

Copyright 2015 Government of South Africa. All Rights Reserved

Figure 2 – CSD home page
Figure 3 – Register user
5.2. Activate account

Once the user has captured their information and registered on the system, the account must now be activated. This is done by means of confirming that the e-mail and cellphone details provided are indeed accurate and linked to an individual.

Actions:

1. Open the CSD activation e-mail and click on the Activate Account link

⚠️ A One Time Pin (OTP) is sent as an SMS to the cellphone number provided on the registration screen

2. Enter the OTP in the Account Activation screen

3. Click on the Submit button
   - The following message will be displayed: Account activated.
   - The message will have a Log In link
5.3. Reset cellphone number

Users can reset their cellphone number for an OTP to be sent to a different cellphone number or if captured incorrectly during registration.

**Actions:**

1. Click on **Click here to change your number** on the **Account Activation** screen
   - Alternatively click on **Click here to change your number** on the **Reset Password** screen
2. Select identification type
3. Enter identification number
4. Enter security question answer 1
5. Enter security question answer 2
6. Enter security question answer 3
7. Click on **Email Link**
4. Open the CSD reset contact details e-mail and click on the **Reset Contact Details** link
   - The system will open the Change Contact Details screen on CSD

5. Enter New cellphone number

6. Click on **Change**
   - The following message will be displayed: **Your contact details have been changed successfully.**

**Figure 8 – Reset contact details**
Reset contact details confirmation

We have sent you an email with a contact details reset link. Please use this link to reset your contact details.

Figure 9 – Reset contact details confirmation

Figure 10 – Reset contact details email
5.4. Log in

Once the user has successfully registered and activated their CSD account, the user can then log in on the CSD.

**Actions:**

1. Click on **Log in** on Home page
2. Enter registered e-mail address
3. Enter password
4. Check the **I accept the terms and conditions**
5. Click on **Log in** button
   - User is navigated to the **CSD landing page**
5.5. Resend account activation e-mail

If the link or the one-time-pin expired, or the user lost the original activation e-mail a new account activation link can be requested. For security reasons, the CSD does not re-send the original activation e-mail.
Actions:

1. Click on **Log in** on Home page
2. Click on **Resend account activation e-mail** link in the Login page
   - User is navigated to the **Activate Account** screen
3. Enter registered e-mail
4. Click **E-mail link** button
5. Receive a **Resend Activation** message on CSD notifying the user that an activation e-mail has been sent
6. Open the CSD activation e-mail and click on the **Activate Account** link

⚠️ A One Time Pin (OTP) is sent as an SMS to the cellphone number provided on the registration window
7. Enter the OTP in the Account Activation screen
8. Click on the **Submit** button
   - User will receive an account activation message with a log in link.

---

![Figure 15 – Log in – Resend account activation e-mail](image)
5.6. Resend OTP

Users can request for an OTP to be resent in order to activate their CSD account.

**Actions:**

1. Click on **Resend** on the **Account Activation** screen
2. Enter the new OTP in the Account Activation screen
3. Click on the **Submit** button

⚠️ User will receive an account activation message with a log in link.

If the OTP failed, the user will be returned to the activation screen with a message either ‘The one time pin is incorrect, please retry.’ OR ‘User OTP already expired’.

This will require a resend of the activation e-mail and the OTP.
5.7. Reset password

A password can be reset in cases where it is lost, stolen, forgotten or compromised.

Actions:

1. Click on Log in on the Home Page
2. Click on Forgot Password
3. Enter registered e-mail address and click on e-mail link
   - The user will be notified if the e-mail address that is entered does not exist
4. System sends the new reset password e-mail with a link
5. Click on the reset password link in the e-mail.
   - When clicking on the reset link in the e-mail the system will open the Account Activation screen on CSD
   - The system will send an OTP via SMS
6. Enter a new password
7. Confirm the password
8. Enter the OTP
9. Click on Reset
   - A reset password confirmation message is displayed: Your password has been reset. Please click here to log in.
   - Click on Click Here to access the Log In page
Figure 19 – Log in – Forgot Password

Figure 20 – Forgot your password

Figure 21 – Forgot password confirmation
Figure 22 – Reset password e-mail

Figure 23 – Reset Password screen
5.8. Edit My Account details

Users can make changes to their account details e.g. name, surname, e-mail etc.

<table>
<thead>
<tr>
<th>Actions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click on <strong>My Account</strong> on the Landing page</td>
</tr>
<tr>
<td>• The information of the user that is logged in will be displayed</td>
</tr>
<tr>
<td>2. Edit any of the fields</td>
</tr>
<tr>
<td>3. Click on <strong>Submit</strong></td>
</tr>
<tr>
<td>• A message will display saying <em>Account details updated successfully</em></td>
</tr>
</tbody>
</table>
5.9. Change password

**Actions:**

1. Click on **My Account** on the Landing page
   - The information of the user that is logged in will be displayed
2. Click on **Change Password**
   - The Change Password screen will be displayed
3. Enter current password
4. Enter new password
5. Confirm password
6. Click on **Reset**
   - Reset password confirmation message is displayed *Password changed successfully*
   - A notification e-mail will be sent to confirm the change of the password
6. Maintain Supplier Information

The following section describes how to maintain supplier information on the CSD.

6.1. Supplier Type Requirements

The supplier type requirements table outlines the different supplier types and supplier sub-types as well as the identification number and tax reference number that must be provided per supplier type.

The supplier type, supplier sub-type will be selected and identification type entered on the supplier identification section of the CSD. The tax reference number will be entered on the tax section of the CSD.

<table>
<thead>
<tr>
<th>Supplier Type</th>
<th>Supplier Sub-Type</th>
<th>Which ID type is required from the Supplier?</th>
<th>Which Tax number is required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>INDIVIDUAL</td>
<td>INDIVIDUAL</td>
<td>SA ID number or Foreign ID number or Foreign Passport number.</td>
<td>Income Tax Reference number if ID type is SA ID number.</td>
</tr>
<tr>
<td></td>
<td>SOLE PROPRIETORSHIP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier Type</td>
<td>Supplier Sub-Type</td>
<td>Which ID type is required from the Supplier?</td>
<td>Which Tax number is required?</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------</td>
<td>----------------------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>FOREIGN COMPANY</td>
<td>FOREIGN COMPANY</td>
<td>If a Foreign ID number or Foreign Passport number is provided then a Work Permit number must also be provided.</td>
<td>PAYE Reference number and VAT number is optional.</td>
</tr>
<tr>
<td>INTERVIVOS TRUST</td>
<td>INTERVIVOS TRUST</td>
<td>Foreign Company Registration number or International Securities Identification Number (ISIN).</td>
<td>Optional: PAYE Reference number or VAT number or Income Tax Reference Number</td>
</tr>
<tr>
<td>CIPC COMPANY</td>
<td>PUBLIC COMPANY (Ltd)</td>
<td></td>
<td>Income Tax Reference number of the trust</td>
</tr>
<tr>
<td></td>
<td>STATE OWNED COMPANY (SOC LTD)</td>
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</tr>
<tr>
<td></td>
<td>NON PROFIT COMPANY (NPC)</td>
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<td></td>
<td>PRIVATE COMPANIES (Pty)(Ltd)</td>
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<td></td>
<td>PERSONAL LIABILITIES COMPANIES (INC)</td>
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<td>TRANSVAAL ORDINANCE</td>
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<td></td>
<td>NON-PROFIT EXTERNAL COMPANY</td>
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<td>EXTERNAL COMPANY</td>
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<td>STATE OWNED ENTITY</td>
<td>PFMA SCHEDULE 1 - CONSTITUTIONAL INSTITUTIONS</td>
<td>None</td>
<td>PAYE Reference number or VAT number or Income Tax Reference Number.</td>
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<td></td>
<td>PFMA SCHEDULE 2 - MAJOR PUBLIC ENTITIES</td>
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<td>PFMA SCHEDULE 3A - NATIONAL PUBLIC ENTITIES</td>
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<td>PFMA SCHEDULE 3B - NATIONAL GOVERNMENT BUSINESS ENTERPRISES</td>
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<td>PFMA SCHEDULE 3C - PROVINCIAL PUBLIC ENTITIES</td>
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<td>PFMA SCHEDULE 3D - PROVINCIAL GOVERNMENT BUSINESS ENTERPRISES</td>
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<td>GOVERNMENT ENTITY</td>
<td>NATIONAL DEPARTMENT</td>
<td>None</td>
<td>PAYE Reference number or VAT number.</td>
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<td>DISTRICT MUNICIPALITY -LIMPOPO</td>
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<td></td>
<td>DISTRICT MUNICIPALITY -NORTHERN CAPE</td>
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<td></td>
<td>LOCAL MUNICIPALITY -GAUTENG</td>
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<td>LOCAL MUNICIPALITY -LIMPOPO</td>
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<td>LOCAL MUNICIPALITY -NORTH WEST</td>
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<td></td>
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<tr>
<td></td>
<td>LOCAL MUNICIPALITY -EASTERN CAPE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier Type</td>
<td>Supplier Sub-Type</td>
<td>Which ID type is required from the Supplier?</td>
<td>Which Tax number is required?</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------</td>
</tr>
<tr>
<td>LOCALMUNICIPALITY - WESTERN CAPE</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>LOCAL MUNICIPALITY - FREE STATE</td>
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<td></td>
</tr>
<tr>
<td>LOCAL MUNICIPALITY - NORTHERN CAPE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNINCORPORATED BODY OR PERSONS</td>
<td>PARTNERSHIP</td>
<td>SA ID number of main partner or International Securities Identification number (ISIN).</td>
<td>PAYE Reference number or VAT number.</td>
</tr>
<tr>
<td></td>
<td>STATUTORY BODY</td>
<td>SA ID number of main partner or International Securities Identification number (ISIN).</td>
<td>PAYE Reference number or VAT number or Income Tax Reference number.</td>
</tr>
<tr>
<td></td>
<td>JOINT VENTURES</td>
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<tr>
<td></td>
<td>CONSORTIUM</td>
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<td>VOLUNTARY ASSOCIATIONS</td>
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</tr>
<tr>
<td></td>
<td>RETIREMENT FUND</td>
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</tr>
</tbody>
</table>

### 6.2. Navigate My Suppliers

Suppliers are maintained in the **My Supplier** section of the CSD. Here suppliers can be added, edited, viewed, removed and supplier information submitted.

**Actions:**

1. **Log in** on the CSD
   - The user is navigated to the CSD landing page
2. Click on **My Suppliers**
   - The **Supplier List** screen will be displayed
3. Click on **Add supplier** to add a new supplier
4. Click on **Edit** to make changes to an existing supplier
5. Click on **View** to view the supplier information added
   - No changes can be made when in view mode
6. Click on **Remove** to remove supplier information.
   - A message will display: *Are you sure you would like to remove this supplier?*
   - Supplier information can only be removed if the information has not yet been submitted
6.3. Supplier identification information

Once the user is logged in to the CSD, the user can add, edit, view, remove and submit supplier information.

⚠️ When a new supplier is added, the user must first complete the supplier identification section before they can complete the other supplier information sections.

6.3.1. Add supplier identification for non-CIPC entity

Follow the below steps when adding the following supplier types (as per supplier type requirements table):
- Individual
- Foreign company
- Trust
- Unincorporated body of persons

**Actions:**

1. **Log in** on the CSD
2. Click on **My Suppliers**
3. Click on **Add supplier**
4. Select supplier type
5. Select supplier sub-type
6. Select identification type
7. Enter identification number
   - **WARNING:** If a foreign passport number or foreign ID number is entered then a work permit number must also be entered.
8. Enter legal name
9. Select country of origin
   - **WARNING:** If a South African ID number or SA Trust Registration number is selected as the identification type then the country of origin will default to South Africa and the field will not be editable.
10. Select industry classification
11. Select allow associates if you want to allow other CSD suppliers to associate themselves to this supplier
12. Click on **Save**
   - A message will display: *Supplier added successfully!*
   - The supplier request will be listed in the supplier list with a status of Created and a supplier reference number will be auto generated e.g. RAAA0000021.
Figure 30 – Add a supplier (non-CIPC)

Figure 31 – Supplier added successfully message
### 6.3.2. Edit supplier identification request for non-CIPC entity

**Actions:**

1. Click on **My Suppliers**
2. Click on **Edit** next to the supplier
3. The following fields can be edited if the supplier request has not been submitted:
   - Supplier type
   - Supplier sub-type
   - Identification number
   - Legal name
   - Industry classification
   - Allow associates
4. Click on **Save**
   - A message will display: *Supplier edited successfully!*
   - The supplier will be listed in the supplier list with a status of Created.
Figure 32 – Supplier edited successfully message

6.3.3. Add supplier identification for a CIPC company

Follow the below steps when adding a CIPC company (as per supplier type requirements table):

<table>
<thead>
<tr>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Log in on the CSD</td>
</tr>
<tr>
<td>2. Click on My Suppliers</td>
</tr>
<tr>
<td>3. Click on Add supplier</td>
</tr>
<tr>
<td>4. Select CIPC Company as supplier type</td>
</tr>
<tr>
<td>5. Select supplier sub-type</td>
</tr>
<tr>
<td>6. Enter South African / CC registration number</td>
</tr>
<tr>
<td>The country of origin will default to South Africa and the field will not be editable</td>
</tr>
<tr>
<td>7. Select industry classification</td>
</tr>
<tr>
<td>8. Select allow associates if you want to allow other CSD suppliers to associate themselves to this supplier</td>
</tr>
</tbody>
</table>
Actions:

9. Click on Save
   - A message will display: *Supplier added successfully!*
   - The supplier request will be listed in the supplier list with a status of Created and a supplier reference number will be auto generated e.g. RAAA000000022.

The **business registration and ownership information** of the CIPC company will **automatically be verified with CIPC**. The *Legal name, Trading name (if relevant), Business status and Registration date* will automatically be returned by CIPC and will display on the Supplier Identification screen. The ownership details e.g. director name, surname, identification number etc. will automatically be returned by CIPC and will display on the Ownership screen (refer to Ownership section of this document).

⚠️ **These fields are not editable** and the supplier should **contact CIPC directly** if any of the information is inaccurate.

---

**Figure 33 – Add CIPC Company**
6.3.4. Edit supplier identification request for CIPC company

**Actions:**

1. Click on **My Suppliers**
2. Click on **Edit** next to the supplier
3. The following fields can be edited on both a supplier request and when a supplier master record is created on submit:
   - Supplier type
   - Supplier sub-type
   - South African company / CC registration number
Actions:

- Industry classification
- Allow associates

4. Click on Save
   - A message will display: Supplier edited successfully!
   - The supplier will be listed in the supplier list with a status of Created.

Figure 35 – CIPC Company edited successfully message

6.3.5. Add supplier identification for state owned entity or government entity

Follow the below steps when adding a State Owned Entity (not registered at CIPC) or Government Entity (as per supplier type requirements table).
If a state owned entity is registered at CIPC then follow the maintain supplier identification for a CIPC company steps.

**Actions:**

1. **Log in** on the CSD
2. Click on **My Suppliers**
3. Click on **Add supplier**
4. Select supplier type
5. Select supplier sub-type
6. Select government breakdown
7. Select industry classification
8. Select allow associates if you want to allow other CSD suppliers to associate themselves to this supplier
9. Click on **Save**
   - A message will display: *Supplier added successfully!*
   - The supplier request will be listed in the supplier list with a status of Created and a supplier reference number will be auto generated e.g. RAAA0000023.

⚠️ The legal name will automatically be populated with the government breakdown selected and the field will not be editable. The country of origin will default to South Africa will not be editable.
Figure 36 – Add Government entity
6.3.6. Edit supplier identification request for state owned entity or government entity

**Actions:**

1. Click on **My Suppliers**
2. Click on **Edit** next to the supplier
3. The following fields can be edited if the supplier request has not been submitted:
   - Supplier type
   - Supplier sub-type
   - Identification number
   - Legal name
   - Country of origin
   - Industry classification
   - Allow associates
Actions:

4. Click on **Save**
   - A message will display: *Supplier edited successfully!*
   - The supplier will be listed in the supplier list with a status of Created.

![Add supplier RAAA0000047](image)

Figure 38 – Government entity edited successfully message
6.3.7. Submit identification information

**Actions:**

1. Click on **Overview** in the menu bar
2. Click on **Submit**
   - The submit button will only be enabled when all the required supplier information have been completed
   - A supplier number and unique supplier security code are auto-generated when a supplier master record is created

⚠️ If a non-CIPC company then the user can not edit the supplier type e.g. change the supplier type from Individual to Partnership. The user must create a new supplier.

The **business registration and ownership information** of the CIPC company will **automatically be verified with CIPC**. The Legal name, Trading name (if relevant), Business status and Registration date will automatically be returned by CIPC and will display on the Supplier Identification screen. The ownership details e.g. director name, surname, identification number etc. will automatically be returned by CIPC and will display on the Ownership screen (refer to Ownership section of this document).

These fields are **not editable** and the supplier should **contact CIPC directly** if any of the information is inaccurate.

6.4. Contacts information

This section outlines how the user can add, edit, view, remove and save contact information. A supplier can have multiple contacts of which one must be indicated as the preferred contact.

6.4.1. Add contact information

Follow the below steps when adding a contact:

**Actions:**

1. Click on **Contacts** in the menu bar
   - This will display the Contacts list.

⚠️ The contact that is logged in will automatically be linked to the new supplier as a contact because a supplier must have at least one contact. This user will default to the **Administration** contact type for the supplier.

2. Click on **Add Contact**

3. Enter E-mail address

⚠️ If the e-mail address already exist on the CSD, a message will display **The following contacts were found with the same e-mail address.** Click on **Use Contact** if you want to use an existing contact. The contact screen will be prepopulated with the existing contact’s information.
**Actions:**

4. Select *Is this your preferred contact?* if the contact is the supplier’s preferred contact

   There can be multiple contacts but only one preferred contact.

   If this option is selected and the contact is not a CSD user, then a message will display *A preferred contact must be a registered user. Do you want to create this contact as a user?* Select **OK** or **Cancel**. If the user selects **OK** then the ‘Do you want this contact to also be a CSD user?’ indicator is automatically checked. If the user selects **Cancel** then the preferred contact indicator will not be checked.

   If the preferred contact indicator is selected and another contact also has a preferred indicator then a message will display: *Another contact is already marked as the preferred contact and will automatically be changed to not preferred.*

5. Select identification type

6. Enter identification number

   If a foreign passport number or foreign ID number is entered then a work permit number must also be entered.

7. Enter name(s)

8. Enter surname

9. Select contact type

10. Select preferred communication method

   Multiple communication methods can be selected. The **default will be set as e-mail**. If a communication method is selected then the corresponding field must be entered e.g. if telephone is selected then the Telephone field must be entered.

   If Postal address is selected and a postal address does not exist for the supplier then a message will display: *No postal address exist for this supplier.*

11. Enter telephone number

12. Enter cellphone number

13. Enter fax number

14. Enter toll free number. This is an optional field.

15. Enter website address. This is an optional field.

16. Select **Do you want this contact to also be a CSD user?**

17. Click on **Save**
   
   - A message will display *Contact added successfully!*
Actions:

⚠️ If a user with the same e-mail address already exist then the existing user will be linked to the supplier contact. If no user exists with the contact’s e-mail address then a new user is created with the contact’s details and an activation e-mail with an activate account link and temporary password is sent to the new user. Once the user activates his/her account (receives OTP via SMS) the user will be prompted to enter the temporary password and create a new password. The new user is also created on the users list.

Figure 39 – Contact list
Figure 40 – Add Contact
Figure 41 – Add existing contact
Figure 42 – Preferred contact to be created as CSD user
Figure 43 – Another contact marked as preferred contact

Figure 44 – Contact added successfully
6.4.2. Edit contact information

Follow the below steps when making changes to a contact:

**Actions:**

1. Click on **My Suppliers**
2. Click on **Edit** next to the supplier on the Supplier List
3. Click on **Contacts** in the menu bar
4. All the contact information can be edited.
5. Click on **Save**
   - A message will display: Supplier edited successfully!
6.4.3. Submit contact

**Actions:**

1. Click on **Overview** in the menu bar
2. Click on **Submit**
   - The submit button will only be enabled when all the required supplier information have been completed

6.5. Address information

This section outlines how the user can add, edit, view, remove and save contact information. A supplier can have multiple addresses of which one must be indicated as the preferred address. At a minimum a supplier must have a physical and postal address.

6.5.1. Add address information

Follow the below steps when adding an address:

**Actions:**

1. Click on **Address** in the menu bar
   - This will display the Address list. The list will be empty if no addresses have been added alternatively it will list all addresses linked to a supplier.
Actions:

2. Click on **Add address**

3. Select **Address type**

4. Enter **Address Line 1**

   *If the physical address is selected as the address type then the address line cannot contain a PO Box or private bag in the text*

5. Enter **Address Line 2**
   - This is an optional field

6. Select **Country**

   *If a country other than South Africa is selected then the Province, District, Municipality, City, Suburb and Ward fields will not be displayed*

7. Select **Province**

8. Select **District**

9. Select **Municipality**

10. Select **City**

11. Select **Suburb**

12. Select **Ward**

13. Enter **Postal Code**

   *The postal code cannot be all zeros*

14. Select **Preferred address**

   *There must be one preferred address per supplier. If the preferred indicator is not selected, a message will display *There must be one preferred address*. If the preferred address indicator is selected and another address also have a preferred indicator then a message will display: *Another address is already marked as the preferred address and will automatically be changed to not preferred.**

15. Select the following if the address captured is the same as physical, postal, payment and or delivery address:
   - Is this address same as physical address?
   - Is this address same as postal address?
   - Is this address same as payment address?
   - Is this address same as delivery address?

16. Click on **Save**
Actions:

- A message will display *Address added successfully!*
Figure 48 – Add South African address
Figure 49 – Add Address other than South Africa

Figure 50 – Address saved successfully
6.5.2. Edit address information

Follow the below steps when making changes to an address:

**Actions:**

1. Click on My Suppliers
2. Click on Edit next to the supplier on the Supplier List
3. Click on Address in the menu bar
4. All the address information can be edited.
5. Click on Save
   - A message will display: Address saved successfully!

6.5.3. Submit address

**Actions:**

1. Click on Overview in the menu bar
2. Click on Submit
3. The submit button will only be enabled when all the required supplier information have been completed

6.6. Bank account information

This section outlines how the user can add, edit, view, remove and save bank account information. A supplier can have multiple bank accounts of which one must be indicated as the preferred bank account.
When a new bank account is added or any existing bank accounts are edited, an OTP will be sent to the preferred contact. A notification e-mail will be sent to the supplier’s preferred contact and the user making the changes when changes are made to the supplier’s banking information.

The bank account information will automatically be verified with the Basic Accounting System (BAS) of Government. The bank name and branch name will automatically be returned by the CSD and will display on the Bank Account list. These fields are not editable.

6.6.1. Add a new bank account

Follow the below steps when adding a bank account:

<table>
<thead>
<tr>
<th>Actions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click on <strong>Bank</strong> in the menu bar</td>
</tr>
<tr>
<td>- This will display the Bank Account List. The list will be empty if no bank accounts have been added alternatively it will list all bank accounts linked to a supplier.</td>
</tr>
<tr>
<td>2. Click on <strong>Add bank account</strong></td>
</tr>
<tr>
<td>3. Enter account holder</td>
</tr>
<tr>
<td>![warning]</td>
</tr>
<tr>
<td>Capture the account holder name as registered at the bank institution</td>
</tr>
<tr>
<td>4. Select the account type</td>
</tr>
<tr>
<td>5. Enter account number</td>
</tr>
<tr>
<td>6. Enter branch number</td>
</tr>
<tr>
<td>![warning]</td>
</tr>
<tr>
<td>The branch number can only contain numeric values and must be six digits. Leading zeros can be captured to have a number with six digits.</td>
</tr>
<tr>
<td>7. Click on <strong>Send OTP</strong></td>
</tr>
<tr>
<td>![warning]</td>
</tr>
<tr>
<td>A One Time Pin (OTP) is sent as an SMS to the cellphone number of the preferred contact.</td>
</tr>
<tr>
<td>8. Enter OTP</td>
</tr>
<tr>
<td>9. Click on <strong>OTP Submit</strong></td>
</tr>
<tr>
<td>- A message will display <em>Bank account saved successfully!</em></td>
</tr>
<tr>
<td>- An in use start date is automatically displayed. This field is not editable.</td>
</tr>
<tr>
<td>![success]</td>
</tr>
<tr>
<td>The bank account information will automatically be verified with the Basic Accounting System (BAS) of Government. The <strong>bank name</strong> and <strong>branch name</strong> will automatically be returned by the CSD and will display on the Bank Account list. These fields are not editable.</td>
</tr>
</tbody>
</table>

If the bank account details already exist then a message will display: *Bank details already exist.*

If the bank name or branch name is not correct a message will display *The information you have entered is incorrect.*

*Review and correct to continue.*
Figure 52 – Bank Account list

Figure 53 – Add bank account
6.6.2. Edit a bank account

Follow the below steps when making changes to a bank account:

**Actions:**

1. Click on **My Suppliers**
2. Click on **Edit** next to the supplier on the Supplier List
3. Click on **Bank** in the menu bar
4. The following fields can be edited if the supplier request has not been submitted:
   - Account holder
   - Account type
   - Account number
   - Branch number
5. Select account in use

⚠️ Only after the bank account information is successfully submitted can the user uncheck the account in use indicator. If it is the preferred bank account and the user attempts to remove the Account in use indicator then a message will display *The preferred account must be in use.*

If the user removes the account in use indicator then the account in use end date will automatically be populated by the system with the date the user removed the account in use indicator.
### Actions:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Select preferred account&lt;br&gt;⚠️ When <strong>adding more than one bank account</strong> to a supplier the user can change the preferred account indicator on a bank account. If the user selects the preferred bank account indicator and another bank account also has a preferred indicator then a message will display <em>Another bank account is already marked as the preferred account and will automatically be changed to not preferred.</em></td>
</tr>
<tr>
<td>7.</td>
<td>Click on <strong>Send OTP</strong>&lt;br&gt;A One Time Pin (OTP) is sent as an SMS to the cellphone number of the preferred contact.</td>
</tr>
<tr>
<td>8.</td>
<td>Enter OTP</td>
</tr>
<tr>
<td>9.</td>
<td>Click on <strong>Submit</strong>&lt;br&gt;The bank account information will <strong>automatically be verified</strong> with the Basic Accounting System (BAS) of Government. The <strong>bank name</strong> and <strong>branch name</strong> will automatically be <strong>returned</strong> by the CSD and will display on the Bank Account list. These fields are not editable. If the bank account details already exist then a message will display: <em>Bank details already exist.</em> If the bank name or branch name is not correct a message will display <em>The information you have entered is incorrect.</em> Review and correct to continue.</td>
</tr>
</tbody>
</table>
6.6.3. Submit bank account

Actions:

1. Click on **Overview** in the menu bar
2. Click on **Submit**
   - The submit button will only be enabled when all the required supplier information have been completed
   - The Account in use and Preferred account indicators will automatically be selected if it is the only bank account of the supplier

The bank account information will automatically be verified with the Basic Accounting System (BAS) of Government. The **bank name** and **branch name** will automatically be returned by the CSD and will display on the Bank Account list. These fields are not editable.
6.7. Tax information

This section outlines how the user can add, edit, view, remove and save supplier tax information.

The tax information will automatically be verified with SARS and a tax clearance status and tax clearance certificate date (if a valid tax clearance certificate) will be automatically be returned by SARS. These fields are not editable.

A notification e-mail will be sent to the supplier’s preferred contact when a supplier’s tax clearance status changes and when the tax clearance certificate is due to expire (if the supplier opted to be notified).

6.7.1. No tax clearance certificate

If a supplier does not have a valid tax clearance certificate then follow the following steps:

Actions:

1. Click on Tax in the menu bar
   - Do you have a valid tax clearance certificate is preselected
2. Unselect Do you have a valid tax clearance certificate
   - A message will display: Contact SARS to obtain a valid tax clearance certificate before award
3. Click on Save

Figure 56 – Tax screen where supplier does not have a valid tax clearance certificate
6.7.2. Add tax information

If a supplier has a valid tax clearance certificate then follow the following steps:

**Actions:**

1. Click on Tax in the menu bar
   - Do you have a valid tax clearance certificate is preselected

2. Enter tax reference number(s)

3. Select *Do you want to be notified prior to your tax clearance certificate expiry*
   - If the user selects this option, a notification e-mail will be sent to the supplier’s preferred contact 30 days, 7 days and 1 day before the tax clearance certificate expiry date.

4. Click on *Save*
   - A message will be displayed: *Supplier tax details added successfully!*

The tax information of the supplier will *automatically be verified with SARS*. The tax clearance certificate status and tax clearance certificate expiry date (if a valid tax clearance certificate) will automatically be returned by SARS and will display on the tax screen. These fields are *not editable* and the supplier should contact SARS *directly* if any of the information is inaccurate.

Once the tax information has been verified with SARS, the system will display the date the tax clearance certificate was verified with SARS. This field is not editable.
Figure 57 – Add Tax Screen where supplier does have a valid tax clearance certificate

6.7.3. Edit tax information

**Actions:**

1. Click on **Tax** in the menu bar
2. Click on **Edit**
3. The following fields can be edited:
   - Do you have a valid tax clearance certificate
   - Tax reference number
   - Do you want to be notified prior to your tax clearance certificate expiry
4. Click on **Save**
   - A message will be displayed: *Supplier tax details edited successfully!*

The **tax information** of the supplier will **automatically be verified with SARS**. The tax clearance certificate status and tax clearance certificate expiry date (if a valid tax clearance certificate) will automatically be returned by SARS and will display on the tax screen. These fields are **not editable** and the supplier should **contact SARS directly** if any of the information is inaccurate.

Once the tax information has been verified with SARS, the system will display the date the tax clearance certificate was verified with SARS. This field is not editable.
6.7.4. Submit tax

**Actions:**

1. Click on **Overview** in the menu bar
2. Click on **Submit**
   - The submit button will only be enabled when all the required supplier information have been completed

The **tax information** of the supplier will automatically be verified with SARS. The tax clearance certificate status and tax clearance certificate expiry date (if a valid tax clearance certificate) will automatically be returned by SARS and will display on the tax screen. These fields are not editable and the supplier should contact SARS directly if any of the information is inaccurate.

Once the tax information has been verified with SARS, the system will display the date the tax clearance certificate was verified with SARS. This field is not editable.

6.8. Ownership information

This section outlines how the user can add, edit, view, remove and save ownership information.

The ownership information of a CIPC company will automatically be verified with CIPC. The ownership details e.g. director name, surname, identification number, director type, director status and appointment date will automatically be returned by CIPC and will display on the Ownership screen. These fields are not editable.

6.8.1. Maintain ownership information of a non-CIPC entity

If the company is not registered at the CIPC then follow the following steps:

**Actions:**

1. Click on **Ownership** in the menu bar
   - This will display the Ownership List. The list will be empty if no ownerships have been added alternatively it will list all owners linked to a supplier.
   - Alternatively click on **Edit** next to the applicable supplier on the Supplier List and then click on **Ownership** in the menu bar.
2. Click on **Add Owner**
3. Select identification type
4. Enter identification number
   - If a foreign passport number or foreign ID number is entered then a work permit number must also be entered.
5. Enter country of origin
Actions:

⚠️ If a South African identification number was selected then the country will default to South African and not be editable. If a foreign identification number was selected then the user must select the country of origin.

6. Enter name(s)
7. Enter surname
8. Select the director type
9. Select the status
10. Select the appointment date
11. Click on Save
   - A message will display Supplier ownership added successfully! Or Supplier ownership edited successfully!

Figure 58 – Ownership list
Figure 59 – Add ownership for a supplier not registered on CIPC
6.8.2. View ownership information of a CIPC company

If the company is registered at the CIPC then follow the following steps to view ownership information automatically returned by CIPC:

**Actions:**

1. Click on **Ownership** in the menu bar
   - This will display the Ownership List. The list will be empty if no ownerships have been added alternatively it will list all owners linked to a supplier.
   - Alternatively click on **Edit** next to the applicable supplier on the Supplier List and then click on **Ownership** in the menu bar.

2. View the ownership information automatically returned by CIPC.

The **business registration and ownership information** of the CIPC company will **automatically be verified with CIPC** when the user clicks on **Save** on the Supplier Identification screen and again when the user
6.8.3. Submit ownership

**Actions:**

1. Click on **Overview** in the menu bar
2. Click on **Submit**
   - The submit button will only be enabled when all the required supplier information have been completed

The business registration and ownership information of the CIPC company will **automatically be verified with CIPC** when the user clicks on **Save** on the Supplier Identification screen and again when the user clicks on **Submit**. The ownership details e.g. director name, surname, identification number, director type, director status and appointment date will automatically be returned by CIPC and will display on the Ownership screen. These fields are **not editable** and the supplier should **contact CIPC directly** if any of the information is inaccurate.

6.9. Associations information

This section outlines how the user can maintain supplier association information. A supplier can have multiple associations. An association simply reflects that one supplier has a relationship with another and the type of association can be specified.

A supplier can only associate itself to another supplier that is registered on the CSD and have a master supplier number that start with an “M”.

6.9.1. Add association

**Actions:**

1. Click on **Associations** in the menu bar
   - This will display the Association List. The list will be empty if no associations have been added alternatively it will list all suppliers associated or pending association to a supplier.
2. Click on **Add Association**
3. Enter associate supplier number (supplier master number that starts with an “M”)
   - The associate supplier name will automatically be returned by the system.
4. Select what is the association
5. Click on **Save**
   - A message will be displayed: Association added successfully!
   - The association status will be Pending on the association list
Figure 61 – Association List

Figure 62 – Add Association
Figure 63 – Pending Association

6.9.2. Submit association

**Actions:**

1. Click on **Overview** in the menu bar
2. Click on **Submit**
   - The submit button will only be enabled when all the required supplier information have been completed
   - An e-mail notification will be sent to the supplier’s preferred contact that’s being associated with: *You have an association request for supplier XYZ. Please click on the link to accept/decline the association request.*
3. When the user clicks on the association e-mail link then the user is navigated to the log-in screen.

6.9.3. Approve / Decline association

**Actions:**

1. Click on **Associations** in the menu bar
   - This will display the Association List. The list will be empty if no associations have been added alternatively it will list all suppliers associated or pending association to a supplier.
2. Click on **Accept / Decline** in the association list
   - A message will display: *Are you sure you would like to accept this association? Or Are you sure you would like to decline this association?*
3. Click on **OK**
Actions:

- If the user clicked on **Accept** then an e-mail notification will be sent to the associated supplier’s preferred contact indicating that the association was accepted.
- If the user clicked on **Decline** then the system will automatically remove the association from both association lists and an e-mail notification will be sent to the associated supplier’s preferred contact indicating that the association was declined.

![Figure 64 – Accept / Decline Association](image)

**6.9.4. Disassociate association**

**Actions:**

1. Click on **Disassociations** in the association list
   - A message will display: *Are you sure you would like to disassociate?*
2. Click on **OK**
   - The system will automatically remove the association from both association lists and an email notification will be sent to the supplier’s primary user indicating the disassociation.
6.10. **Commodities**

This section outlines how the user can add, edit, view, remove and save commodity information.

6.10.1. **Add commodity information**

Follow the below steps when adding a commodity:

<table>
<thead>
<tr>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click on <strong>Commodity</strong> in the menu bar</td>
</tr>
<tr>
<td>- This will display the Commodity list. The list will be empty if no commodity groups have been added alternatively it will list all commodities linked to a supplier.</td>
</tr>
<tr>
<td>2. Click on <strong>Add Commodity</strong></td>
</tr>
<tr>
<td>3. Enter Name</td>
</tr>
<tr>
<td>4. Enter Description. This is an optional field.</td>
</tr>
<tr>
<td>5. Select Segment</td>
</tr>
<tr>
<td>6. Select Family</td>
</tr>
<tr>
<td><img src="https://via.placeholder.com/15" alt="Warning" /> A supplier can add and save multiple commodities however is limited to a maximum of five families.</td>
</tr>
<tr>
<td>7. Select Classes/ Commodities</td>
</tr>
<tr>
<td>8. Click on <strong>Add</strong></td>
</tr>
<tr>
<td>- The commodity selection will then be saved to the list below</td>
</tr>
</tbody>
</table>
**Actions:**

---

**Figure 66 – Commodity list**

**Figure 67 – Add Commodity**
6.10.2. Add location information

If a commodity location is **Nationwide** then follow the following steps:

**Actions:**

1. Click on **Save and Continue**
   - This will display the Location where the commodities can be delivered at. The default location for the commodity will be Nationwide.

2. Click on **Save**
   - A message will display `Supplier commodity details added successfully!`

If a commodity location is **Province wide** then follow the following steps:

**Actions:**

1. Click on **Save and Continue**
### Actions:

- This will display the Location where the commodities can be delivered at. The default location for the commodity will be Nationwide.

2. To add provinces to a commodity. Unselect **Nationwide**

3. Select Provinces

4. Click on **Save**
   - A message will display *Supplier commodity details added successfully!*

If a commodity location is **District wide** then follow the following steps:

### Actions:

5. Click on **Save and Continue**
   - This will display the Location options to add to the commodity. The default location for the commodity will be Nationwide.

6. Unselect **Nationwide**

7. Unselect **Province wide**

8. Select Province

9. Select District

10. Select Municipalities

11. Click on **Save**
   - A message will display *Supplier commodity details added successfully!*

---

### 6.10.3. Edit commodity group information

Follow the below steps when making changes to a commodity group:

### Actions:

1. Click on **My Suppliers**

2. Click on **Edit** next to the supplier on the Supplier List

3. Click on **Commodity** in the menu bar

4. All the commodity information can be edited.

5. Click on **Save**
   - A message will display: *Supplier commodity details edited successfully!*
6.10.4. Submit commodity

**Actions:**

1. Click on **Overview** in the menu bar
2. Click on **Submit**
   - The submit button will only be enabled when all the required supplier information have been completed

6.11. Maintain Users

Users or Contacts that are linked to a supplier must be maintained. To maintain users, select the edit option from the user list linked to the suppliers. It is also important to disassociate users that are no longer with the supplier to prevent security breach of actions on CSD.

6.11.1. View a list of all users

**Actions:**

1. Click on **My Suppliers**
2. Click on the **User** tab of the specific supplier
   - The system will display a list of users that are associated with the supplier
   - The only function that can be performed from here is the dis-association of users
3. Click on **Next** or **Back** to move to the next pages
6.11.2. **Dis-associate a user**

Because it is possible for a user to be associated with multiple suppliers, it could be required for a user to be dis-associated with a supplier.

**Actions:**

1. Click on **My Suppliers**

4. Click on the **User** tab of the specific supplier
   - The system will display a list of users that are associated with the supplier

2. Click on the **dis-associate** link in the list
   - A pop-up will be displayed to confirm the dis-association
   - Should the user decide to not continue with this action, click on **cancel** to cancel the action

3. Click on **OK**
   - The user will be dis-associated from the supplier and will no longer appear on the user list of the supplier
6.12. **Supplier Overview**

The Overview Screen provides the status of a supplier. The icons are hyperlinks and can be clicked to navigate the user to the relevant screen.

**Actions:**

1. **Click on Overview in the menu bar**
   - This will display three columns of information: an overview of the completion status of the supplier information, the verification status of the information verified with external systems e.g. SARS, CIPC etc. as well as key information
   - The **Completion Status** informs the supplier on the status of their information. The information will be either Completed, In Progress or Outstanding. Before the information is submitted, the Completion status will be In Progress, only when the supplier information is submitted, the Completion status will be updated to Completed.
   - The **Verification Status** informs the supplier on the status of the information that must be verified by external systems e.g. SARS, CIPC etc. The information will either be Successful, Retry or Failed.
   - The **Key Information** include business status, tax compliance status and bank account status
   - The icons are hyperlinks that navigates the user to the relevant supplier section
   - ![](danger) If the supplier has been flagged as a restricted supplier, tender defaulter or a finally deregistered supplier, an indicator will be displayed under the Key Information heading

2. **Click on Submit**
   - If submit is successful then a CSD supplier number and unique security code will be auto-generated
   - Refer to submit section of the document for details on submit action
6.13. **Edit a supplier master record**

When a supplier request is successfully submitted then a supplier master record is created. When the supplier master record is edited then a new supplier request is created.

**Actions:**

1. Click on **Edit** next to the supplier with a supplier number e.g. MAA000001

   - If a non-CIPC company then the user cannot edit the supplier type e.g. change the supplier type from Individual to Partnership. The user must create a new supplier.

2. Unselect **Is Supplier Active** indicator on identification tab
   - A message will display “Are you sure you want to continue? Organs of state will not be able to access your information and information that have not been submitted will not be processed.”

   - This indicator will only display on Edit if a supplier master record exist
     - A user can remove “Is Supplier Active?” indicator if the no longer want to do business with Government
7. Reports

7.1. Registration summary report

The purpose of the registration summary report is to provide a summary of verified supplier information and only displays supplier information that has been submitted and verified.

Actions:
1. Click on Reports on the menu bar
2. Click on Registration Summary
3. Enter a supplier number
4. Enter a supplier registration security code
5. Check the I am not a robot Captcha
6. Click on View Report
   - A registration summary report is generated with the supplier information.

7.2. Action log report

The purpose of the action log report is to indicate which user performed which action to any supplier of the logged in user and when (date and time) the action was performed. A user must be logged in to be able to view the action log report.

Actions:
1. Click on Reports on the menu bar
2. Click on Action Log
   - The action log report will run automatically and display all results using the current date as start and end dates
3. Unselect Null next to supplier number
   - User can filter the action log report by entering a specific supplier number
4. Unselect Null next to supplier reference number
   - User can filter the action log report by entering a specific supplier reference number
5. Unselect Null next to UserID
   - User can filter the action log report by entering a specific user id
6. Click on View Report
   - An action log report is generated with the supplier information.
8. Contact Details

Contact National Treasury for further clarity on the process on csd@treasury.gov.za or 012 315 5509.

9. Glossary of Descriptions

<table>
<thead>
<tr>
<th>Term / Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account type</td>
<td>The type of bank account held by a supplier, e.g. Savings, Cheque/Current, etc.</td>
</tr>
<tr>
<td>Address line</td>
<td>The location address e.g. Street, road name, name of building</td>
</tr>
<tr>
<td>Address list</td>
<td>The address list contains the address details of the supplier address(s).</td>
</tr>
<tr>
<td>Address type</td>
<td>The type of address e.g. Physical, postal etc.</td>
</tr>
<tr>
<td>Allow associations</td>
<td>Indicates if the supplier allows associations with other suppliers</td>
</tr>
<tr>
<td>Appointment Date</td>
<td>The date the director was appointed</td>
</tr>
<tr>
<td>Association status</td>
<td>The status of the association request e.g. pending or approved.</td>
</tr>
<tr>
<td>Bank account holder name</td>
<td>The name of the person / institution in whose name the bank account is registered</td>
</tr>
<tr>
<td>Bank account list</td>
<td>The bank account list contains the bank account details of the supplier bank account(s).</td>
</tr>
<tr>
<td>Bank account number</td>
<td>The account number of the supplier into which payments should be made</td>
</tr>
<tr>
<td>Bank branch name</td>
<td>The branch name of the bank where the supplier's bank account is held, e.g. Van Der Walt Street.</td>
</tr>
<tr>
<td>Bank branch number</td>
<td>The branch code of the bank where the supplier's bank account is held.</td>
</tr>
<tr>
<td>Bank name</td>
<td>This field indicates the name of the bank where the supplier’s bank account is held, e.g. Standard Bank SA.</td>
</tr>
<tr>
<td>Business Status</td>
<td>The status returned by CIPC indicating if the enterprise is in business</td>
</tr>
<tr>
<td>Cellphone Number</td>
<td>The mobile number of the contact</td>
</tr>
<tr>
<td>City</td>
<td>The city in which the address is located in</td>
</tr>
<tr>
<td>Closed Date</td>
<td>The date that the supplier request was closed and the supplier master was updated</td>
</tr>
<tr>
<td>Closed By</td>
<td>User ID of the system that closed the supplier request</td>
</tr>
<tr>
<td>Contact list</td>
<td>The contact list contains the contact details of the supplier contacts.</td>
</tr>
<tr>
<td>Contact Type</td>
<td>The type of contact e.g. Sales, Administration, Finance</td>
</tr>
<tr>
<td>Country</td>
<td>User must enter their country of origin</td>
</tr>
<tr>
<td>Country of origin</td>
<td>The country that supplied the identification document</td>
</tr>
<tr>
<td>Created Date</td>
<td>The date the supplier request was created</td>
</tr>
<tr>
<td>Created By</td>
<td>The user that created the supplier request</td>
</tr>
<tr>
<td>Delivery address same as physical address</td>
<td>Indicates that the delivery address is the same as the physical address. The delivery address is used to indicate to the supplier or external store where the items must be delivered to.</td>
</tr>
<tr>
<td>Director type</td>
<td>The type of director e.g. Director Member, Founder etc.</td>
</tr>
<tr>
<td>Do you have a tax clearance certificate?</td>
<td>Indicates if supplier is registered at SARS for tax</td>
</tr>
<tr>
<td>E-mail address</td>
<td>This field displays the contact e-mail address</td>
</tr>
<tr>
<td>Fax number</td>
<td>The contact facsimile number</td>
</tr>
<tr>
<td>Foreign company registration number</td>
<td>The registered number of a foreign entity on CIPC</td>
</tr>
<tr>
<td>Foreign ID number</td>
<td>A national identification number issued to citizens who are outside of South Africa appearing on an identity document issued by a country which is outside of South Africa</td>
</tr>
<tr>
<td>Term / Abbreviation</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Foreign passport number</td>
<td>An identification number in a passport is a travel document, usually issued by the government of a nation that certifies the identity and nationality of its holder for the purpose of international travel</td>
</tr>
<tr>
<td>Foreign trust registration number</td>
<td>The Trust registration number of a foreign entity</td>
</tr>
<tr>
<td>Government breakdown</td>
<td>Applicable to entities which are national provincial/ local government excluding parastatals and universities</td>
</tr>
<tr>
<td>ID Type</td>
<td>The type of identification that uniquely identifies the entity</td>
</tr>
<tr>
<td>Identification Number</td>
<td>Dependent on the ID type the user selects i.e. SA ID Number or Foreign Passport Number</td>
</tr>
<tr>
<td>In use end date</td>
<td>Indicates the date of when the bank account was in use to</td>
</tr>
<tr>
<td>In use start date</td>
<td>Indicates the date of when the bank account was in use from</td>
</tr>
<tr>
<td>Income tax number</td>
<td>The number issued by SARS for entities who are eligible to pay income tax</td>
</tr>
<tr>
<td>Internal identification number</td>
<td>The internal identification number is the unique supplier number or the supplier reference number</td>
</tr>
<tr>
<td>International securities identification number (ISIN)</td>
<td>An International Securities Identification Number (ISIN) uniquely identifies a security. Securities for which ISINs are issued include bonds, commercial paper, stocks and warrants.</td>
</tr>
<tr>
<td>Is supplier active?</td>
<td>Indicates whether the Supplier in the Supplier Master is currently open to doing business with Government</td>
</tr>
<tr>
<td>Is the bank account in use?</td>
<td>Indicates if the bank account is in use or not</td>
</tr>
<tr>
<td>Do you want this contact to also be a CSD user?</td>
<td>Indicates if the contact must also be created as a CSD user</td>
</tr>
<tr>
<td>Is this the preferred account?</td>
<td>To indicate the primary bank account for transactions</td>
</tr>
<tr>
<td>Is this your preferred contact?</td>
<td>Used to indicate if a contact is the preferred and therefore the primary contact</td>
</tr>
<tr>
<td>Last verification date</td>
<td>The latest date that the tax clearance status was verified with SARS</td>
</tr>
<tr>
<td>Legal name</td>
<td>The registered name of the entity on an legal document</td>
</tr>
<tr>
<td>Municipality</td>
<td>The municipal district of which the address is located in</td>
</tr>
<tr>
<td>Name(s)</td>
<td>The given name of the contact person</td>
</tr>
<tr>
<td>Next verification date</td>
<td>The date that the tax clearance status should be verified with SARS</td>
</tr>
<tr>
<td>OTP</td>
<td>One time pin sent to a user per SMS</td>
</tr>
<tr>
<td>PAYE number</td>
<td>The number issued by SARS for entities who are eligible to pay PAYE tax</td>
</tr>
<tr>
<td>Payment address same as physical address</td>
<td>Indicates that the payment address is the same as the physical address. The payment address field indicates the supplier’s address to where the payment must be sent. This address will be print on all payment advices.</td>
</tr>
<tr>
<td>Postal address same as physical address</td>
<td>Indicate that the postal address is the same as the physical address. The postal address indicates the supplier’s post box number that must be used when posting the printed orders to the supplier.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Retrieved from SAPO stating the area code of the suburb</td>
</tr>
<tr>
<td>Preferred address?</td>
<td>The preferred and therefore the primary address</td>
</tr>
<tr>
<td>Preferred Communication Method</td>
<td>The method/s of communication the user prefers to be used when they are contacted e.g. e-mail, cellphone etc.</td>
</tr>
<tr>
<td>Province</td>
<td>The province of the address line e.g. Gauteng, North West, Western Cape etc.</td>
</tr>
<tr>
<td>Registration date</td>
<td>The date the entity was registered at CIPC</td>
</tr>
<tr>
<td>SA Company/CC Registration number</td>
<td>The registration number of the entity on CIPC (Formally known CIPRO)</td>
</tr>
<tr>
<td>SA ID number</td>
<td>The identification number allocated to the delegated official on his identity document (issued by department of Home Affairs)</td>
</tr>
<tr>
<td>SA trust registration number</td>
<td>The South African registration number of a Trust issued by the Master of the High court</td>
</tr>
<tr>
<td>Status (Director)</td>
<td>The status of the director e.g. active, deceased etc.</td>
</tr>
<tr>
<td>Term / Abbreviation</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Submitted Date</td>
<td>The date that the supplier request was submitted</td>
</tr>
<tr>
<td>Submitted By</td>
<td>The user who submitted the supplier request</td>
</tr>
<tr>
<td>Suburb</td>
<td>The suburb the address is situated in</td>
</tr>
<tr>
<td>Supplier</td>
<td>A supplier is an entity that supplies goods or services to government. Therefore the supplier will be at the level where the goods and services are provided. CSD caters for all the scenarios.</td>
</tr>
<tr>
<td>Supplier inactive date</td>
<td>The date indicating when the Supplier became inactive</td>
</tr>
<tr>
<td>Supplier inactive reason</td>
<td>The reason the Supplier is inactive</td>
</tr>
<tr>
<td>Supplier list</td>
<td>The supplier list contains the supplier requests and/or supplier master records in its final state.</td>
</tr>
<tr>
<td>Supplier name (of Associate)</td>
<td>The Legal name of the supplier that another supplier is associated with</td>
</tr>
<tr>
<td>Supplier number</td>
<td>The unique number of the supplier registered on the CSD</td>
</tr>
<tr>
<td>Supplier number (of Associate)</td>
<td>The unique supplier number of the supplier that another supplier is related to</td>
</tr>
<tr>
<td>Supplier reference number</td>
<td>The unique supplier reference number when a Supplier Request is in a “Created” status</td>
</tr>
<tr>
<td>Supplier request state</td>
<td>The state that describes the conditions that the Supplier Request passes through e.g. created, submitted, approved, authorised and closed</td>
</tr>
<tr>
<td>Supplier sub-type</td>
<td>The sub-grouping for suppliers based on the ownership and registration</td>
</tr>
<tr>
<td>Supplier type</td>
<td>A grouping for suppliers based on the ownership and registration</td>
</tr>
<tr>
<td>Surname</td>
<td>The surname/ last name of the contact person</td>
</tr>
<tr>
<td>Tax clearance certificate status</td>
<td>Confirmation from SARS whether a supplier’s tax affairs are in order or not</td>
</tr>
<tr>
<td>Telephone Number</td>
<td>The contact landline number</td>
</tr>
<tr>
<td>Toll free number</td>
<td>The toll-free number of the supplier</td>
</tr>
<tr>
<td>Trading name</td>
<td>The name that the entity trades under</td>
</tr>
<tr>
<td>VAT number</td>
<td>The number issued by SARS for entities This field indicates the VAT (Value Added Tax) number of the supplier. Some companies do not have VAT numbers thus this field may be left blank.</td>
</tr>
<tr>
<td>Website address</td>
<td>The website of the supplier</td>
</tr>
<tr>
<td>What is the association</td>
<td>Describes the type of relationship between suppliers e.g. Head Office/Branch, Consortium etc.</td>
</tr>
<tr>
<td>Work permit number</td>
<td>The number issued to a citizen to grant permission to work in a country</td>
</tr>
<tr>
<td>You are not registered at CIPC, please complete the following information</td>
<td>A label describing informing the supplier that they are not a CIPC registered entity which requires them to complete ownership information</td>
</tr>
</tbody>
</table>