Vendor Self Service User Guide

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1 VENDOR SELF SERVICE

The City of Fort Smith has partnered with Tyler Technologies to provide our vendors with access to information related to their vendor accounts. Vendor Self Service (VSS) provides vendors with web-based access to information stored in the City of Fort Smith's Munis® database. The information is drawn from multiple Munis® products within the City's financial system, including Accounts Payable, Purchasing, Contract Management, and Bid Management. This guide is intended as a resource to aid City vendors in the VSS registration process.

Using VSS, vendors can enter and maintain their contact and remittance information, discount and payment terms, designated contact persons, and enter a list of commodity codes that represent the goods and services the vendor can provide.

A listing of the vendor's current and prior 1099 data, purchase orders, invoices, contracts, and checks is available in VSS for inquiry purposes.

VSS allows vendors to search for and view bid request information, and then use that information to submit a bid offer or quote. The submission process creates bid records in the City's bid management program where it can be examined and evaluated by the City's bid management personnel.

1.1.1 Vendor Self Service Users

Vendor Self Service requires vendors who are existing vendors with the City to register using the VSS website to gain access to their information. To successfully link your VSS record to the City's internal database, you will need to enter the credentials provided on the front of this packet in step one (1) of the registration process.

Potential vendors who do not exist in the City's database can complete the registration process. Until the vendor has been approved by the appropriate City personnel, the vendor will have authorized limited access to the Vendor Self-Service portal.

2 VENDOR REGISTRATION

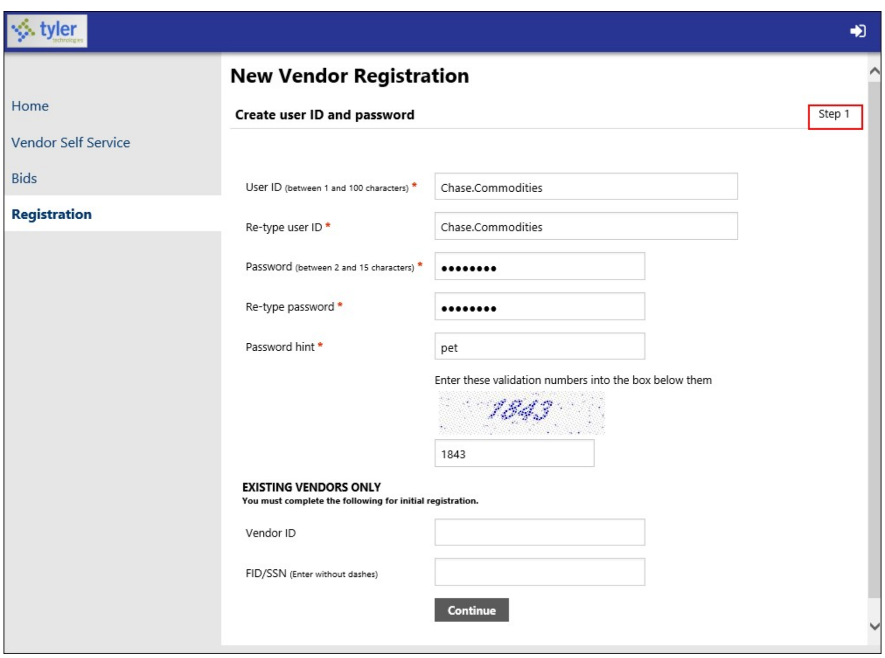
Employees who are subject to receive a travel advance, travel reimbursement or other reimbursement from the City must register to gain access to Vendor Self Service.

Register by clicking **Registration** on the VSS home page.

(https://cityoffortsmithar.munisselfservice.com/Vendors/default.aspx)

Registration is a multistep process. Vendor Self Service displays the number of steps in the process, with the current step displayed in bold type. Vendor Self Service does not save any information entered in the fields on any page until the registration is complete. If a vendor leaves the registration process before completing each of the steps, all of the information entered is discarded and they must start again.

STEP 1: The first step in the process defines the user ID and password information as well as the employee contact.



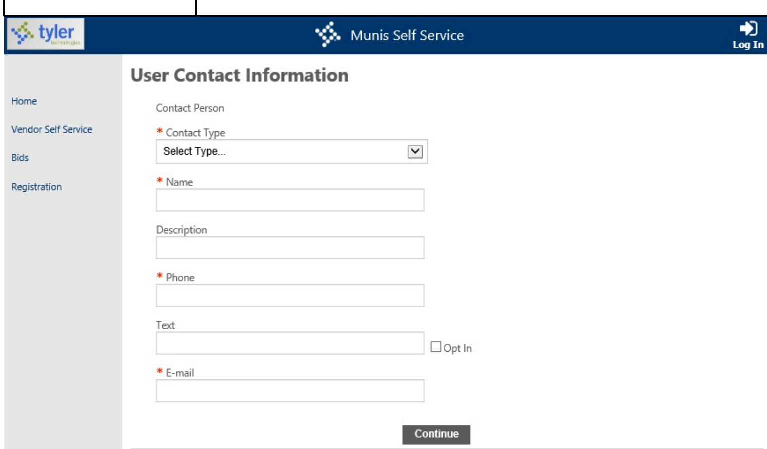
The fields in step one should be completed following the guideline within the following table.

Field	Description
User ID	Defines the vendor's VSS login name. Each user ID must be unique and cannot be greater than 40 characters in length.
Password	Indicates the vendor's login password. The vendor must enter and then retype a login password in the boxes. VSS requires entry of a minimum of twelve characters for the password and a maximum of 15 characters.
Password Hint	Contains a hint used to assist the vendor in remembering their password. The hint cannot be the same as the vendor's password. VSS sends this hint to the vendor in an email message when they click **Forgot Password** on the login page.
CAPTCHA	Displays a CAPTCHA code (Completely Automated Public Turing Test to Tell Computers and Humans Apart), which is used to protect the VSS database from attack. The vendor must enter the numbers shown in the box.

For employees, part two of step one will require the entry of user contact information.

To complete step one of the registration process, prospective vendors should complete the User Contact Information by following the field help guidelines listed in the following table.

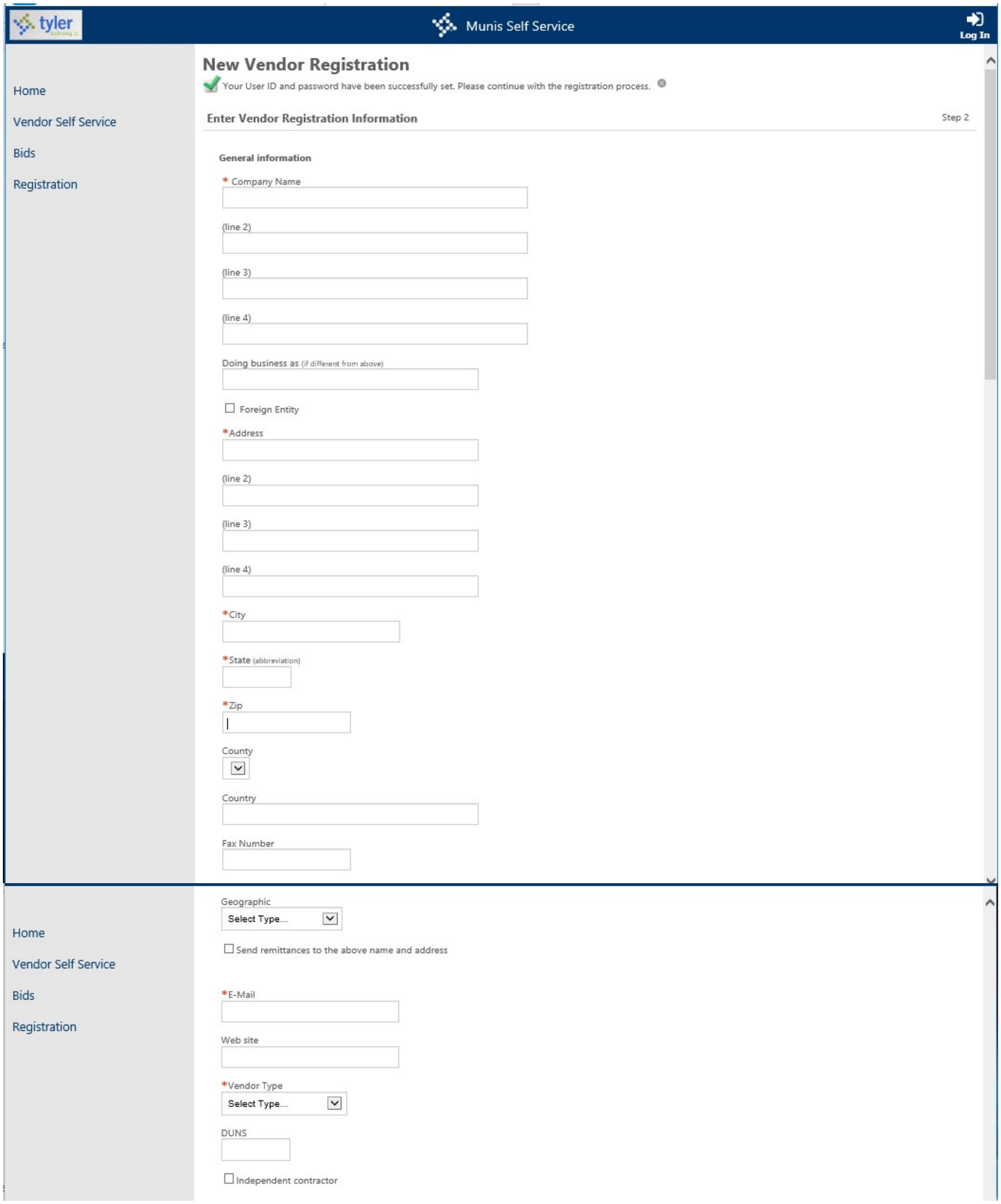
Field	Description	Required
Contact Type	Available options are General Contact, Accounts Payable, and Purchasing. The user must select one. There will be an opportunity to add more contacts in later steps.	Yes
Name	This is the contact person's first and last name.	Yes
Description	This field is open to the vendor. A best practice for this entry is to use the contact person's job title or job function.	No
Phone	This is the contact person's phone number. A best practice is to use the contact's direct business line. The format to be used for the phone number is XXX-XXX-XXXX.	Yes
Text	This field is optional to allow text messages to be sent to the contact. Regular data rates would apply. If a phone number is entered here, the contact must also check "Opt In."	No
E-mail	Enter a valid e-mail address for the contact in this field.	Yes



Once the vendor has completed the User Contact page and selected **Continue,** the vendor may proceed to step two (2) in the VSS registration.

Step 2: General Vendor Information.

The second step in the employee registration process requires the employee to provide their general business and contact information. For the Company Name, please enter your full legal Name.

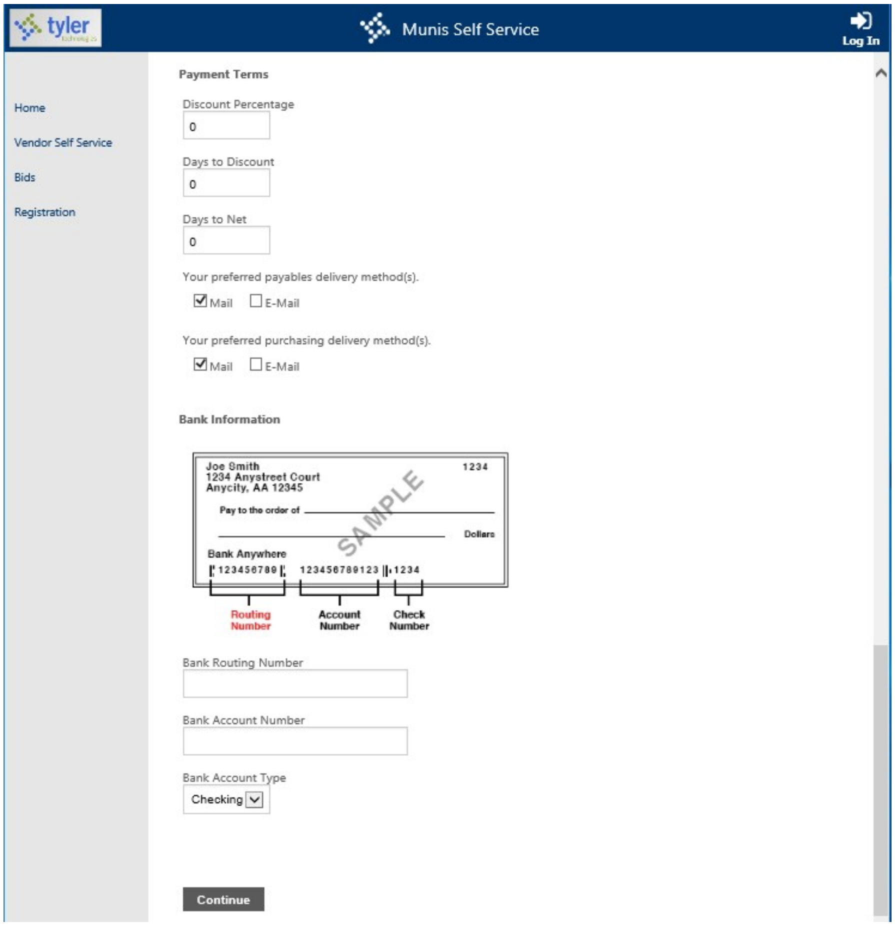


Field	Description
Company Name	Contains the vendor's name or business name. (50-Character Limit) Lines 2-4 may be used if required. **For employees, this field should contain your full legal name.**
Doing Business As	Indicates the vendor's doing business as (DBA) name, if applicable.
Foreign Entity	When selected, indicates that the vendor is a foreign entity. This should be left unchecked.
Address, City, State, ZIP	Define the employee's main address. The vendor must enter a two-letter state postal abbreviation code in the State box.
Fax Number	Displays the employee's fax number, if applicable.
Geographic	Employees should leave this field blank.
Send Remittances to the Above Name and Address	If the employee selects this check box, Vendor Self Service enters the values from the main address as the default values in the boxes in step three of the registration process. If left unchecked, the employee will be able to enter additional addresses later in the registration process.
Email	Contains the employee's primary email address. It is the address to which all notifications and alerts are sent, such as registration confirmation messages or password hints. Additional email addresses for contact persons are defined later in the registration process.
Web Site	Employee may leave this field blank.
Vendor Type	Determines the vendor's type. Employees should always select "Employee."

The New Vendor Registration page contains a Minority Business Entity (MBE) section that must be completed by minority business enterprise vendors. Employee's should skip this section.

The next section identifies the employee's tax information.

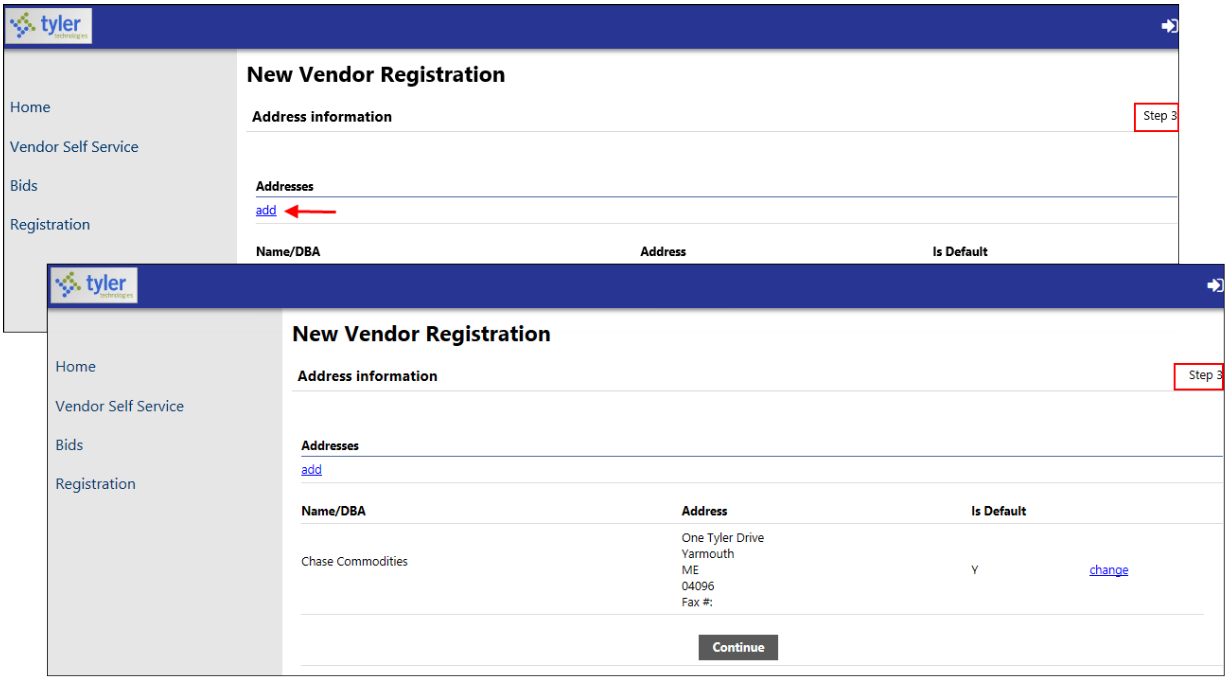
The Payment Terms and Bank Information sections define the vendor's business terms and financial transaction information. However, the Bank Information section only appears when your VSS administrator has enabled entry and viewing of bank information. Employee's may choose this option to receive fund via electronic transfer. This is not required but an added value option for our employees.



Field	Description
Payment Terms	
Discount Percentage	Employees will not use the payment term fields.
Days to Discount	
Days to Net	
Your Preferred Payables Delivery Method	
Your Preferred Purchasing Delivery Method	
Bank Information	
Bank Routing Number	Determines routing number of the bank account to which payments made to the employee should be sent. The program automatically selects the correct bank code based on the entered routing number.
Bank Account Number	Contains the employee's bank account number.
Bank Account Type	Indicates the type for the entered account: checking or savings.

Step 3: Adding additional addresses.

Step three of the VSS registration process requires the employee to enter address information. If the employee selected the Send Remittances to the Above Name and Address check box during step two, Vendor Self Service automatically enters the first address record. If the check box was not selected, the Addresses table is blank.



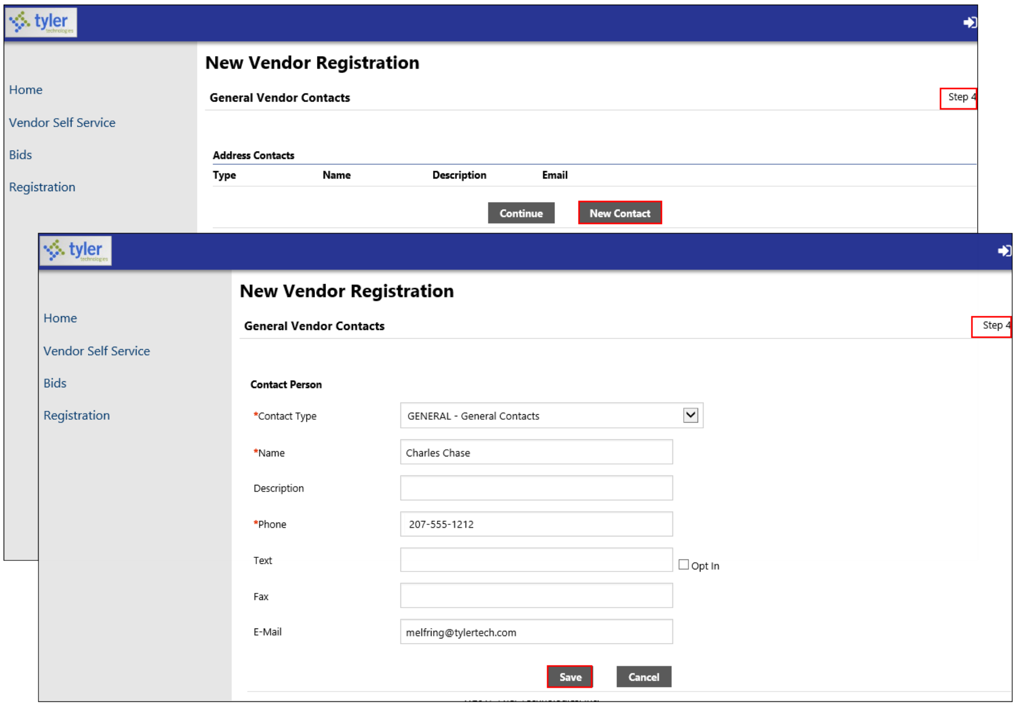
The vendor must click **Add** to create a new address record, which displays the Remittance Information page.

Field	Description
Address Type	Determines the type code of the entered address.
Company Name	Defines the name that appears on items sent to this remit address. The name can vary from the vendor name, if necessary.
Address, City, State, ZIP	Provide the remit mailing address.
Fax	Contains the fax number for this remit address.
Email	Defines the email address used for the remit address.
Bank Information	
Bank Routing Number	Determines routing number of the bank account to which payments made to the employee should be sent. The program automatically selects the correct bank code based on the entered routing number.
Bank Account Number	Contains the employee's bank account number.
Bank Account Type	Indicates the type for the entered account: checking or savings.

Clicking **Save** after entry of an address record returns the Address Information page, where the new address record has been added to the table.

An employee can add individual contacts for an address record by clicking **Change**, which displays the Remittance Information page. These contacts are only associated with the address record and are not displayed as part of the general vendor record.

Clicking **Add Contact** on the Remittance Information page displays the Contact Information page, where the employee can create contact records for the address.

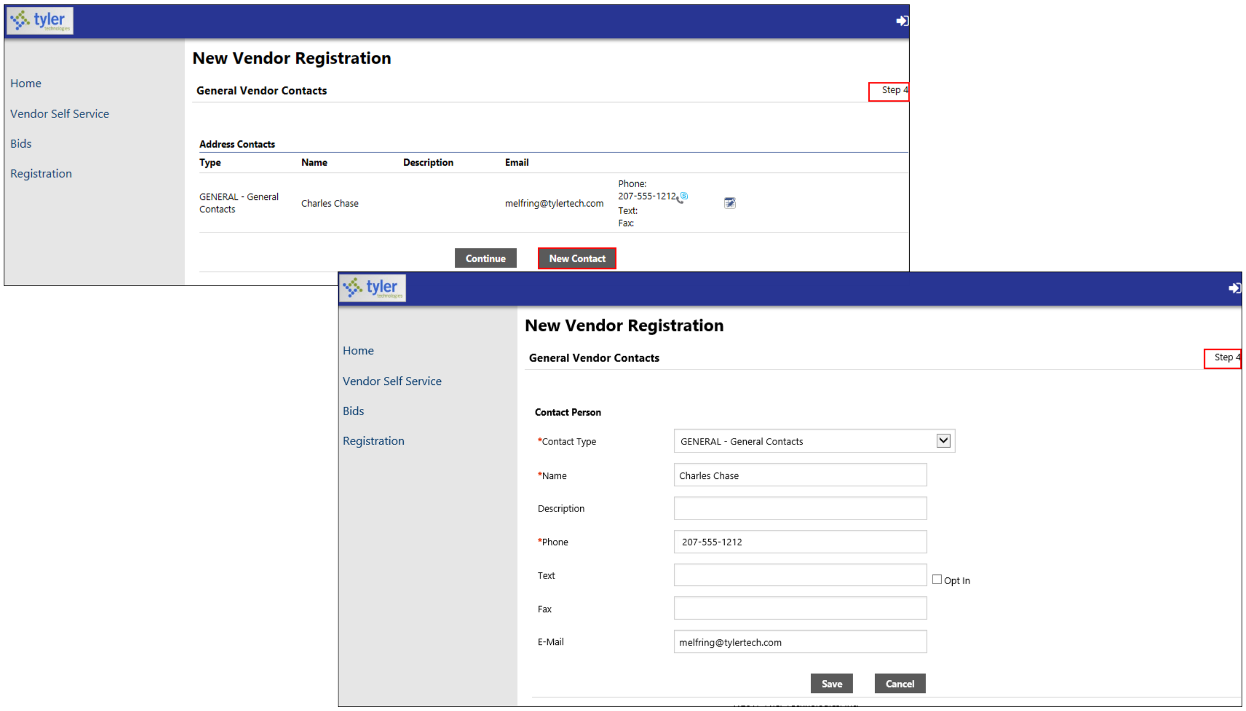


Field	Description
Contact Person	
Contact Type	Determines the contact type code. Contact type codes are defined in Munis using the Contact Types program.
Name	Contains the name of the contact person.
Phone, Fax, Email	Define the contact's phone and fax numbers, as well as the contact's email address. The fax and email information are optional.

Clicking **Save** after completing the contact information returns the employee to the address record, with the new contact record provided in the Addresses Contacts group.

The employee must click **Save** on the Remittance Information page to return to the Address Information page, and then click **Continue** to advance to the next sub-step in the registration process.

On this next screen, the vendor clicks **New Contact** to enter a contact person for the general vendor record using the General Vendor Contacts page.

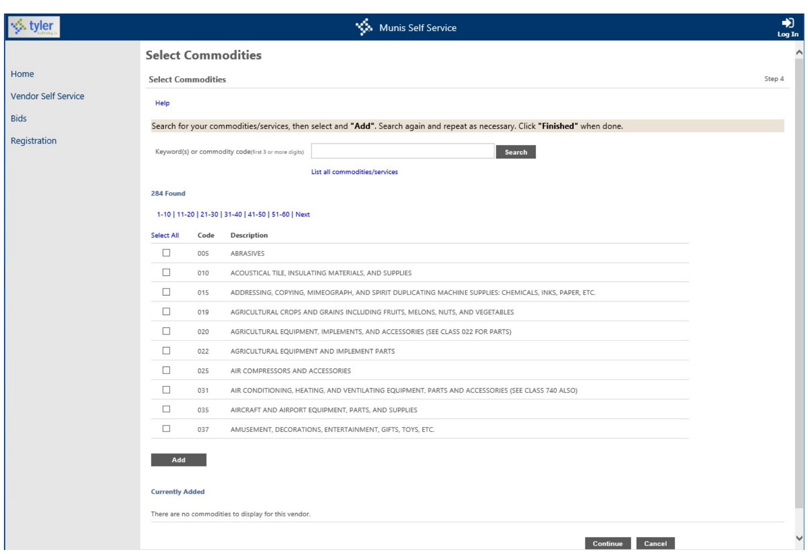


This page contains fields that are identical in function to those from step three, but they apply to the vendor record as a whole and not a single remit address. Clicking **Save** after entering the contact information returns the vendor to the General Vendor Contacts page with the new contact record displayed in the Address Contacts group.

The vendor must click **Continue** to advance to the next step of the VSS registration process.

Step 4: Select Commodities

Employees may skip this setup as it is related to Vendors wishing to participate in the bid process.

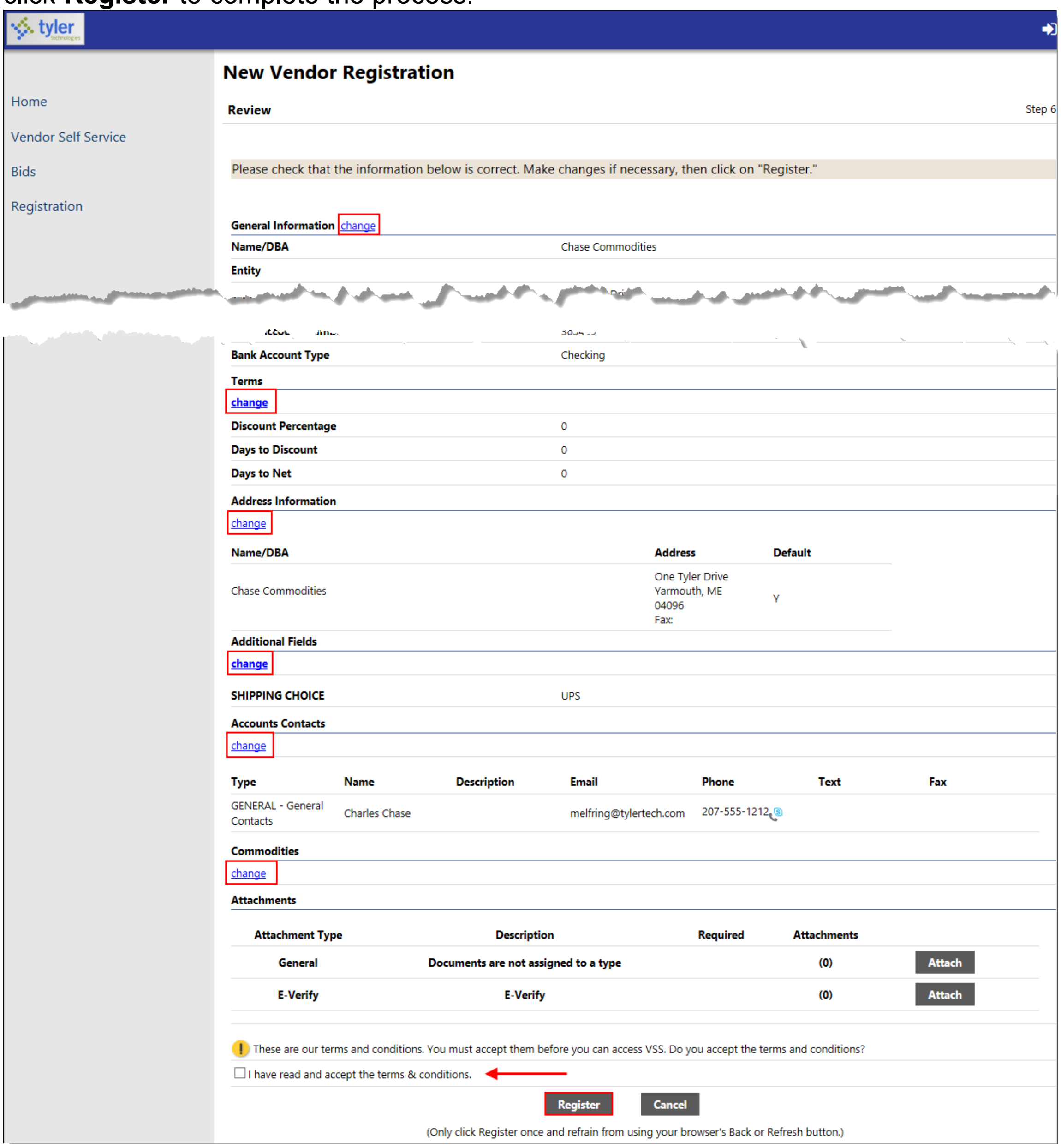


Step 5: Vendor Registration Review.

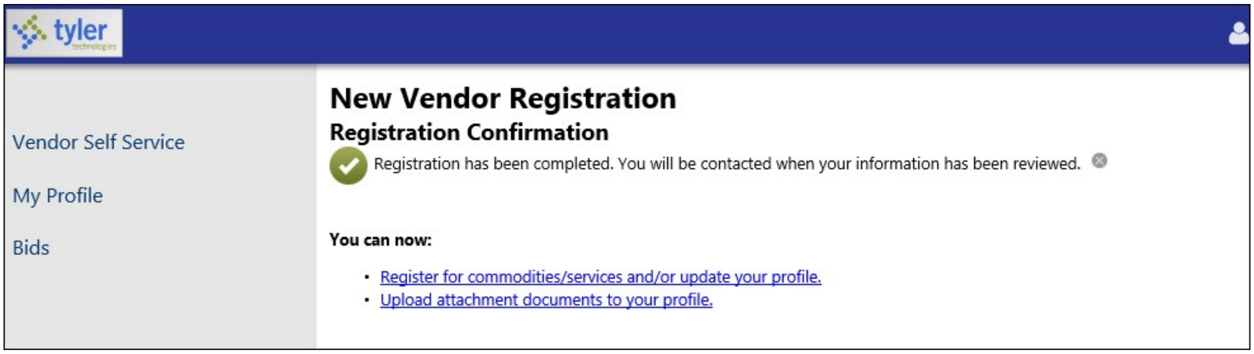
On the Review page, the employee reviews and confirms the information they entered in previous steps. If changes are required for any detail group, the vendor uses the Change option for that group to make the appropriate changes.

During the review process, vendors must complete and attached a W-9 to the vendor record by selecting the **Attach** button to the right of the attachments field.

When all the entered information is correct, the vendor must select the Terms and Conditions check box, acknowledging agreement with your organization's terms and conditions, and then click **Register** to complete the process.



Vendor Self Service displays a registration confirmation page that provides the vendor with links to register commodities or update their VSS profile, and to upload attachments to their profile.

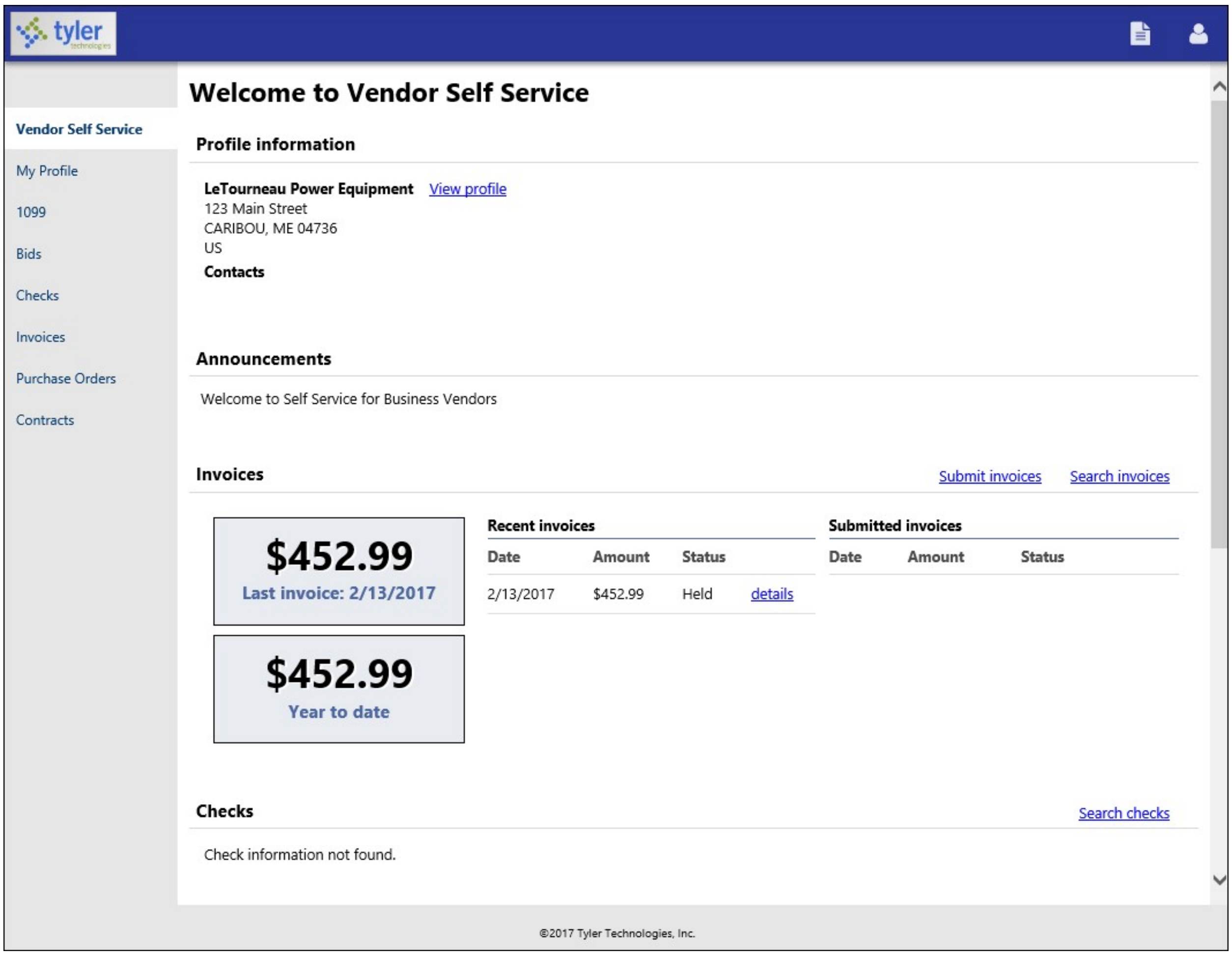


Newly registered employees only have access to the Home, Vendor Self Service, My Profile, and Bids options on the menu.

The City of Fort Smith's Vendor Self Service administrator will grant the employee access to additional menu options upon approval.

3 VENDOR SELF SERVICE HOME PAGE

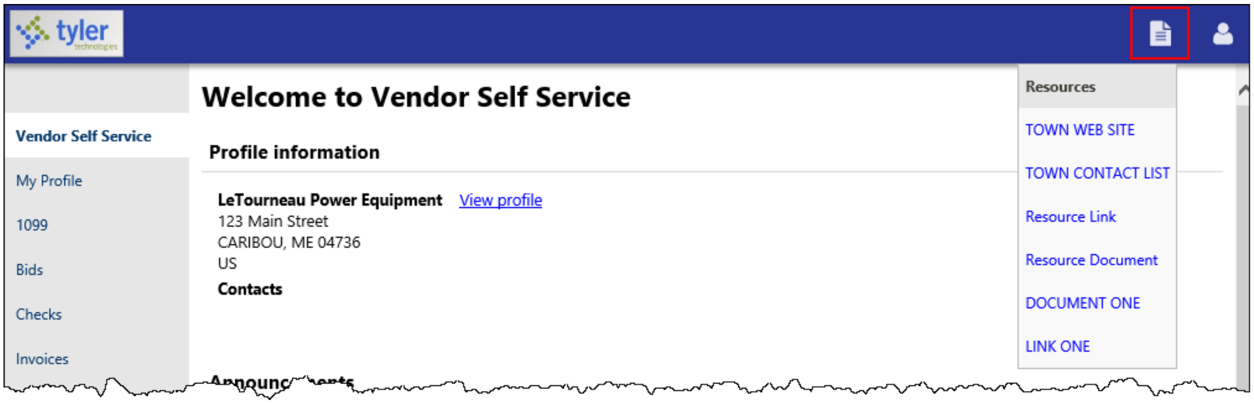
The Vendor Self Service home page contains a header and a series of summary information groups.



Clicking the login option in the header displays the following menu options:

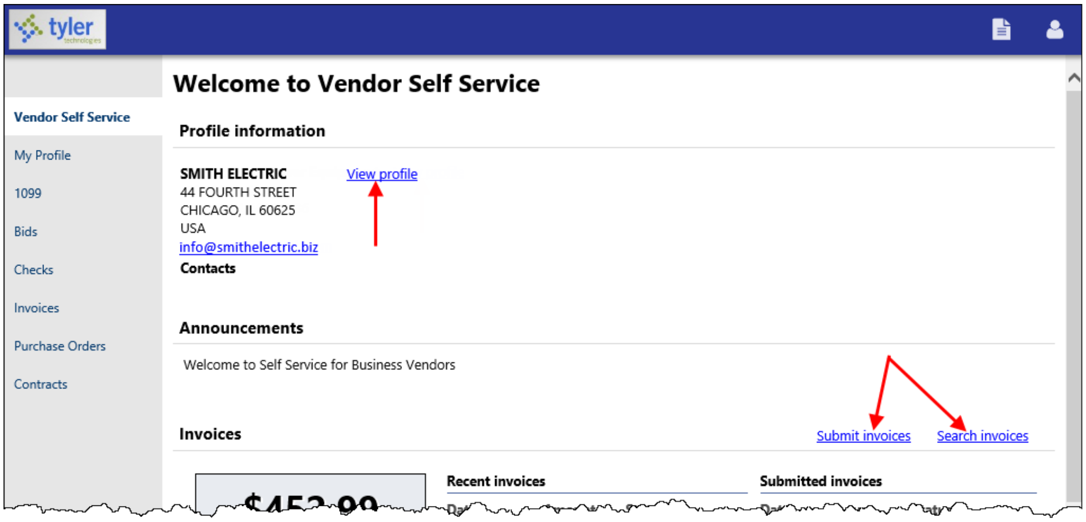
- My Account – Opens the My Account page containing the vendor's account information.
- Log Out – Logs the vendor out of Vendor Self Service.

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

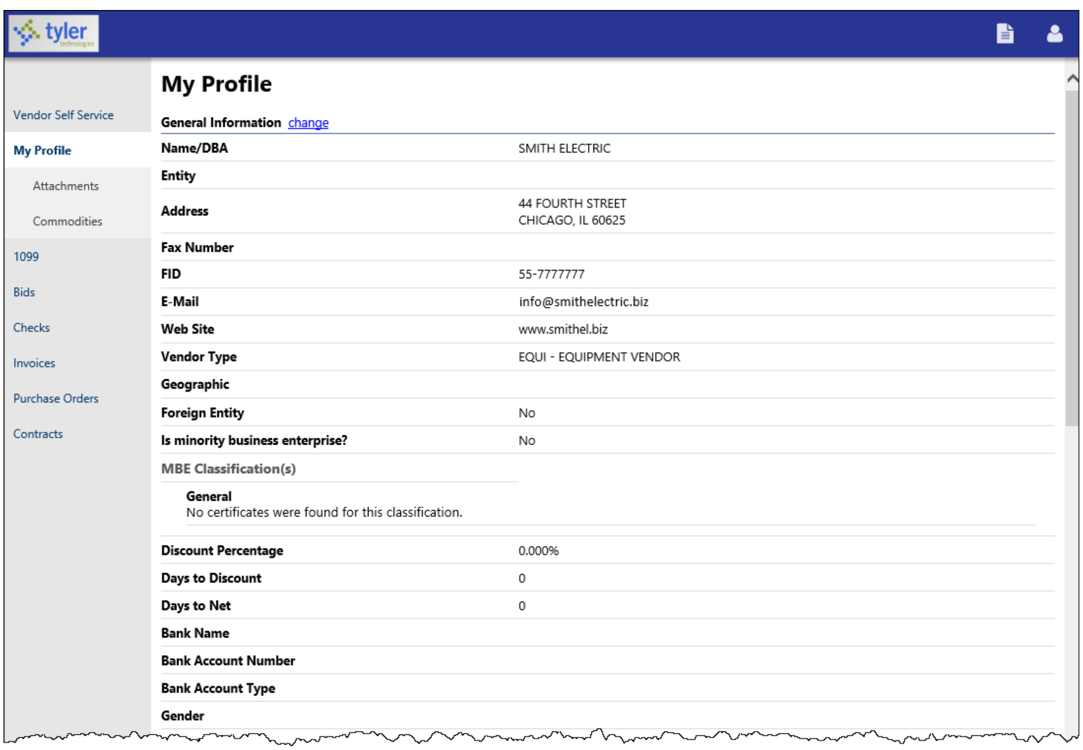


4 VENDOR NAVIGATION

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**, a vendor can update the information in that group.



The General Information group contains the vendor's address and contact information, type and foreign entity status, minority business enterprise status and certifications, discount terms and the vendor's 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 the vendor's remittance address and contact information, while the Address Contacts group lists the vendor's contact persons and information.

Address Information

change

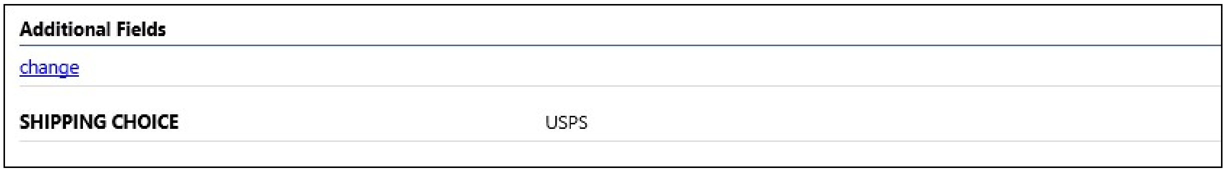
Name/DBA	Address	Is Default

Address Contacts

change

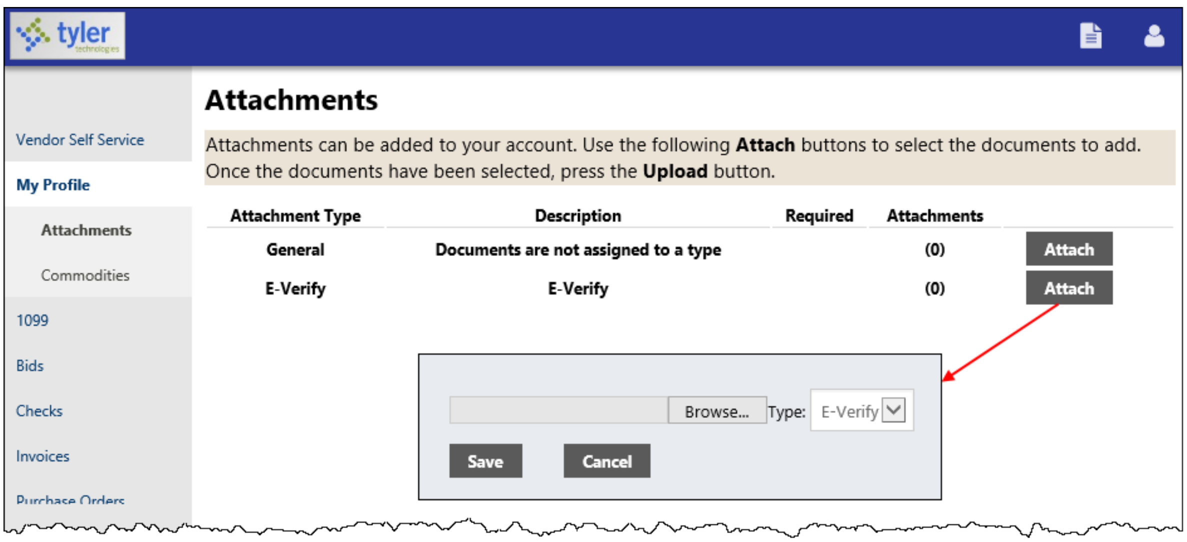
Type	Name	Title	Email	Phone	Fax
ACCOUNTS PAYABLE	Susan Agouris	Accounting Office	info@mithelectric.biz	312-555-1212	

The Additional Fields group identifies the vendor's shipping preferences. Clicking **Change** allows the vendor to update this information.



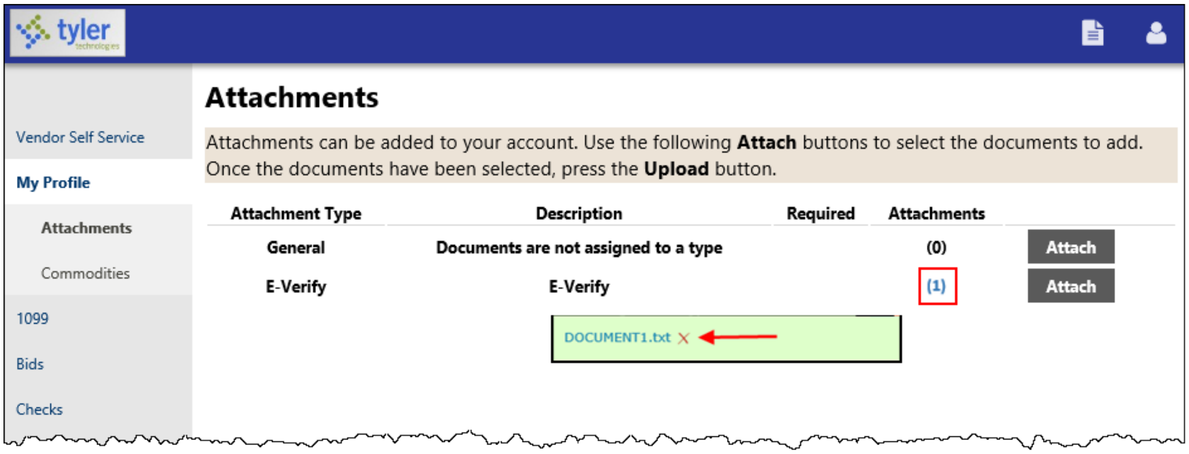
4.1.1 Attachments

A vendor adds attachments to their profile by clicking **Attachments** on the menu. The Attachments option is only available when the vendor is viewing their My Profile page.



Attachments are added by clicking the **Attach** button on the Attachments page, which allows the vendor to navigate to a file or document to upload. The Attachments column indicates the number of documents attached for the attachment types. Vendors can attach an unlimited number of files.

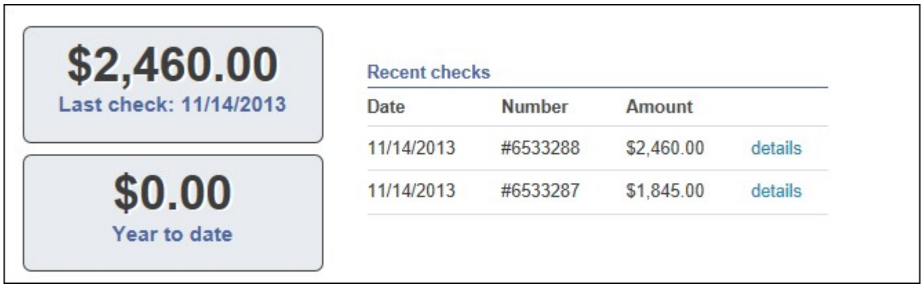
To remove an attachment, the vendor clicks the number of attachments indicator. On the attachments list, clicking the **Delete** button removes the attachment.



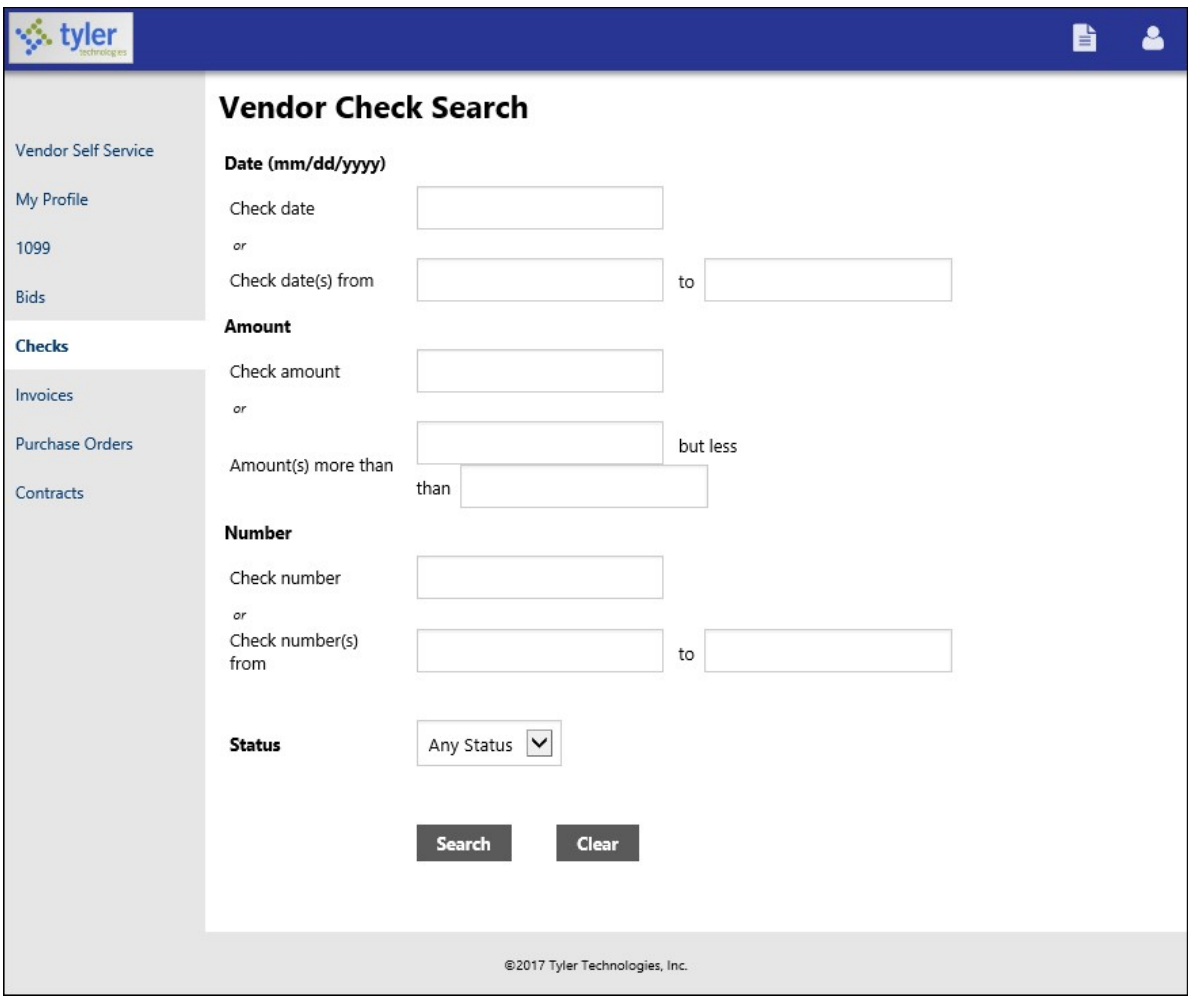
The vendor cannot maintain their attachments in VSS once they have been uploaded. Should a vendor need to manage changes to their attachments, they must contact the City of Fort Smith Accounts Payable department.

4.1.2 Checks

The Checks group provides a list of checks recently issued to the vendor.



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

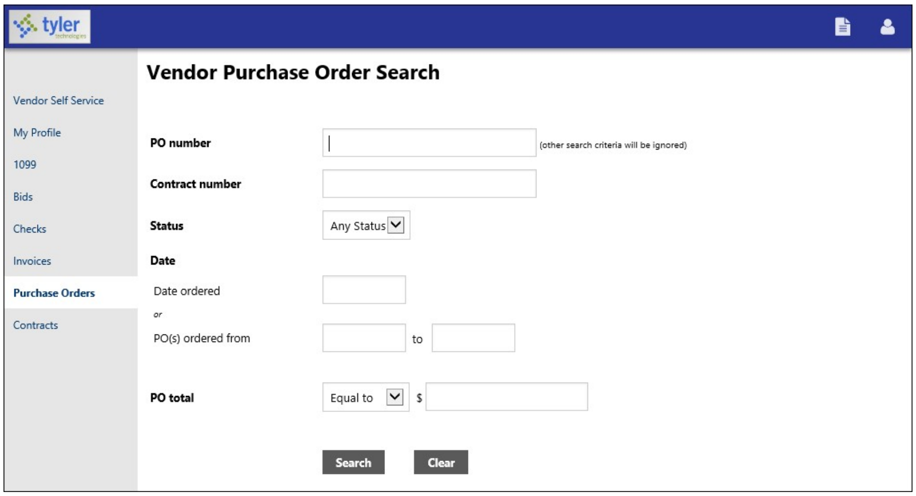


Search Results for checks provides the check date, amount, check number, and status. Use the View option of an individual check to view additional details.

4.1.3 Purchase Orders

Purchase Orders provides a list of recent purchase orders issued to the vendor.

The initial **Search Purchase Orders** page allows vendors 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.