Vendor Self Service (VSS)

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Contents

1 VENDOR SELF SERVICE OVERVIEW

Vendor Self-Service provides vendors with cloud-based access to information stored in the City's Tyler Enterprise ERP solution. The information includes accounts payable, purchasing, contracts, and bids.

You can enter and maintain your contact and remittance information, discount and payment terms, required documentation, and the commodity codes that represent the goods and services you can provide.

A listing of your current and prior 1099 data, bids, purchase orders, invoices, contracts, checks, and work orders is available in Vendor Self-Service.

You can search for and view formal solicitations (bids), and then use that information to submit a bid proposal or quote.

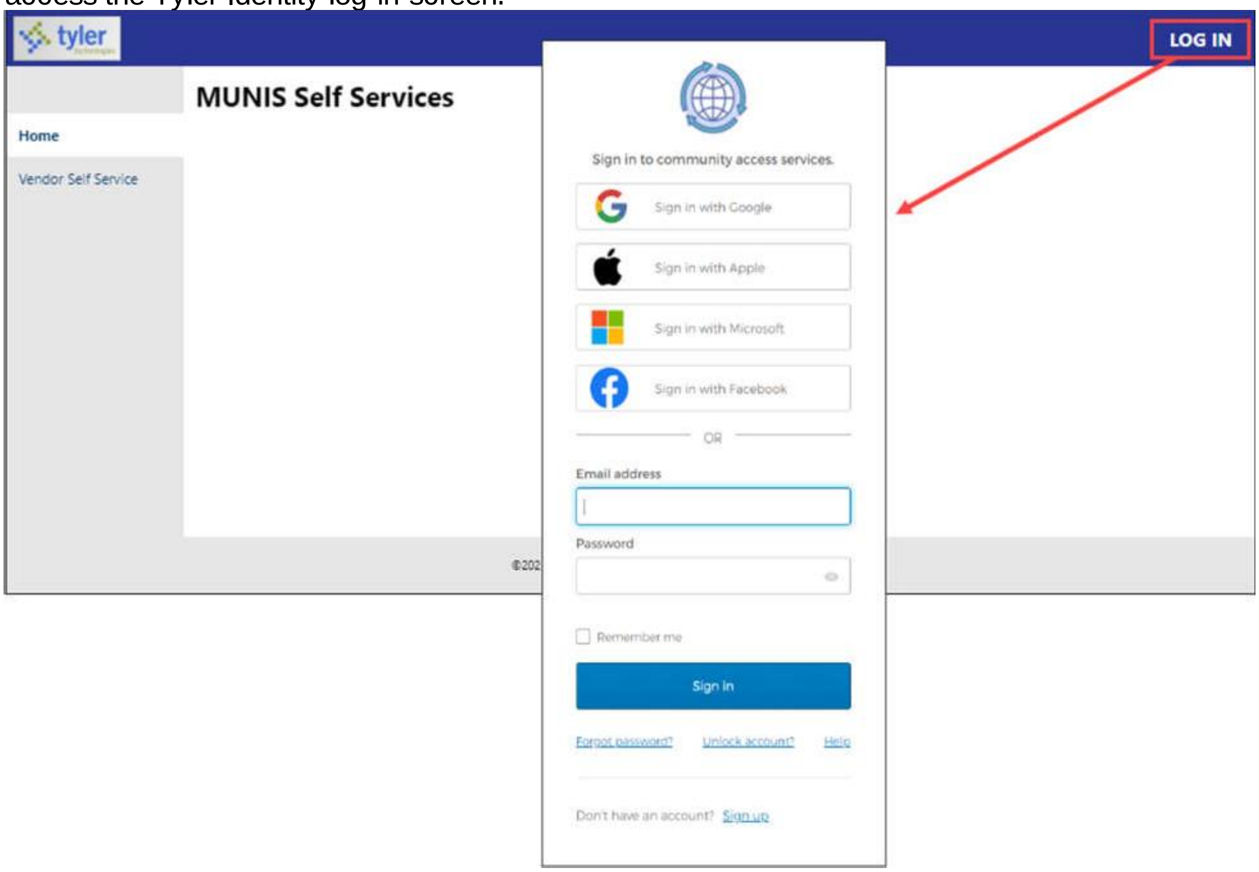
2 VENDOR SELF SERVICE AND TYLER IDENTITY

Vendors who access your organization's VSS application must have an email address associated with a Tyler Identity account. Tyler Identity is used by multiple Tyler applications, including Vendor Self Service and Citizen Self Service, to provide users a single sign-on experience. The log-in account requires a unique email address and password.

Note: The credentials associated with the Tyler Identity account are intended to be used for all Tyler applications that utilize Tyler Identity. If a user has both a Vendor Self Service and Citizen Self Service account, the Tyler Identity login must be the same in order to associate both the vendor and citizen accounts with the Tyler Identity account.

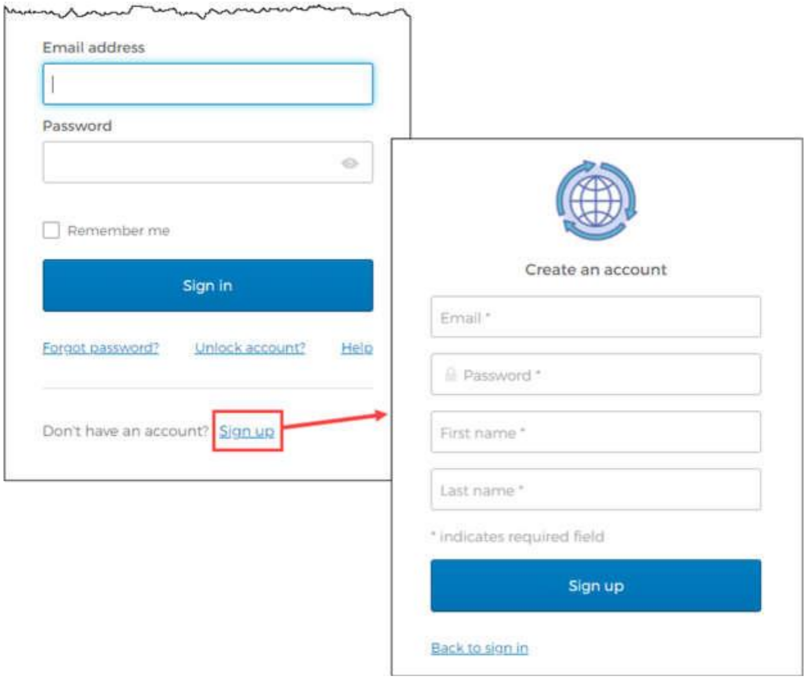
2.1.1 New Users

To associate an email account with Tyler Identity, open the VSS application and click Log In to access the Tyler Identity log-in screen.

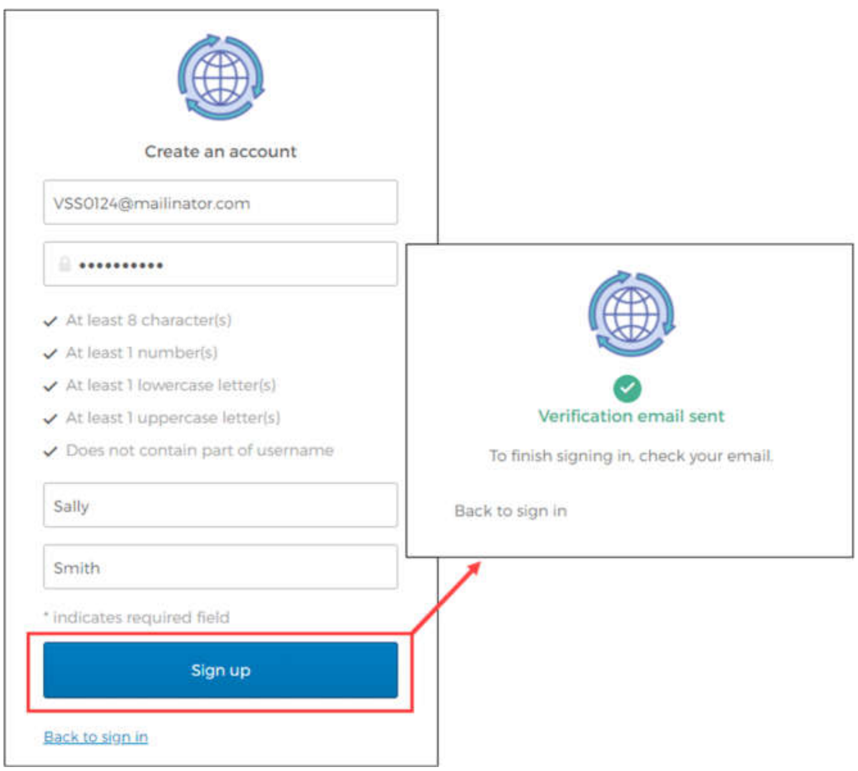


From this screen, vendors may use their established email and password credentials for an existing social account (such as Google®, Apple®, Microsoft®, or Facebook®) to log in, or click the Sign Up option to create unique Tyler Identity credentials.

To create unique Tyler Identity credentials, click Sign Up to display the Create an Account screen.



Enter a valid email address, create a password, complete the first and last name information, and click Sign Up. Tyler Identity sends a verification email to the supplied email address.



Click the link in the verification email to complete the account verification process and return to VSS. Users cannot log in to VSS until they verify the account.

For issues related to authentication with Tyler Identity, visit https://tylerportico.com/community-access-help.html.

2.1.2 Existing Users

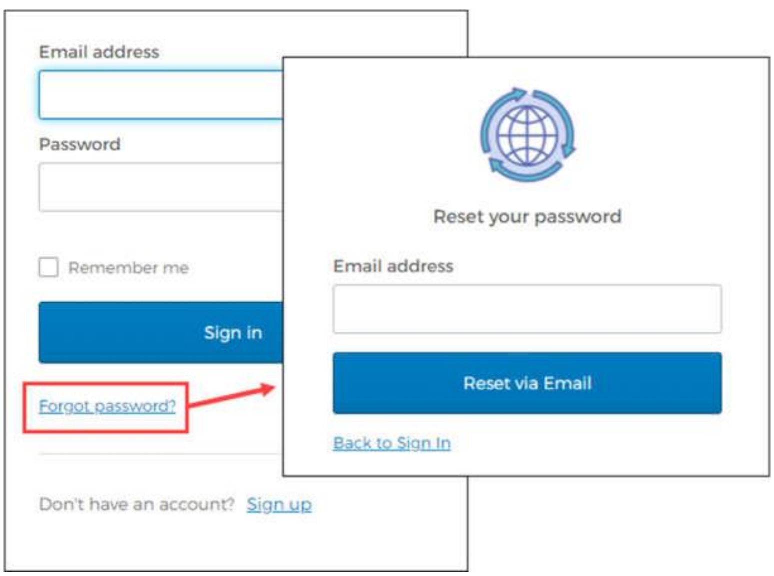
Users who have established a Tyler Identity account can log in using their Tyler Identity email and password credentials. Users who have not transitioned to using Tyler Identity must create a new account.

- If vendors create a Tyler Identity account using their previous credentials and the email addresses match, the existing VSS account information is automatically linked to the Tyler Identity account.
- If vendors do not use an existing email, or if they have multiple accounts that use the same email address, they must create a new Tyler Identity account and complete the process to link the VSS account to it.

Important! Tyler Identity allows users to log in using social provider accounts such as Apple, Facebook, Google, and Microsoft. The email address associated with the social provider account is used as the Tyler Identity email when completing these account verifications.

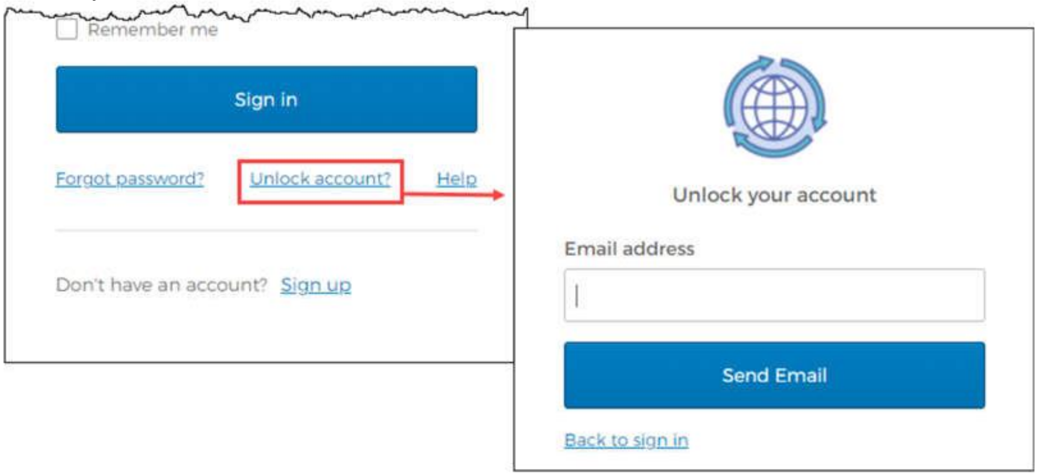
2.1.3 Password Resets

If a user forgets their assigned password, clicking the Forgot Password? link on the Sign-in screen provides the steps to reset the password. The Help link on the Sign-In screen also provides detailed password retrieval instructions.



2.1.4 Locked Accounts

If a user's account is locked, clicking the Unlock Account? Link on the Sign-in screen provides the steps to unlock the account.



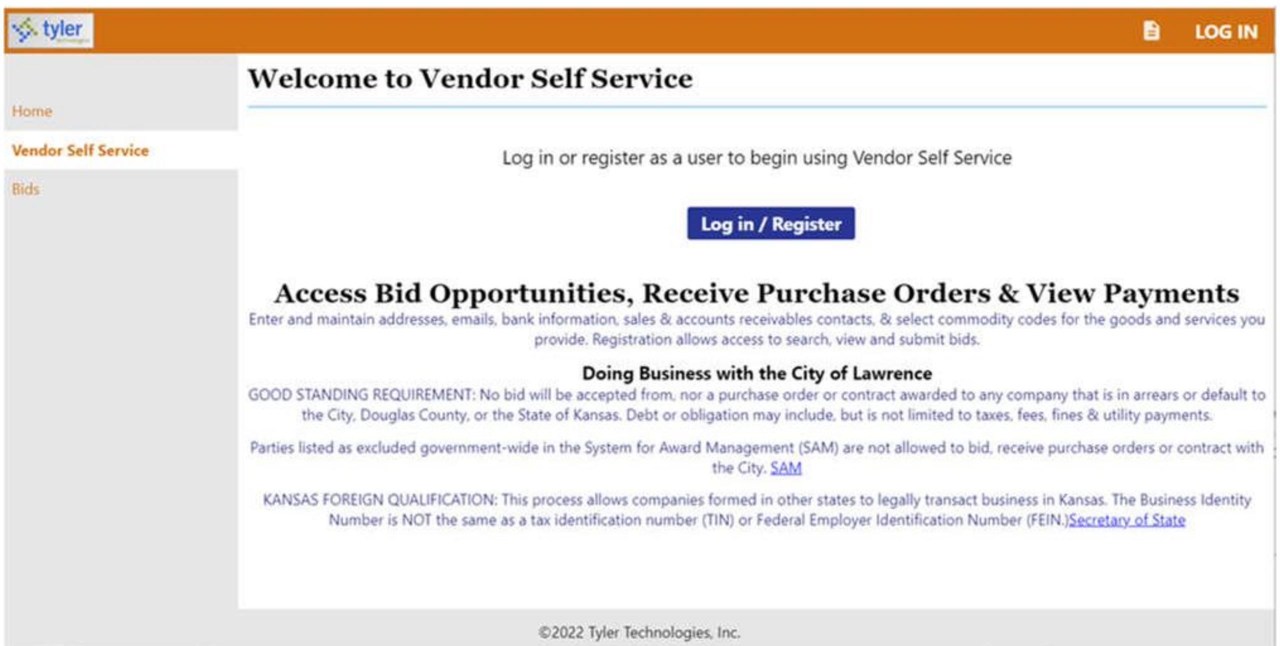
3 VENDOR REGISTRATION

Vendor Self Service requires EXISTING vendors to register using the VSS website to gain access to their information. You must have your *new* Tyler Enterprise ERP vendor ID number to successfully link your VSS registration with the City's Tyler Enterprise ERP record; you will enter the number in the Vendor ID box during registration.

Contact cityaccounting@lawrences.org or purchasing@lawrenceks.org for your new vendor number.

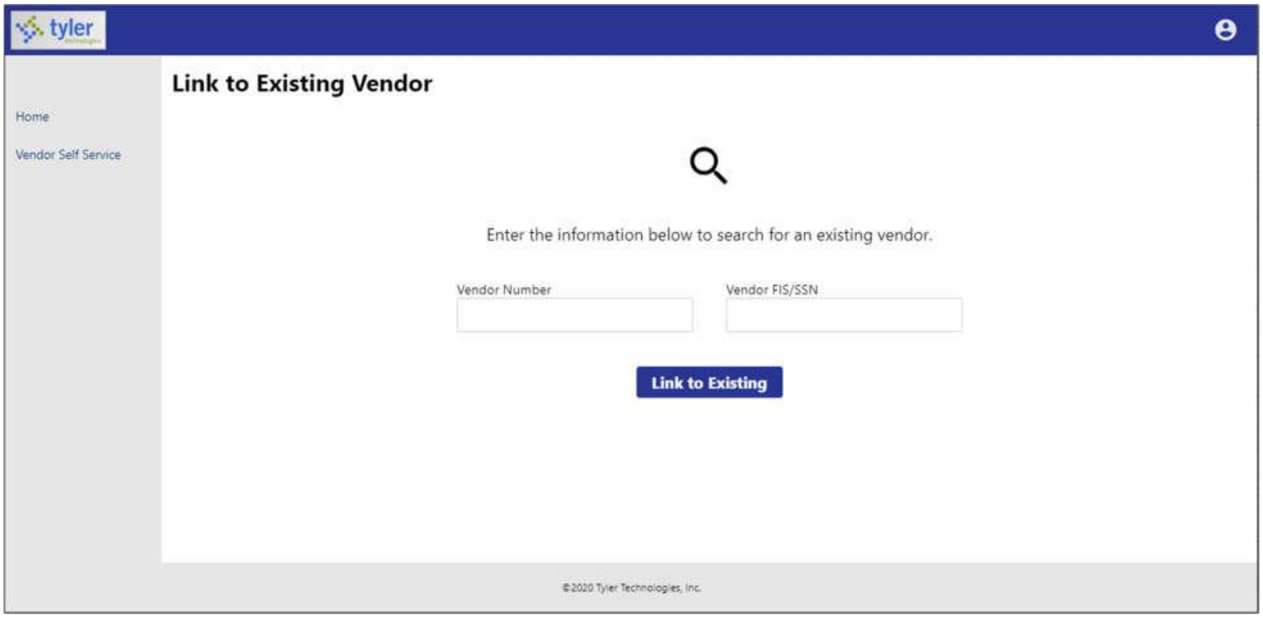
Potential vendors who have not done business with the City of Lawrence before can complete the registration process, but will only have limited access to VSS.

Once you have successfully logged in to VSS, the program provides the Vendor Self Service Home page. This page includes options to create a new vendor record or link to an existing Tyler Enterprise ERP vendor record.



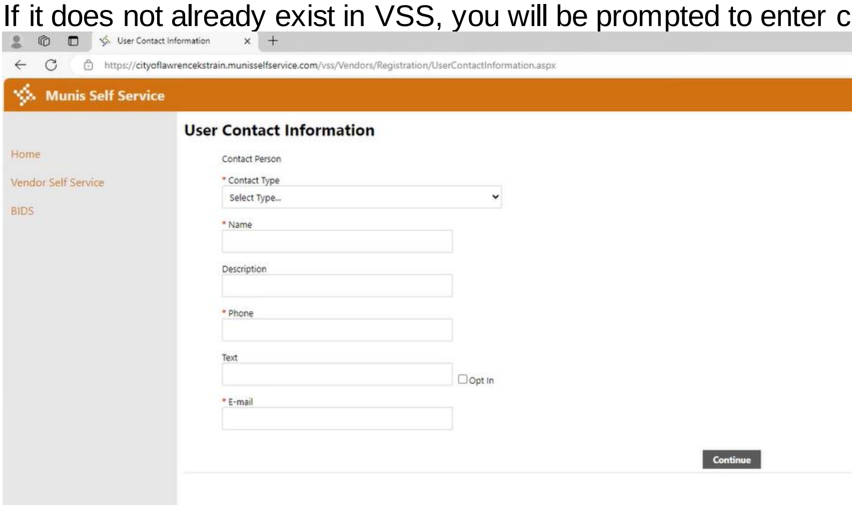
4 LINKING TO AN EXISTING TYLER ENTERPRISE ERP VENDOR RECORD

If you are an existing vendor with the City of Lawrence, the Link to Existing option provides the Link to Existing Vendor screen, where you can enter your vendor number and your Federal identifier or Social Security number to search for the existing vendor record.



When existing Tyler Enterprise ERP vendors complete the Vendor Number and Vendor FIS/SSN boxes and click Link to Existing, VSS verifies the entered information with the vendor record in Tyler Enterprise ERP.

If it does not already exist in VSS, you will be prompted to enter contact information.

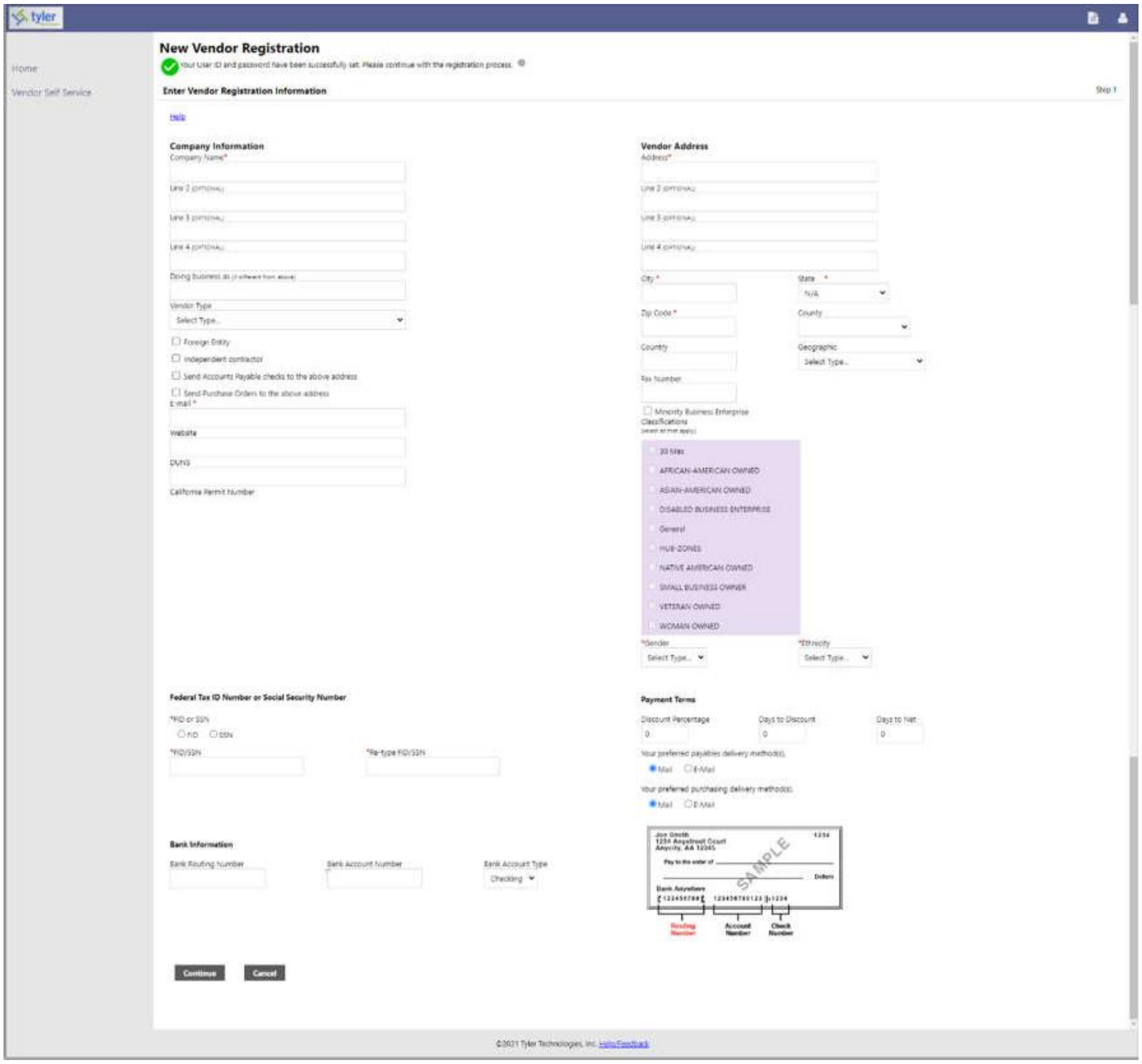


Once you have entered your Vendor number and Vendor FIS/SSN and been matched to a vendor account, an email will be sent to the email on file with a Validation PIN that you will need to enter in VSS to complete the process.

This generated PIN is valid for 36 hours. If the PIN expires, the user can click the 'Regenerate PIN' option in the self-service application to send a new, unique PIN email to the vendor contact identified in the system.

5 CREATING A NEW VENDOR RECORD

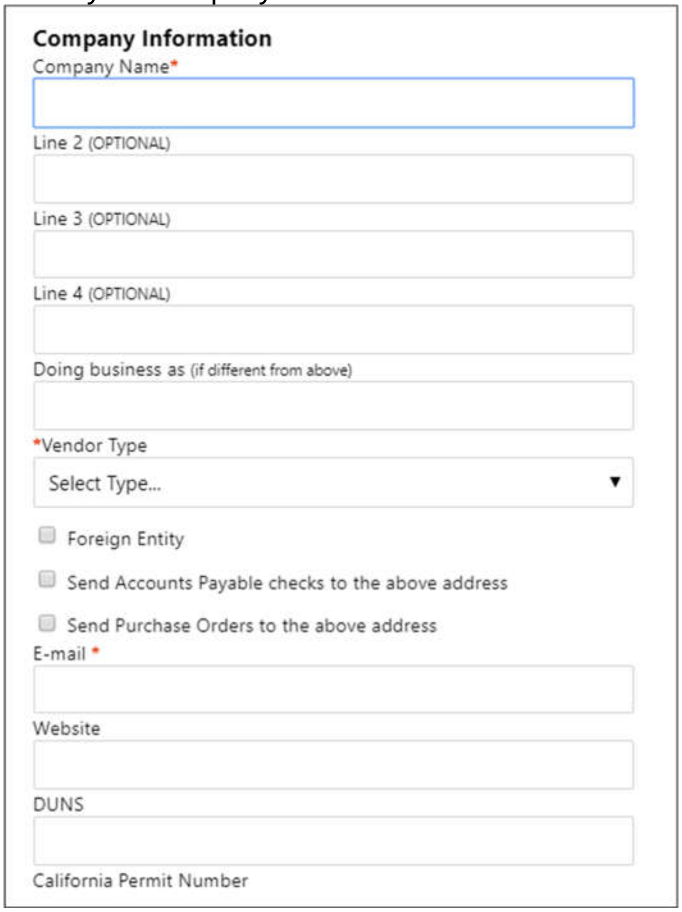
If you do not have an existing record with the City, the Create New Vendor option provides Step 1 of the New Vendor Registration screen.



Vendors must complete the required fields to specify the information for the new vendor record.

5.1.1 Company Information

The Company Information group of the New Vendor Registration page defines basic information about your company.

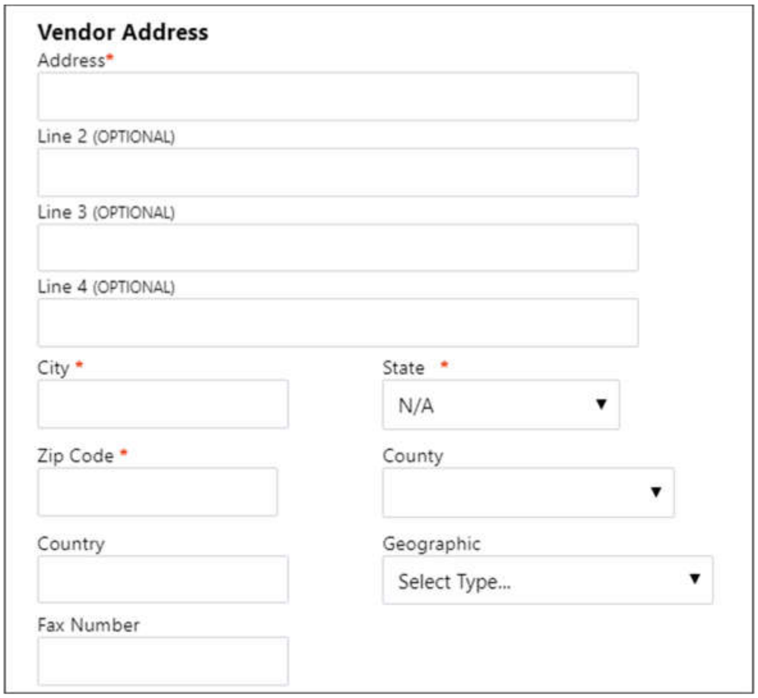


Field	Description
Company Information	
Company Name	**Enter your name or business name.**
Line 2 Line 3 Line 4	**Stores additional vendor name or business name information, such as an address.** *These fields are optional.*
Doing Business As (If Different from Above)	**Indicates your doing business as (DBA) name, if applicable.**
Foreign Entity	**When selected, indicates that the vendor is a foreign entity.**
Send Accounts Payable Checks to the Above Address	**When selected, sends accounts payable (AP) checks to the address indicated on the previous lines in the Company Information group rather than the address in the Vendor Address group.**
Send Purchase Orders to the Above Address	**When selected, sends purchase orders (POs) to the address indicated on the previous lines in the Company Information group rather than the address in the Vendor Address group**.
Email	**Primary email address, which is the address to which all notifications and alerts are sent, such as registration confirmation messages or password hints.** *Additional email addresses for vendor contacts are defined later in the registration process.*

Field	Description
Website	**Include the URL for your website.**
DUNS	**Indicates the 9-digit Data Universal Numbering System (DUNS) number assigned to your company.** *The DUNS number is a unique 9-character identification number provided by Dun & Bradstreet (D&B). The DUNS number is used by the Federal government to monitor business entities and is required for Federal grants and proposals*.

5.1.2 Vendor Address

The Vendor Address group of the New Vendor Registration page specifies the vendor's main address and selected contact information.



Field	Description
Vendor Address	
Address Line 2 Line 3 Line 4	**Define your MAIN address.**
City	**Specify the city**
State	**Enter a two-letter state postal abbreviation code**
Zip Code	**Enter your ZIP Code**.
Country	**Must use for addresses that are outside of the United States.**

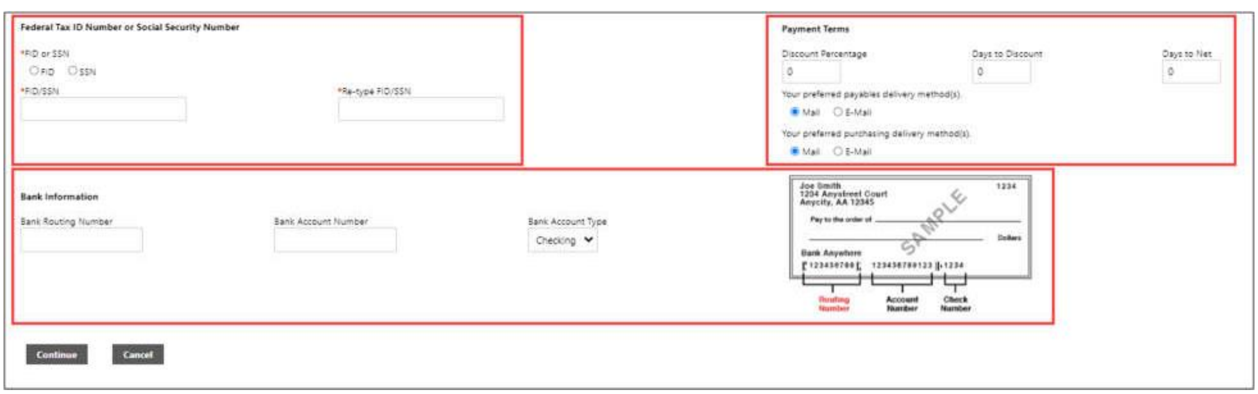
5.1.3 Minority Business Enterprise

The New Vendor Registration page contains a Minority Business Entity (MBE) section that must be completed by vendors that are designated as minority business enterprises. A minority business enterprise is typically defined as a business that is at least 51% owned and operated by a minority. These businesses are typically certified by a city, state, or federal agency.

Field	Description
Minority Business Enterprise	
Minority Business Enterprise	Indicate if you are a minority business enterprise, when selected.
Minority Business Enterprise Classifications (Select All That Apply)	Define which MBE classifications you possess. Select one or more of the check boxes, but the General check box is always selected and cannot be cleared. The MBE Classifications section displays the number of certifications of each type that the vendor possesses. Click **Manage** for a classification to maintain certifications. See Appendix A—Managing Minority Business Enterprise Certificates for more information.

5.1.4 Federal Tax ID Number or Social Security Number, Payment Terms, and Bank Information

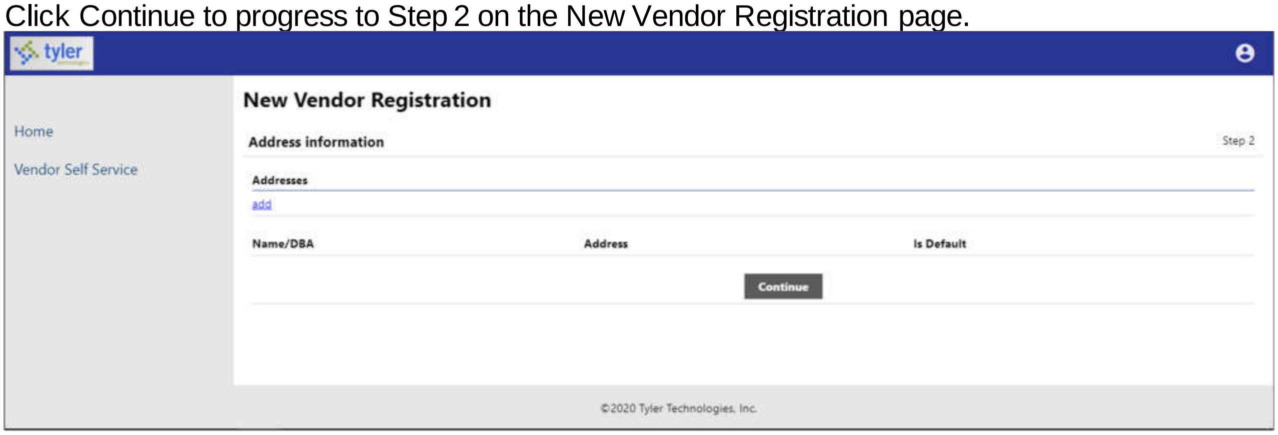
The groups at the bottom of the New Vendor Registration page specify tax, payment, and banking information. The FID or SSN must be a unique value that is not used by any other vendor profile.



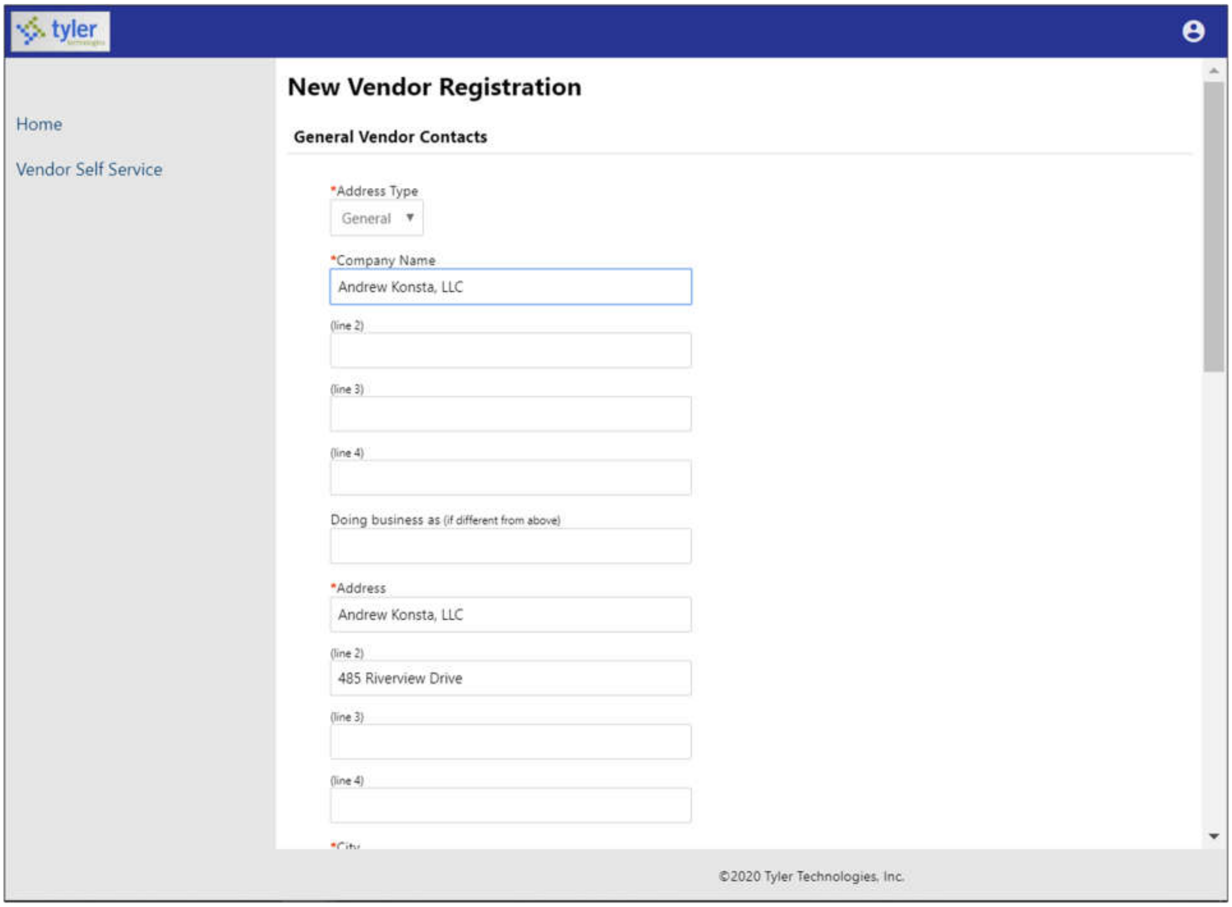
Field	Description
Federal Tax ID Number or Social Security Number *(The fields in this group are all required.)*	
FID or SSN	Enter Federal Tax Identification number or Social Security Number.

Field	Description
FID/SSN	Identifies your federal tax identification number or Social Security number. If SSN is selected, the Social Security number must be entered in the format nnn-nn-nnnn.
Re-type FID/SSN	Provides space to re-enter the vendor's FID or SSN to confirm the correct value.
Payment Terms	
Discount Percentage	Defines the discount percentage you offer.
Days to Discount	Enter the number of days within which payment must be received by the vendor in order for your organization to claim the discount percentage.
Days to Net	Indicates the number of days that the vendor allows before requiring net payment.
Your Preferred Payables Delivery Method & Your Preferred Purchasing Delivery Method	Determine the vendor's preferred delivery method for payables and purchasing documents.
Bank Information	
Bank Routing Number	Routing number of the bank to which payments should be sent. The program automatically selects the correct bank code based on the entered routing number.
Bank Account Number	Your bank account number.
Bank Account Type	Indicate checking or savings.

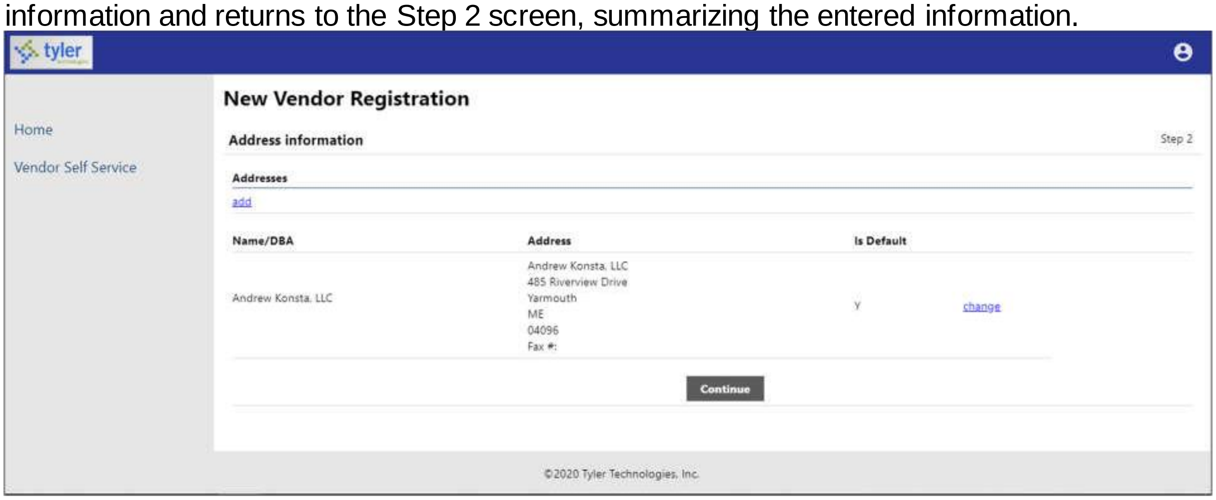
Click Continue to progress to Step 2 on the New Vendor Registration page.



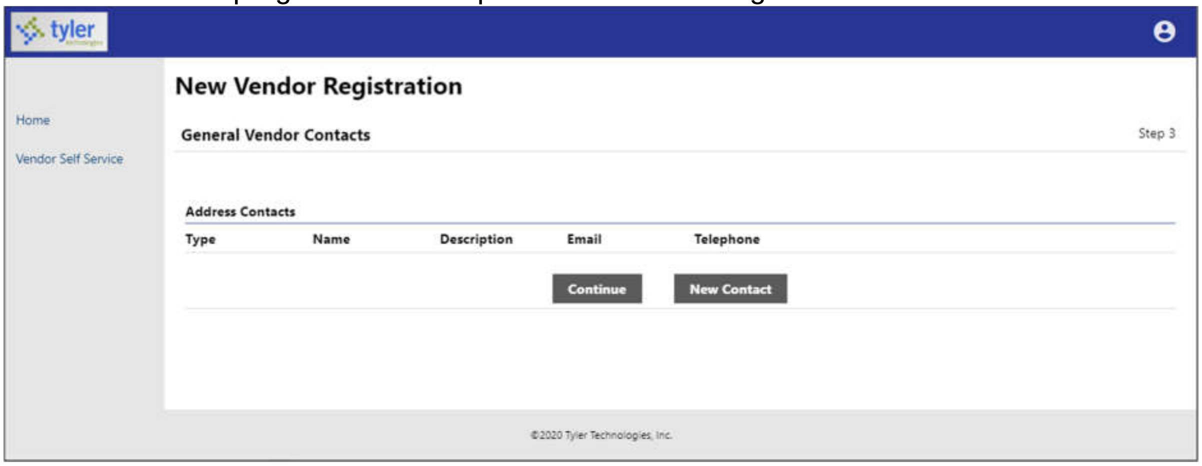
Click the Add link in the Addresses group to display the General Vendor Contacts screen for adding remit address information.



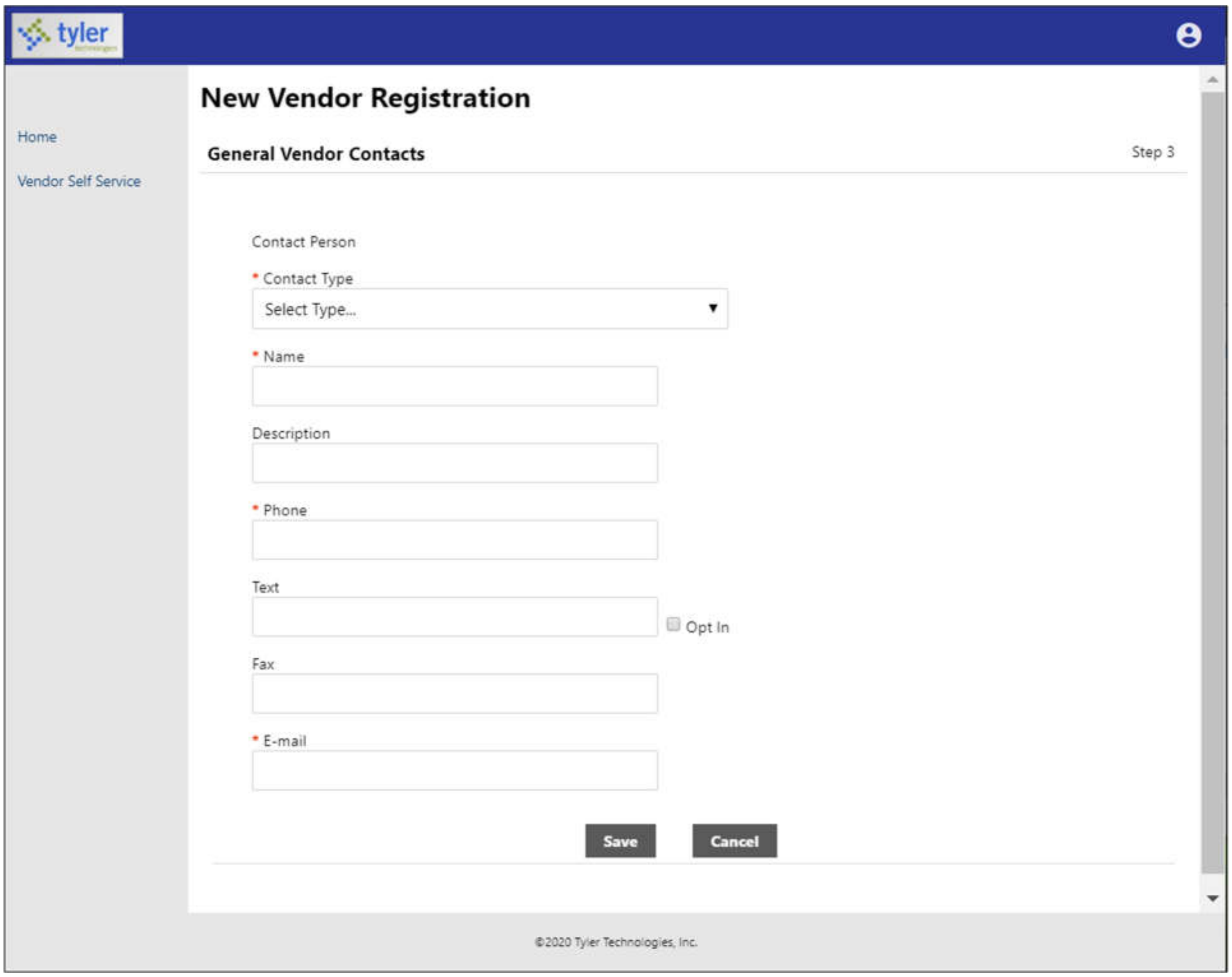
After completing the fields, click Save at the bottom of the page. VSS saves the entered information and returns to the Step 2 screen, summarizing the entered information.



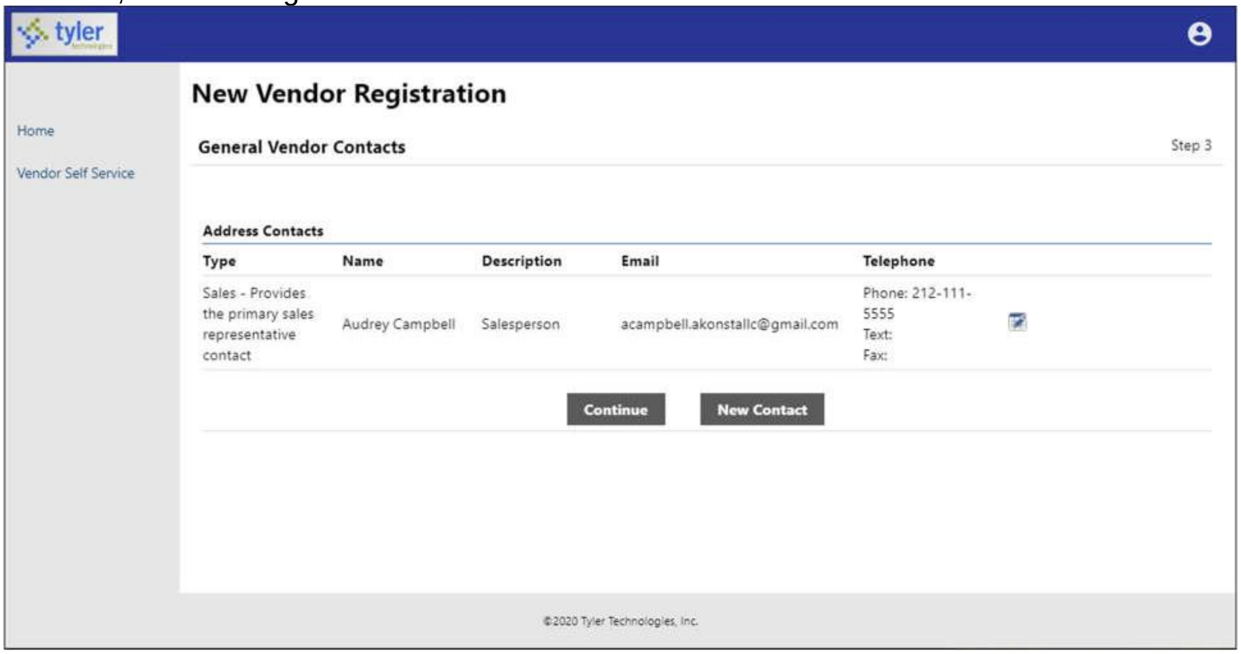
Click Continue to progress to the Step 3 screen for defining vendor contacts.



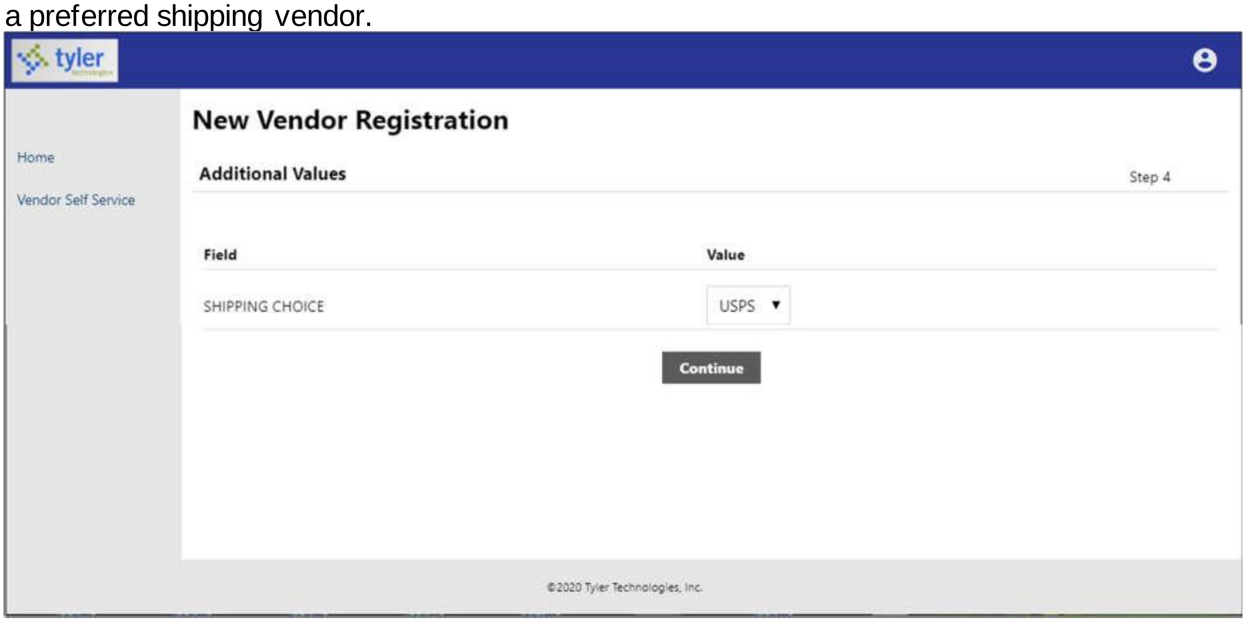
Click New Contact to add a new vendor contact.



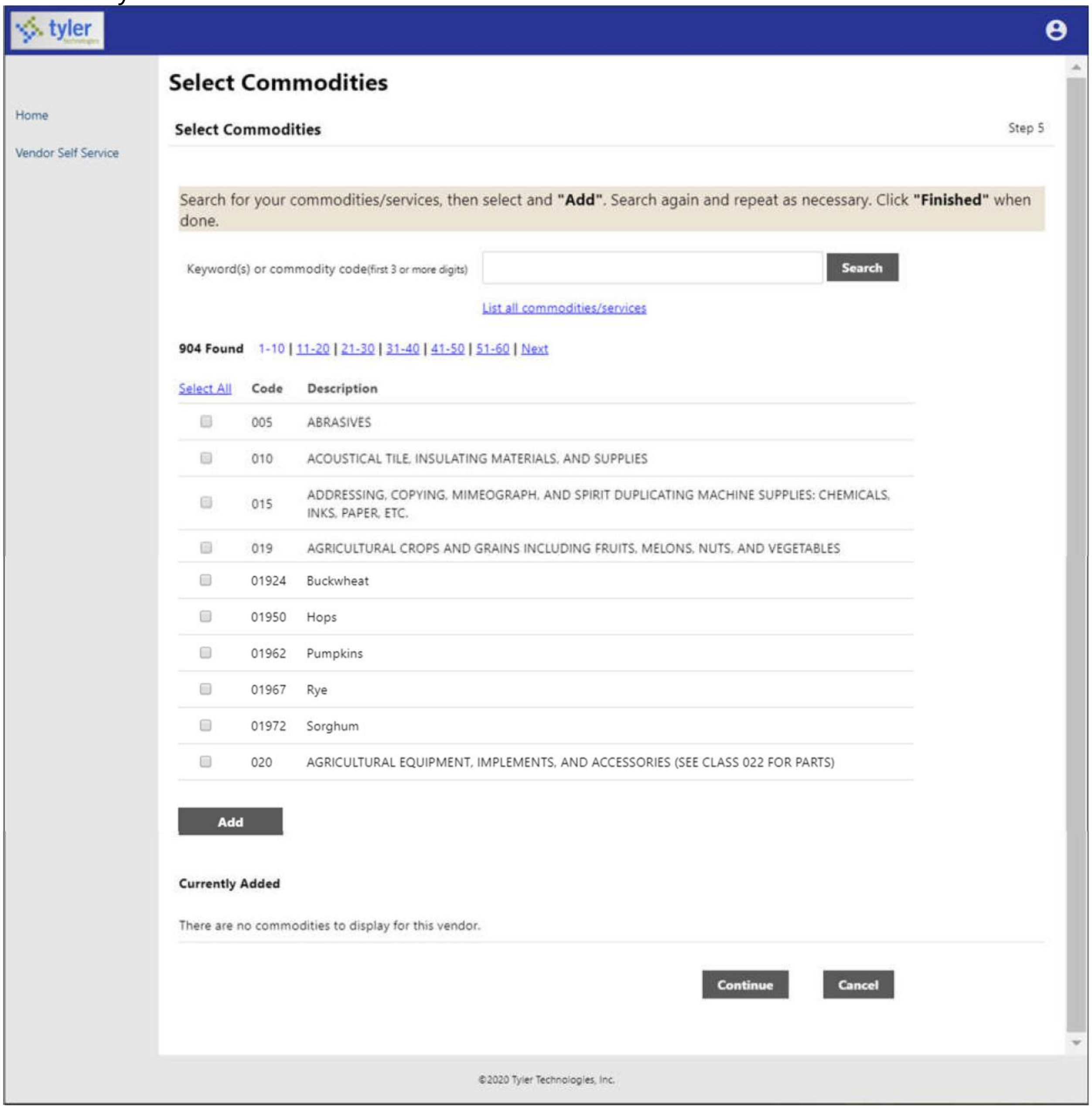
Complete the fields and click Save. VSS saves the entered information and returns to the Step 3 screen, summarizing the entered information.



Click Continue to progress to the Step 4 screen.
In this example, the Step 4 screen provides additional values to specify for the vendor, such as a preferred shipping vendor.

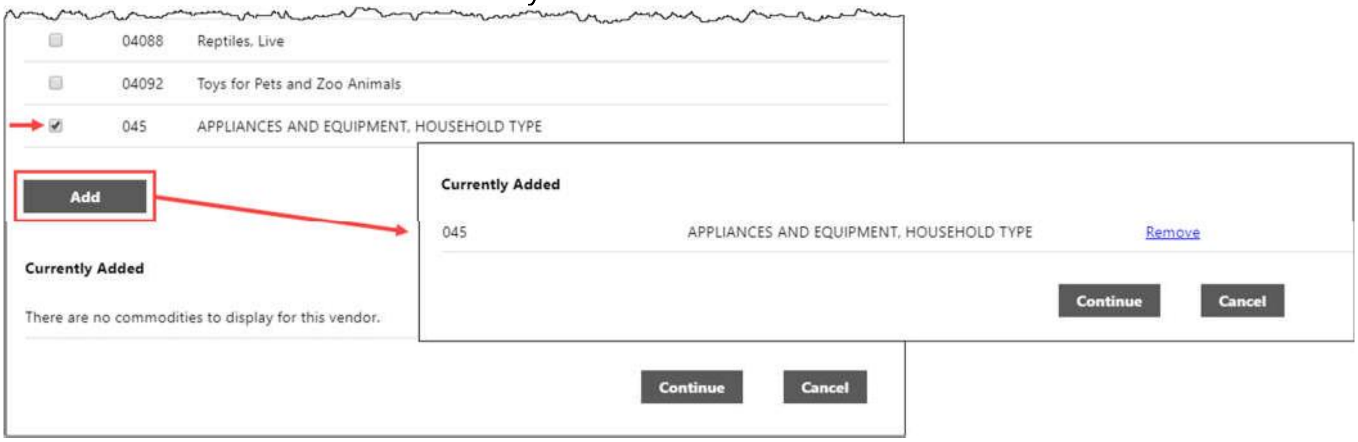


Select the additional values as required and then click Continue to progress to the Step 5 screen. In this example, VSS provides the Select Commodities screen for choosing the commodity codes to associate with the vendor.



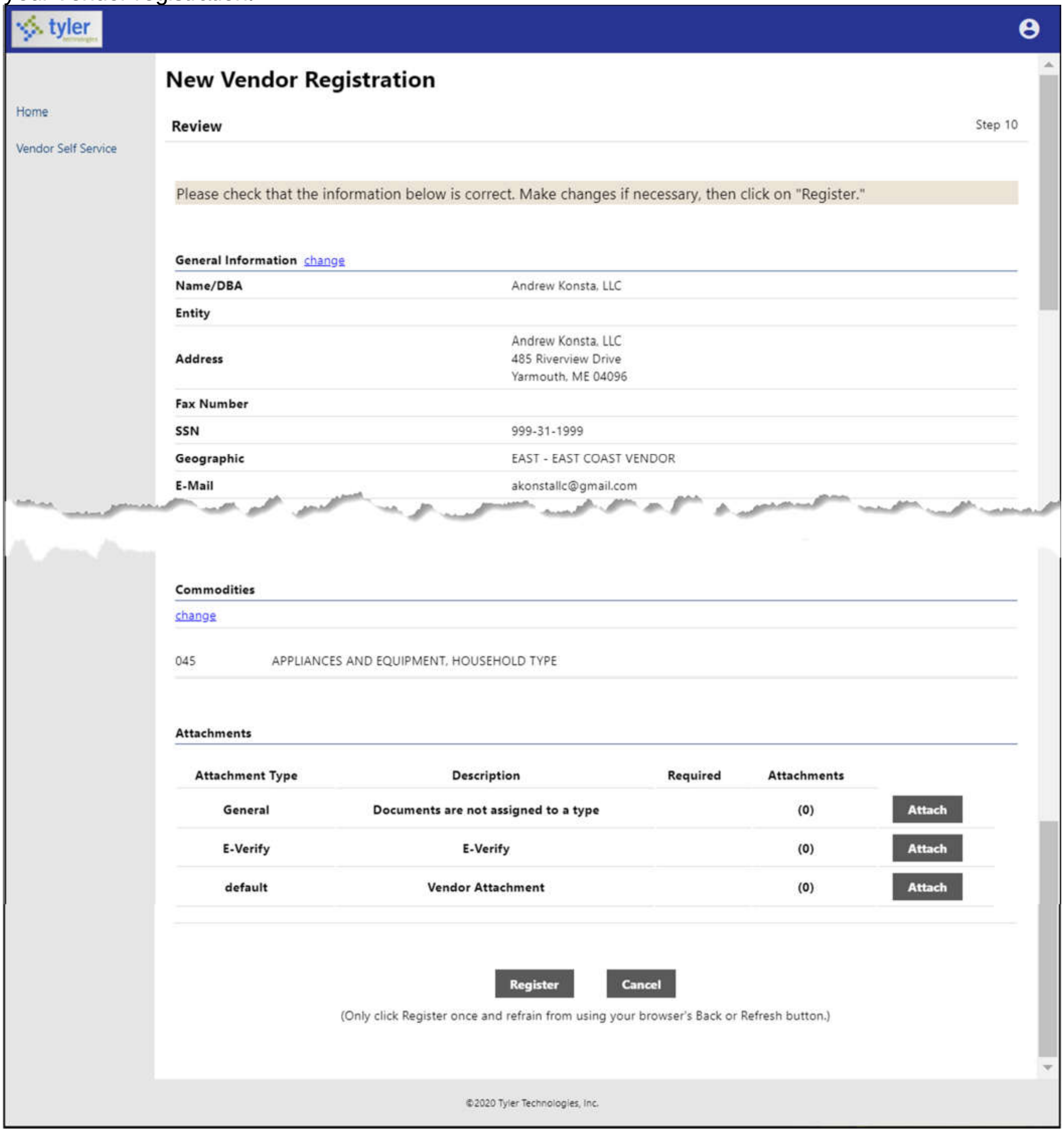
Enter keywords or commodity codes in the Search box to refine the list of provided codes.

Select the check box for each commodity code to be associate with your company, and click Add to associate the selected commodity codes.

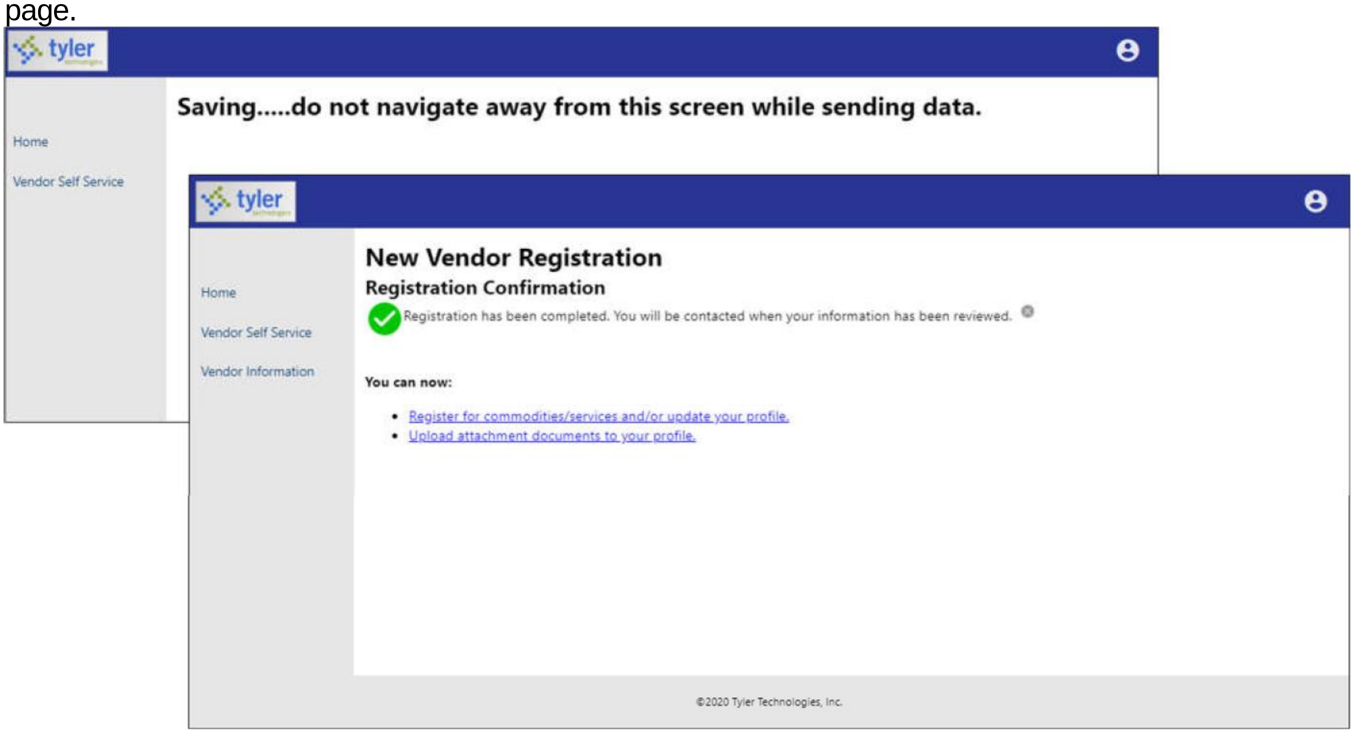


Use the Remove option to delete any currently associated commodity codes.

Click Continue to progress to the next step to review the entered information prior to submitting your vendor registration.



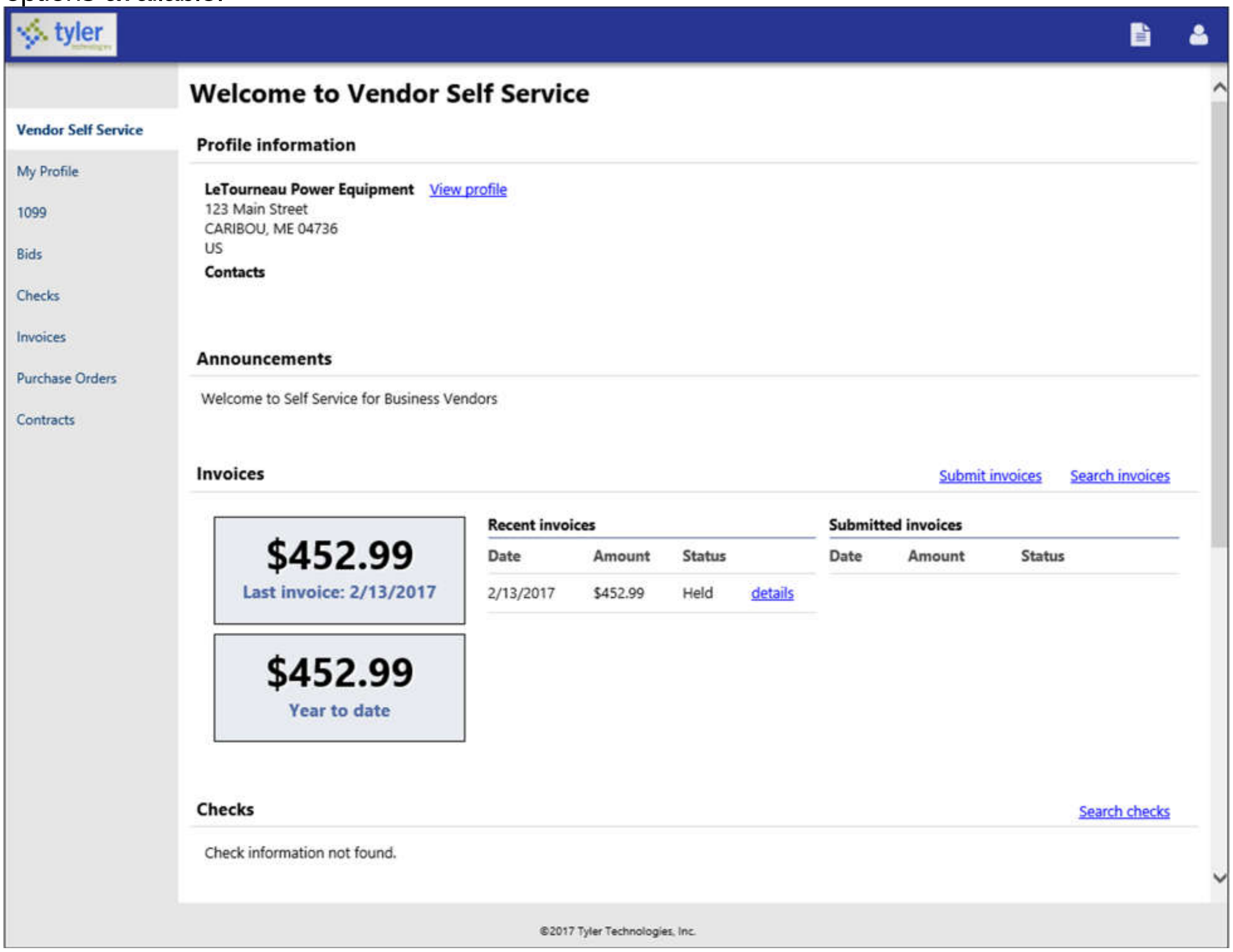
Click Register to complete the registration. You must click the Register option only once and remain on the page. If the registration is successful, VSS provides a Registration Confirmation page.



Newly registered vendors will only have access to the Home, Vendor Self Service, and Vendor Information tabs.

6 VENDOR SELF SERVICE HOME PAGE

The Vendor Self Service home page provides the vendor's profile information and access to the options available.



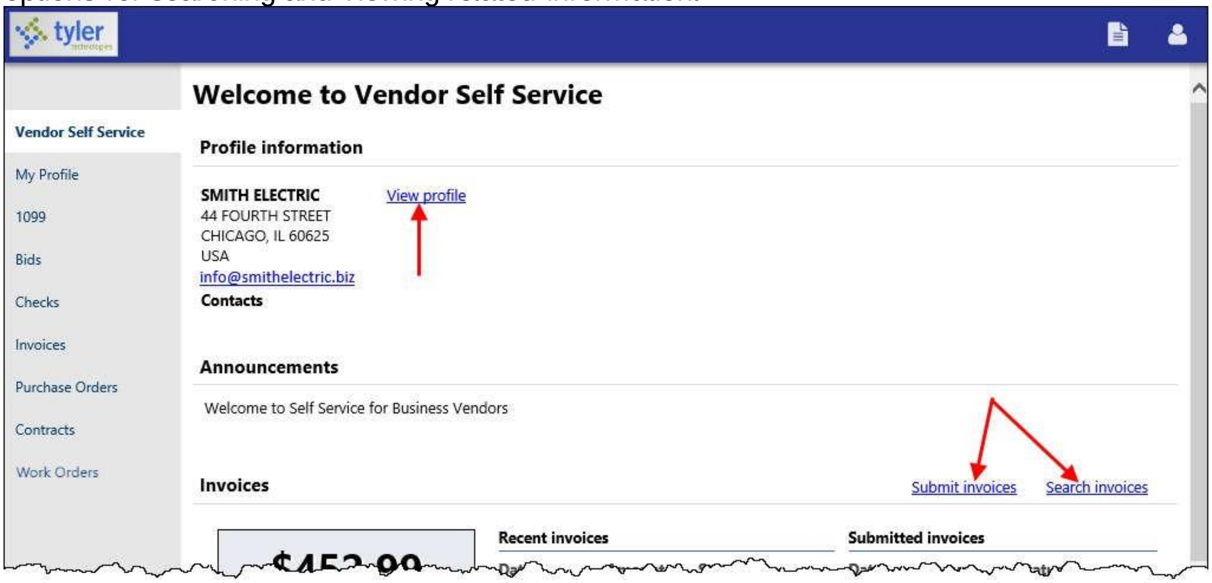
Clicking the User Information option in the header displays the following menu options:

- My Account – Opens the My Account page containing your account information.
- Log Out – Logs you out of Vendor Self Service.

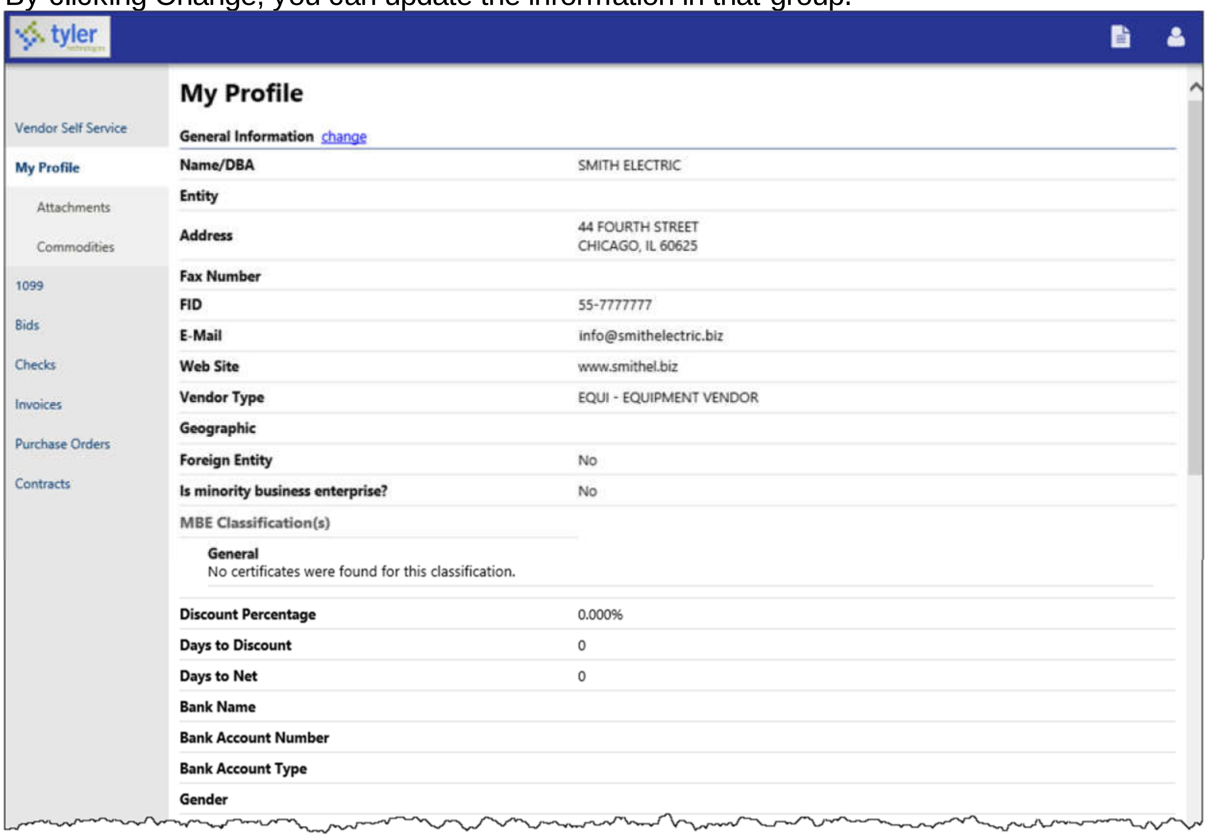
The Resources option in the header provides a menu of links or documents provided by the City.

7 VENDOR NAVIGATION

On the Vendor pages, the headers for the individual information groups that display include options for searching and viewing related information.



Clicking View Profile in the Profile Information group or the My Profile option in the navigation menu displays the My Profile page. The My Profile page groups profile information by category. By clicking Change, you can update the information in that group.



The General Information group contains your address and contact information, type and foreign entity status, minority business enterprise status and certifications, discount terms and banking information.

General Information change	
Name/DBA	SMITH ELECTRIC
Entity	
Address	44 FOURTH STREET CHICAGO, IL 60625
Fax Number	
FID	55-7777777
E-Mail	dan.olson@tylertech.com
Web Site	info@smithelectric.biz
Vendor Type	EQUI - EQUIPMENT VENDOR
Geographic	
Foreign Entity	No
Is minority business enterprise?	No
MBE Classification(s)	
General No certificates were found for this classification.	
Discount Percentage	0.000%
Days to Discount	0
Days to Net	0
Bank Name	
Bank Account Number	
Bank Account Type	
Gender	
Ethnicity	

The Address Information group displays your remittance address and contact information, while the Address Contacts group lists your contact persons and information.

Address Information

change

Name/DBA	Address	Is Default

Address Contacts

change

Type	Name	Title	Email	Phone	Fax
ACCOUNTS PAYABLE	Susan Agouris	Accounting Office	info@mithelectric.biz	312-555-1212	

The Additional Fields group identifies your shipping preferences. Clicking Change allows you to update this information.

Additional Fields

change

SHIPPING CHOICE	USPS

The Current Vendor Commodities group contains a list of commodity codes associated with your company. You can remove commodities from the list by clicking the Remove link. The Add option allows you to add commodities to the list.

Commodities

add

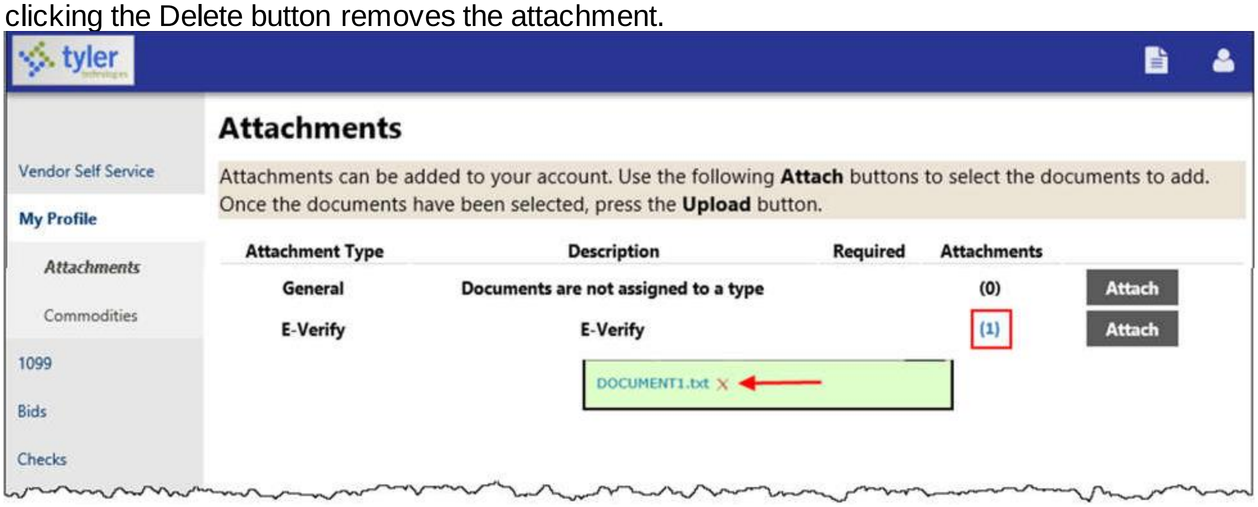
Code	Description	
206	COMPUTER HARDWARE AND PERIPHERALS FOR MINI AND MAIN FRAME COMPUTERS	Remove
28525	Current Collection Equipment and Accessories, Electrical	Remove
28726	Circuit Cards	Remove
28782	Transmitters, Emergency Alarm Type (To incl. Equipment Operation Status Reporting)	Remove

7.1.1 Attachments

You can add attachments to your profile by clicking Attachments on the menu. The Attachments option is only available from the My Profile page.

Add attachments by clicking the Attach button on the Attachments page, which allows you to navigate to a file or document to upload. The Attachments column indicates the number of documents attached for the attachment types. You can attach an unlimited number of files.

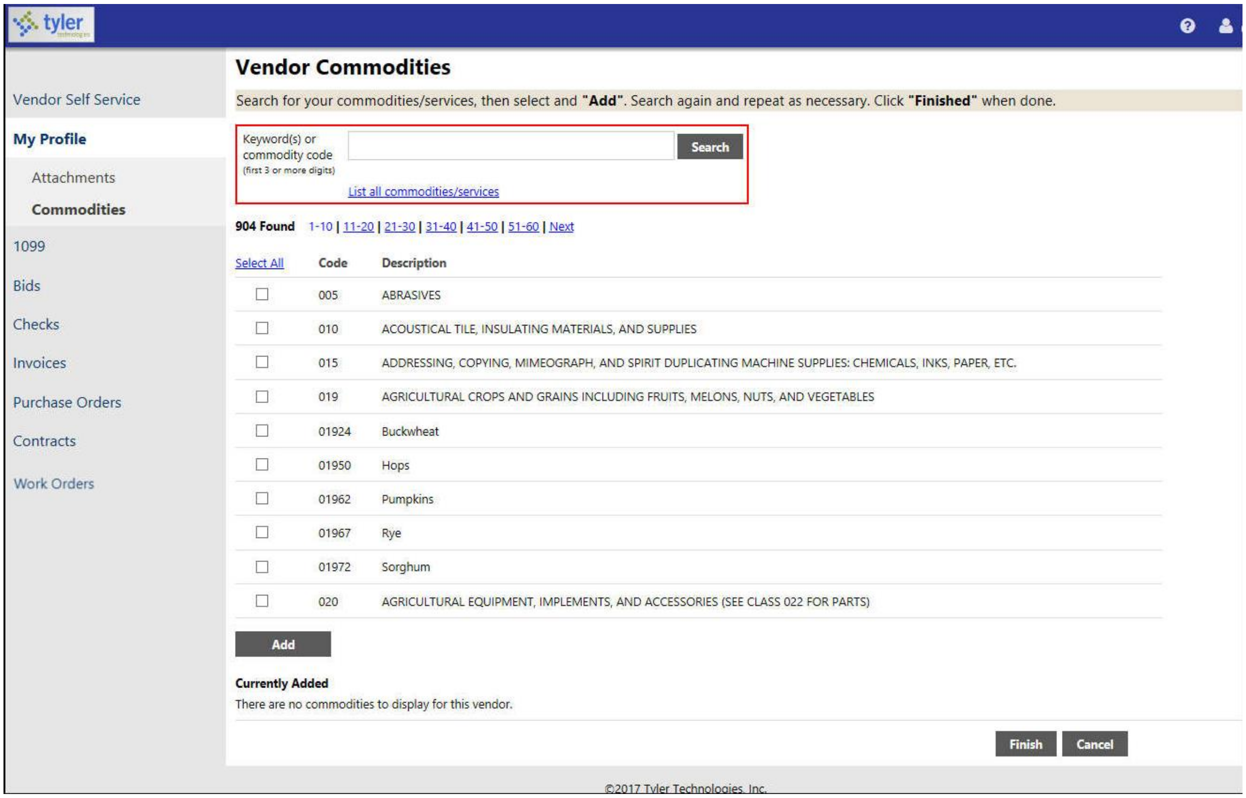
To remove an attachment, click the number of attachments indicator. On the attachments list, clicking the Delete button removes the attachment.



You cannot maintain your attachments in VSS once uploaded. Only City Accounting staff can add, update, or delete your attached files.

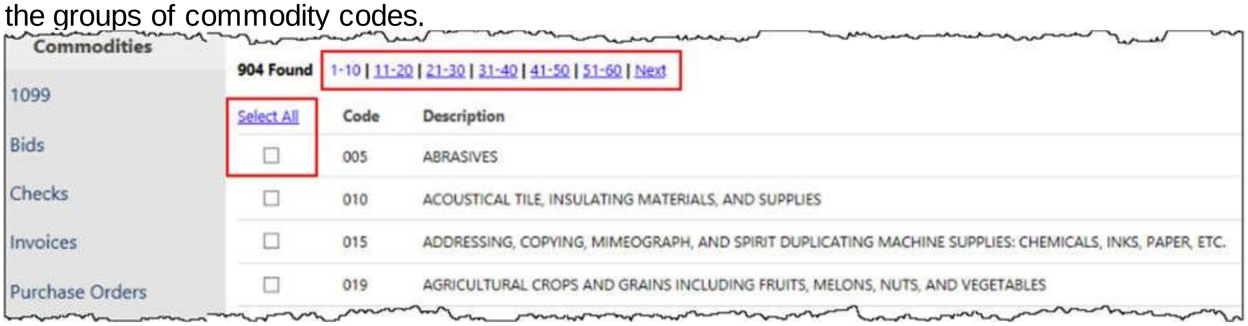
7.1.2 Commodities

Clicking Commodities on the navigation menu displays the Vendor Commodities page.



Use the Search box to search for commodities by code or keyword. Alternatively, clicking List All Commodities/Services displays all commodity codes in the City's database. VSS displays the number of codes found during a search and updates the commodity table.

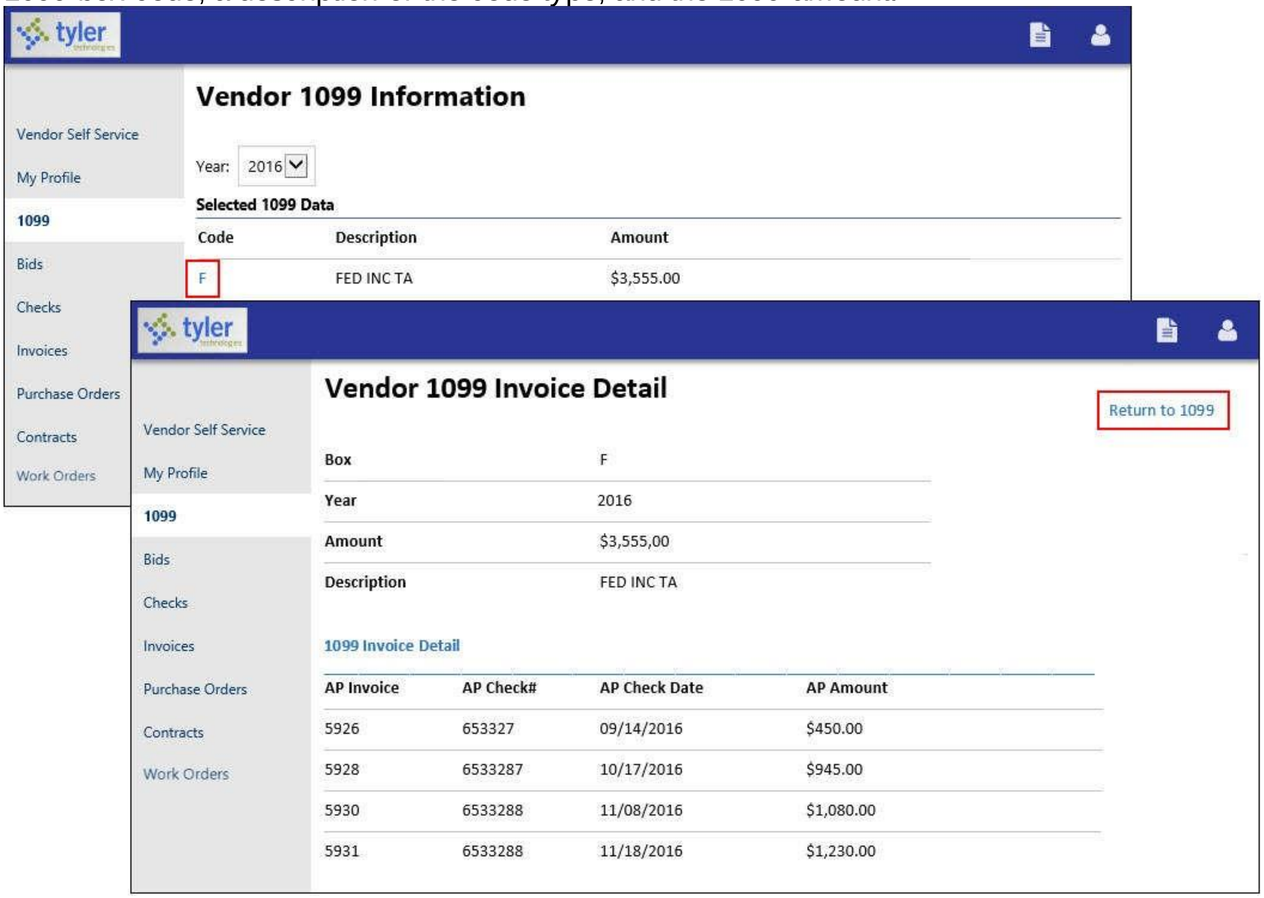
You can view commodities by group using the numbered group selections, or identify specific commodities by selecting individual check boxes. If you select an individual check box within a numbered group selection, VSS saves the value of each check box when you navigate between the groups of commodity codes.



After identifying the applicable commodity codes, clicking Add causes VSS to add the selected commodity codes to your profile and updates the Currently Added list. Clicking Remove removes the commodity from the group. When you complete the commodity code update, click Finished to save the changes and return to the My Profile page, where the Current Vendor Commodities group provides the full list of your associated commodity codes.

7.1.3 1099

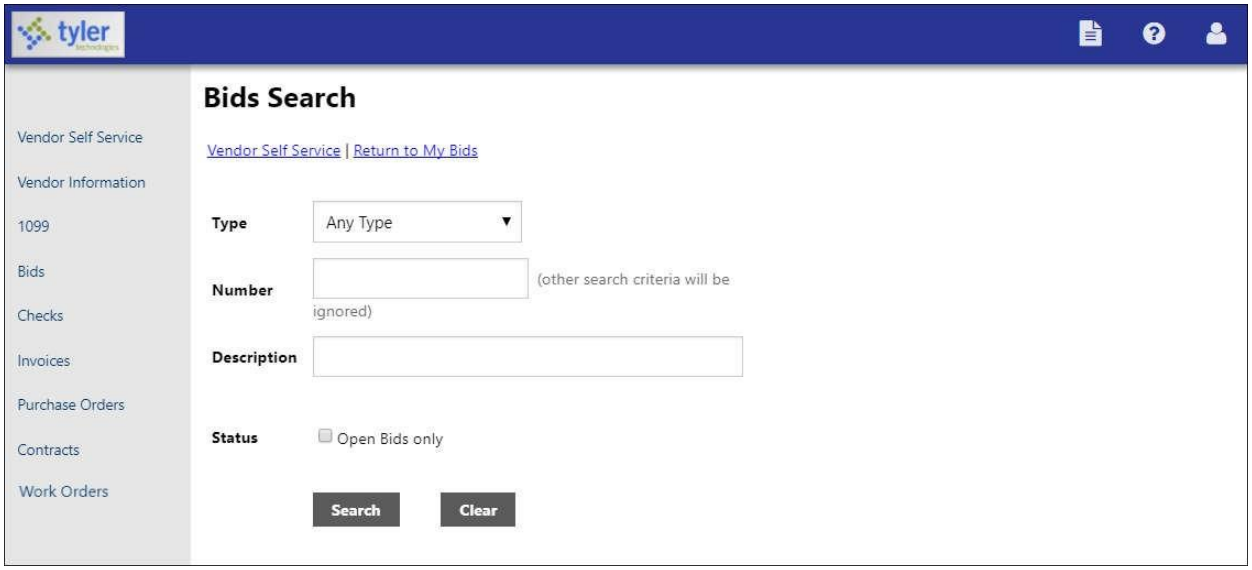
The 1099 page displays a listing of your 1099 data for a selected year. The data includes the 1099 box code, a description of the code type, and the 1099 amount.



Clicking a code type provides the Vendor 1099 Invoice Detail page. This page displays the general 1099 information, as well as a listing of 1099 invoice details, if they exist for the selected box code. Clicking Return to 1099 returns the vendor to the Vendor 1099 Information page.

7.1.4 Bids

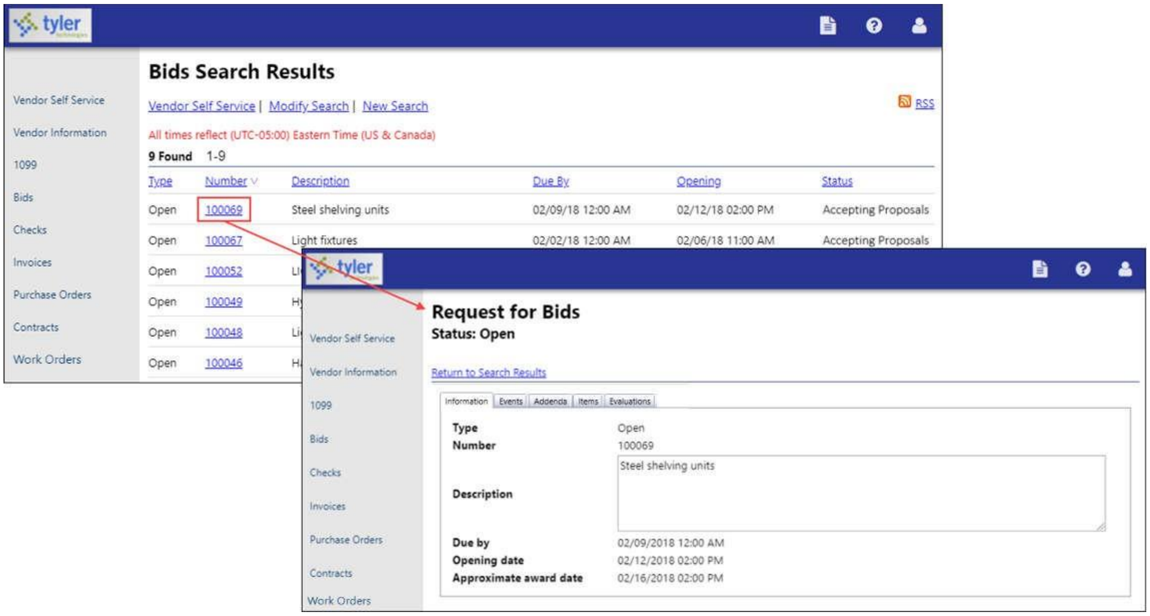
Bids provides a list of bids for the City. Bids opens to the Bid search page, which allows you to search for bids using the bid number, bid description, or bid status.



Search results include all bids that match the entered criteria.

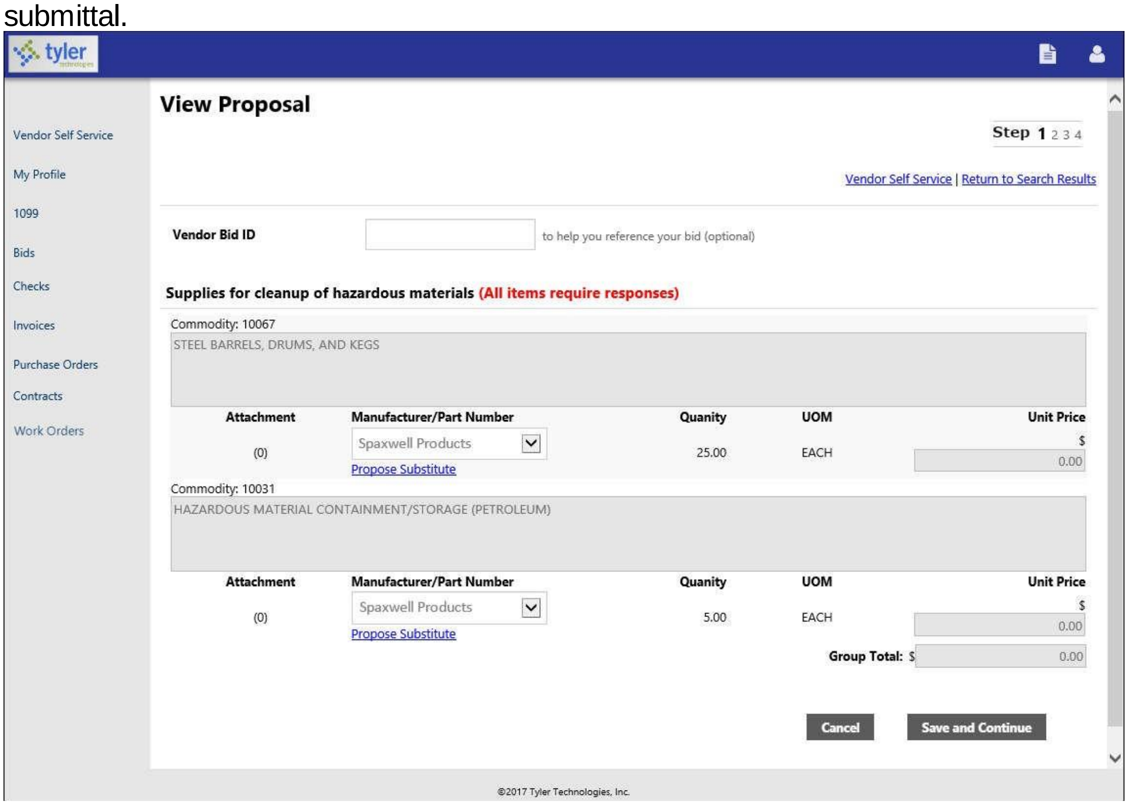
The RSS link allows you to subscribe to an RSS feed that is updated when the City enters or updates bid records.

Clicking the Bid Number for a bid displays the Request for Bids page. The information provided varies according to the current status of the bid. Generally, the Information, Addenda, Items, and Evaluations tabs are available.

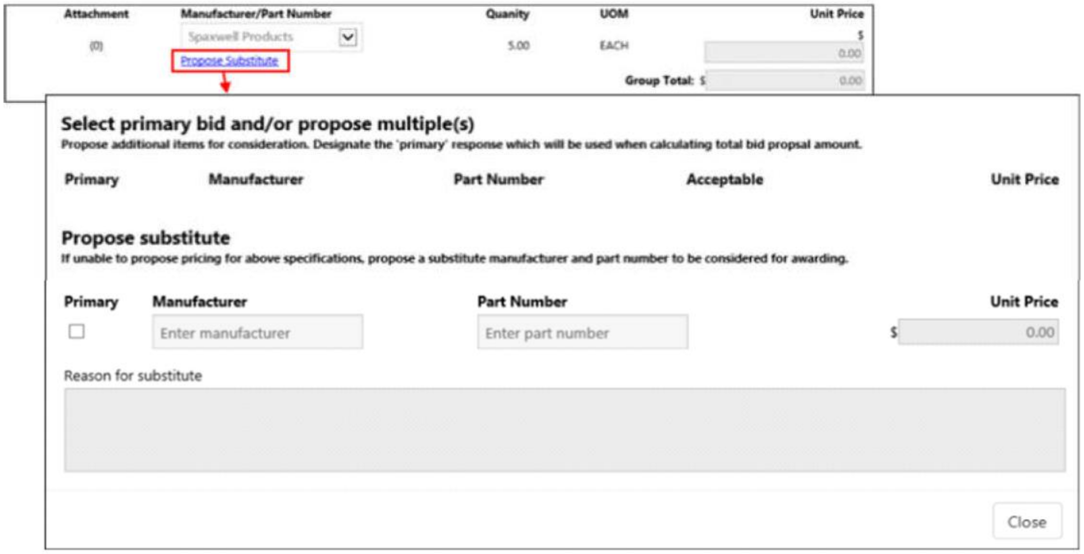


For open bids, the Create Proposal option allows you to submit a proposal for the selected bid request.

The Create Proposal procedure is a four-step process that guides you through bid response and submittal.



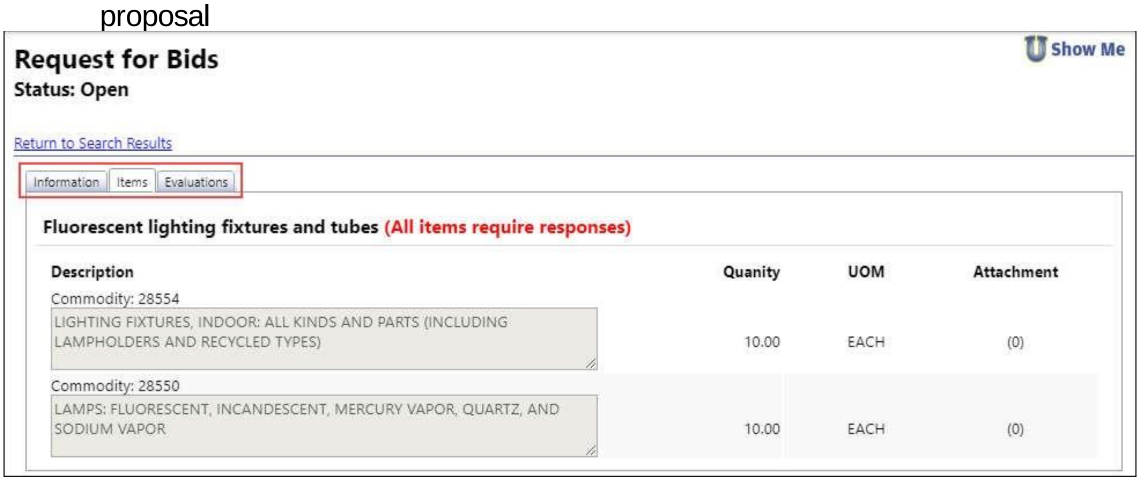
If the bid has the Allow Substitute option, you can propose a substitute item and enter a note justifying the proposed substitute item.



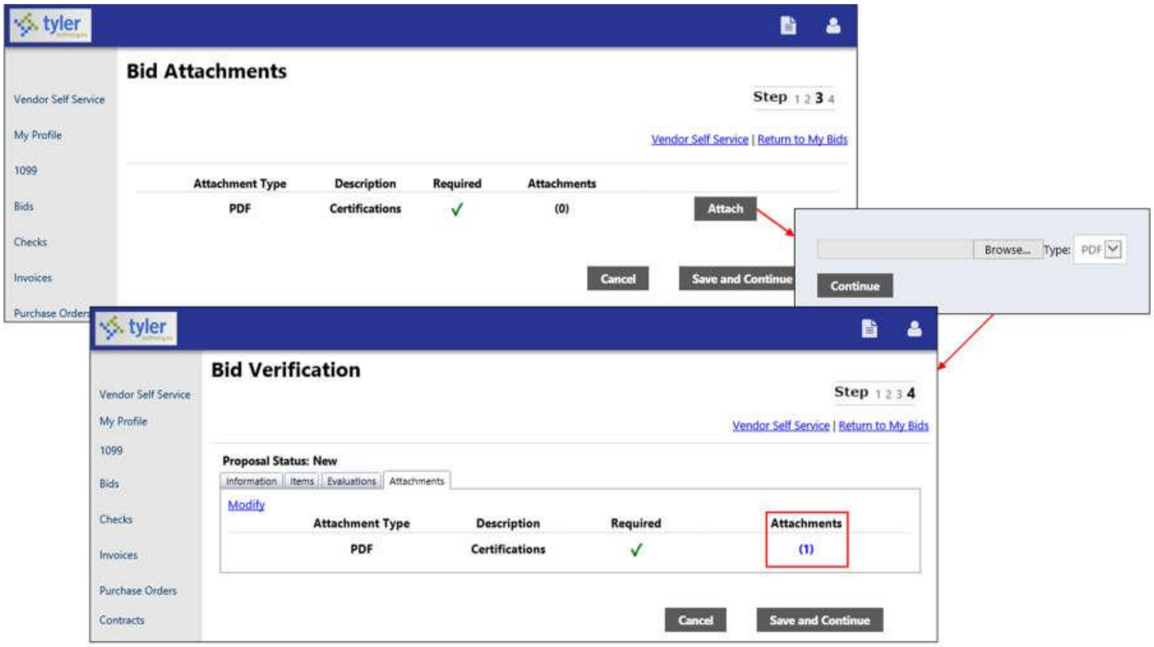
The Save and Continue option saves the information entered and moves you through the steps required to complete the proposal.

The proposal information is organized onto tabs:

- Information—Displays general information about the requestor call for bids.
- Items—Displays the items listed in the request for bids.
- Evaluations—Provides questions to which your organization requires answers.
- Attachments—Stores documents the vendor has attached to their proposal.
  Note: The Attachments tab displays only when an attachment has been added to the proposal



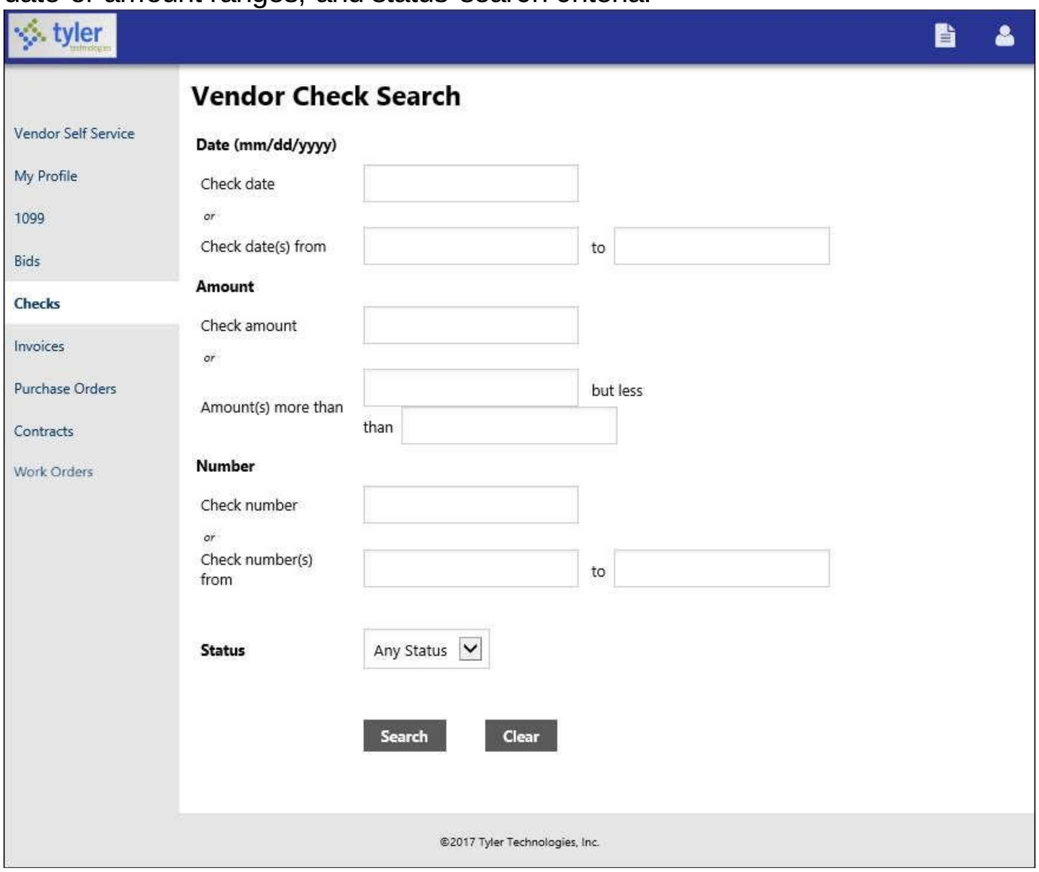
You can add attachments to your proposal or quote by selecting an attachment type and using the Browse button to select the file to attach.



7.1.5 Checks

The Checks group provides a list of checks recently issued to your company by the City.

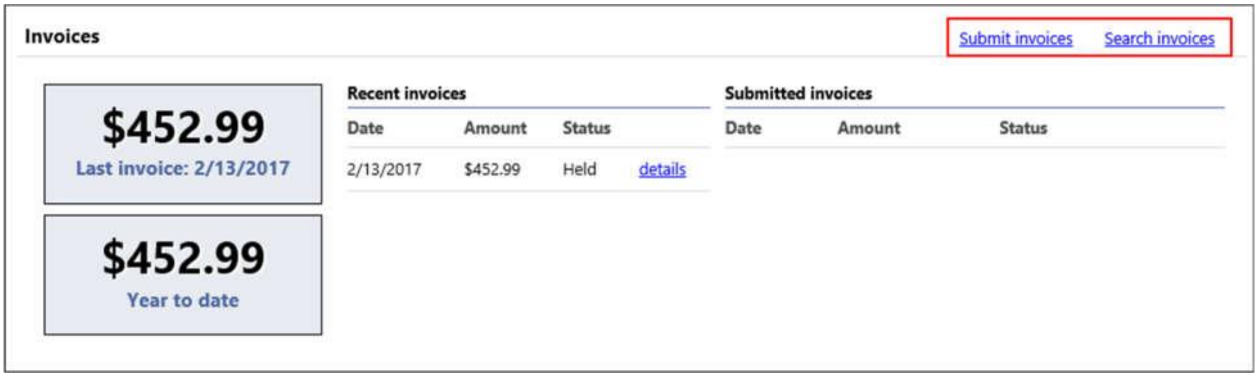
Using the Search Checks option, you can find additional check details using the invoice number, date or amount ranges, and status search criteria.



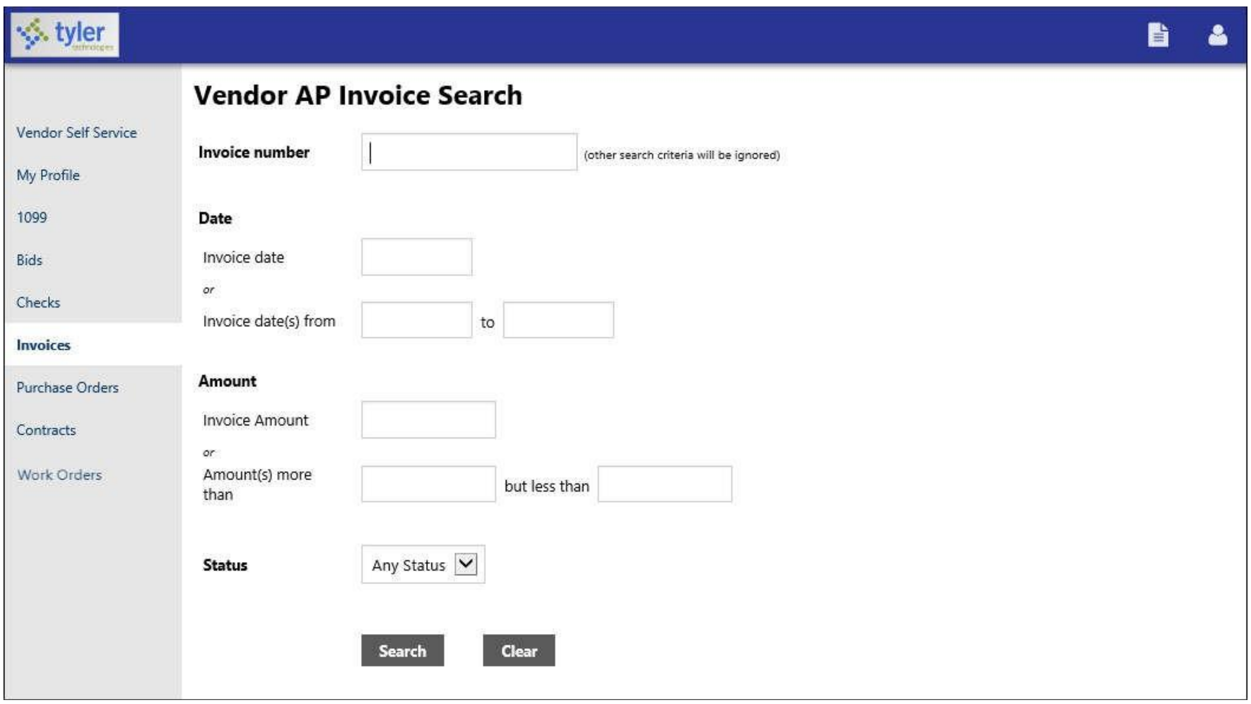
Search Results for checks provides the check date, amount, check number, and status. Use the View option of an individual check to view additional details.

7.1.6 Invoices

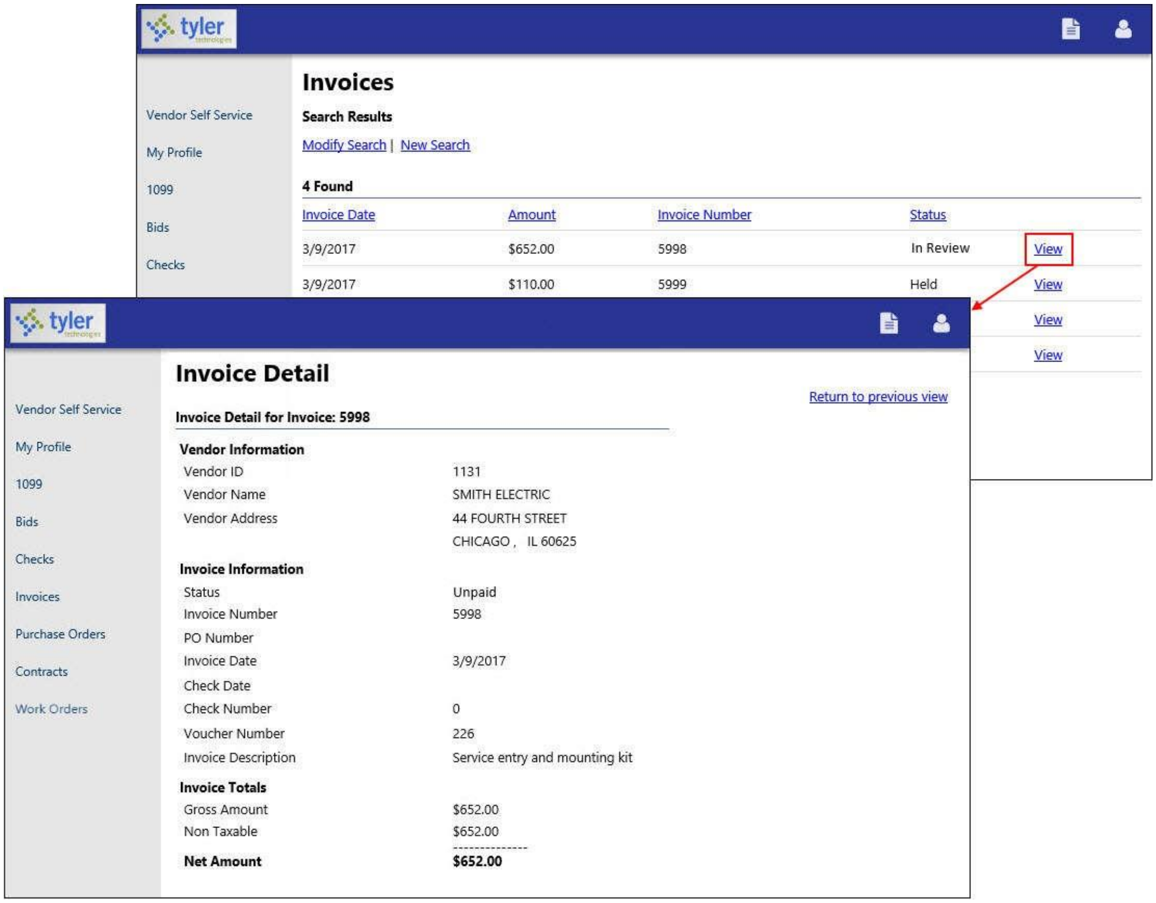
The Invoices group provides details for recent and submitted invoices. You are only able to view invoices that are associated with your vendor ID.



The Search Invoices page allows searches by invoice number, date or amount ranges, and status.

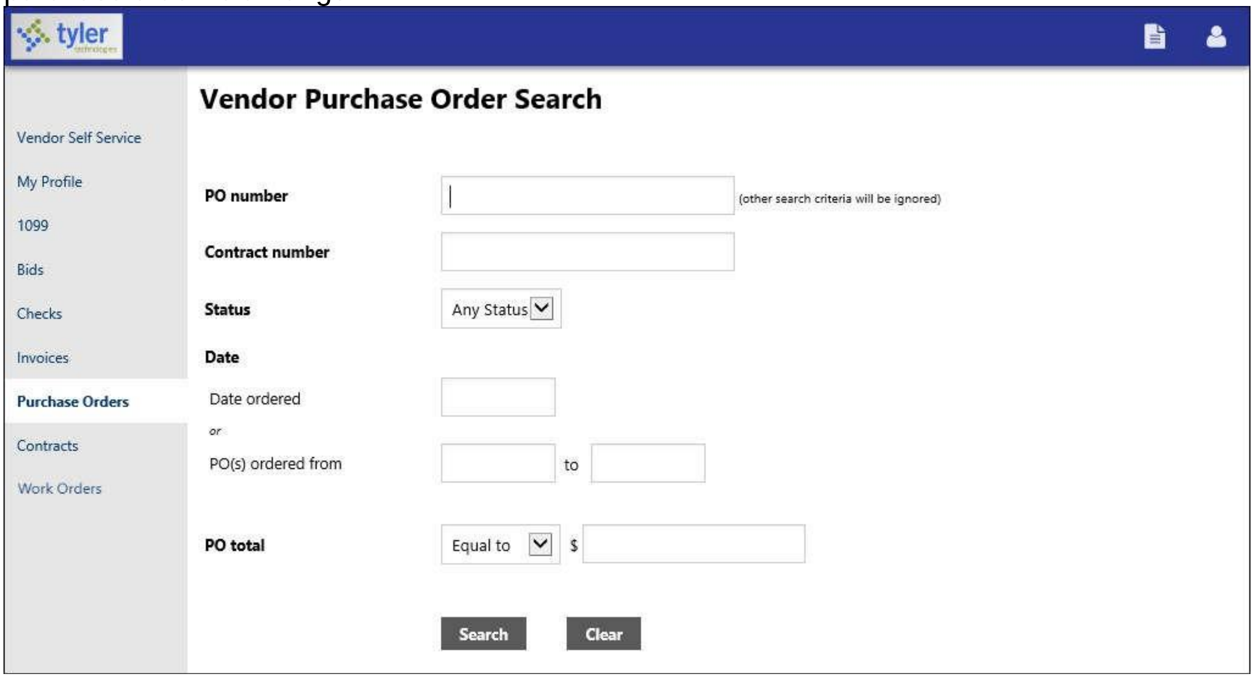


The Search Results page provides the invoice date, amount, invoice number, and status. When you clicks Details, VSS provides the Invoice Detail page, which includes additional information sorted by Vendor, Invoice, and Invoice Totals groups.

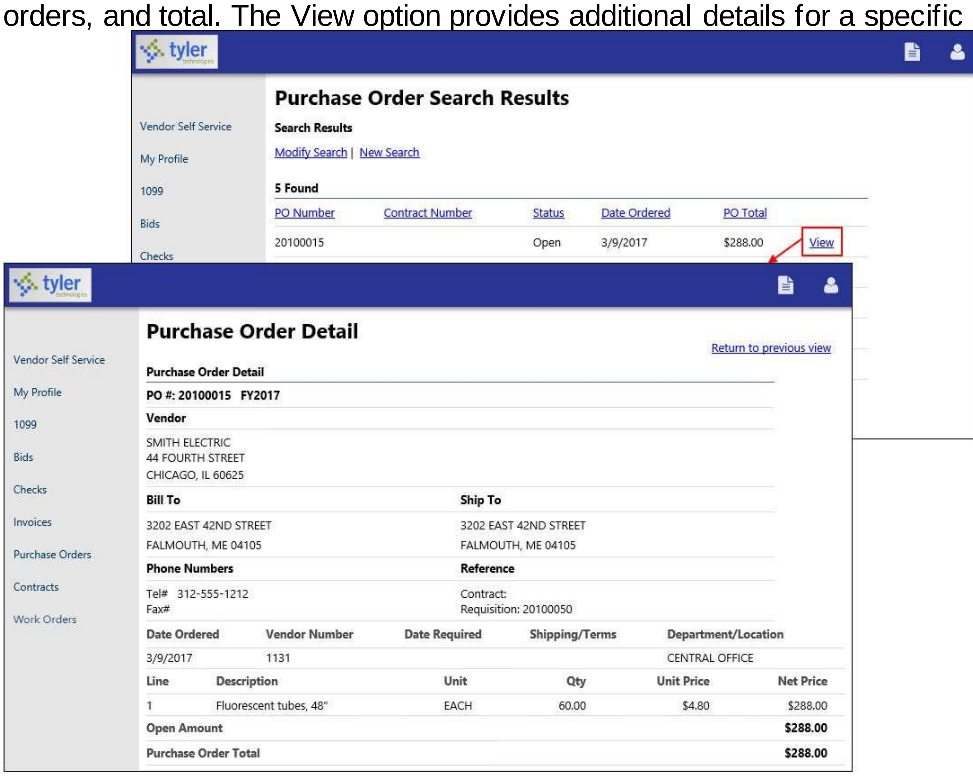

tyler
Invoices
Search Results
Modify Search | New Search
4 Found
Invoice Date
Amount
Invoice Number
Status
3/9/2017 $652.00 5998 In Review View
3/9/2017 $110.00 5999 Held View
View
View
Vendor Self Service
My Profile
1099
Bids
Checks
Invoice Detail
Return to previous view
Invoice Detail for Invoice: 5998
Vendor Information
Vendor ID 1131
Vendor Name SMITH ELECTRIC
Vendor Address 44 FOURTH STREET
CHICAGO , IL 60625
Invoice Information
Status Unpaid
Invoice Number 5998
PO Number
Invoice Date 3/9/2017
Check Date
Check Number 0
Voucher Number 226
Invoice Description Service entry and mounting kit
Invoice Totals
Gross Amount $652.00
Non Taxable $652.00
Net Amount $652.00
Invoices
Purchase Orders
Contracts
Work Orders

7.1.7 Purchase Orders

Purchase Orders provides a list of recent purchase orders issued to you from the City. The initial Search Purchase Orders page allows you to search by purchase order number, date, or a purchase order total range.

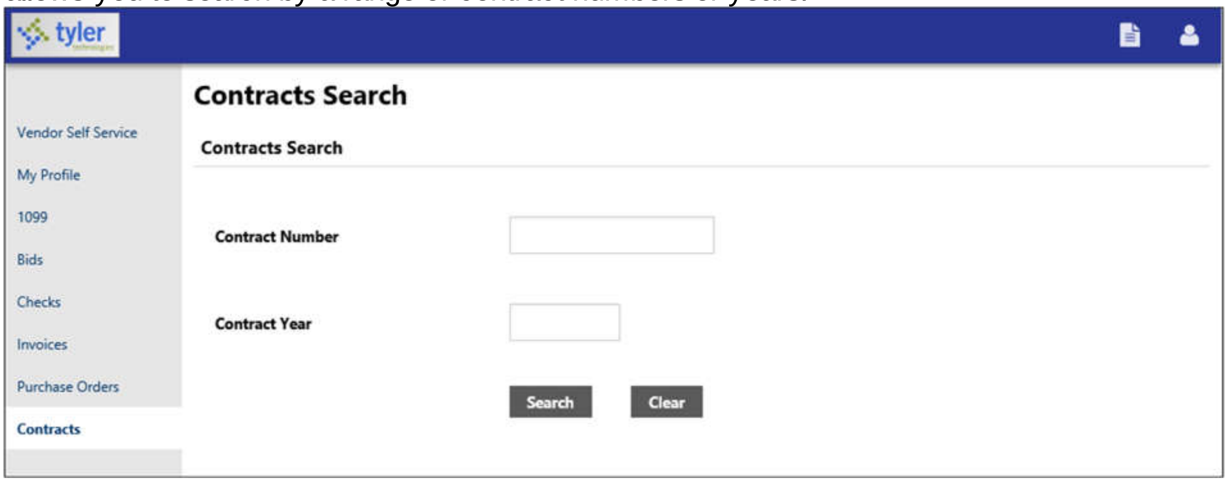


Search results include the purchase order number, contract number (if applicable), status, date orders, and total. The View option provides additional details for a specific purchase order.

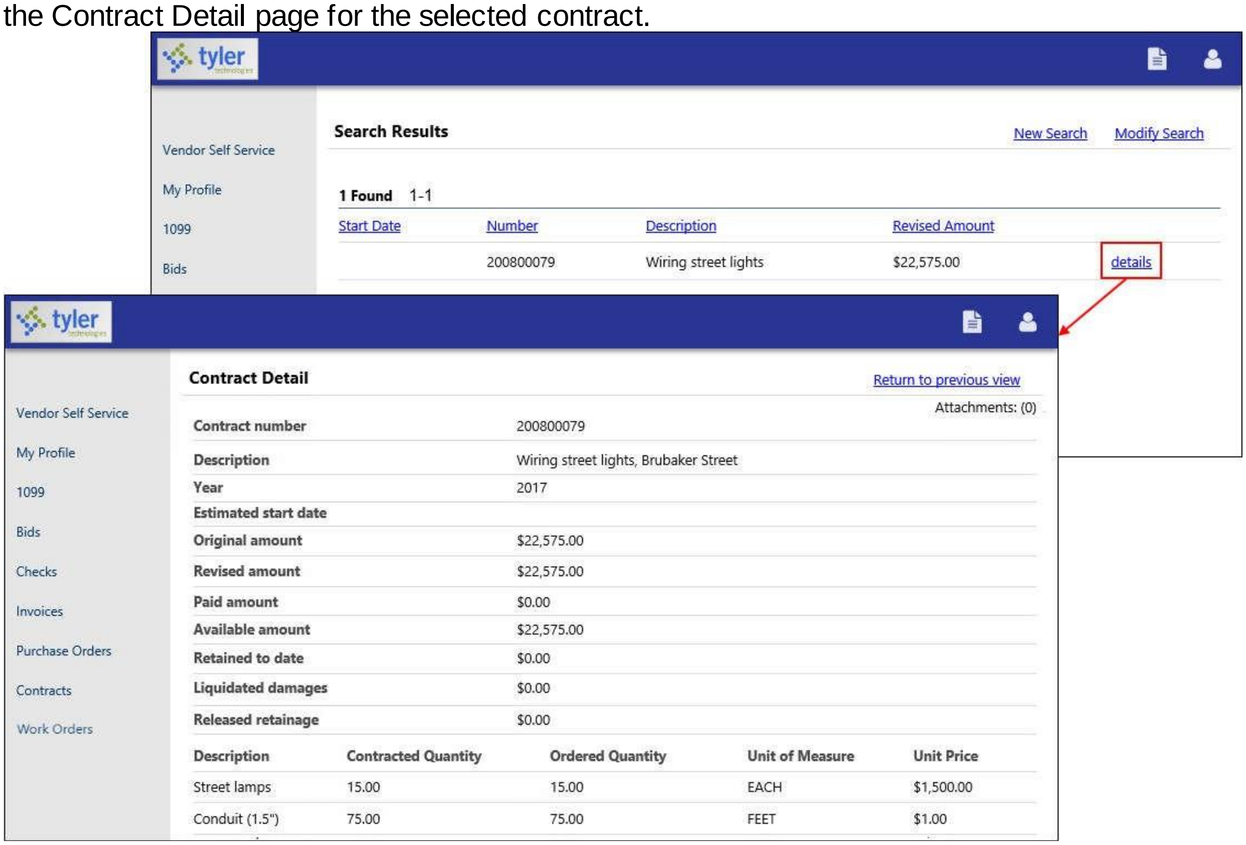


7.1.8 Contracts

Contracts provides contracts you currently holds with the City. The initial Contracts Search page allows you to search by a range of contract numbers or years.



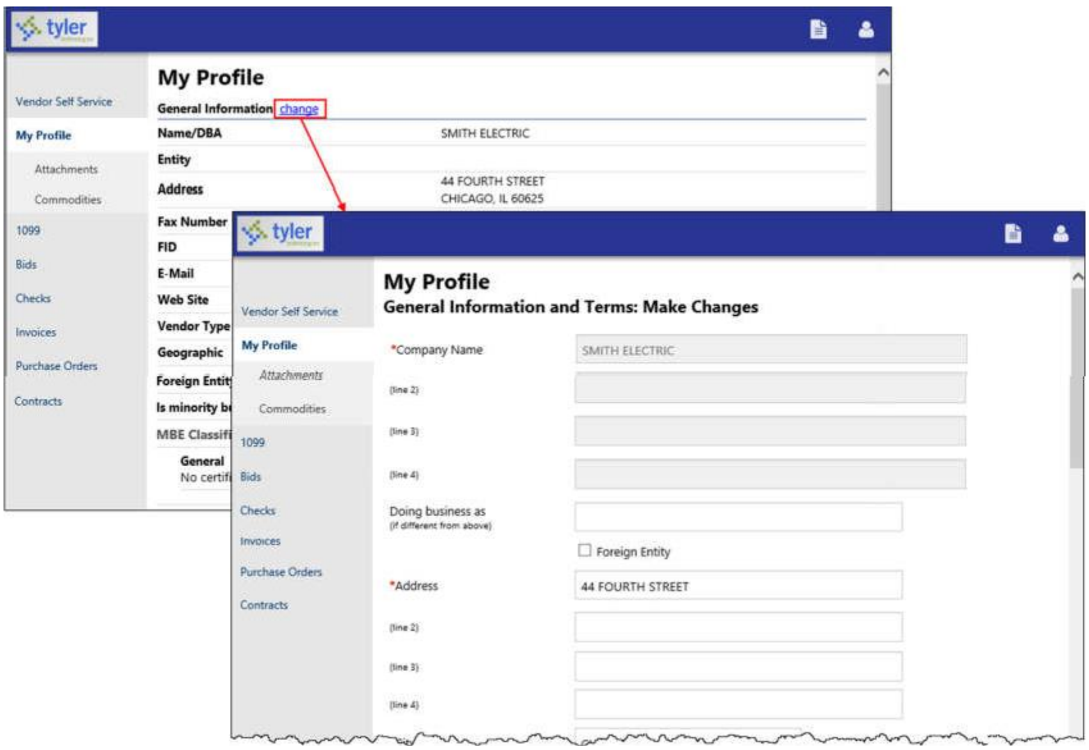
Search results include the contract start date, number, and amount. The Details option displays the Contract Detail page for the selected contract.



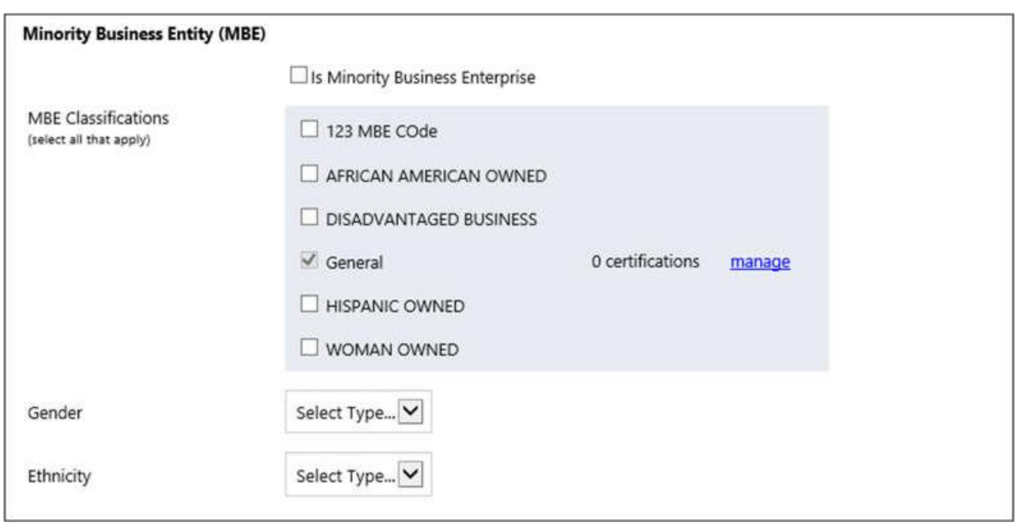
Appendix A—Managing Minority Business Enterprise Certificates

If your organization's Vendor Self Service administrator has cleared the Disable MBE Certification Management check box on the Vendor Administration page, vendors can manage their minority business enterprise (MBE) certifications in Vendor Self Service.

To maintain MBE certifications, vendors use the Change option on the My Profile page.

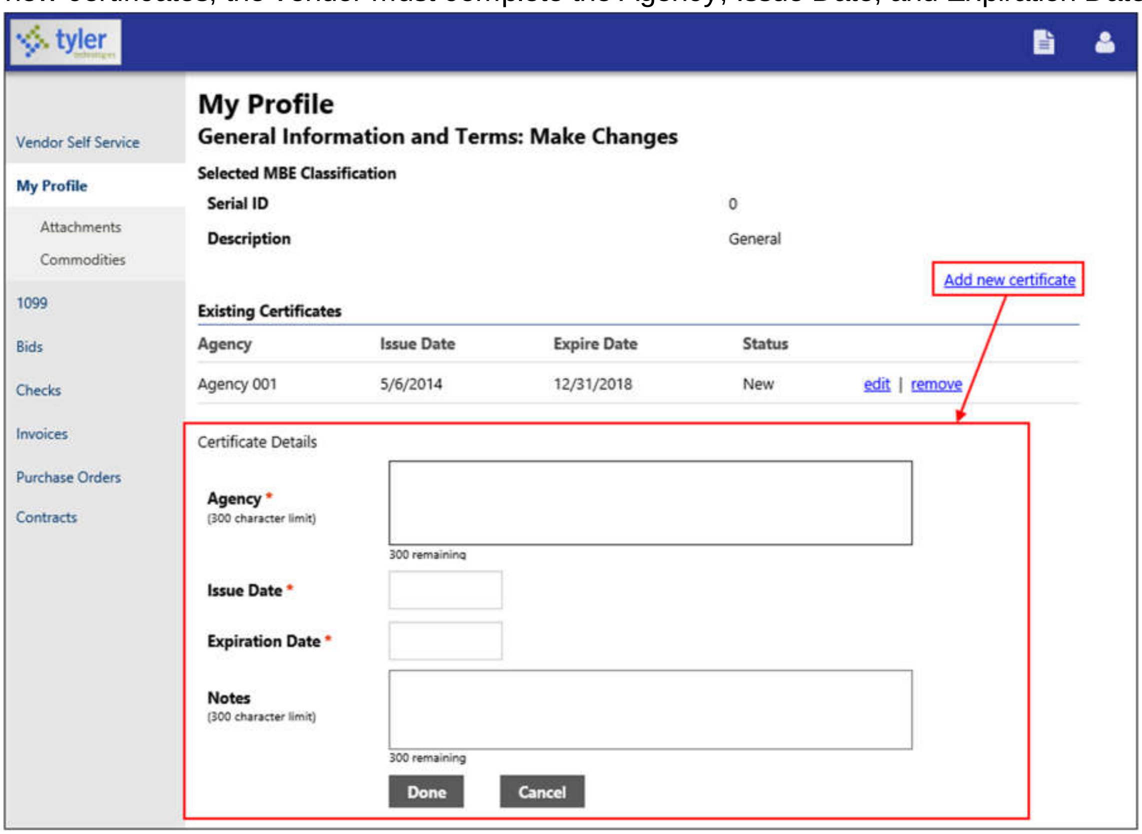


The Minority Business Entity (MBE) section contains the check boxes that indicate if the vendor is a minority business enterprise, and if so, which classifications your company possesses.

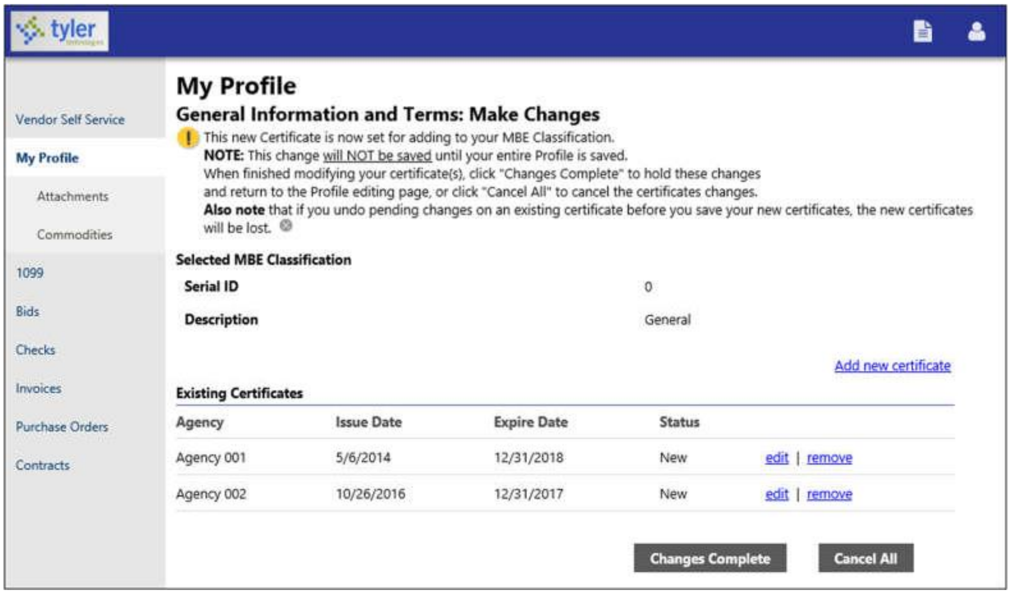


The Manage option for each classification allows a vendor to maintain the classification using the Manage MBE Classification Certificates page.

Clicking Add New Certificate refreshes the page to include the Certificate Details section. For new certificates, the vendor must complete the Agency, Issue Date, and Expiration Date fields.



When the vendor has finished entering data in the boxes, clicking Done saves the entry and displays the Make Changes page.



The Make Changes page includes message indicating that the new certificate is ready to be added to the vendor's profile, but that the information will not be saved until the vendor's entire profile is saved.

After entering, editing, or removing certificates for a classification, the vendor clicks Changes Complete to save the certificate entries or Cancel All to discard all of the certificate information. Clicking Changes Complete returns the vendor to the Make Changes page, where the Minority Business Entity section displays the updated certification count.

On the My Profile–Make Changes page, the vendor must click Update to permanently update their profile with the certificate information.