

## Texas SmartBuy Membership Program Application User Guide



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## Texas SmartBuy Membership Program Application User Guide

Welcome to the Texas SmartBuy Membership Program Application! This guide allows the new and existing SmartBuy members the opportunity to pay online and access their account through the SmartBuy Application portal on TxSmartbuy.com.

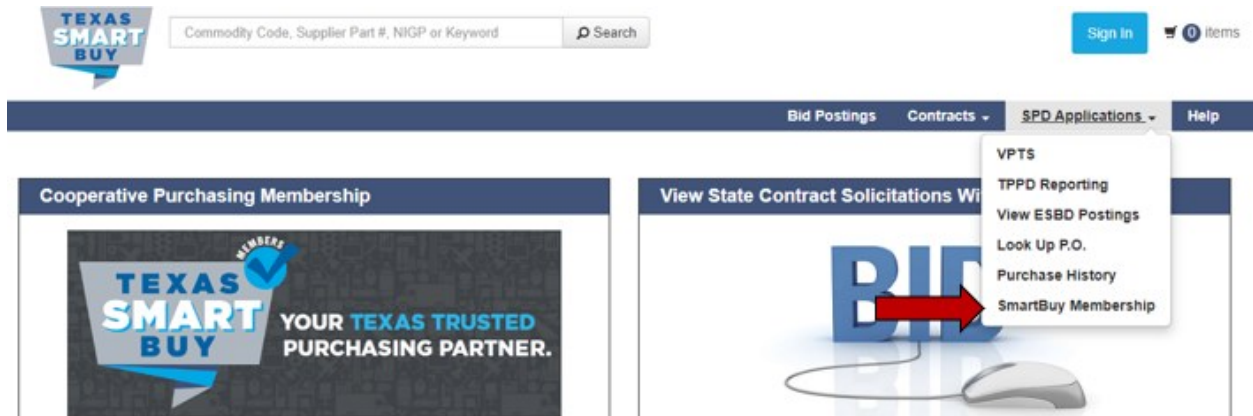
This user guide contains instructions and screenshots demonstrating how to apply for a new membership, renew your membership, pay online, updating information, uploading documents, and more! Underlined blue text found throughout this guide are links to different sections and external resources. To quickly go to a section, click on the underlined text. External resources will be opened in your default browser.

**Note:** Google Chrome and Microsoft Edge are the preferred browsers for TxSmartBuy.com, other browsers are not recommended.

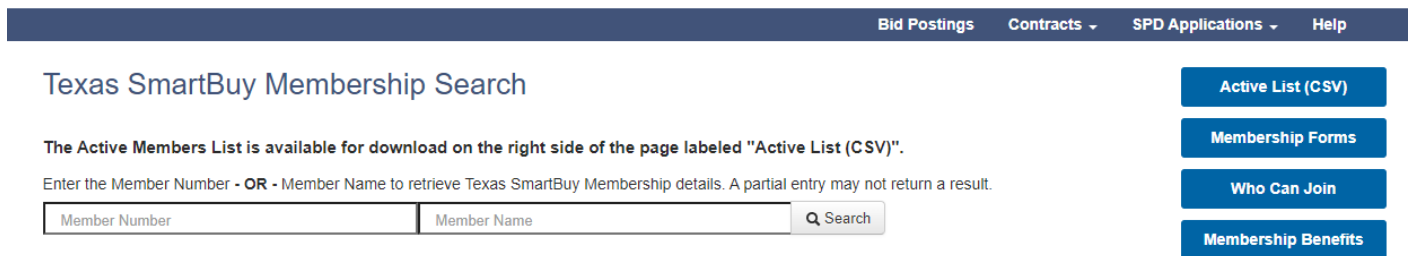
The Texas Smartbuy Membership Program Application is located on the Texas SmartBuy Website under the SPD Applications dropdown tab. Users should contact their [account superuser\(s\)](#) to provide access to the application, or contact the SPD Membership team by email at [members@cpa.texas.gov](mailto:members@cpa.texas.gov) or phone at 512-463-3368.

## Member Search

To get to the Member Search go to the TxSmartBuy Home page, then navigate to the SPD Applications dropdown. Within this drop down, you will select SmartBuy Membership.



After arriving at the Texas SmartBuy membership search page, you will see several options.



Here you can type in your member number (if applicable) or your member name. When entering your member name, ensure you type out the name completely or you may not receive results. Also, be sure to try several different variations of your organizations name to ensure a proper search.

Example – “City of Austin” compared to “City Austin” **Before applying for a membership, please search for your organization first.** Your organization may be registered.

## Texas SmartBuy Membership Search

Enter the Member Number - **OR** - Member Name to retrieve Texas SmartBuy Membership details. A partial entry may not return a result.

Member Number	City of Austin	Search
---------------	----------------	--------

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

After the results appear, select the correct member number on the left-hand side to take you to your organization's home page. (See M2270 in the member number column below)

#### Texas SmartBuy Membership Search

The Active Members List is available for download on the right side of the page labeled "Active List (CSV)".

Enter the Member Number - OR - Member Name to retrieve Texas SmartBuy Membership details. A partial entry may not return a result.

Member Number	Member Name	Q Search
---------------	-------------	----------

Click on the member number to view the membership details. [Are none of these you? Register now.](#)

Member Number	Member Name	Initial Membership Date	Effective Date	Expiration Date
M2270	CITY OF AUSTIN	10/23/1991	9/23/2022	9/23/2023
K0003	CITY OF AUSTIN EMPLOYEES RETIRE SYSTEM	2/24/2003	7/15/2019	7/15/2020

[Active List \(CSV\)](#)[Membership Forms](#)[Who Can Join](#)[Membership Benefits](#)

If your organization did not appear in the search results, click **"Are none of these you? Register now."** link. Then, follow the steps in the registration process.

#### Texas SmartBuy Membership Search

The Active Members List is available for download on the right side of the page labeled "Active List (CSV)".

Enter the Member Number - OR - Member Name to retrieve Texas SmartBuy Membership details. A partial entry may not return a result.

Member Number	Member Name	Q Search
---------------	-------------	----------

Click on the member number to view the membership details. [Are none of these you? Register now.](#)

Member Number	Member Name	Initial Membership Date	Effective Date	Expiration Date
M2270	CITY OF AUSTIN	10/23/1991	9/23/2022	9/23/2023
K0003	CITY OF AUSTIN EMPLOYEES RETIRE SYSTEM	2/24/2003	7/15/2019	7/15/2020

[Active List \(CSV\)](#)[Membership Forms](#)[Who Can Join](#)[Membership Benefits](#)

If your organization did not appear in any search results, click **"No results found, register now"** link. Then, follow the steps in the registration process.

#### Texas SmartBuy Membership Search

Enter the Member Number - OR - Member Name to retrieve Texas SmartBuy Membership details. A partial entry may not return a result.

Member Number	Member Name	Q Search
---------------	-------------	----------

[No Results Found, register now](#)

On this page, you can also download the full Active Members list in CSV file format. You can click membership registration to start the process of becoming a member. Membership forms

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

will take you to a page containing all required documents necessary for becoming a member and the agent of record name change form. The “Who Can Join” page details the type of organizations that can become members. Finally, the “Membership Benefits” page details how utilizing statewide contacts can save your organization money.

## Membership Application

---

### Step 1 – Organization’s Information

Provide the full name of your organization as this will be the name on file in our system. Look through the list of approved entity types and select the option that matches your organization. If you do not find a match, your organization may be ineligible for membership. You may contact us at [members@cpa.texas.gov](mailto:members@cpa.texas.gov) to verify.

Next, provide the address for your main location. If your organization has multiple offices, provide the primary office's address. We require you to provide the phone number of your organization; this is the phone number the general public may use to contact your organization. The fax number is optional.

The screenshot shows a web form titled "Texas Smartbuy Membership Application". Below the title is a section header "Organization". The form contains the following fields:

- \*Organization Name: [Text input field]
- \*Entity Type: [Dropdown menu]
- \*Address: [Text input field]
- Address Line 2: [Text input field]
- \*City: [Text input field]
- \*State: [Dropdown menu with "-- select an option --"]
- \*Zip: [Text input field]
- \*Phone Number: [Text input field with placeholder "1231231234"]
- Fax Number: [Text input field with placeholder "1231231234"]

### Step 2 – Contact’s Information

In order to process your application, we need a primary and secondary contact. The contacts are for administrative purposes. Please list TWO individuals who will receive all correspondence from CPA.

We require the primary and secondary contact’s name, title, and an email address to receive membership application status emails.

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A shared email and phone number are not required but strongly recommended. This number will help us contact your organization if the primary or secondary contacts are unavailable.

**Contacts**

\*Primary Contact Name:

\*Primary Contact Title:

\*Primary Contact Email:

\*Secondary Contact Name:

\*Secondary Contact Title:

\*Secondary Contact Email:

Shared Email:

SharedTeam@example.gov

Shared Phone Number:

1231231234

### Step 3 – Superuser’s Information

Provide a contact to act as a Superuser for your organization. This can be the primary contact, secondary contact, or a third person. The Superuser will be responsible for your organization's access to TxSmartBuy.

For more information on the role of a Superuser, see our guide in the [Help](#) section.

To create a Superuser account, enter their first name, last name, email address, phone number, and role. Superusers with the "Agency View Only" role can view TxSmartBuy and create carts; however, they cannot take the next step of purchasing. Superusers with the "Agency Purchaser" role can create a purchase order within TxSmartBuy.

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

Verify all information is accurate, then click **“Submit Application”**.

#### Texas SmartBuy Superuser

\*First Name:

\*Last Name:

\*Email:

\*Phone Number:

\*Role:

-- select an option --

Submit Application

## Uploading Required Documents

To submit forms, you must be logged into Texas Smartbuy and be listed as either the primary or secondary contact.

1. Primary or Secondary Contact will sign into **TxSmartBuy.com**.
2. Select **“Membership Program”** within the My Account tab.

### My Account

Overview

Update Your Password

Update Your Security Questions

Membership Program

### My Settings

Profile

MTCTest@test.com

(555) 555-5555

### Welcome to the Portal

#### Announcements Section

Home

### Main Announcement Page

Google Chrome is the preferred browser for Texas SmartBuy.

Users may experience page loading issues in other browsers.

If refreshing pages does not work, please contact Texas SmartBuy Support at:  
[spd.outreach@cpa.texas.gov](mailto:spd.outreach@cpa.texas.gov)



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The next step is to add your [document\(s\) required for proof of eligibility](#). For forms and documents, please view the Membership Form section. Save the documents to your computer so they can be found for upload.

Document(s) required for proof of eligibility are mandatory for new and existing accounts. Assistance Organizations must submit a current contract or grant from a state agency to prove state funding yearly before the \$100 payment can be submitted. All documentation must be on file with the Texas SmartBuy Membership Program before a determination of eligibility can be made.

### Step 1 – Submit Forms

Select **Submit Forms** to add documents.

#### Membership Details

##### Primary Information:

Member Number: P2067

Member Category: P - Appraisal Districts

Travel Member: Yes

Update Information

##### Organization:

Organization Name: KC Pending Test

Address: 123 KCP Loop

Address Line 2: -

City: Austin

State: Texas

Zip: 78774

Phone Number: (512) 586-5128

Fax Number:

##### Contacts:

Primary Contact Name: KC Pending

Submit Forms

Currently, there are no restricted file types. Files should be uploaded in a format that is generally accepted as the standard. For example, Word documents normally have the docx file extension (Specifications.docx), PDF documents normally have the pdf file extension (Specifications.pdf), and Excel documents normally have the.xlsx file extension (Specifications.xlsx).

After the “**Submit Forms**” button is selected, a new window will be opened that prompts the user to enter the number of files to be uploaded.

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### Statewide Procurement Division

#### Step 2 – Add Files

Select the number of files you'd like to upload then select Next.

#### File(s) Upload System

STEPS

1 Number of Files


2 Upload File on the File Cabinet

### Number of Files

Please select how many files you need to upload

Files Number

Cancel

< 

Next >

#### Step 3 – Uploading Files

You will have as many file and description pairs as the number of files selected in Step 2. Save all files to your computer first.

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

#### File(s) Upload System

STEPS

- 1 Number of Files
- 2 Upload File on the File Cabinet

Upload File on the File Cabinet

Select the file(s) you want to upload

\* Select File 1  No file chosen

\* Description 1

\* Select File 2  No file chosen

\* Description 2

Next, select Choose File to add a file to each numbered area. This will prompt your computer to open the file explorer on your system. Then search and select the desired file. Only one document per Choose File button is allowed. Repeat the process until all files are uploaded. If a file is not uploaded successfully, the field next to Choose File will say “No file chosen”. Every file needs to include a description. This can include the file type or the file contents.

<input type="checkbox"/>	Name	Date modified	Type	Size
▼	Today (1)			
	name-change-form (26).pdf	5/10/2023 10:09 AM	Microsoft Edge PDF ...	144 KB
▼	Earlier this week (2)			
	required-documents (20).pdf	5/8/2023 3:29 PM	Microsoft Edge PDF ...	96 KB
	name-change-form (25).pdf	5/8/2023 10:06 AM	Microsoft Edge PDF ...	144 KB
▼	Last week (15)			
	resolution (21).pdf	5/5/2023 2:32 PM	Microsoft Edge PDF ...	128 KB
	f4317af9-765d-415c-84ec-2faf7c25467c.PNG	5/5/2023 12:53 PM	PNG File	160 KB
	name-change-form (24).pdf	5/5/2023 12:26 PM	Microsoft Edge PDF ...	144 KB
	SmartBuy Member Superuser Guide 2_3_202...	5/5/2023 11:27 AM	Microsoft Edge PDF ...	836 KB
	MembershipActiveList(CSV)Export (27).csv	5/4/2023 12:54 PM	Microsoft Excel Com...	546 KB

Select “**Finish**” after files and descriptions have been completed.

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

**File(s) Upload System**

STEPS

- ✓ 1 Number of Files
- 2 Upload File on the File Cabinet

**Upload File on the File Cabinet**  
Select the file(s) you want to upload

\* Select File 1  required-documents.doc

\* Description 1 Agent of Record Name Change form

Select File 2  resolution (13).pdf

\* Description 2 resolution

You will be prompted to close this window when the file upload is complete. Only close the File(s) Upload System window once you see the prompt below, not the browser window of TxSmartBuy.com. If the TxSmartBuy.com browser window is closed, progress in the TSBM application may be lost and will require you to login again to resubmit documents.

File(s) Upload System - Google Chrome

852252-sb2.secure.netsuite.com/app/site/hosting/scriptlet.nl?script=203&deploy=3&compid=852252\_SB2&whence=

**File(s) Upload System**

STEPS

- ✓ 1 Number of Files
- ✓ 2 Upload File on the File Cabinet

**Finished**  
Upload Finished. You may now close this window

Once the files are uploaded, a notification will be sent to the Statewide Procurement Division (SPD). After the documents have been reviewed by SPD, an email notification will be sent to the primary and secondary contact on file with the application/renewal status.

## Making a Payment

Whether your submitted documents have just been approved or you are an existing member ready to renew, the step to pay your annual fee of \$100 are the same.

To submit a payment, you must be logged into Texas Smartbuy and be listed as either the primary or secondary contact.

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If you are becoming a member for the first time, you will not be able to submit a payment until you have uploaded all required documents. Those documents will be reviewed and approved by the Statewide Procurement Division (SPD).

When on the Member Details page, a Submit Payment button will appear on the right-hand side of the screen. Select this button and you will be taken to a page that provides two options for payment. The preferred method of payment is by credit card as you can become an active member almost instantly, whereas paying by check can take up to two weeks.

[Home](#) / [My Account](#) / [Membership](#)

## My Account

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Purchase Requisitions
- Purchase Orders
- Favorite Orders
- Membership Program**

## My Settings

## Membership Details

**Primary Information:**

**Member Number:** F2065

**Member Category:** F - Fire Prevention Districts

**Travel Member:** Yes

**Organization:**


**Organization Name:** TH Test

**Address:** 123 street drive

**Address Line 2:**

**City:** Austin

[Update Information](#)

 [Submit Payment](#)

[Submit Forms](#)

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

Click the radial button to pay by credit card and select the **“Next”** button.

#### Pay Membership Fee:

##### Activate Your Membership Account

The annual membership fee for participation in the Texas SmartBuy Membership program is: \$100.00 - FEE IS NON-REFUNDABLE

##### Select Payment Type:

- ☐ Credit Card 
- ☐ Pay By Mail - Takes XXX amount of days to process



On the following page, select **“Submit”**.


#### Pay Membership Fee:

##### Credit Card Verification

- Credit Card Payment Amount \$100.00
- Please note by selecting the Submit button, you will be directed to the secure credit card processing site to make a credit card payment.



You will now be directed to the NIC Credit Card Payment portal. On this page, you will need to fill all information for you organization here. If any data is prepopulated, double check that this information is correct. Then select **“Next”**.




1 Payment Type

2 Customer Info

3 Payment

4 Submit Payment


## Payment

Payment Type 

Credit/Debit Card

Customer Information

Complete all required fields [ \* ]

Country \*  
United States 


First Name \*  
  
First name is missing.

Last Name \*

Address \*



Address 2


City \*  
Austin

State \*  
TX - Texas 

ZIP/Postal Code \*

Phone Number \*

Email   
 



Next >

Payment Information

## Texas Comptroller of Public Accounts

### Statewide Procurement Division


On the following page, you will enter your organizations credit card information. Then select **“Next”**.

The screenshot shows a web form for entering credit card information. The form is divided into several sections:   
1. **Payment Type**: A grey header bar with a green checkmark icon on the right.   
2. **Credit/Debit Card**: A large section title in the center.   
3. **Customer Information**: A grey header bar with a green checkmark icon on the right. Below it, there is an **Edit** button.   
4. **Address**: Fields for John Doe, 123 test drive, -, and Austin, TX 78774.   
5. **Phone Number**: Field for 555-555-5555.   
6. **Country**: Field for United States.   
7. **Email Address**: Field for TeasCoop@test.com.   
8. **Payment Information**: A grey header bar. Below it, there is a note: "Complete all required fields [ \* ]".   
9. **Credit Card Number \***: A text input field with a help icon.   
10. **Credit Card Type**: A section with logos for MasterCard, VISA, DISCOVER, and AMERICAN EXPRESS.   
11. **Expiration Month \***: A dropdown menu with "Select a Month".   
12. **Expiration Year \***: A dropdown menu with "Select a Year".   
13. **Security Code \***: A text input field with a help icon.   
14. **Name on Credit Card \***: A text input field.   
15. **Next >**: A green button with a red arrow pointing to it from the left.   
16. **Cancel**: A grey button at the bottom left.

User will complete system verification and select **“Submit Payment”**.



**Texas Comptroller of Public Accounts**  
Statewide Procurement Division



1 Payment Type

2 Customer Info

3 Payment

4 Submit Payment

Payment

Payment Type

Credit/Debit Card

Customer Information

Address

Jane Doe  
MCT Test Drive  
Bastrop, TX 78222

Phone Number

555-555-5555

Country

United States

Email Address

MCTTest@test.com

Payment Information

Credit Card


MasterCard \*\*\*\*5637  
Exp. 08/2036

Name on Credit Card


Jane Doe

Verification

☒ I'm not a robot

  
reCAPTCHA  
Privacy - Terms

Cancel



Submit Payment

Transaction Summary

CPA SPD Membership	\$100.00
Texas.gov Price	\$100.00

Need Help?  
Review payment information. You may edit Billing and Payment Method here if needed. When complete, select Submit Payment. You will receive a printable receipt at the end of your successful payment transaction.

The user will be redirected back to TxSmartbuy.com. Please allow 30 minutes for our system to receive the payment details from NIC. If your organization is new to the program, the Membership Details page will show your membership expiration date. Existing members will gain a year to their expiration date.

If you are a new member, the person you entered as the Superuser will be able to login and grant others at your organization the ability to create purchase orders though TxSmartBuy! For additional details, please see the Super User Guide at <https://www.txsmartbuy.com/help>

## Texas SmartBuy Membership Renewal

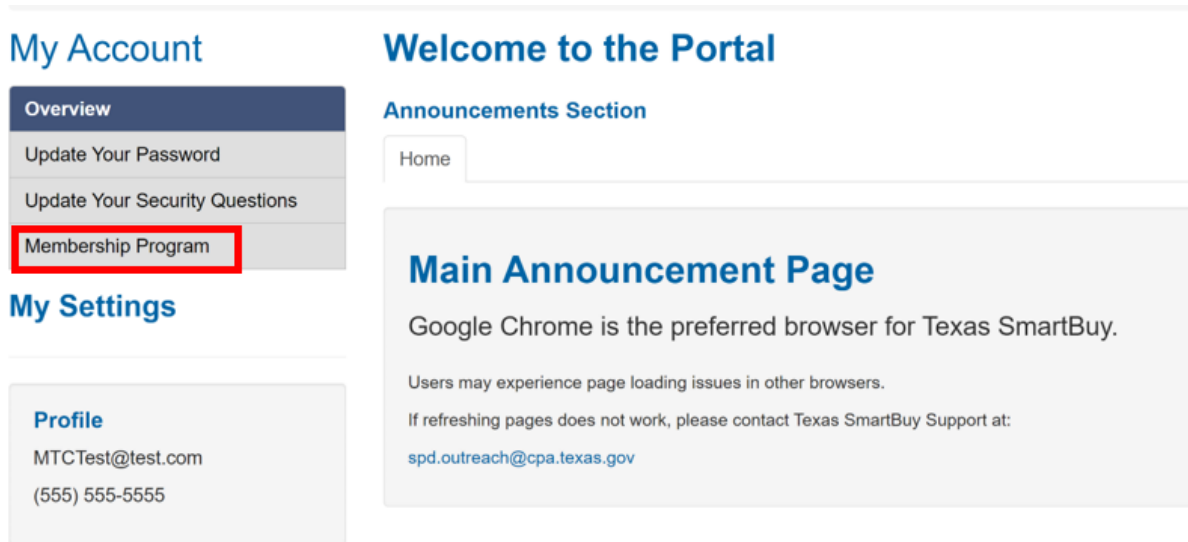
Each qualified organization must pay an annual membership fee of \$100. The membership fee is non-refundable and must be paid yearly to keep the membership in good standing.

Active and participating Texas SmartBuy Members can submit payment 60 days prior to their expiration date to renew their Texas SmartBuy Membership. Any organization who lapses in payment, can re-activate their account by submitting the annual membership fee on **TxSmartBuy.com**. If the organization is expired more than 2 years, a new board resolution and other documents required for eligibility must be submitted before an organization can submit the membership payment online.

**\*Note: All Assistance Organizations are required to submit a current contract or grant from a state agency to prove state funding. Contract or grant must show beginning and end dates for the current state of Texas fiscal year.**

### How to renew membership with credit card

1. Primary or Secondary Contact will sign into **TxSmartBuy.com**.
2. Select “**Membership Program**” within the My Account tab.



3. From the Membership Details screen, click “**Submit Payment**”.

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

#### My Account

- Overview
- Update Your Password
- Update Your Security Questions
- Membership Program**

#### My Settings

##### Profile

MTCTest@test.com  
(555) 555-5555

#### Membership Details

##### Primary Information:

Member Number: L2077  
Member Category: L - Library Districts  
Travel Member: Yes

[Update Information](#)

##### Organization:

Organization Name: MTC Test  
Address: MCT Test Drive  
Address Line 2:  
City: Waco  
State: Texas  
Zip: 78222

[Submit Payment](#)[Submit Forms](#)

- Click the radial button to pay by credit card payment type and then “**Next**”.

Home / My Account / Membership

#### My Account

- Overview
- Update Your Password
- Update Your Security Questions
- Membership Program**

#### My Settings

##### Profile

MTCTest@test.com  
(555) 555-5555

##### Contact Superuser


[My Agency Superuser  
Information List](#)

#### Pay Membership Fee:

##### Activate Your Membership Account

The annual membership fee for participation in the Texas SmartBuy  
Membership program is: \$100.00 - FEE IS NON-REFUNDABLE

##### Select Payment Type:

- ☒ Credit Card 
- ☐ Pay By Mail - Takes XXX amount of days to process

[Next](#)

- Click “**Submit**” to verify credit card process.

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

Home / My Account / Membership

### My Account

Overview

Update Your Password

Update Your Security Questions

Membership Program

### My Settings

#### Profile

MTCTest@test.com

(555) 555-5555

#### Contact Superuser

[My Agency Superuser Information List](#)

### Pay Membership Fee:

#### Credit Card Verification

- Credit Card Payment Amount \$100.00
- Please note by selecting the Submit button, you will be directed to the secure credit card processing site to make a credit card payment.


Submit

6. User will be directed to NIC for a secure credit card payment.

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**Texas Comptroller of Public Accounts**  
Statewide Procurement Division

7. Complete all Customer Information required fields [\*] and select “Next”.




1 Payment Type

2 Customer Info

3 Payment

4 Submit Payment

Payment

Payment Type 

Credit/Debit Card

Customer Information

Country \*  
United States

First Name \*

Last Name \*

Address \*  
MCT Test Drive


Address 2

City \*  
Bastrop

State \*  
TX - Texas

Zip/Postal Code \*  
78222

Phone Number \*  
555-555-5555


Email   
MCTTest@test.com

Next >

Payment Information

Cancel

Transaction Summary

CPA SPD Membership	\$100.00
Texas.gov Price 	\$100.00

Need Help?  
Please complete the Customer Information Section

**Texas Comptroller of Public Accounts**  
Statewide Procurement Division

8. Complete all Payment Information required fields [\*] and select **“Next”**.

**NiC**

1 Payment Type 2 Customer Info 3 Payment 4 Submit Payment

**Payment**

Payment Type ✓

**Credit/Debit Card**

Customer Information ✓

Address: Jane Doe, MCT Test Drive, Bastrop, TX 78222  
Phone Number: 555-555-5555  
Country: United States  
Email Address: MTCTest@test.com

**Payment Information**

Credit Card Number \* [?]  
Credit Card Type: [?]  
Expiration Month \*: Select a Month [v]  
Expiration Year \*: Select a Year [v]  
Security Code \* [?]  
Name on Credit Card \*

Next >

Cancel

**Transaction Summary**

CPA SPD Membership	\$100.00
Texas.gov Price [?]	\$100.00

**Need Help?**

You have selected to pay by credit card. Complete Customer Billing Information and enter Credit Card Information.

**Texas Comptroller of Public Accounts**  
Statewide Procurement Division

9. User will complete system verification and select **“Submit Payment”**.

**NIC**

1 Payment Type 2 Customer Info 3 Payment 4 Submit Payment

### Payment

Payment Type ✓

**Credit/Debit Card**

Customer Information ✓

Address: Jane Doe, MCT Test Drive, Bastrop, TX 78222  
Phone Number: 555-555-5555  
Country: United States  
Email Address: MCTTest@test.com

Payment Information ✓

Credit Card: MasterCard \*\*\*\*5637, Exp. 08/2038  
Name on Credit Card: Jane Doe

Verification

✓ I'm not a robot

Cancel Submit Payment

### Transaction Summary

CPA SPD Membership	\$100.00
Texas.gov Price	\$100.00

### Need Help?

Review payment information. You may edit Billing and Payment Method here if needed. When complete, select Submit Payment. You will receive a printable receipt at the end of your successful payment transaction.

10. The user will be redirected back to TxSmartbuy.com. Please allow 30 minutes for our system to receive the payment details from NIC. The Membership Information will update with the membership's new expiration date.

## Editing Texas SmartBuy Membership

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The Primary and Secondary Contacts for each organization have access to edit the Texas SmartBuy Membership details.

**Contacts can edit the Organization's:**

- Address
- City
- Zip code
- Phone and Fax Number
- Contacts Information

**Contacts cannot edit the Organization's:**

- Organization Name
- Membership Number
- Member Category
- Travel Member Status
- Expiration Date

### How to edit the Membership Details

1. Primary or Secondary Contact will sign into TxSmartBuy.com.
2. Select **"Membership Program"** within the My Account tab.



**Texas Comptroller of Public Accounts**  
Statewide Procurement Division

**My Account**

- Overview
- Update Your Password
- Update Your Security Questions
- Membership Program**

**My Settings**

**Profile**  
MTCTest@test.com  
(555) 555-5555

**Welcome to the Portal**

**Announcements Section**  
Home

**Main Announcement Page**  
Google Chrome is the preferred browser for Texas SmartBuy.  
Users may experience page loading issues in other browsers.  
If refreshing pages does not work, please contact Texas SmartBuy Support at:  
[spd.outreach@cpa.texas.gov](mailto:spd.outreach@cpa.texas.gov)

3. From the Membership Details screen, select **“Update Information”**.

**My Account**

- Overview
- Update Your Password
- Update Your Security Questions
- Membership Program**

**My Settings**

**Profile**  
MTCTest@test.com  
(555) 555-5555

**Membership Details**

**Primary Information:**  
Member Number: L2077  
Member Category: L - Library Districts  
Travel Member: Yes

**Organization:**  
Organization Name: MTC Test  
Address: MCT Test Drive  
Address Line 2:  
City: Waco  
State: Texas  
Zip: 78222

**Update Information**

**Submit Payment**

**Submit Forms**

**Texas Comptroller of Public Accounts**  
Statewide Procurement Division

4. User will edit Membership Details and then select **“Save”**.

Home / My Account / Membership

## My Account

- Overview
- Update Your Password
- Update Your Security Questions
- Membership Program**

## My Settings

### Profile

MCTTest@test.com  
(555) 555-5555

### Contact Superuser

My Agency Superuser  
Information List

## Membership Details

**Primary Information:**

Member Number: L2077

Member Category: L - Library Districts

Travel Member: Yes

**Organization:**

Organization Name: MTC Test

Address: MCT Test Drive

Address Line 2:

City: Waco

State: Texas

Zip: 78222

Phone Number: (254) 555-5555

Fax Number:

**Contacts:**

Primary Contact Name: MTC Tester

Primary Contact Title: CFO

Primary Contact Email: MCTTest@test.com

Secondary Contact Name: KCC Test

Secondary Contact Title: Tester

Secondary Contact Email: kcctest@test.com

Shared Email:

Shared Phone Number:

**Save**

**Submit Payment**

**Submit Forms**

**Reset**

5. The Membership Details will save with updates.

Home / My Account / Membership

## My Account

Overview

Update Your Password

Update Your Security Questions

**Membership Program**

## My Settings

### Profile

MTCTest@test.com  
(555) 555-5555

### Contact Superuser

[My Agency Superuser Information List](#)

## Membership Details

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### Primary Information:

**Member Number:** L2077  
**Member Category:** L - Library Districts  
**Travel Member:** Yes

### Organization:

**Organization Name:** MTC Test  
**Address:** MCT Test BLVD  
**Address Line 2:**  
**City:** Austin  
**State:** Texas  
**Zip:** 78222  
**Phone Number:** (254) 555-5555  
**Fax Number:**

### Contacts:

**Primary Contact Name:** MTC Tester  
**Primary Contact Title:** CFO  
**Primary Contact Email:** MTCTest@test.com  
**Secondary Contact Name:** KCC Test  
**Secondary Contact Title:** Tester  
**Secondary Contact Email:** kcctest@test.com  
**Shared Email:**  
**Shared Phone Number:**

### Membership Information:

**Initial Membership Date:** 1/26/2016  
**Effective Date:** 2/18/2022  
**Expiration Date:** 2/18/2025

## Adding and Removing Contacts

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Important information to note prior to editing contacts:

- Submit a **Texas Smartbuy Membership Program Agent of Record Name Change** form. This can be found at <https://comptroller.texas.gov/purchasing/docs/members/name-change-form.pdf>.
- To edit the primary or secondary contact, the user must be the primary or secondary contact for the membership.
- After a primary or secondary contact is added, the contact will gain the ability to add or remove contacts, edit membership details, upload documents, and submit payments associated to the membership.
- After a primary or secondary contact is removed, the contact will lose the ability to add or remove contacts, edit membership details, upload documents, and submit payments associated to the membership.

1. Navigate to <https://www.txsmartbuy.com/> and enter user login credentials to begin.

### Login Credentials

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**Email Address** (required)

**Password** (required)

Sign In

Forgot password?

**Please only use Google Chrome to navigate this site.**

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

2. After login, the user will be on the **“My Account”** page. Select Membership Program on the left side of the webpage.

## My Account

Overview
Update Your Password
Update Your Security Questions
Membership Program

## My Settings

## Welcome to the Portal

### Announcements Section

Home

## Main Announcement Page

Google Chrome is the preferred browser

3. Here, the user will see Membership Details. To add or remove a contact, select the **“Update Information”** button on the right side of the webpage.

## Membership Details

### Primary Information:

Member Number: K2076

Member Category: K - Political Sub-divisions, Special Districts, and Miscellaneous

Travel Member: Yes

Update Information

## Texas Comptroller of Public Accounts

### Statewide Procurement Division

- The form is now editable. Scroll down to the **Contacts** section of the **Membership Details**. The user can replace the **Primary Contact** information and/or **Secondary Contact** information as needed.

#### Contacts:

**Primary Contact Name:**

**Primary Contact Title:**

**Primary Contact Email:**

**Secondary Contact Name:**

**Secondary Contact Title:**

**Secondary Contact Email:**

**Shared Email:**

**Shared Phone Number:**

- Scroll to the top of Membership Details and select the **“Save”** button to apply the user changes.

#### Membership Details

##### Primary Information:

**Member Number:** K2076

**Member Category:** K - Political Sub-divisions, Special Districts, and Miscellaneous

**Save**

- The Membership Details page will refresh, and the changes will now be visible.

## Additional Guides and Required Forms

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For additional guides on how to use and navigate TxSmartBuy please go to:

<https://www.txsmartbuy.com/help>

For additional information on the Super User Role, view our user guide:

<https://www.txsmartbuy.com/ShopFlow/help/docs/Agency%20Superuser%20Guide%20142021.pdf>

For additional documents that your organization may be required to submit are located at:

<https://comptroller.texas.gov/purchasing/members/forms/>

## Supplemental Information

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### Resolution

#### [Link to the resolution form](#)

**Note:** This form is a PDF file. It includes fillable form fields and functionality that work best with the free Adobe Reader. While some browsers and viewers may open this file, they may not function as intended unless you **download and save the file first** and view it with the latest version of [Adobe Reader](#).

The Resolution authorizes a qualified organization to participate in the State of Texas SmartBuy Membership Program of the Texas Comptroller of Public Accounts pursuant to 271.081 and 271.083 of the Local Government Code.

All fields must be completed before document can be reviewed and approved by Statewide Procurement Division (SPD).

**Note:** Primary and Secondary Contacts listed on the Application and Resolution must match.



# Texas Comptroller of Public Accounts

## Statewide Procurement Division

### Texas Smartbuy Membership Application

**Organization**

\*Organization Name:

\*Entity Type:

\*Address:

Address Line 2:

\*City:

\*State:

\*Zip:

\*Phone Number:

Fax Number:

**Contacts**

\*Primary Contact Name:

\*Primary Contact Title:

\*Primary Contact Email:

\*Secondary Contact Name:

\*Secondary Contact Title:

\*Secondary Contact Email:

Shared Email:

Shared Phone Number:

### Texas SmartBuy Membership Program

#### Resolution

State of Texas, County of  (County Entity Located In)

Whereas, the Texas Comptroller of Public Accounts is authorized to provide purchasing services for local governments pursuant to **§§271.082 and 271.083 of the Local Government Code.**

Whereas, the  (Enter Board of Directors, City Council, Commissioner's Court, School Board, etc.)

of  (Enter Name of Qualified Applicant/Entity), is as:

(Check One of the Following)

<input type="radio"/> Appraisal District	<input type="radio"/> Charter/Academy School
<input type="radio"/> Community Supervision/Corrections Department	<input type="radio"/> Council of Governments/Planning Commissions
<input type="radio"/> County	<input type="radio"/> Education Service Center
<input type="radio"/> Fire Prevention District	<input type="radio"/> Hospital District
<input type="radio"/> Judicial District	<input type="radio"/> Junior/Community College
<input type="radio"/> Library District	<input type="radio"/> Mental Health/Mental Disability Organization
<input type="radio"/> Municipality	<input type="radio"/> School District
<input checked="" type="radio"/> State-funded Assistance Organization	<input type="radio"/> Texas Rising Star Care Provider
<input type="radio"/> Special District	<input type="radio"/> Utility District
<input type="radio"/> Emergency Service	<input type="radio"/> Drainage
<input type="radio"/> Housing	<input type="radio"/> Municipal
<input type="radio"/> Political Subdivision	<input type="radio"/> Special
<input type="radio"/> Port or Transportation Authority	
<input type="radio"/> Workforce Development Board	

defined as an entity qualified to participate in the Texas SmartBuy Membership Program of the Texas Comptroller of Public Accounts pursuant to §271.081 of the Local Government Code.

**John Smith, CFO** (Primary Contact and Title)


**Jane Doe, Finance Director** (Secondary Contact and Title)

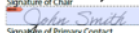
is/are authorized to execute all documentation for  (Entity Name) pertaining to its participation in the Texas Comptroller of Public Accounts Cooperative Purchasing Program; and

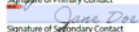
Whereas,  (Entity Name) acknowledges its obligation to pay annual participation fees established by the Texas Comptroller of Public Accounts.


Now, Therefore Be It Resolved, that request be made to the Texas Comptroller of Public Accounts to approve  (Entity Name) for participation in the Texas Comptroller of Public Accounts Cooperative Purchasing Program.

Adopted this  day of  2023 by  (Entity Name)

By:  **Phillip Blake, Board President** (Printed Name and Title of Chair)

 **John Smith, CFO** (Printed Name and Title of Primary Contact)

 **Jane Doe, Finance Director** (Printed Name and Title of Secondary Contact)

 **Glenn Hegar**  
Texas Comptroller of Public Accounts

Publication 96-1356-3 (09/22)

Please note that Signature of the Chair on the Resolution form refers to the Chairman of the board

## Texas SmartBuy Membership Program

### Agent of Record Name Change Form

**Note:** This form is a PDF file. It includes fillable form fields and functionality that work best with the free Adobe Reader. While some browsers and viewers may open this file, they may not function as intended unless you **download and save the file first** and view it with the latest version of [Adobe Reader](#).



## Texas SmartBuy Membership Program

### Agent of Record Name Change Form

Account Number: V1082  
Entity Name: Blue Bird Center  
Shared Phone Number: 555-555-5555  
Shared Email Box: purchasing@bluebird.org

The Agent(s) of Record for the above-mentioned entity are:

1) **\*Primary Contact's Name:** John Smith  
(This person will receive all correspondence from CPA)  
Primary Contact's Title: CFO  
Signature: John Smith  
Email: Jsmith@bluebird.org  
2) **\*Secondary Contact's Name:** Jane Doe  
(This person will receive all correspondence from CPA)  
Secondary Contact's Title: Finance Director  
Signature: Jane Doe  
Email: Jdoe@bluebird.org

Approval signature is **REQUIRED** and must be one of the following:

- ☐ Current Agent of Record  
☒ Chairman of the Governing Board

\*Approver's Name and Title: Dr. Phillip Blake, Board President  
\*Approver's Signature: Dr. Phillip Blake  
\*Date: 01/01/2023

(NOTE: Please list two people who will receive all correspondence from CPA. Asterisks denote mandatory fields).  
If you have questions about this form, please call 512-463-3368. Please submit the completed form by email to [members@cpa.texas.gov](mailto:members@cpa.texas.gov) or fax to 512-936-2667.

Reset Form

Print Form

Submit Form



Glenn Hegar  
Texas Comptroller of Public Accounts

Publication 96-1356-1 (09/22)

All mandatory fields must be completed before document can be reviewed and approved by Statewide Procurement Division (SPD).

**Texas Comptroller of Public Accounts**

Statewide Procurement Division

Please list two people who will receive all correspondence from CPA.

**Note:** Contact's Title, Signature and Email are mandatory.

Approver must be one of the following:

1. **Current Agent of Record** (current Primary and Secondary Contact listed on the Texas SmartBuy Membership Account)
2. **Chairman of the Governing Board** (Example: Mayor, Board President, Superintendent, etc.)