Enterprise ERP, *powered by Munis®*
User Guide for
Vendor Self Service (VSS)

Version 2021

For more information, visit www.tylertech.com.

Revision History

Date	Comments
10/13/2022	Updated for version 2021.7
7/22/2022	Updated for version 2021.6

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Vendor Self Service Overview

Vendor Self Service (VSS) provides vendors with web-based access to information stored in your organization's Enterprise ERP, *powered by Munis®* database. The information is drawn from multiple Enterprise ERP products, including Accounts Payable, Purchasing, Contract Management, Bid Management, and Asset Management.

Using VSS, vendors can enter and maintain their contact and remittance information, discount and payment terms, designated contact persons, and the 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, checks, and work orders is available in VSS. This information is entered by users in your organization using Enterprise ERP programs, and the information is available to vendors for inquiry purposes only.

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 your Enterprise ERP database that can be examined and evaluated by your organization's bid management personnel.

The fields and options available to vendors in VSS are determined by your VSS administrators. Refer to the *Enterprise ERP Vendor Self Service (VSS) Administration Guide* for details on modifying VSS permissions.

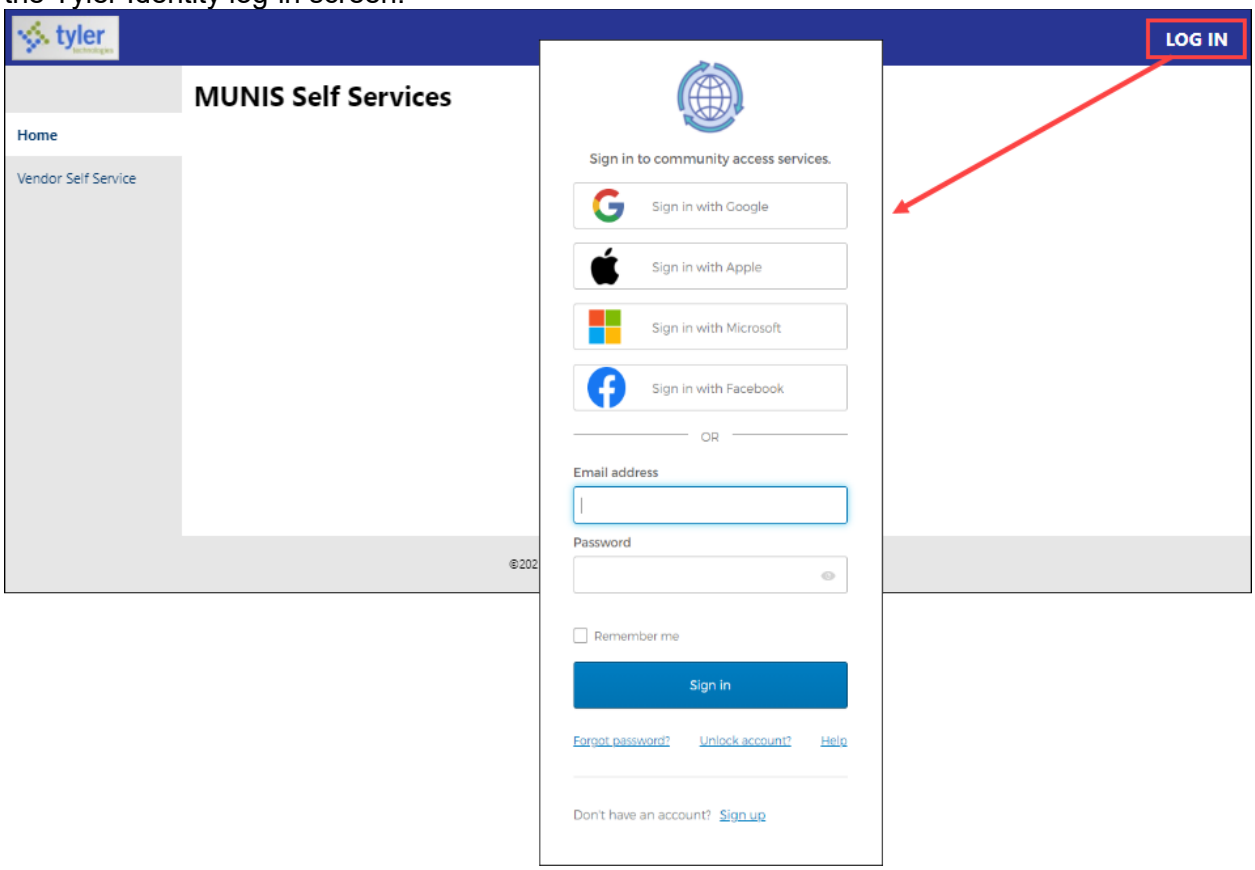
Vendor Self Service and Tyler Identity

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.

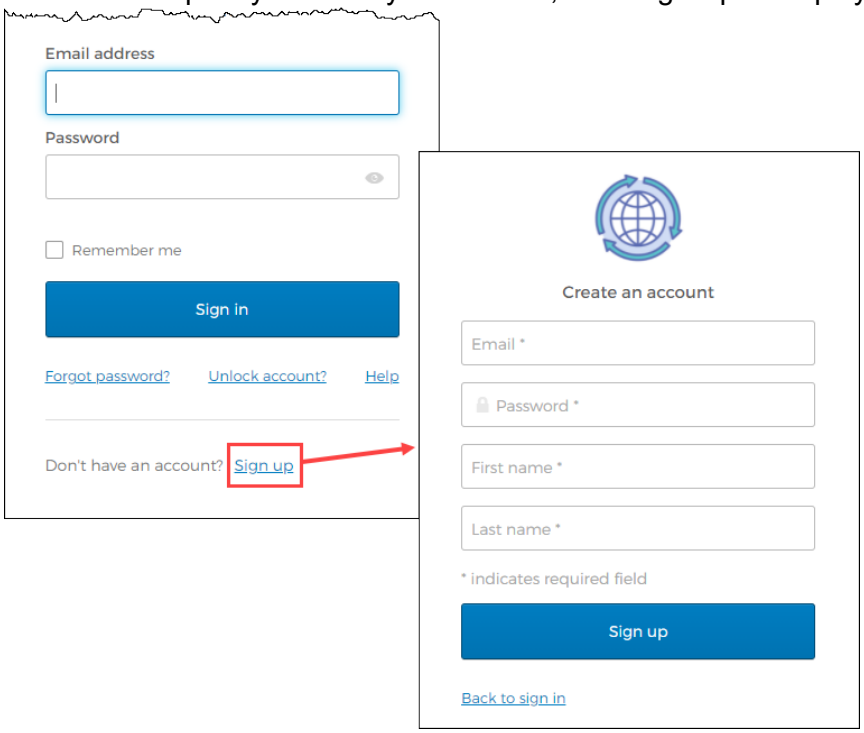
New Users

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

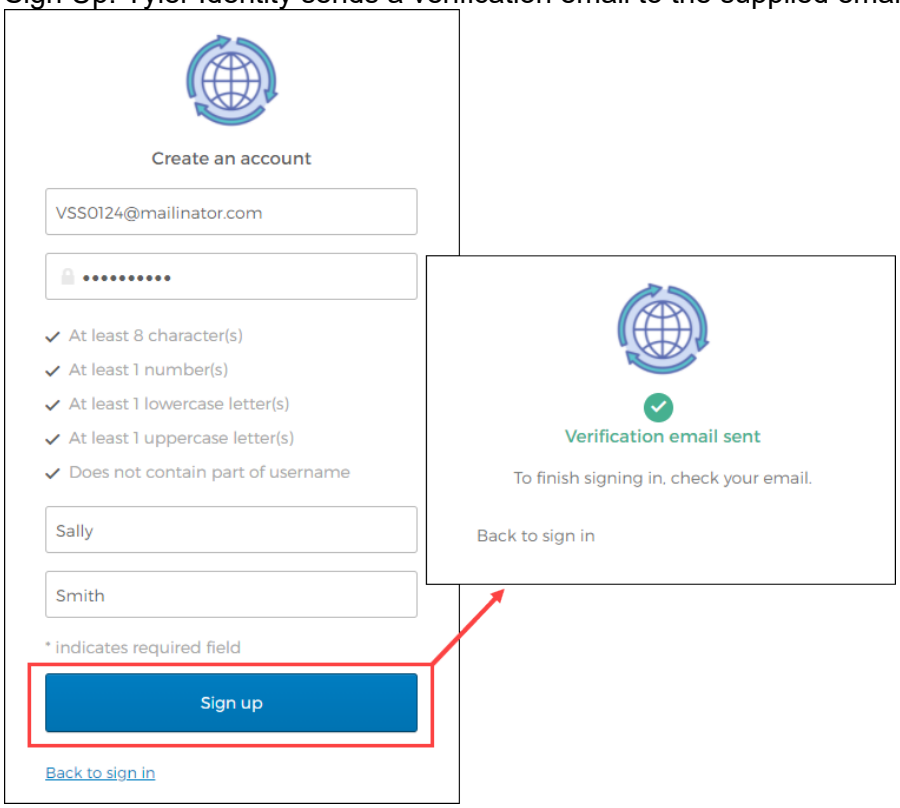


From this screen, vendors may use their established email and password credentials for an existing social account (such as Google®, Apple®, Microsoft®, or Facebook®) to log in, or click the Sign Up option to create unique Tyler Identity credentials.

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 more information on using Tyler Identity, visit https://tylerportico.com/community-access-help.html.

Existing Users

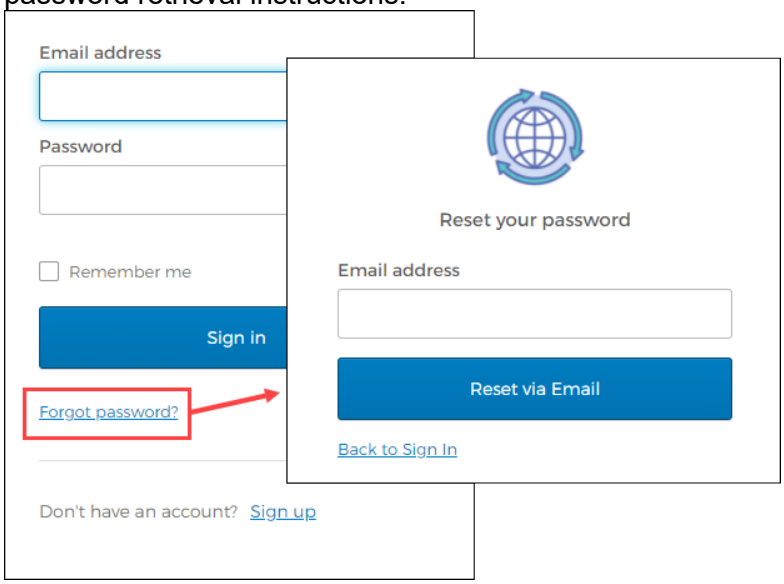
Users who have established a Tyler Identity account can log in using their Tyler Identity email and password credentials. Users who have not transitioned to using Tyler Identity must create a new account.

- 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.

Password Resets

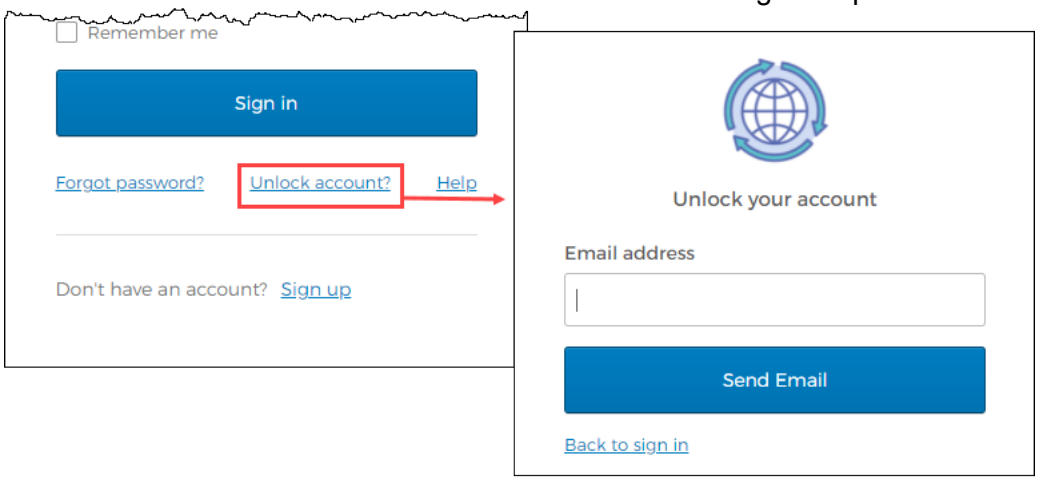
If a user forgets their assigned password, clicking the Forgot Password? link on the Sign-in screen provides the steps to reset the password. The Help link on the Sign-In screen also provides detailed password retrieval instructions.



Locked Accounts

If a user's account is locked, for example, if too many unsuccessful password attempts have been made, clicking the Unlock Account? link on the Sign-in screen provides the steps to unlock the account.

Enter the email address associated with the account to begin the process to unlock the account.

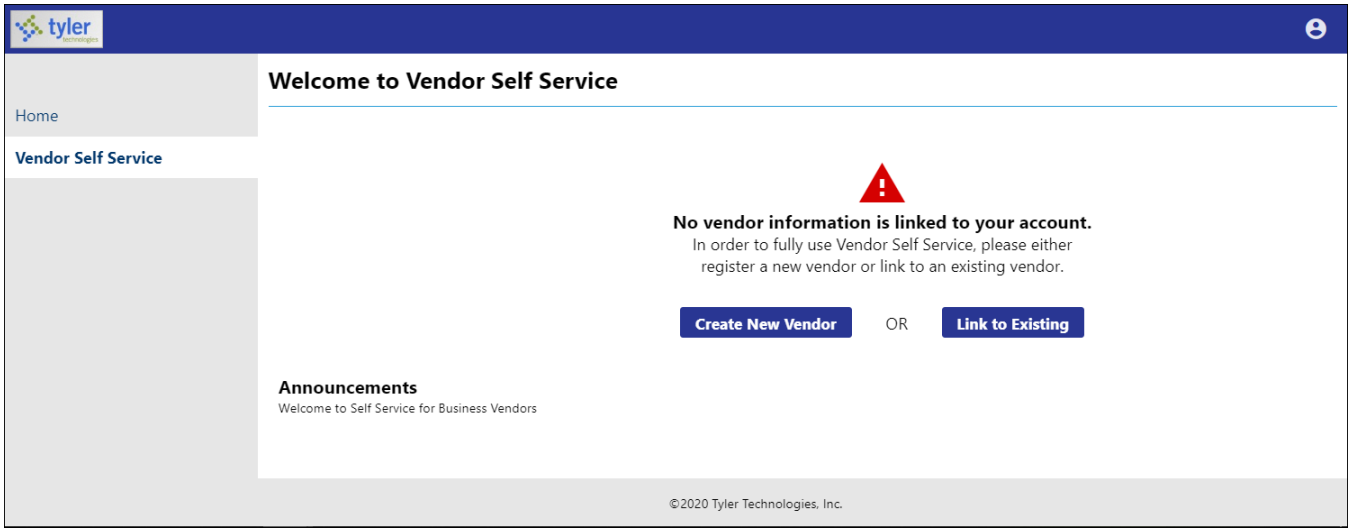


Vendor Registration

Vendor Self Service requires vendors who exist in your organization's Enterprise ERP database to register using the VSS website to gain access to their information. To successfully link a vendor's VSS registration with a record in Enterprise ERP, you must provide the vendor with the vendor ID number assigned by your organization. The vendor enters the number in the Vendor ID box during registration.

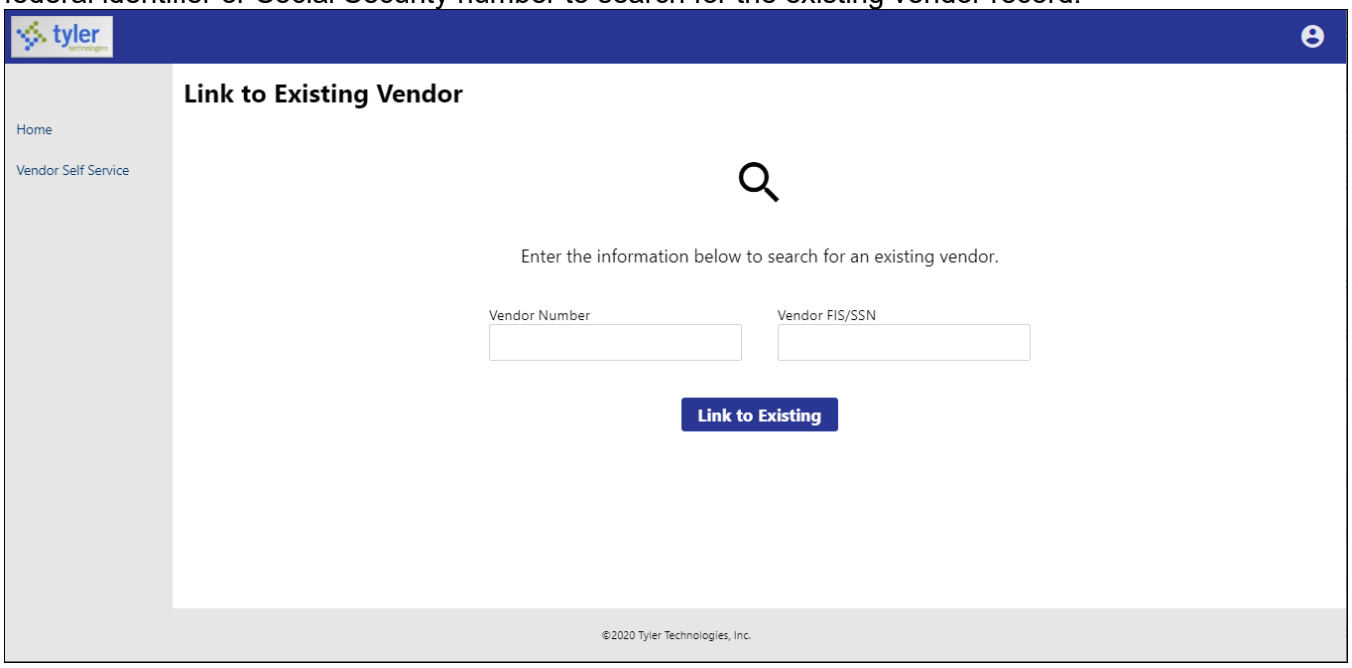
Potential vendors who do not exist in your organization's Enterprise ERP database can complete the registration process, but they are granted limited access to VSS. When completed by a potential vendor, the registration process creates a new record in the Vendors program in Enterprise ERP. A user from your organization with Enterprise ERP vendor maintenance permissions must change the status of the newly created record to Active in Enterprise ERP. A Vendor Self Service administrator must grant the vendor's user ID access to the appropriate pages in VSS before the vendor can fully utilize the site.

Once the vendor successfully logs 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 Enterprise ERP vendor record.



Linking to an Existing Enterprise ERP Vendor Record

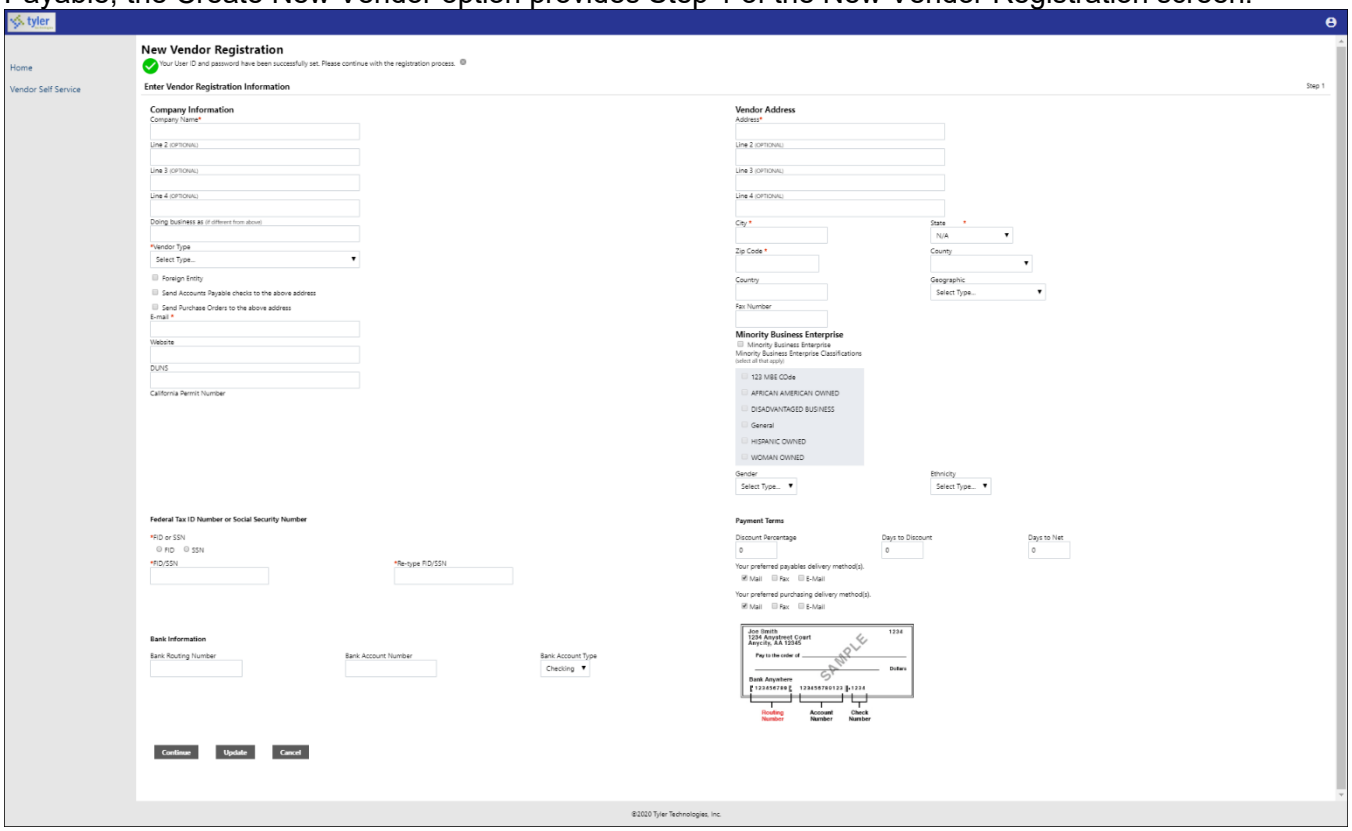
If the vendor has an existing record in the Enterprise ERP Vendors program, the Link to Existing option provides the Link to Existing Vendor screen, where you can enter the vendor number and the vendor's federal identifier or Social Security number to search for the existing vendor record.



When existing 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 Enterprise ERP. If all information matches, the vendor is automatically presented with the Vendor Information page. They do not have to complete the remaining steps of the registration process. However, in order to complete the process successfully, the vendor must know the Enterprise ERP vendor ID assigned by your organization, which is the vendor number in the Enterprise ERP Vendors program. The value entered in the Vendor FIS/SSN box must match the value from the Enterprise ERP vendor record exactly.

Creating a New Vendor Record

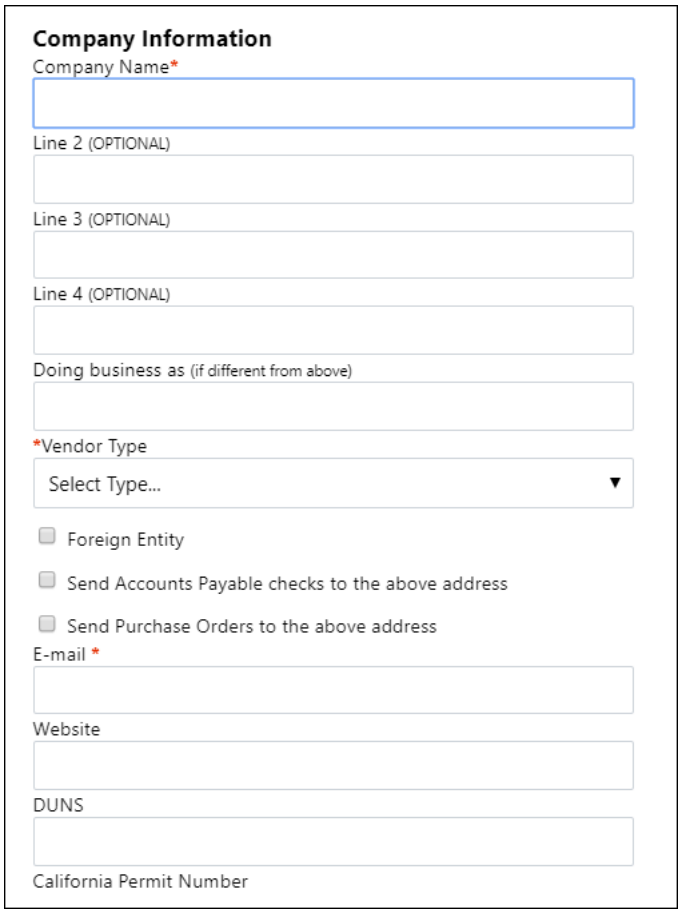
If the vendor does not have an existing record in the Vendors program in Enterprise ERP Accounts Payable, the Create New Vendor option provides Step 1 of the New Vendor Registration screen.



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

Company Information

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

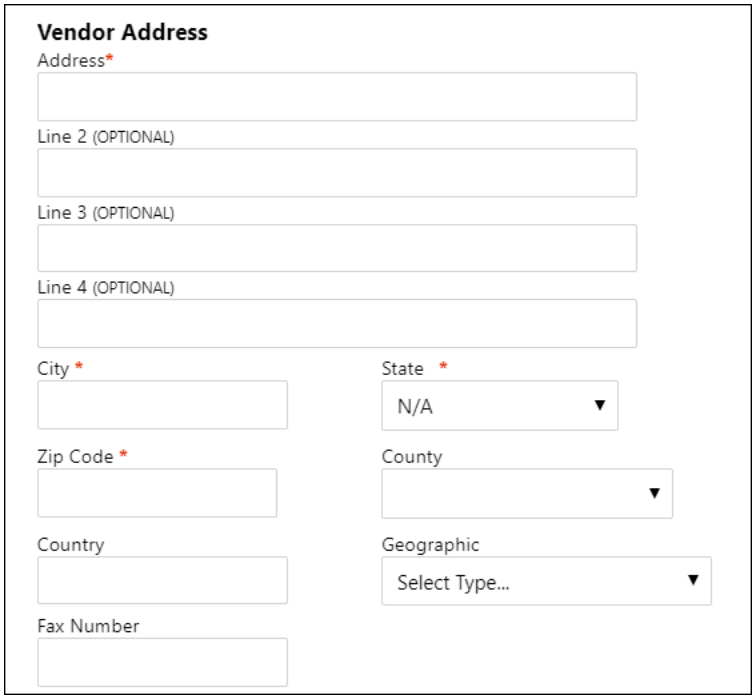


Field	Description
Company Information	
Company Name	Contains the vendor's name or business name. The value entered here appears in the Alpha box in the Vendors program.
Line 2 Line 3 Line 4	Stores additional vendor name or business name information, such as an address. These fields are optional.
Doing Business As (If Different from Above)	Indicates the vendor's doing business as (DBA) name, if applicable.
Vendor Type	Sets the type code for the vendor. Vendor type codes are defined by your organization using the Accounts Payable Miscellaneous Codes program in Enterprise ERP. Your organization must define at least one vendor type code in order to allow vendors to successfully register in Vendor Self Service. If no vendor type codes exist, vendors cannot complete the registration process.
Foreign Entity	When selected, indicates that the vendor is a foreign entity.

Field	Description
Send Accounts Payable Checks to the Above Address	When selected, sends accounts payble (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	Contains the vendor'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 vendor contacts are defined later in the registration process.
Website	Includes the URL for the vendor's website.
DUNS	Indicates the 9-digit Data Universal Numbering System (DUNS) number assigned to the vendor organization. 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. A DUNS number is required for federal grants and proposals.
California Permit Number	Identifies the permit number for vendors who do business in California.

Vendor Address

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

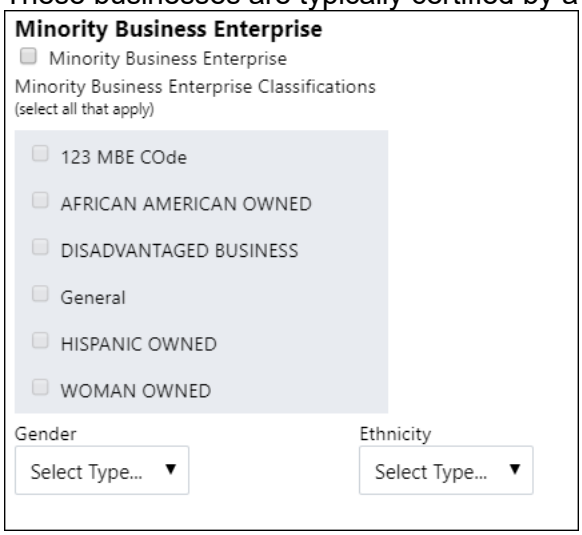


Field	Description
Vendor Address	

Field	Description
Address Line 2 Line 3 Line 4	Define the vendor's main address.
City	Specifies the city portion of the vendor's address.
State	Establishes the state portion of the vendor's address. The vendor must enter a two-letter state postal abbreviation code in this box.
Zip Code	Contains the ZIP Code™ portion of the vendor's address.
County	Identifies the county portion of the vendor's address, if applicable. This information may be relevant if the vendor resides in a county that collects county-specific sales tax.
Country	Sets the country for addresses that are outside of the United States.
Geographic	Indicates the vendor's geographic code. The codes are defined in Enterprise ERP using the Accounts Payable Miscellaneous Codes program.
Fax Number	Displays the vendor's fax number, if applicable. This box can be hidden by a VSS administrator by clearing the Address Fax Number check box on the Field Settings tab of the Vendor Administration page.

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.

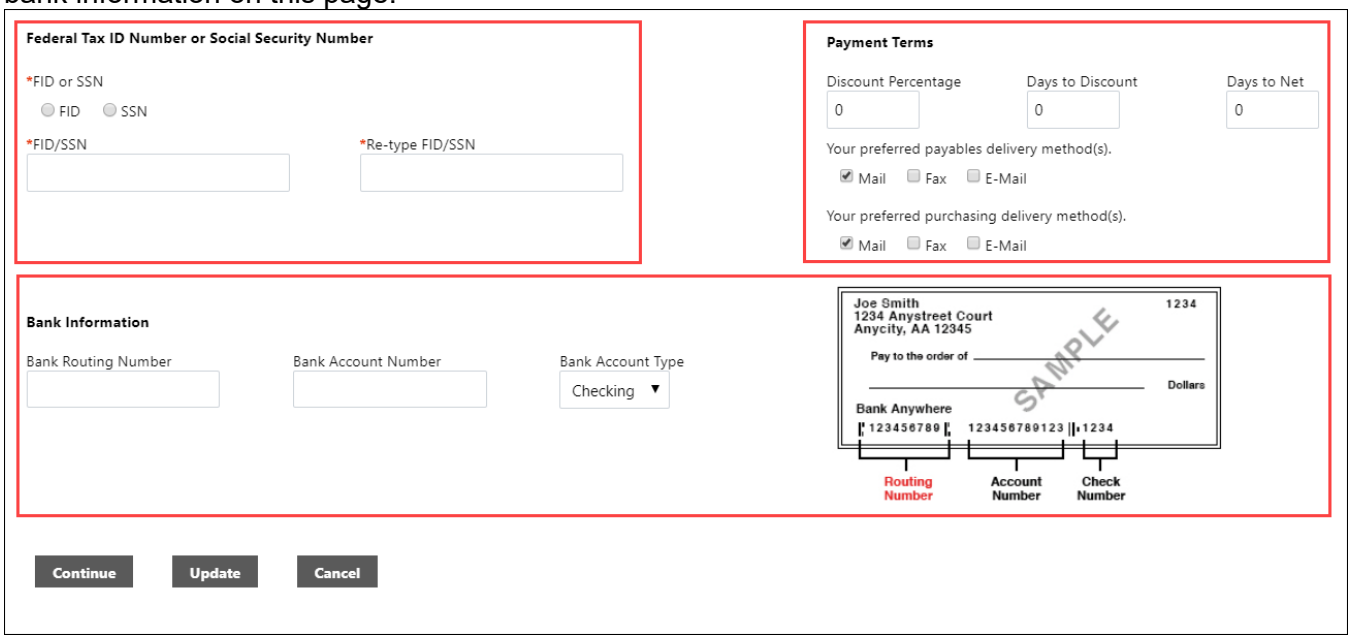


Field	Description
Minority Business Enterprise	
Minority Business Enterprise	Indicates that the vendor is a minority business enterprise, when selected.
Minority Business Enterprise Classifications (Select All That Apply)	Define which MBE classifications the vendor possesses. The classifications displayed in the section are created and maintained by your organization using the Accounts Payable Miscellaneous Codes

Field	Description
	program in Enterprise ERP. The vendor can 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. If the VSS administrator has enabled certification management, vendors can click **Manage** for a classification to maintain certifications. See Appendix—Managing Minority Business Enterprise Certificates for more information.
Gender Ethnicity	Contain the vendor gender and ethnicity codes your organization has defined in Enterprise ERP using the Accounts Payable Miscellaneous Codes program. If no codes have been created, these lists cannot be used. The values selected from the lists determine the vendor's gender and ethnicity for vendor statistic and tracking purposes. A VSS administrator can hide the lists from view by clearing the check boxes on the Field Settings page in Vendor Administration.

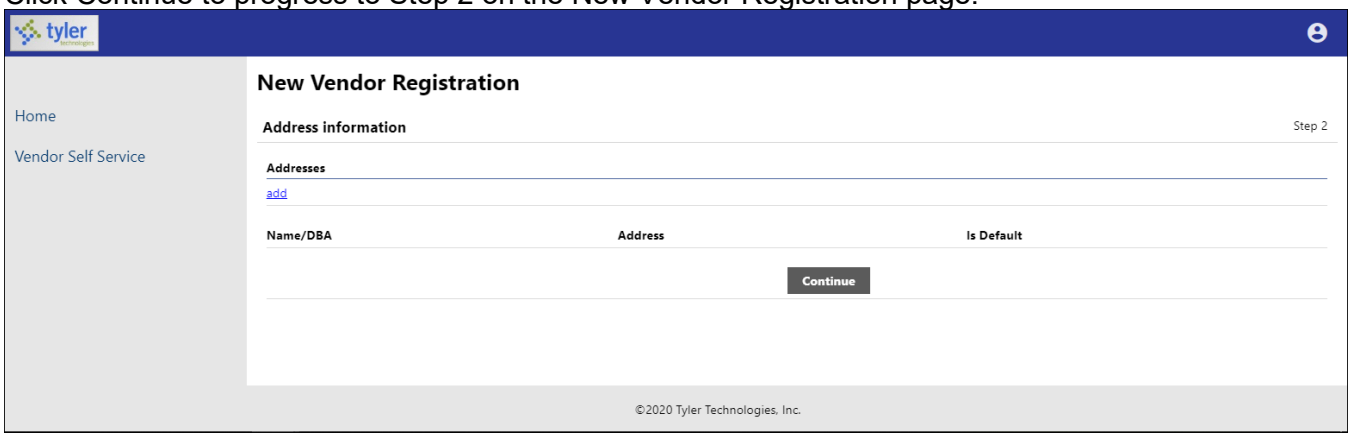
Federal Tax ID Number or Social Security Number, Payment Terms, and Bank Information

The groups at the bottom of the New Vendor Registration page specify tax, payment, and banking information for the vendor. The FID or SSN must be a unique value that is not used by any other vendor profile, unless your organization has selected the Allow Duplicate FIDs/SSNs check box in the Accounts Payable program.
The Bank Information section does not display unless your VSS administrator has enabled entry of bank information on this page.

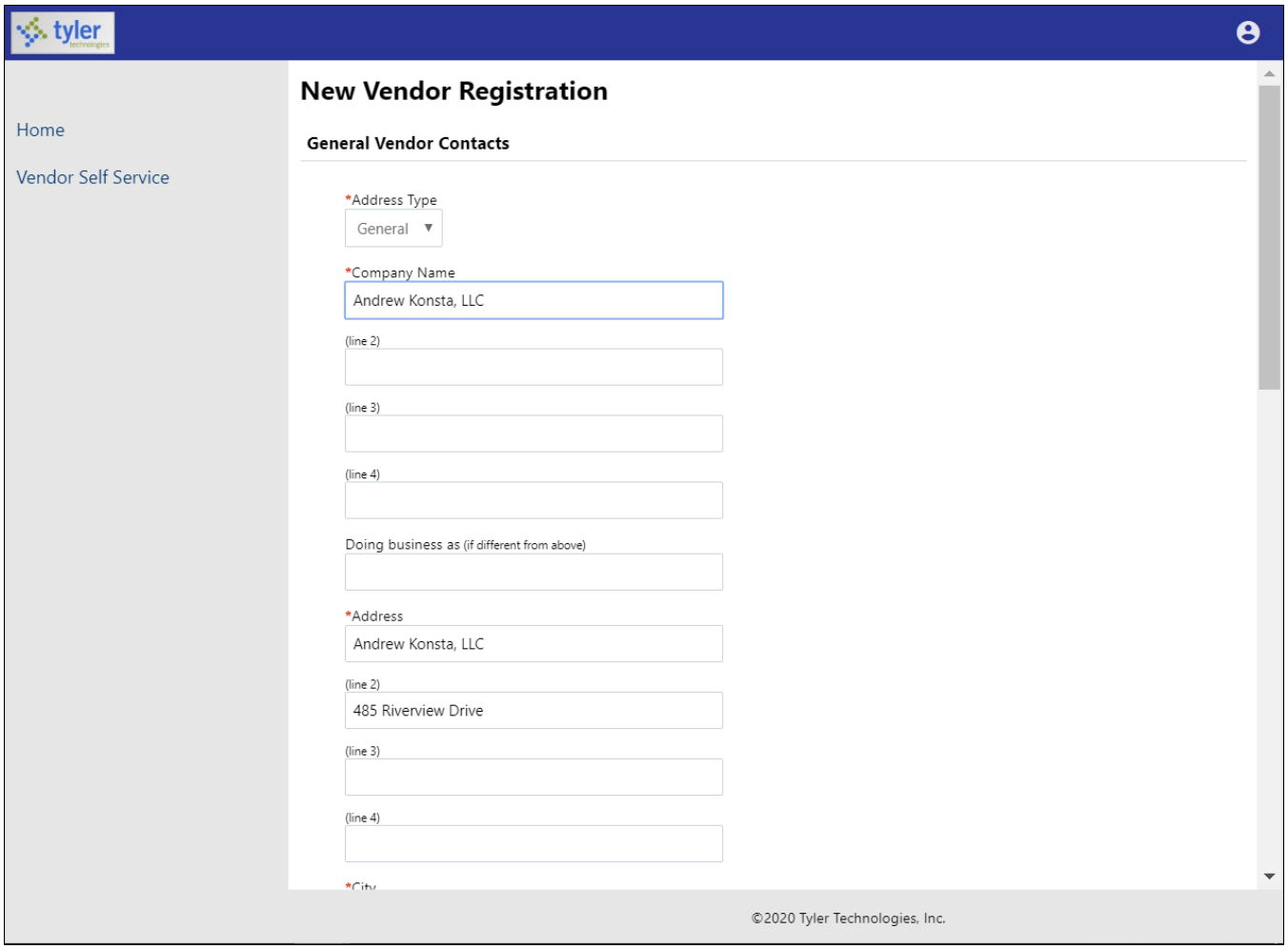


Field	Description
Federal Tax ID Number or Social Security Number *(The fields in this group are all required.)*	
FID or SSN	Requires the vendor to select whether to enter a federal tax identification number or a Social Security number.
FID/SSN	Identifies the vendor's federal tax identification number 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 the vendor extends to your organization.
Days to Discount	Contains 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. A VSS administrator can hide the check boxes from view by clearing the equivalent check boxes on the Field Settings page in Vendor Administration. The administrator can also restrict the delivery method to only one selection.
Bank Information *(This section does not display unless your VSS administrator has enabled entry of bank information on this page.)*	
Bank Routing Number	Determines the routing number of the bank account to which payments made to the vendor should be sent. The program automatically selects the correct bank code based on the entered routing number.
Bank Account Number	Contains the vendor's bank account number.
Bank Account Type	Indicates the type for the entered account: checking or savings.

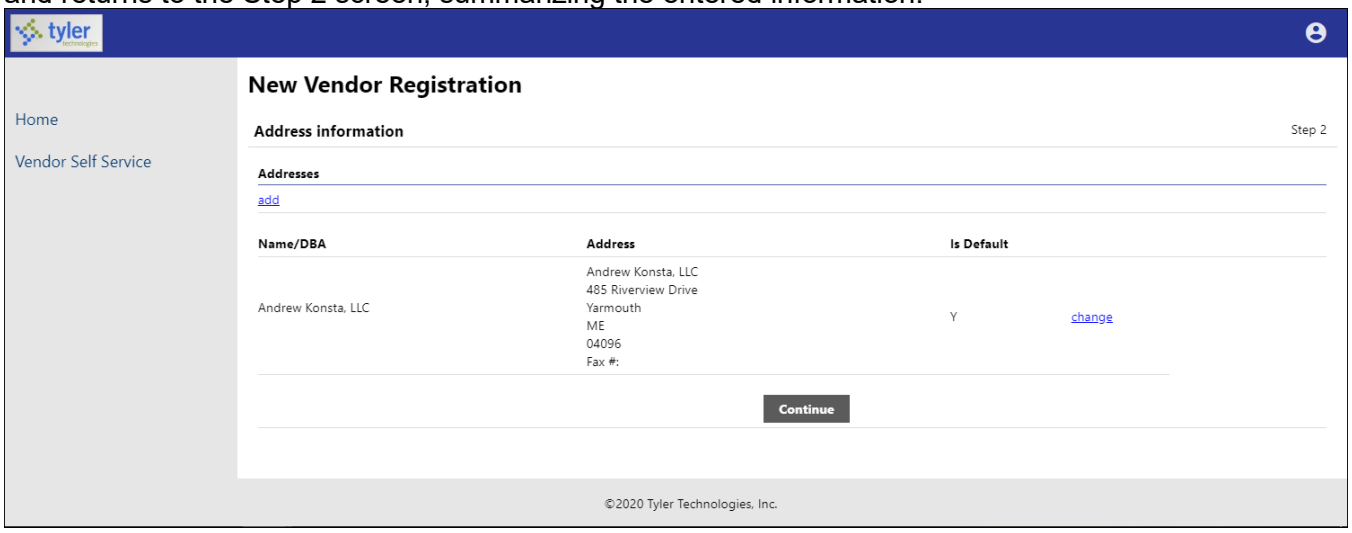
Click Continue to progress to Step 2 on the New Vendor Registration page.



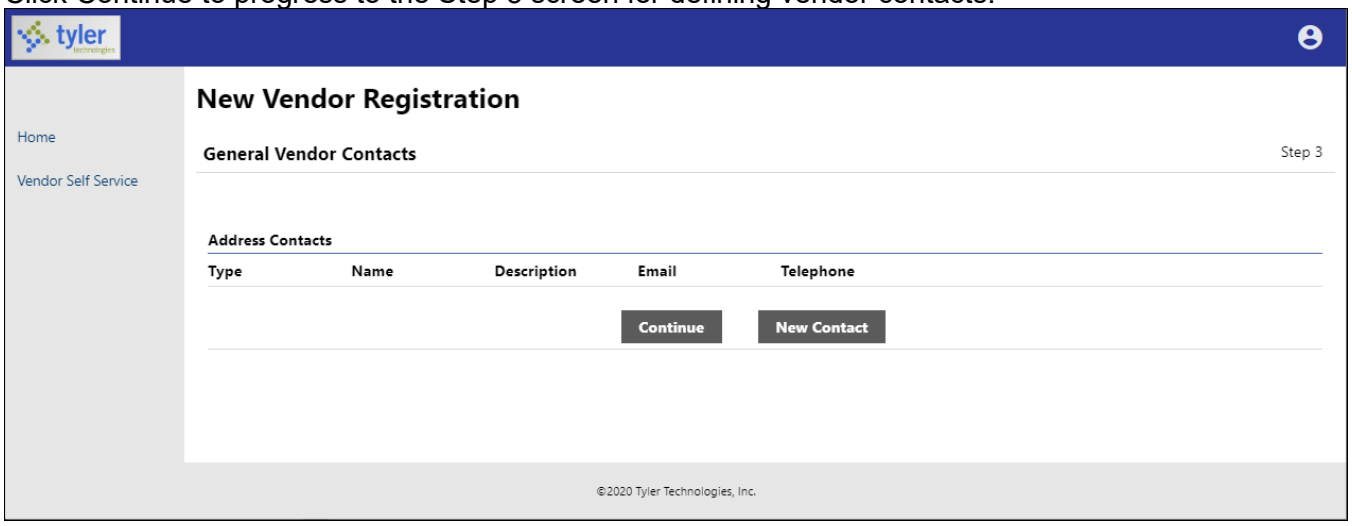
Click the Add link in the Addresses group to display the General Vendor Contacts screen for adding vendor remit address information.



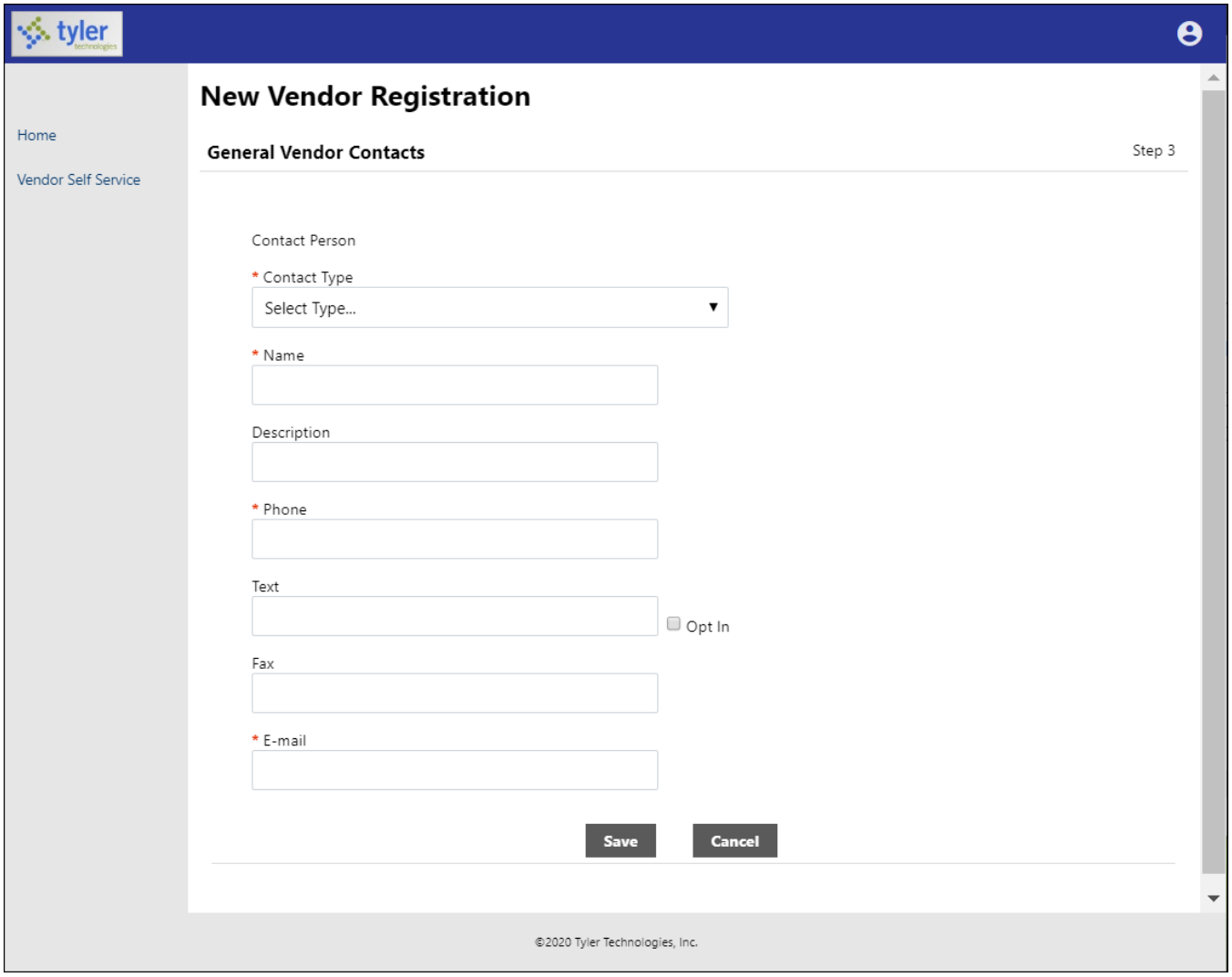
After completing the fields, click Save at the bottom of the page. VSS saves the entered information and returns to the Step 2 screen, summarizing the entered information.



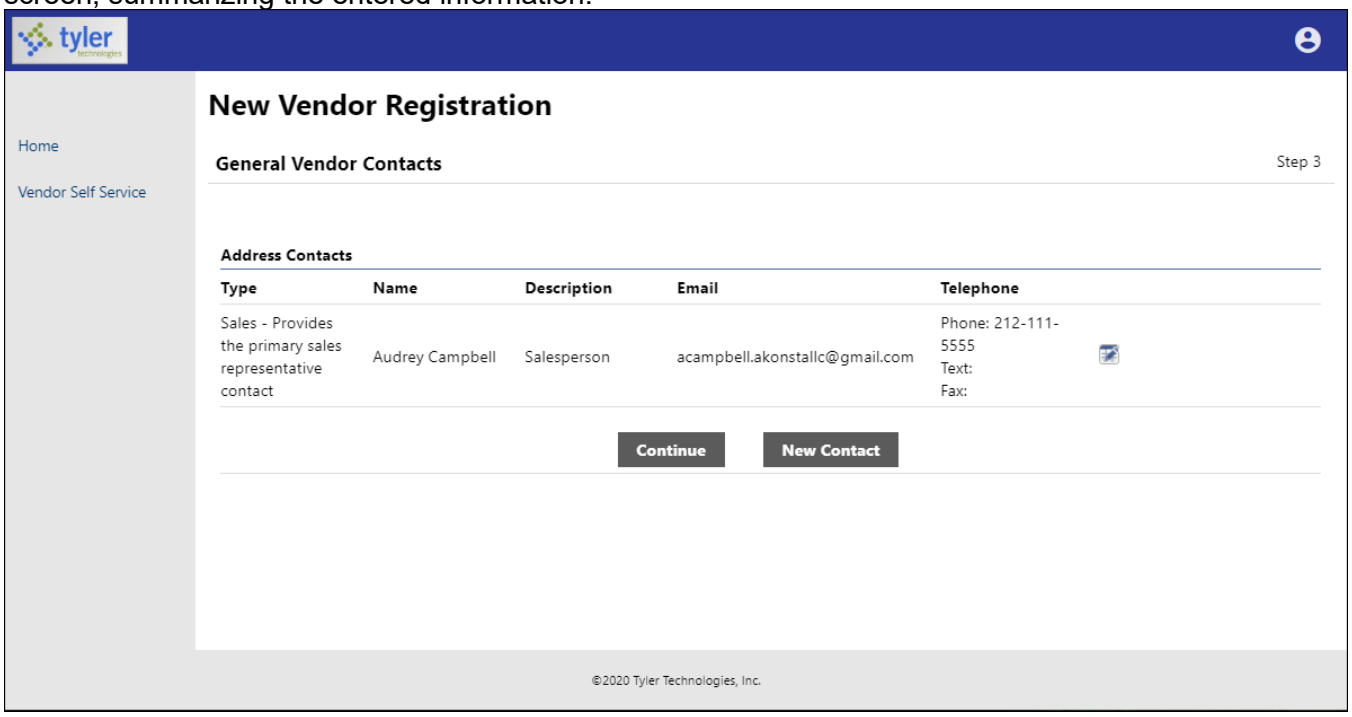
Click Continue to progress to the Step 3 screen for defining vendor contacts.



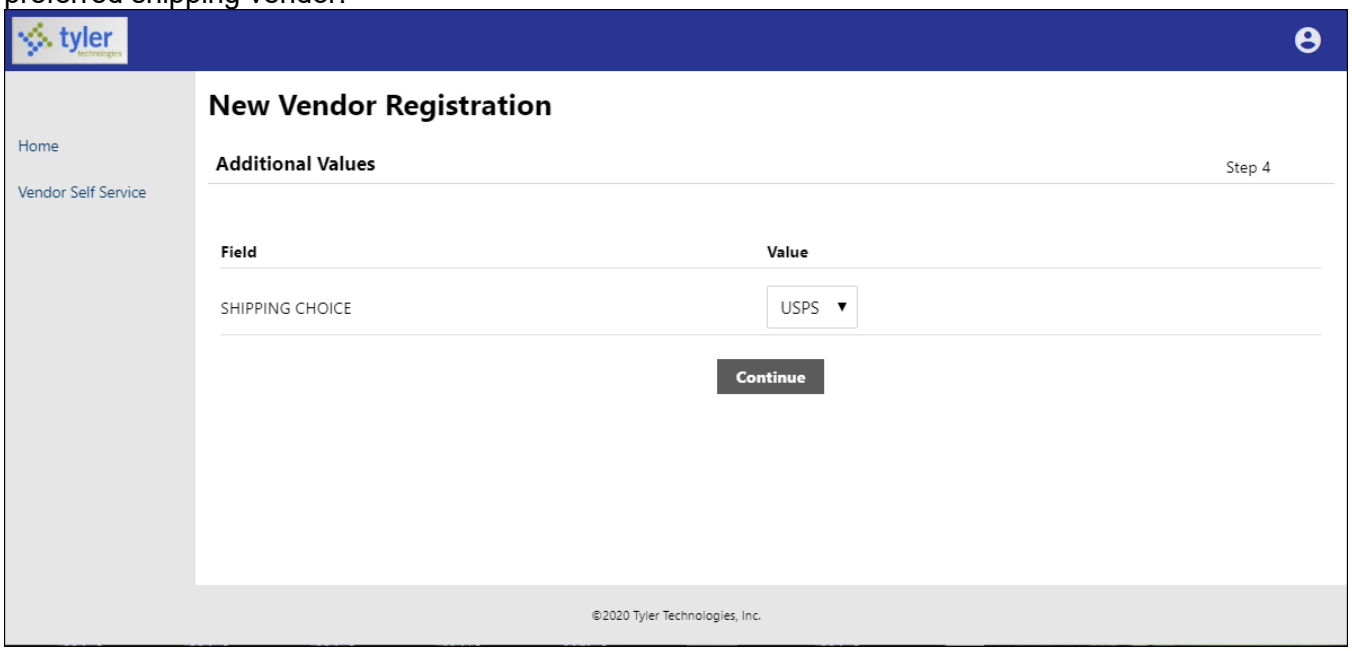
Click New Contact to add a new vendor contact.



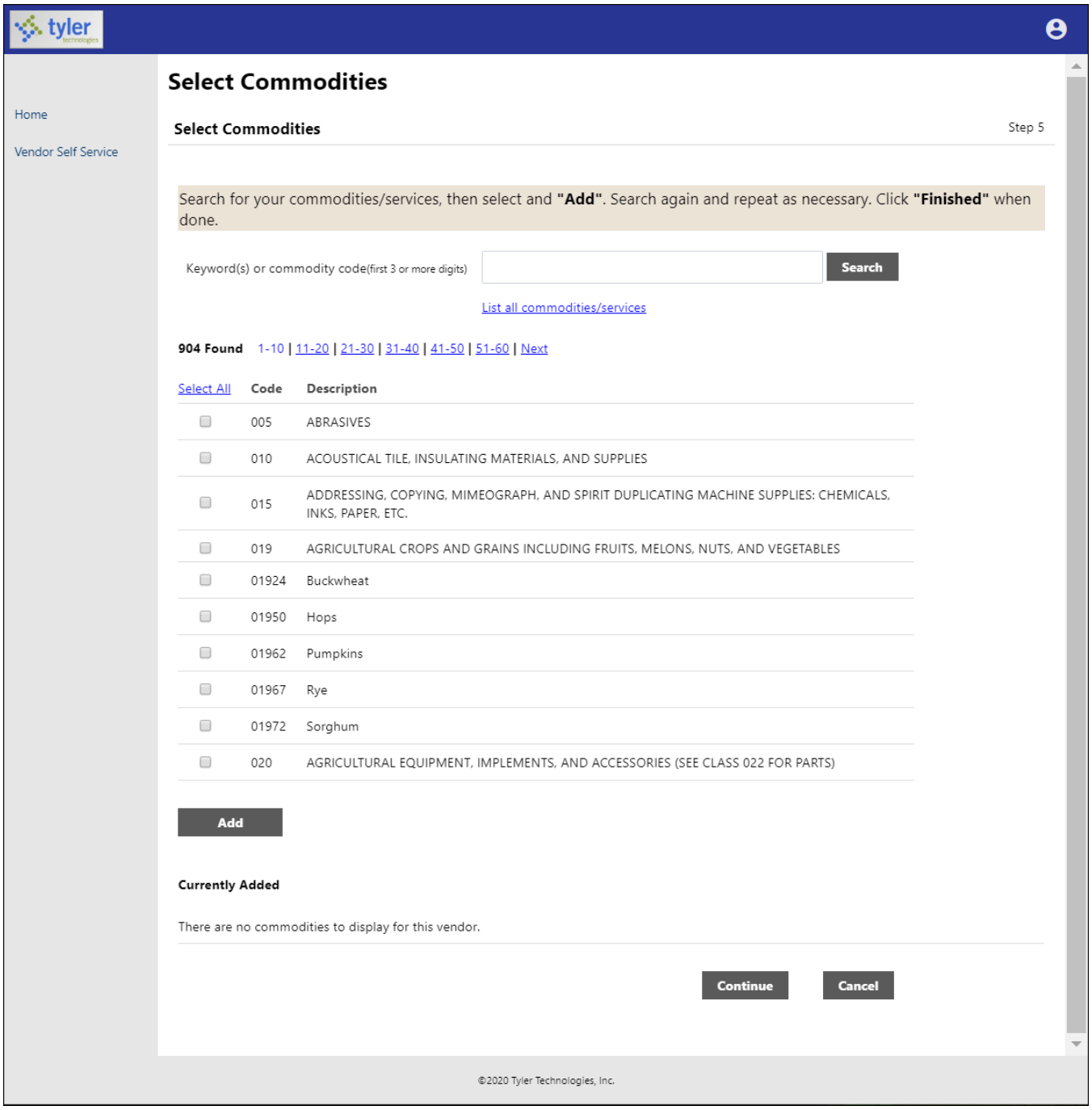
Complete the fields and click Save. VSS saves the entered information and returns to the Step 3 screen, summarizing the entered information.



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.

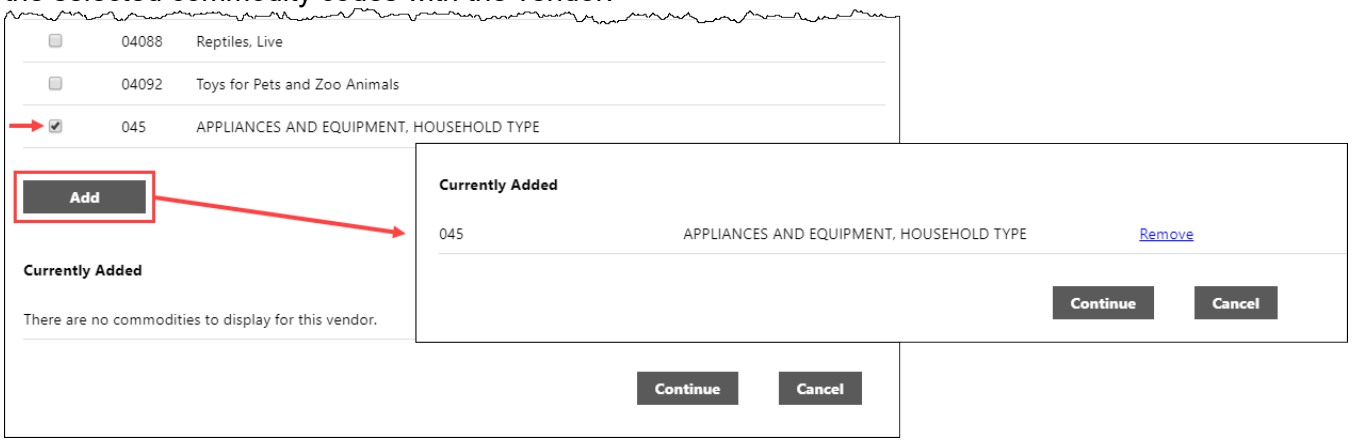


Select the additional values as required and then click Continue to progress to the Step 5 screen. In this example, VSS provides the Select Commodities screen for choosing the commodity codes to associate with the vendor.



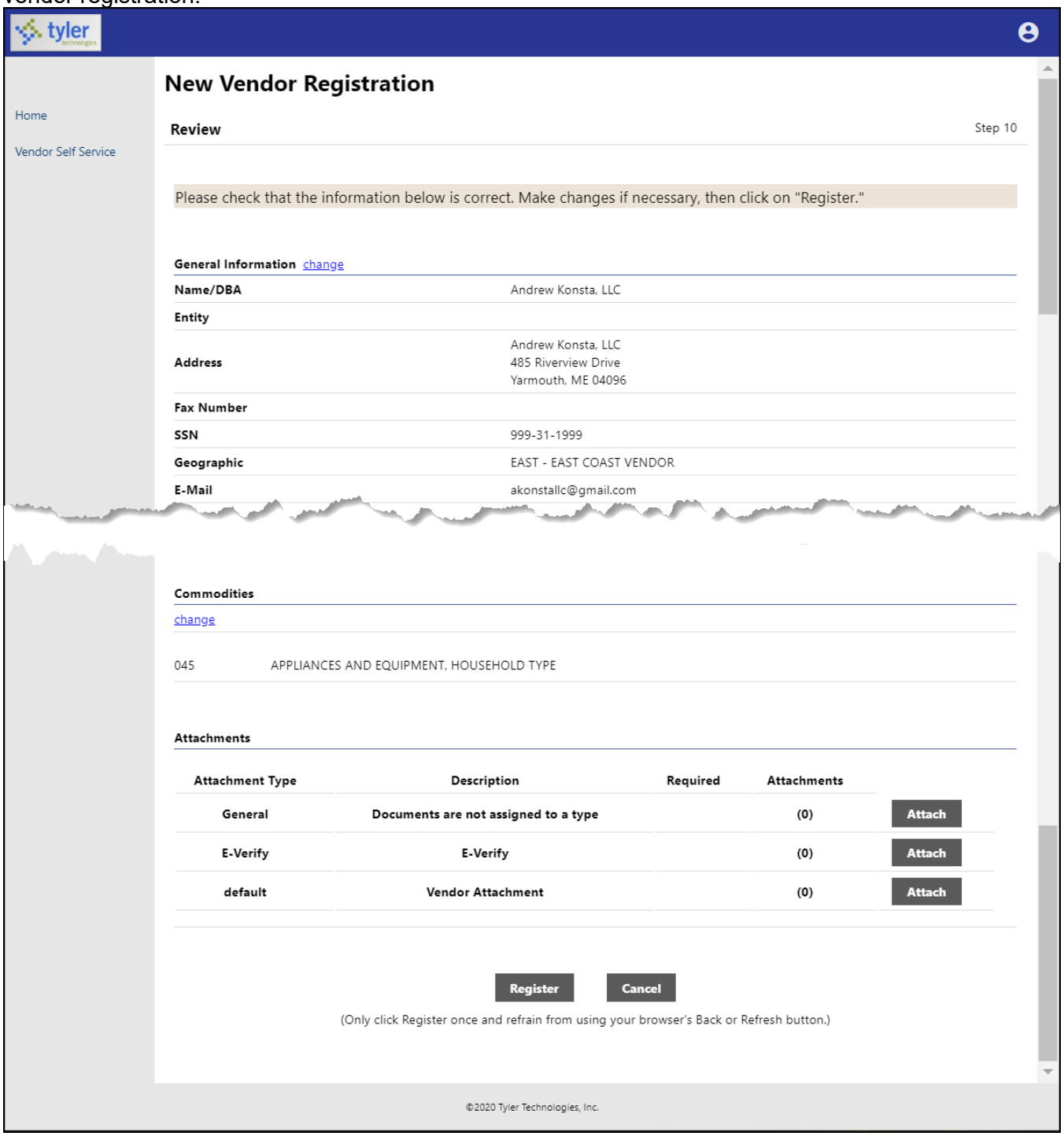
Enter keywords or commodity codes in the Search box to refine the list of provided codes.

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

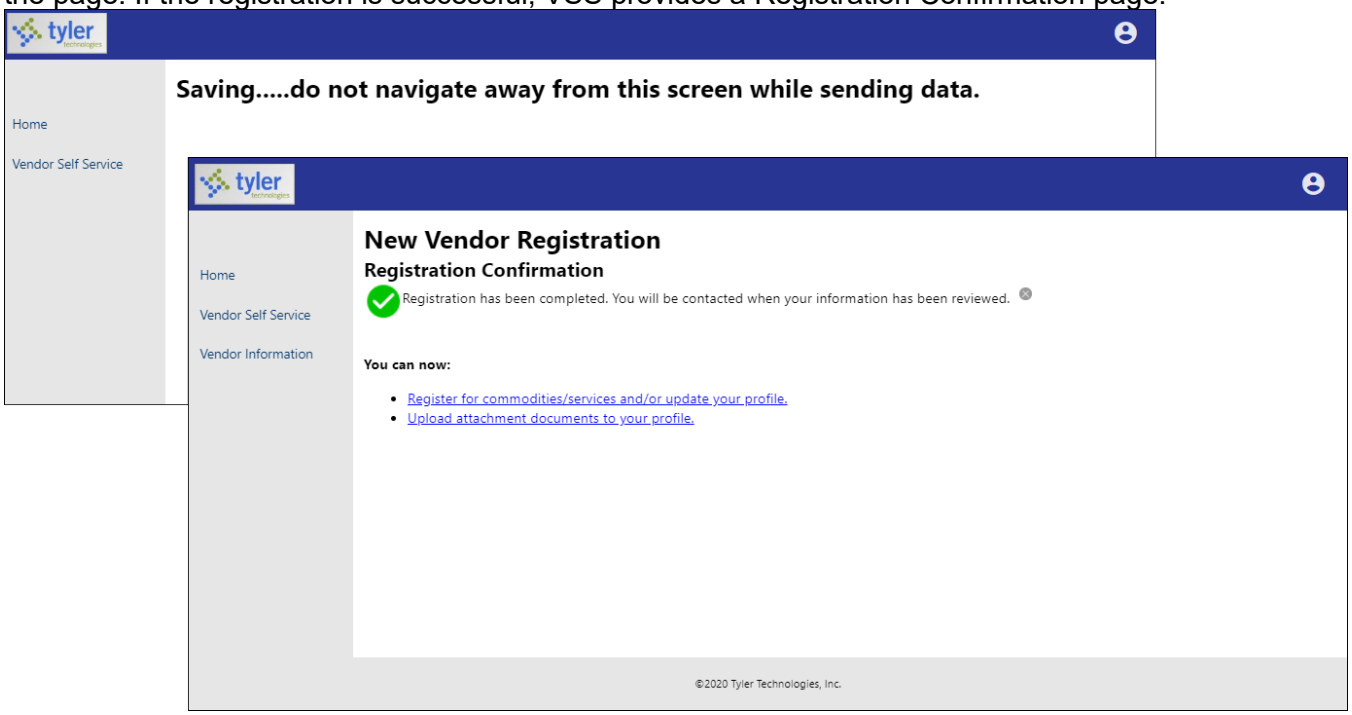


Use the Remove option to delete any currently associated commodity codes.

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



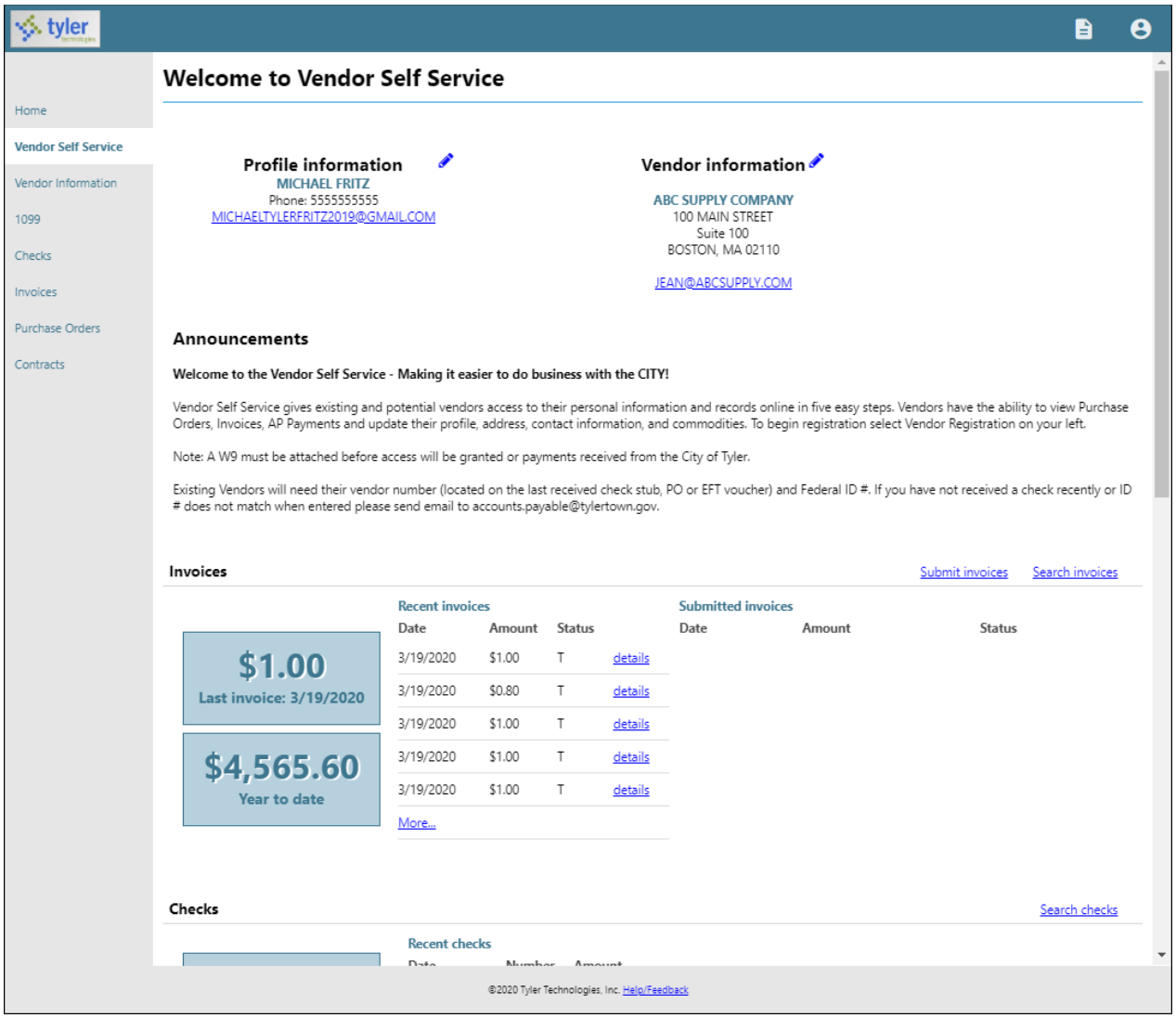
Click Register to complete the registration. You must click the Register option only once and remain on the page. If the registration is successful, VSS provides a Registration Confirmation page.



Newly registered vendors only have access to the Home, Vendor Self Service, and Vendor Information tabs. Your organization's Vendor Self Service administrator must grant the vendor access to additional options.

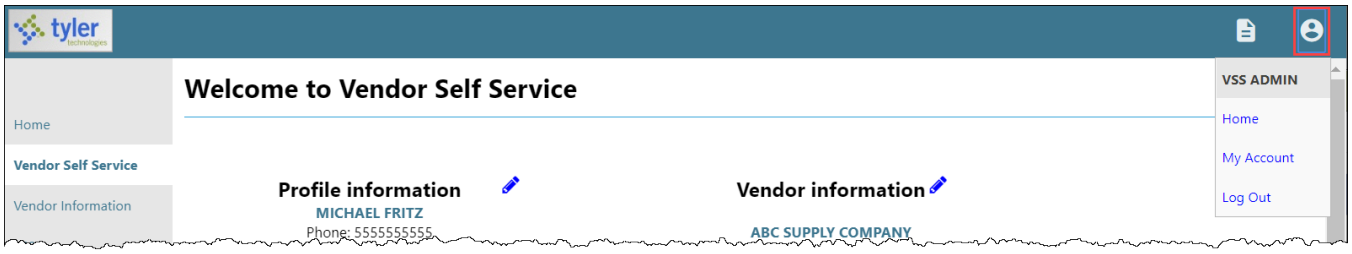
Vendor Self Service

The Vendor Self Service home page provides the vendor's profile information and access to the options that your organization makes available, such as Invoices, Checks, Purchase Orders, Contracts, and Bids.



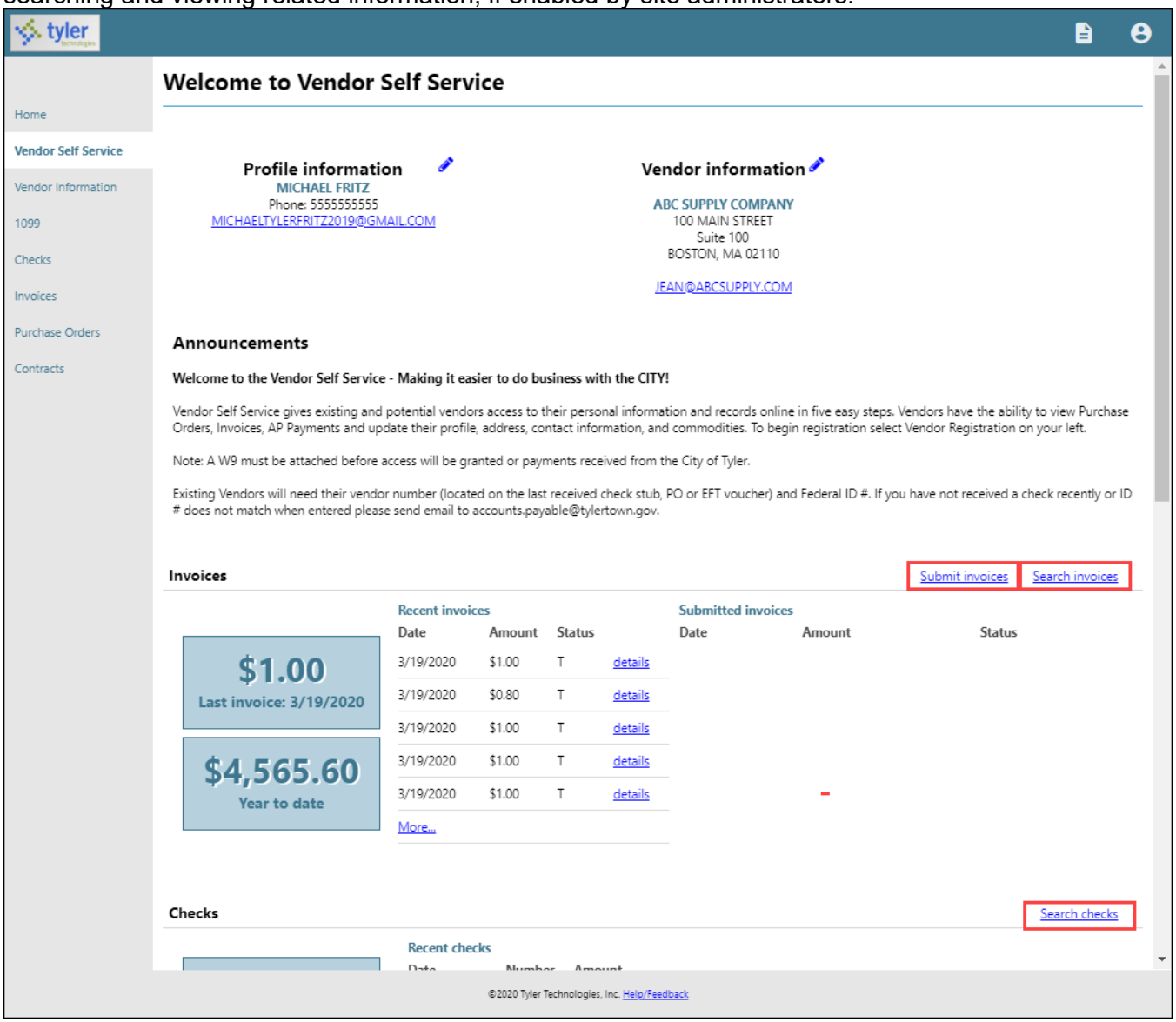
Clicking the login option in the header displays the following menu options:

- Home—Opens the default Self Service home screen.
- My Account—Opens the My Account page containing the vendor's account information.
- Log Out—Logs the vendor out of Vendor Self Service.



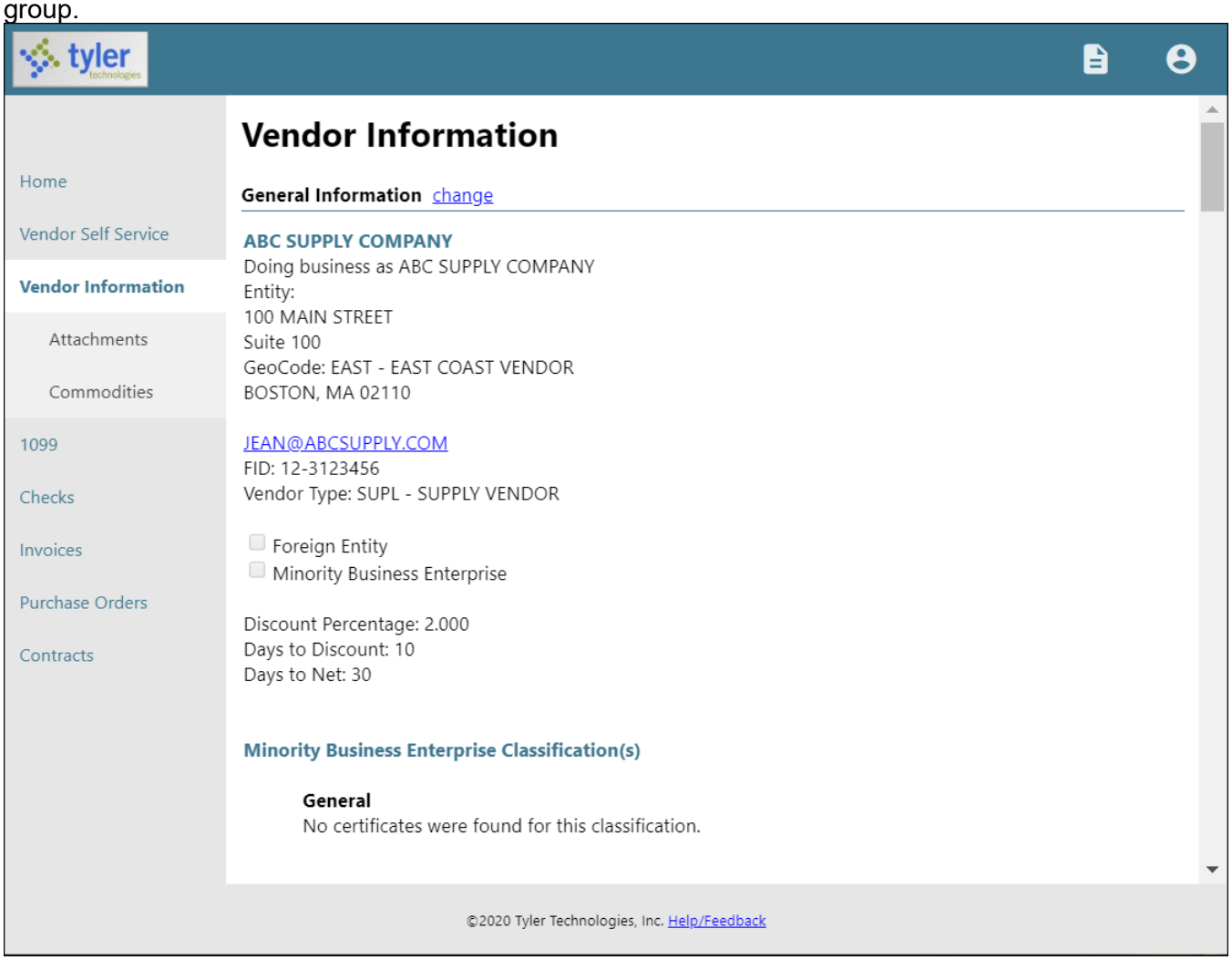
The Resources option in the header provides a menu of links or documents provided by your organization. These options are maintained in Vendor Administration.

On the Vendor Self Service page, the headings for the individual information groups include options for searching and viewing related information, if enabled by site administrators.



Vendor Information

Clicking Vendor Information provides the Vendor Information page. The Vendor Information 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, and discount terms. If your VSS administrator has enabled viewing of banking information on vendor profiles, the General Information group also displays the vendor's banking information.

The Address Information group displays the vendor's remittance address and contact information.

Address Information change

Name/DBA	Address	Is Default
ABC SUPPLY COMPANY	PO BOX 348992 WILLIAMSBURG VA,23185	N
ABC SUPPLY COMPANY	123123 WILLOWBROOK AVENUE PORTLAND ME,02434	N
ABC SUPPLY COMPANY	497897 FRANKLIN AVE WACO TX,76710	N

The Contacts group lists the vendor's contact persons and information.

Contacts change

Type	Name	Title	Email	Phone
GENERAL	KELLY PIPER	ACCT. REP	KPIPER@ABCSUPPLY.COM	617-234-1234
GENERAL	SAMUEL L. SMITH	SALES MAN	SSMITH@ABCSUPPLY.COM	617-234-1234
GENERAL	MICHAEL FRITZ		MICHAELTYLERFRITZ2019@GMAIL.COM	5555555555

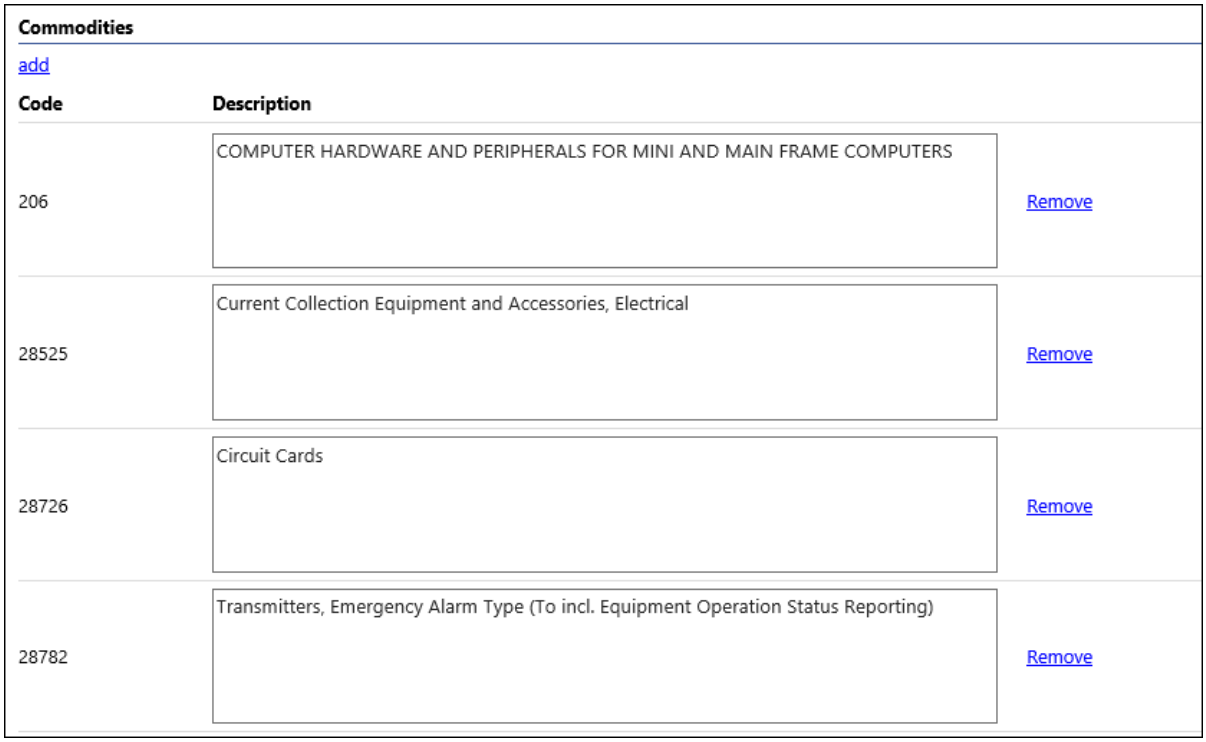
The Additional Fields group identifies the vendor's shipping preferences. Clicking Change allows the vendor to update this information.

Additional Fields

change

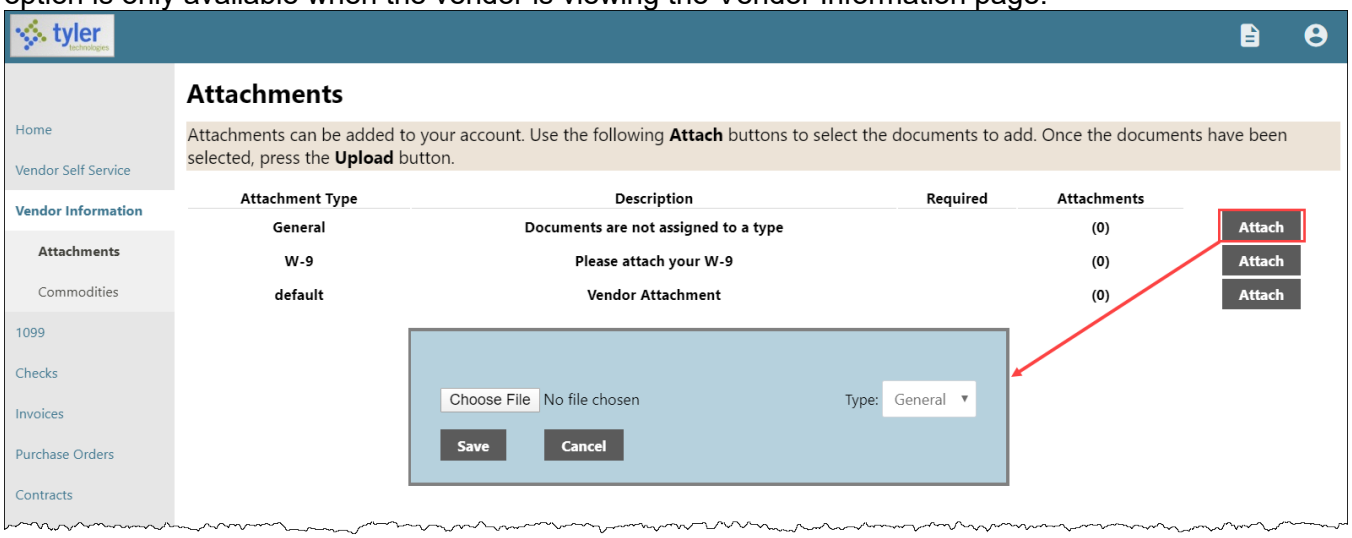
SHIPPING CHOICE	USPS

The Commodities group contains a list of commodity codes associated with the vendor. Vendors remove commodities from the list by clicking the Remove link. The Add option allows vendor to add commodities to the list.



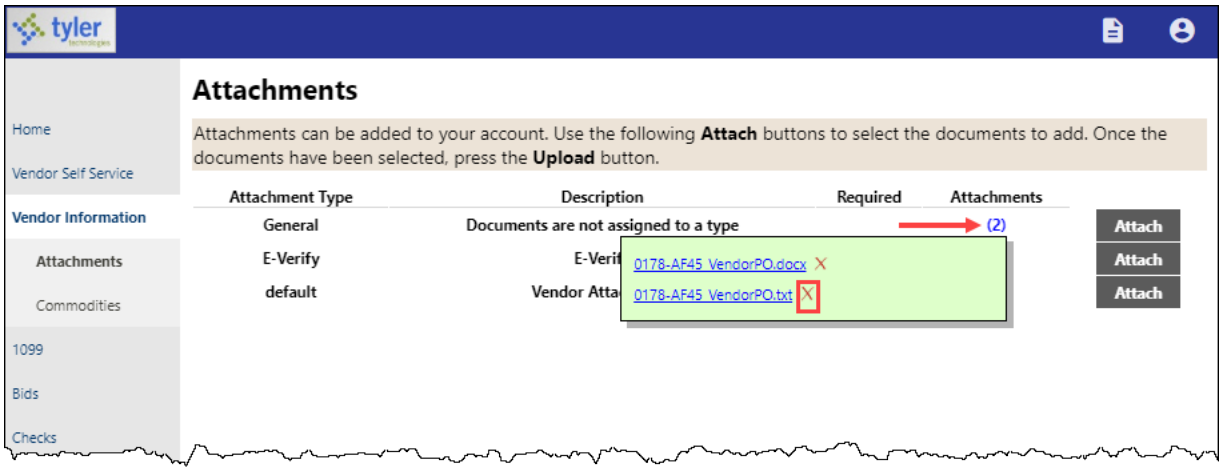
Attachments

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

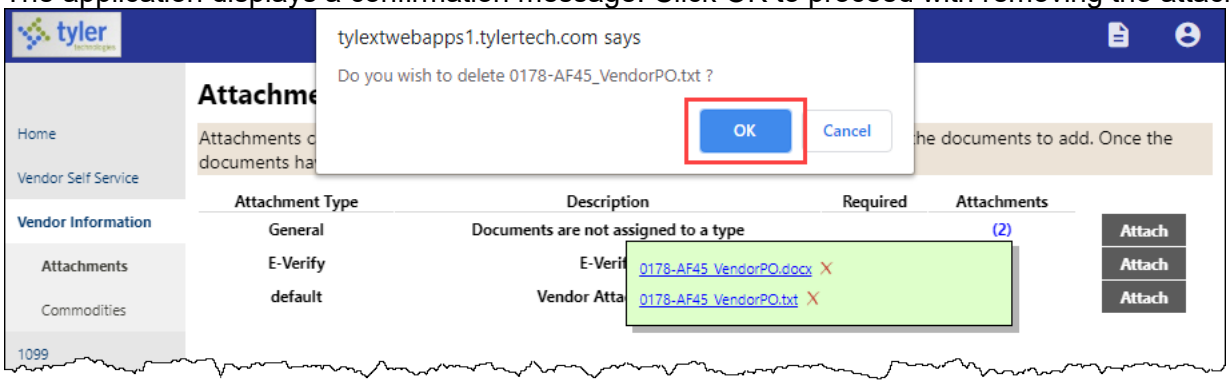


Attachments are added by clicking the Attach button on the Attachments page, which allows the vendor to navigate to a file or document to upload. The Attachments column indicates the number of documents attached for each attachment type. Vendors can attach an unlimited number of files.
Note: Only files with permitted extensions are allowed. Enterprise ERP Self Service administrators control which extensions are allowed on the File Upload Restrictions page of the MSS Hosting site.

To remove an attachment, click the number in the Attachments column and then select the Delete button for the attachment to remove.



The application displays a confirmation message. Click OK to proceed with removing the attachment.

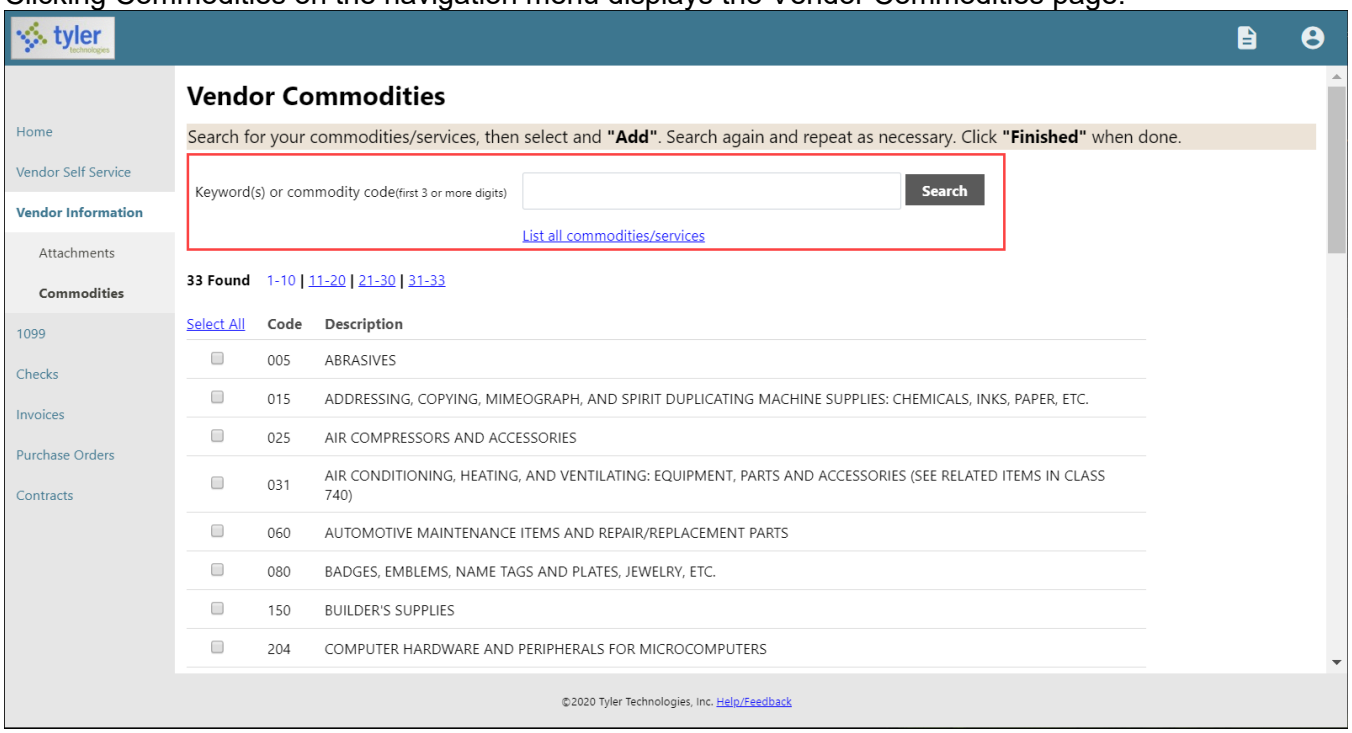


The uploaded files are also added to the vendor record in the Enterprise ERP Vendors program and they can be viewed using the Vendor Attachments screen in that program.

The vendor cannot maintain their attachments in VSS once they have been uploaded. An Enterprise ERP user from your organization must access the vendor record in the Vendors program and use the buttons on the Vendor Attachments screen to add, update, or delete the vendor's attached files.

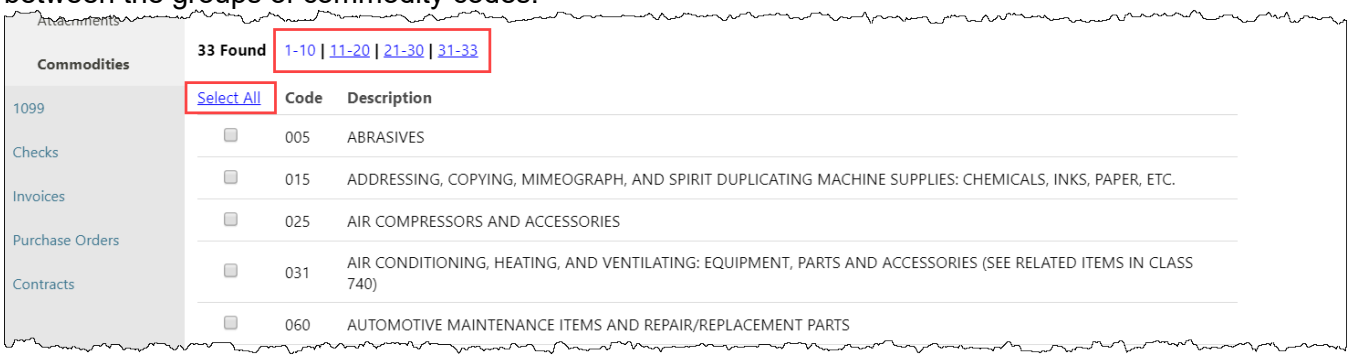
Commodities

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

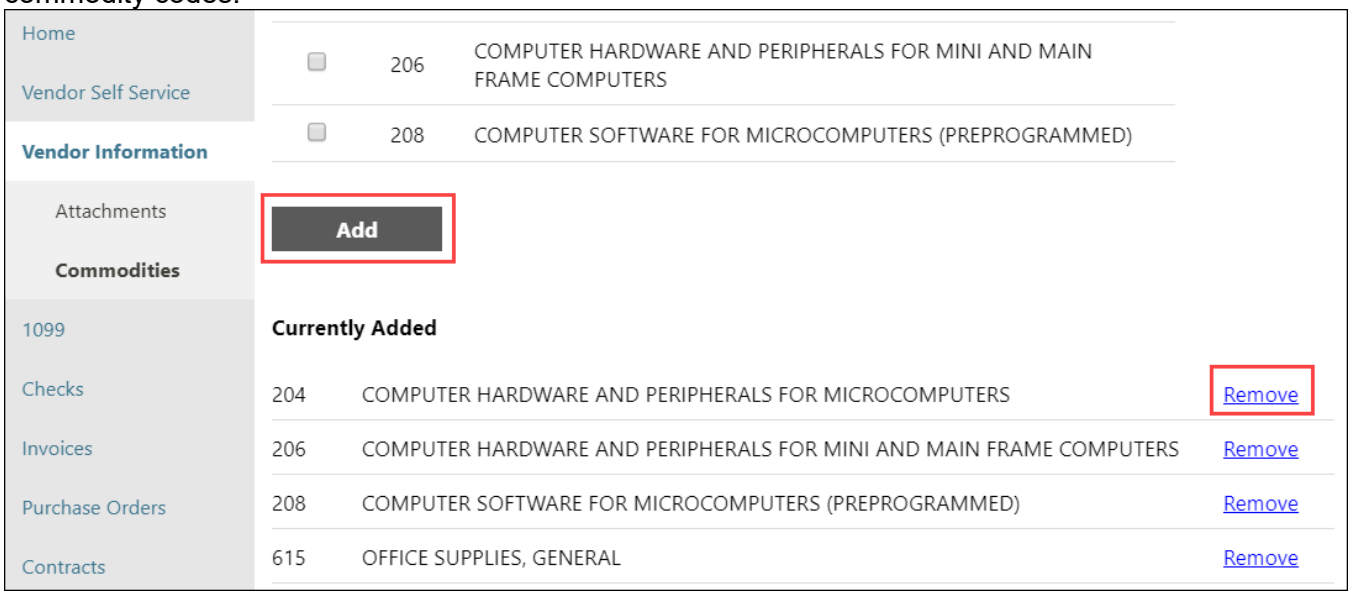


Vendors use the Search box to search for commodities by code or keyword. Alternatively, clicking List All Commodities/Services displays all commodity codes in your organization's Enterprise ERP database. VSS displays the number of codes found during a search and updates the commodity table.

Vendors can view commodities by group using the numbered group selections, or they can identify specific commodities by selecting individual check boxes. If a vendor selects an individual check box within a numbered group selection, VSS saves the value of each check box when the vendor navigates between the groups of commodity codes.



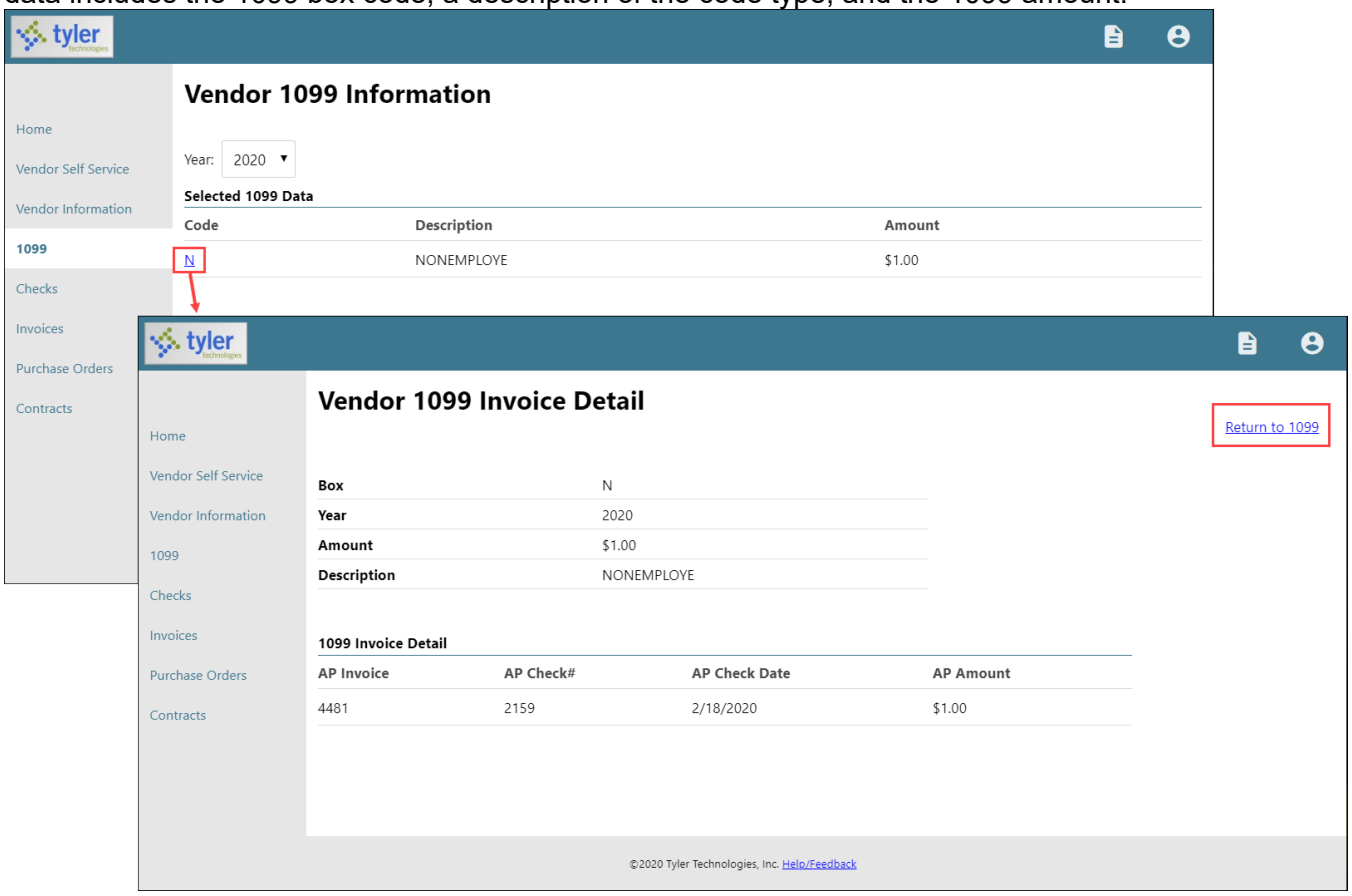
After identifying the applicable commodity codes, clicking Add causes VSS to add the selected commodity codes to the vendor's profile and updates the list of commodities. Clicking Remove removes the commodity from the group. The Currently Added group provides the full list of associated commodity codes.



When vendors complete the commodity code update, they click Finish at the bottom of the page to save the changes and return to the Vendor Information page.

1099

The Vendor 1099 Information page displays a listing of the vendor's 1099 data for a selected year. The data includes the 1099 box code, a description of the code type, and the 1099 amount.



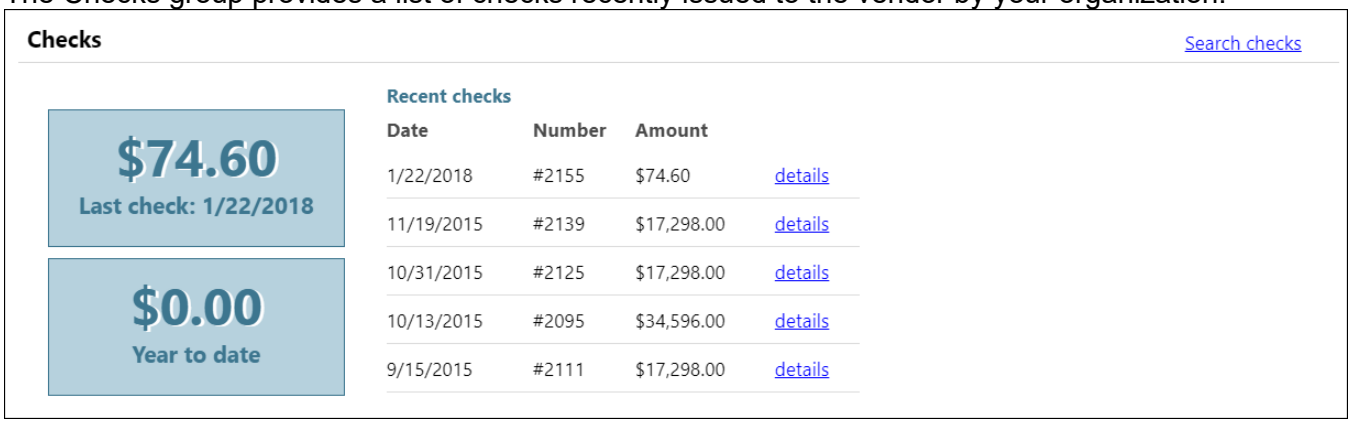
Clicking a code type provides the Vendor 1099 Invoice Detail page. This page displays the general 1099 information, as well as a listing of 1099 invoice details, if they exist for the selected box code. Clicking Return to 1099 returns the vendor to the Vendor 1099 Information page.

Pages regarding **Bids** have been removed as the City of Huntsville does not use this feature. To see bid solicitations issued by:

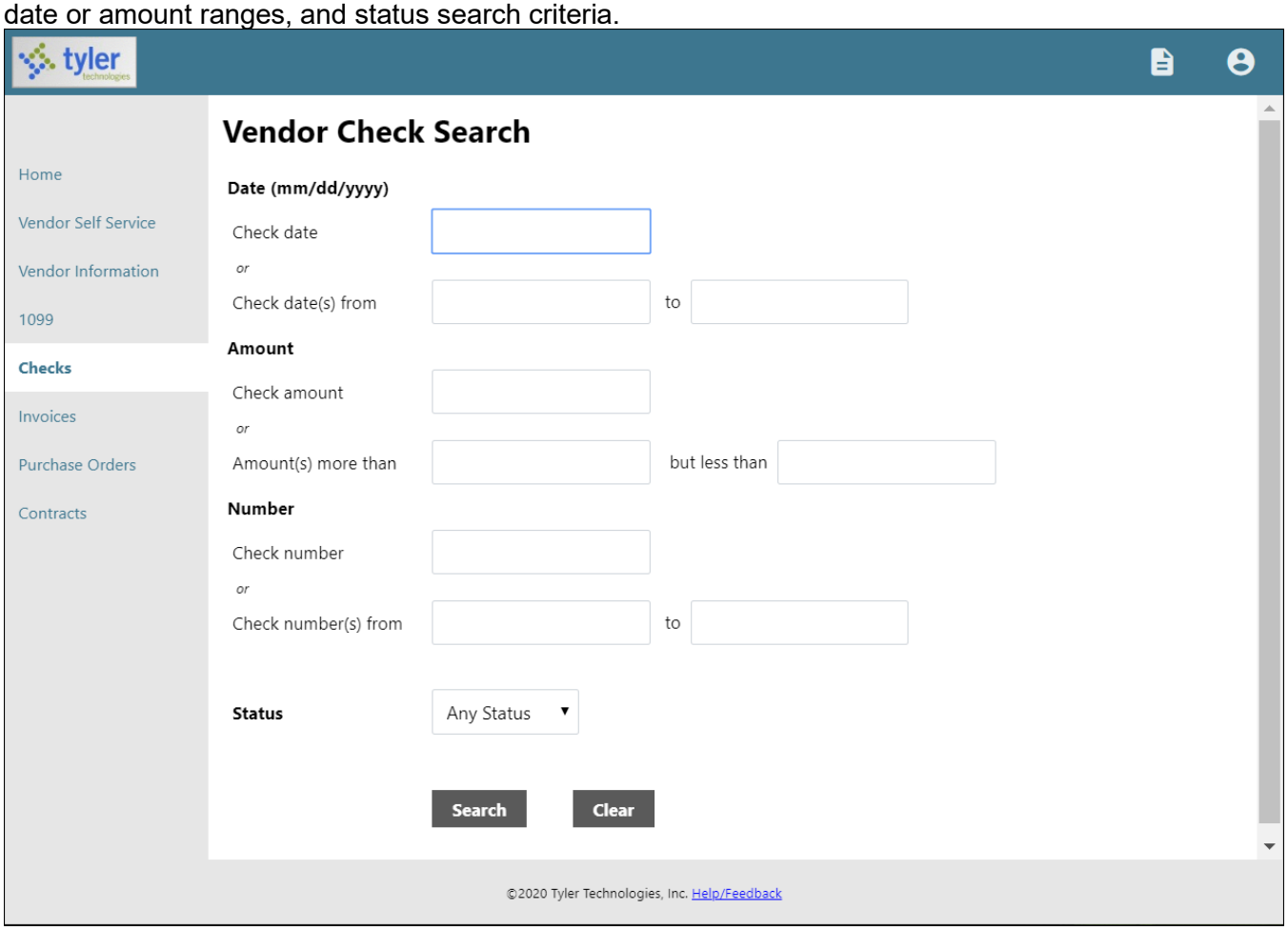
- City of Huntsville Procurement Services Division - https://www.bidnetdirect.com/alabama/cityofhuntsville
- City of Huntsville Engineering Department - https://www.huntsvilleal.gov/business/bid-a-project/rfp/

Checks

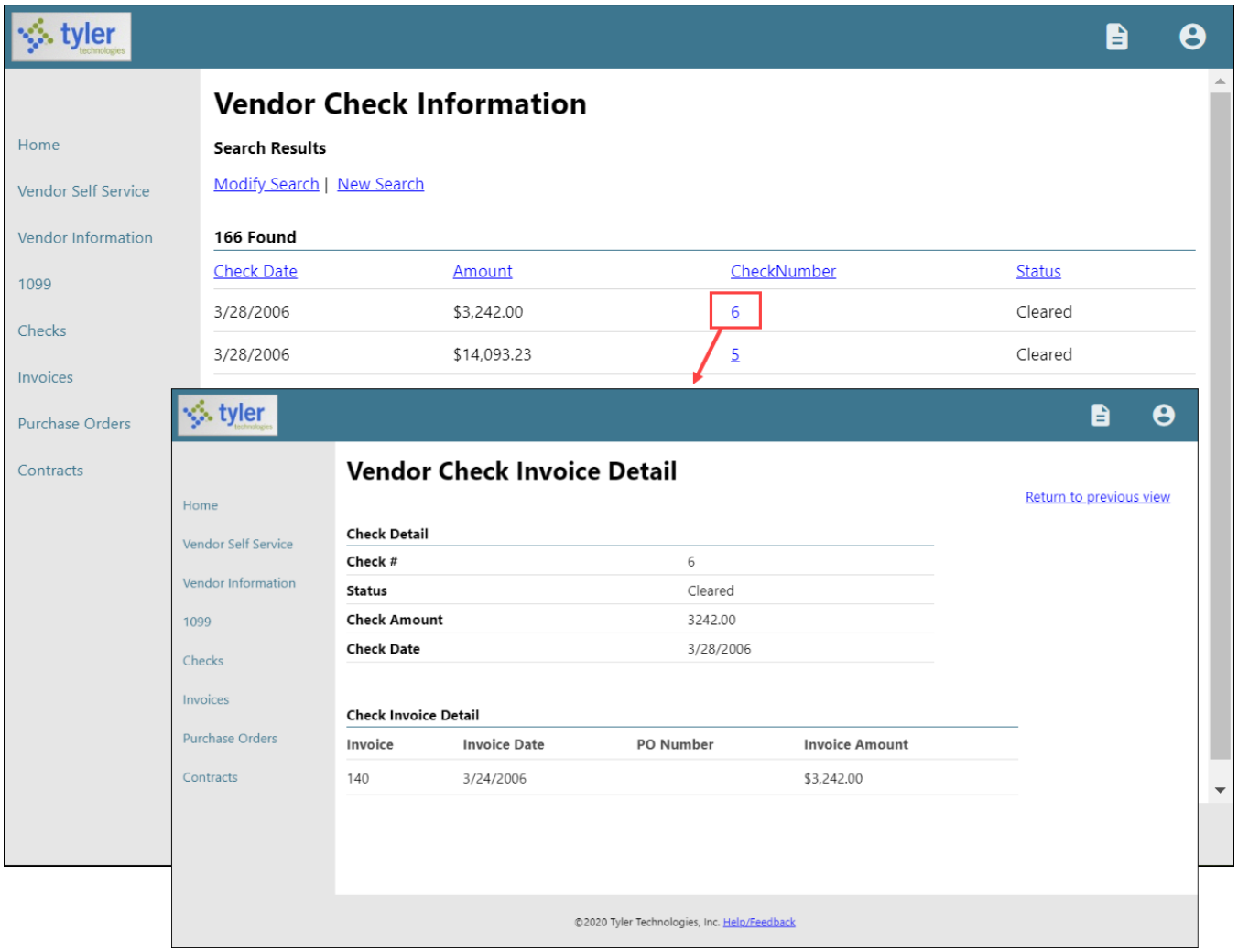
The Checks group provides a list of checks recently issued to the vendor by your organization.



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



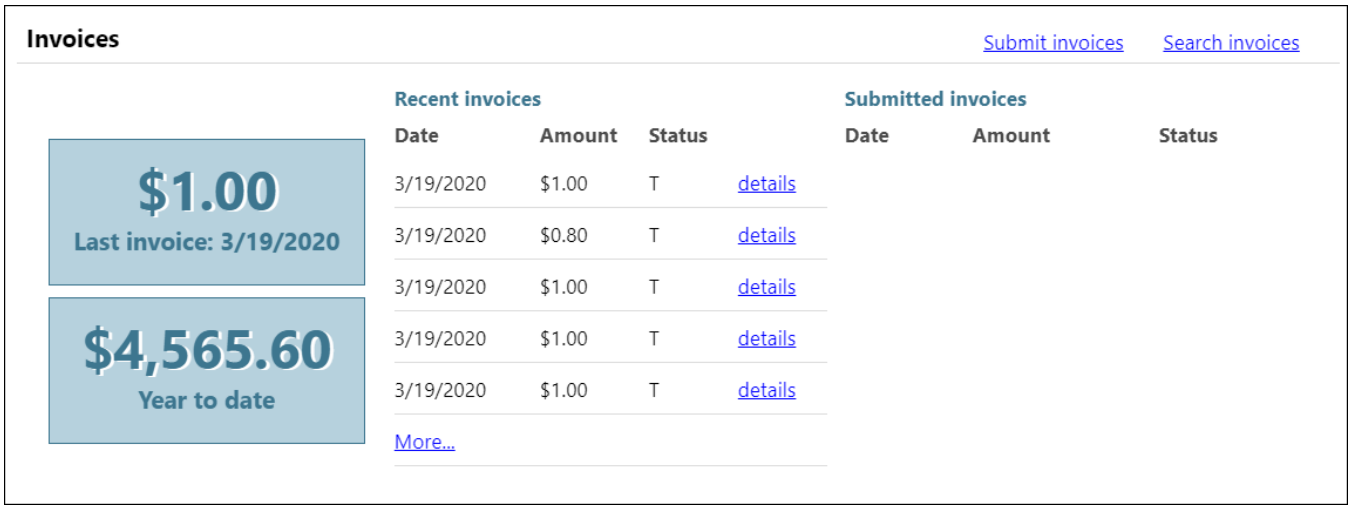
Search Results for checks provides the check date, amount, check number, and status. Clicking a check number reveals additional check details.



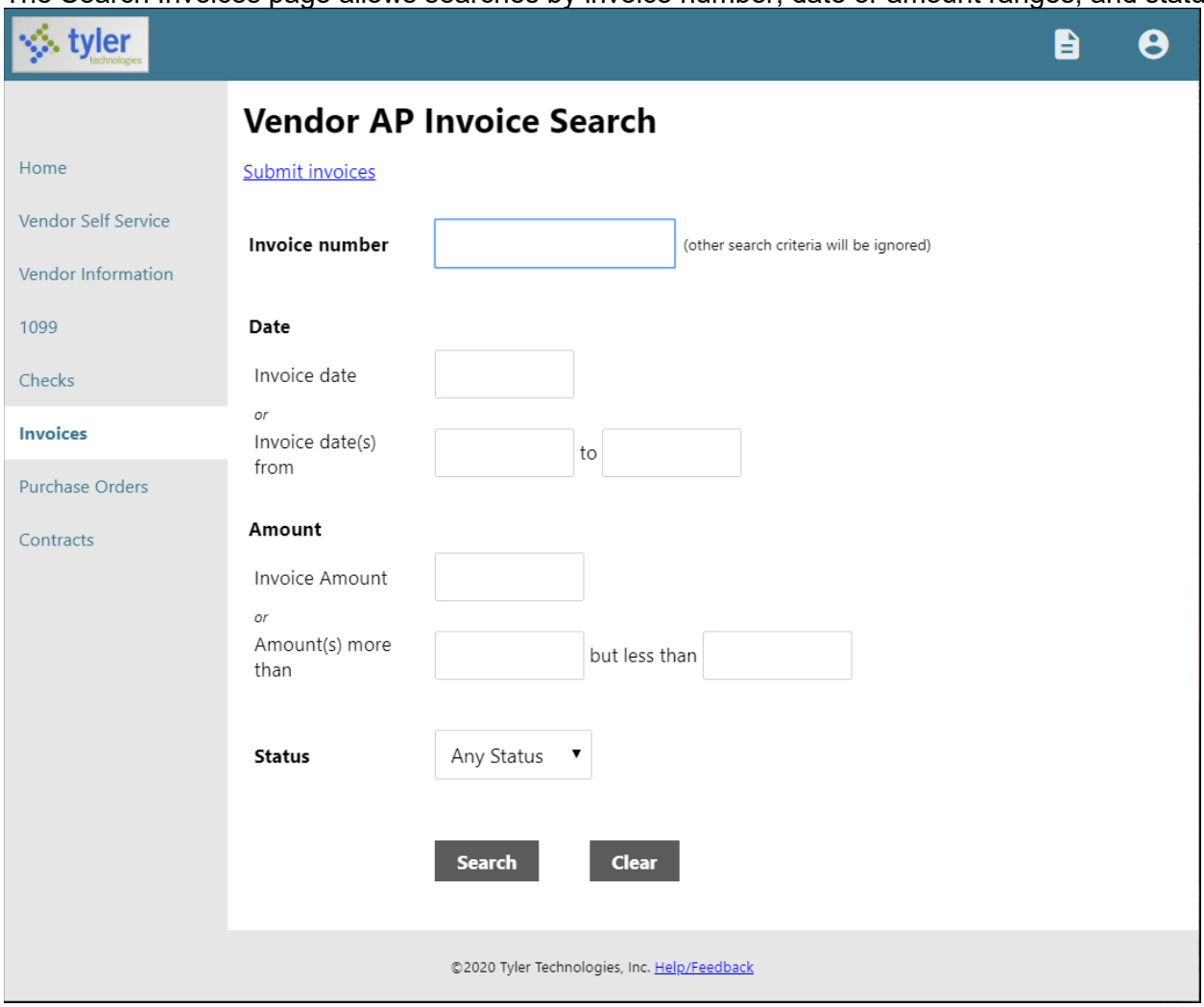
Use the Return to Previous View option to close the Vendor Check Invoice Detail screen and return to the Vendor Check Information screen.

Invoices

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

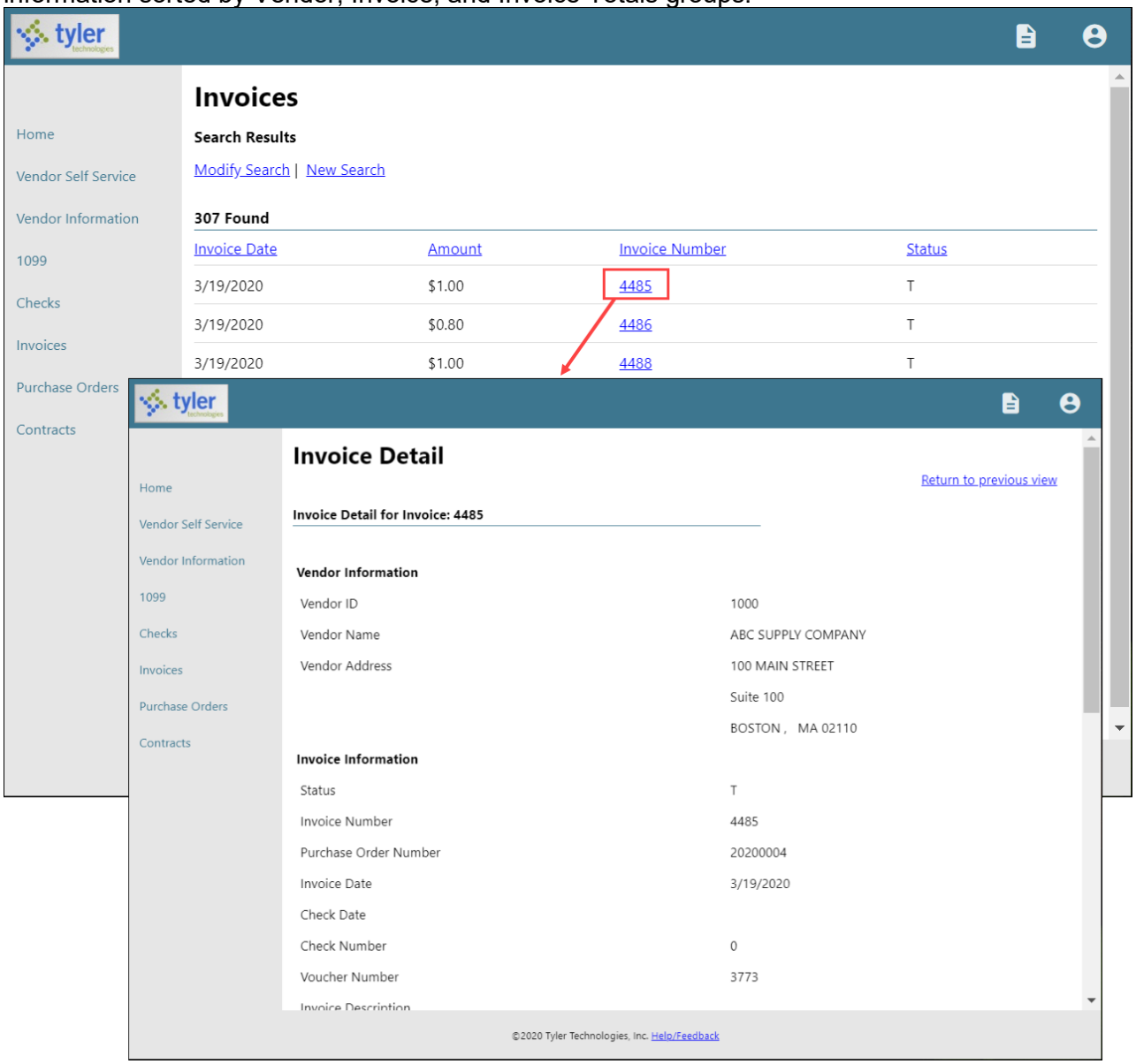


The Search Invoices page allows searches by invoice number, date or amount ranges, and status.

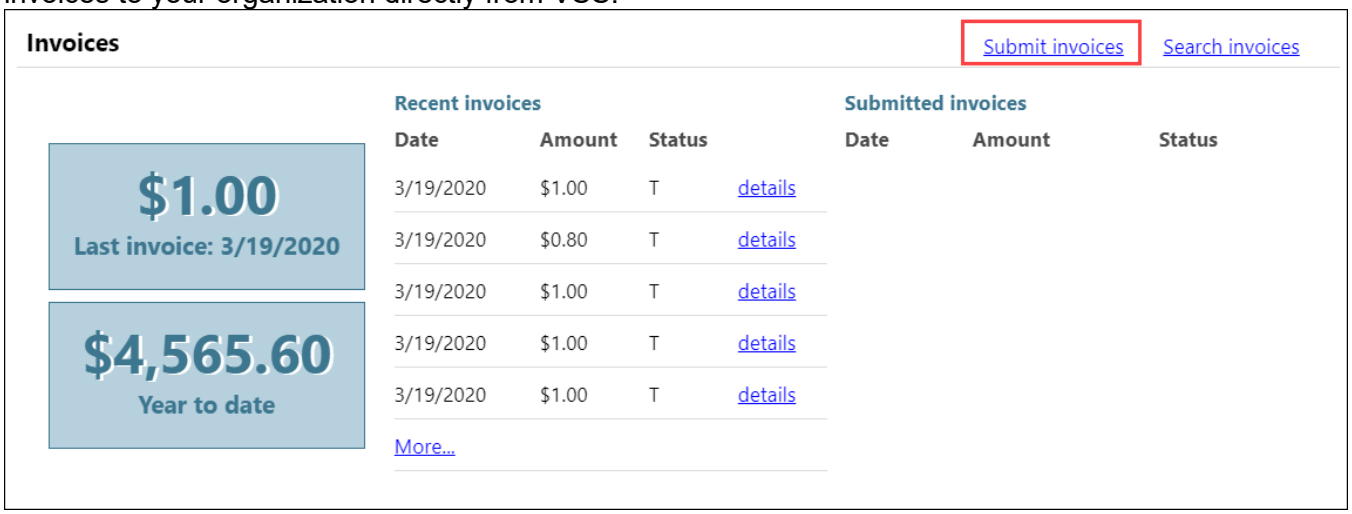


The Search Results page provides the invoice date, amount, invoice number, and status. When the vendor clicks the invoice number, VSS provides the Invoice Detail page, which includes additional

information sorted by Vendor, Invoice, and Invoice Totals groups.



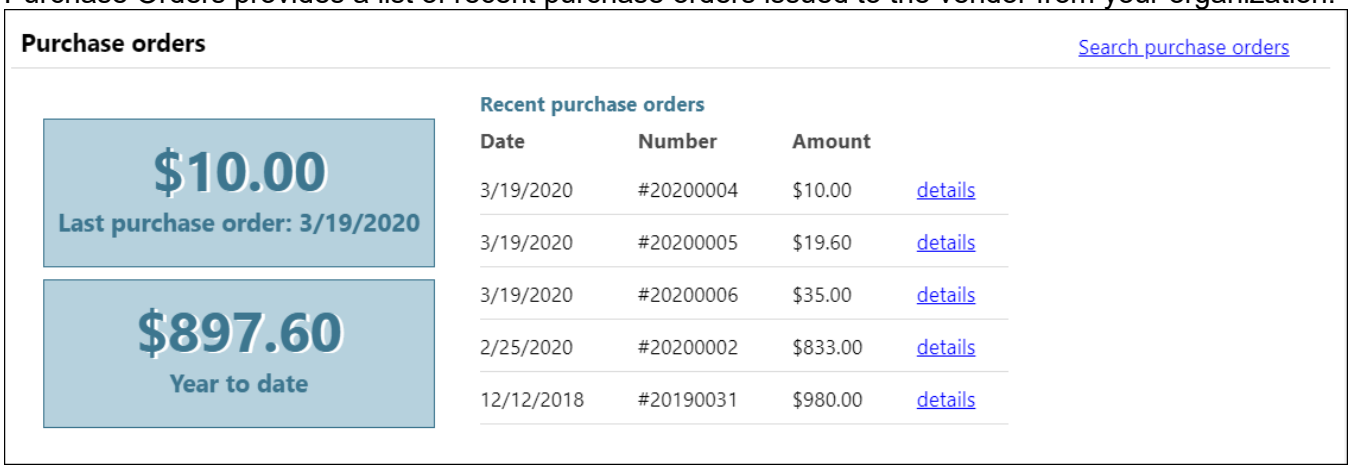
With the applicable settings in Vendor Administration, Enterprise ERP Accounts Payable Settings, and Enterprise ERP Purchasing Settings enabled, the Submit Invoices option allows vendors to submit invoices to your organization directly from VSS.



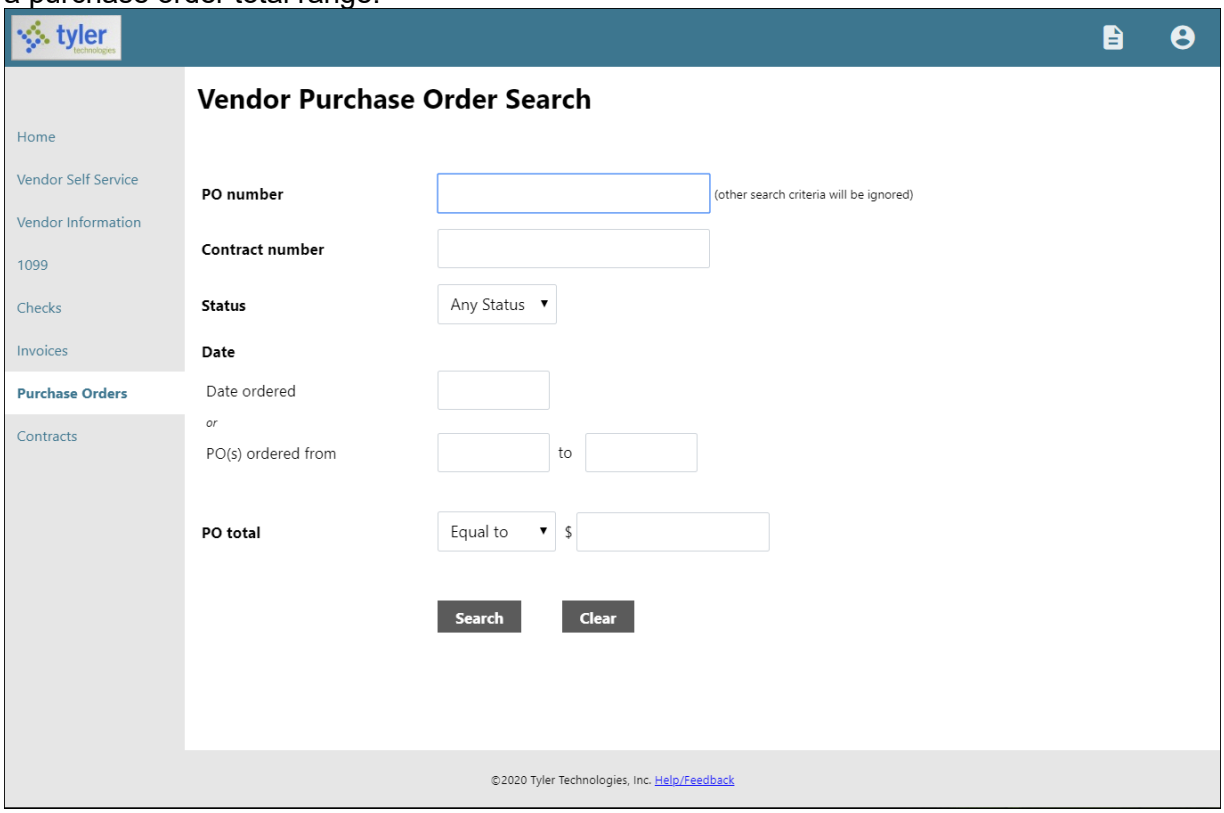
Depending on settings configured for the vendor in Vendor Administration, the Submit Invoices option may require the vendor to indicate a valid purchase order or contract number when they submit an invoice.

Purchase Orders

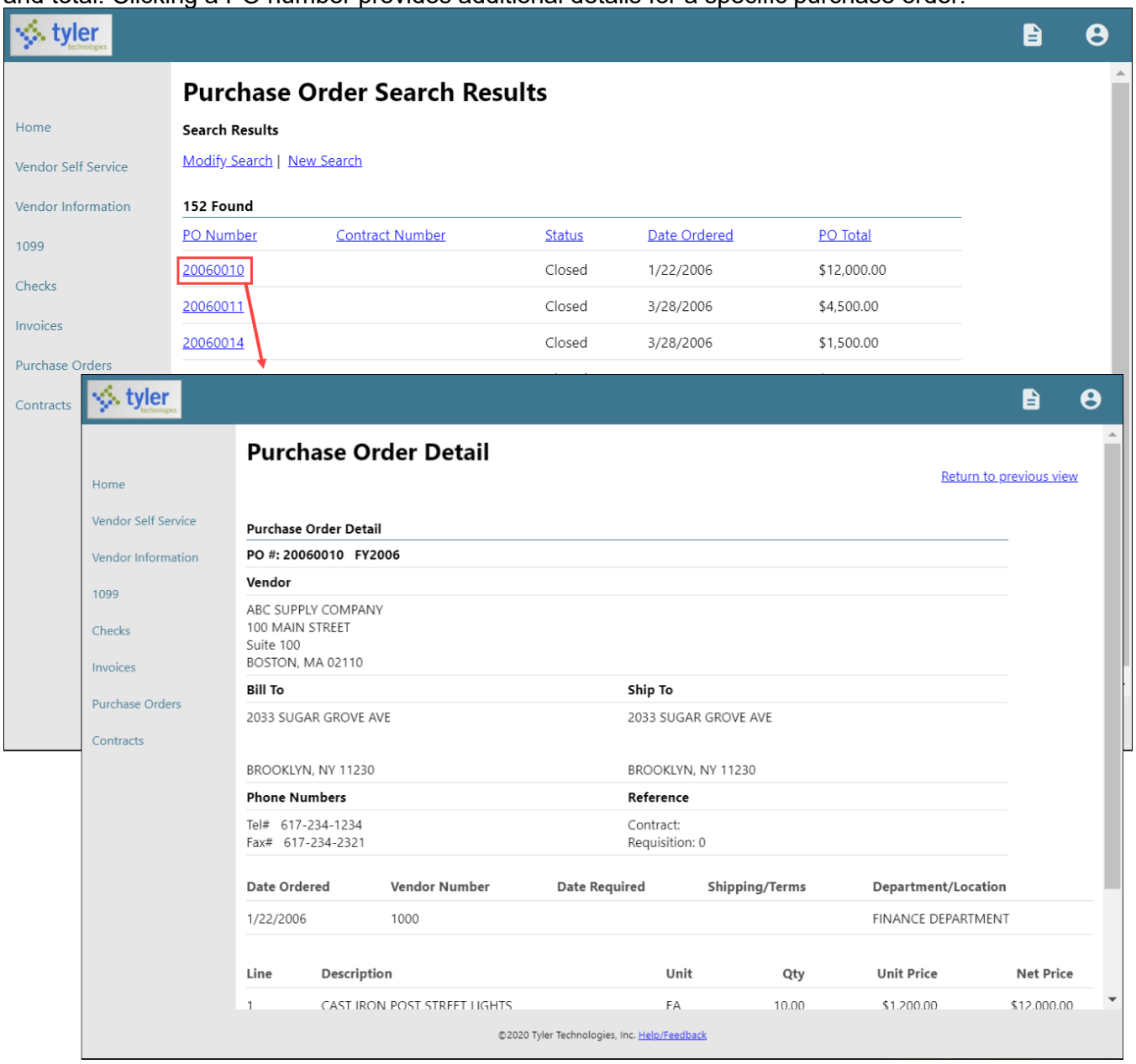
Purchase Orders provides a list of recent purchase orders issued to the vendor from your organization.



The initial Search Purchase Orders page allows vendors to search by purchase order number, date, or a purchase order total range.

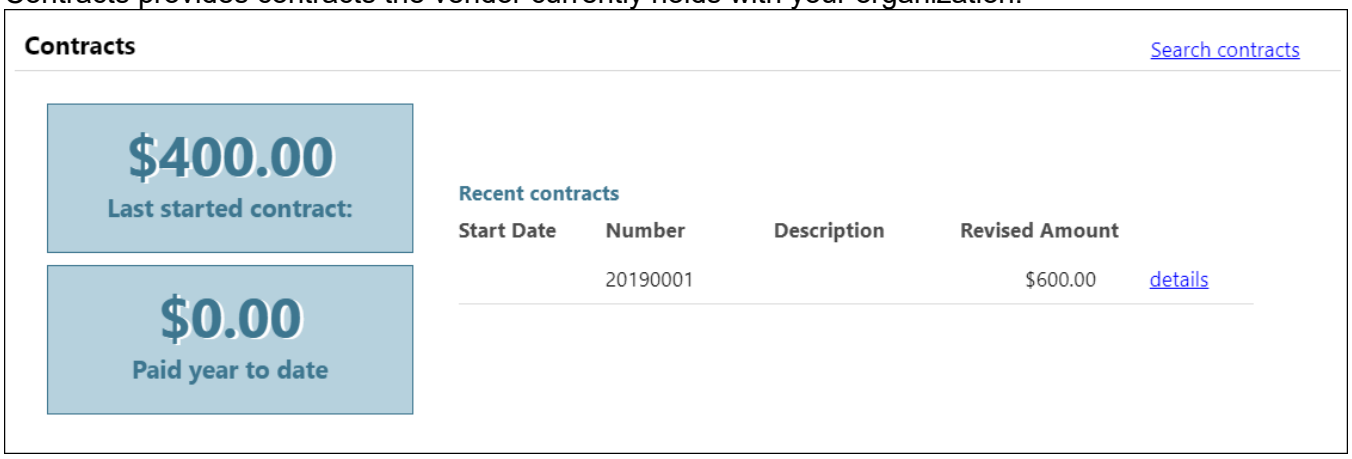


Search results include the purchase order number, contract number (if applicable), status, date orders, and total. Clicking a PO number provides additional details for a specific purchase order.

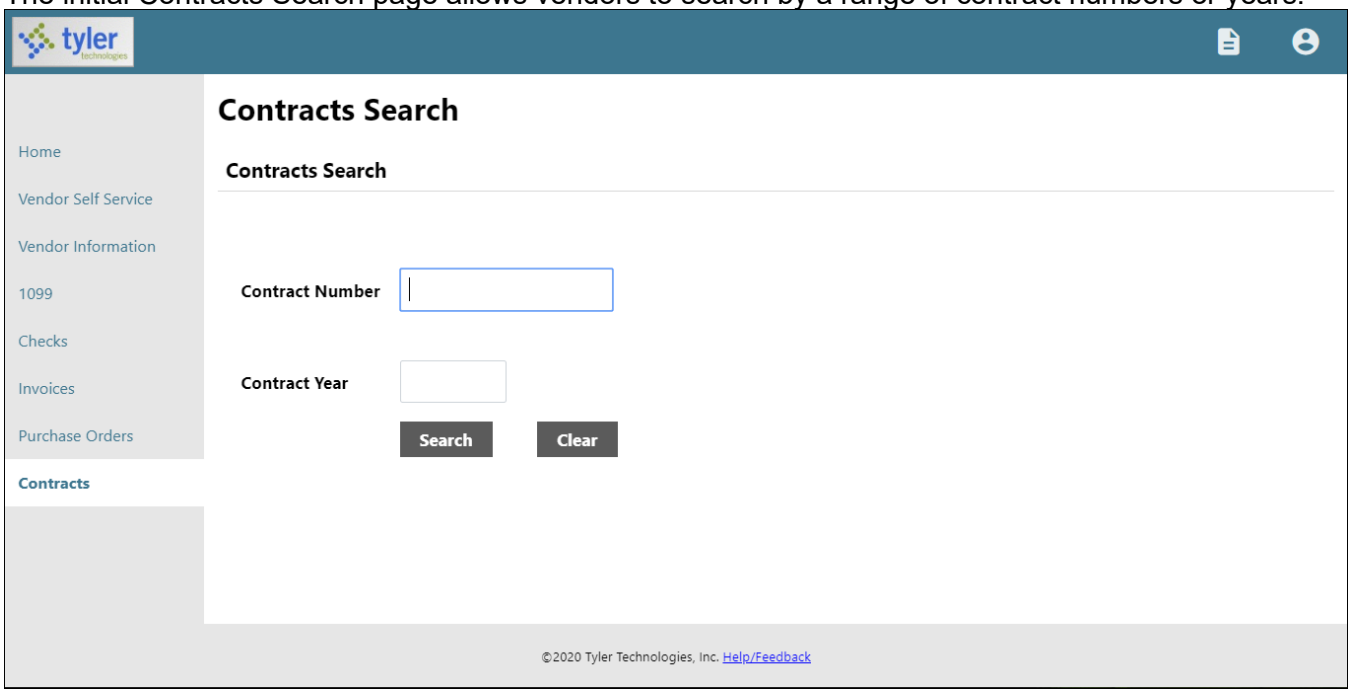


Contracts

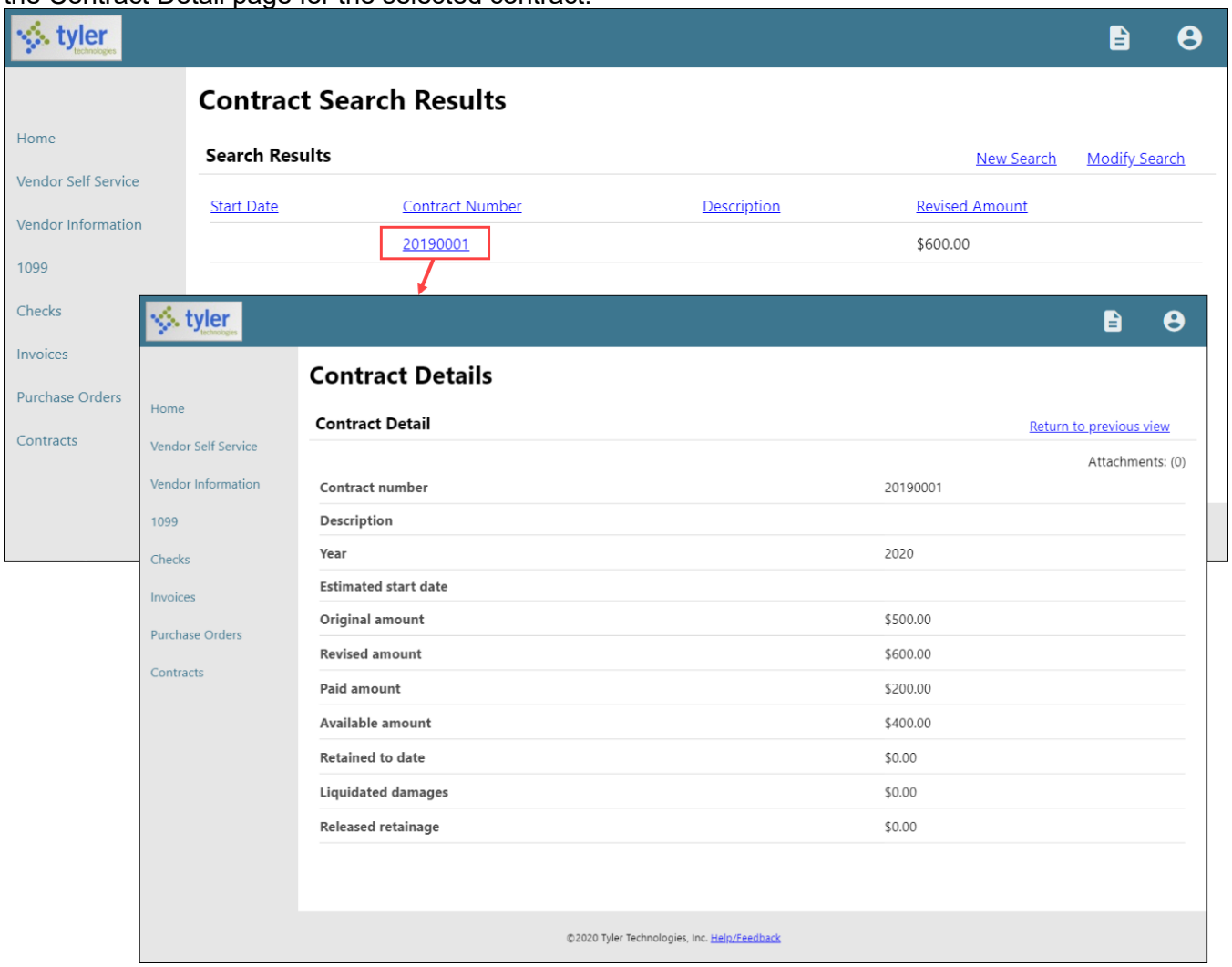
Contracts provides contracts the vendor currently holds with your organization.



The initial Contracts Search page allows vendors to search by a range of contract numbers or years.



Search results include the contract start date, number, and amount. Clicking a contract number shows the Contract Detail page for the selected contract.

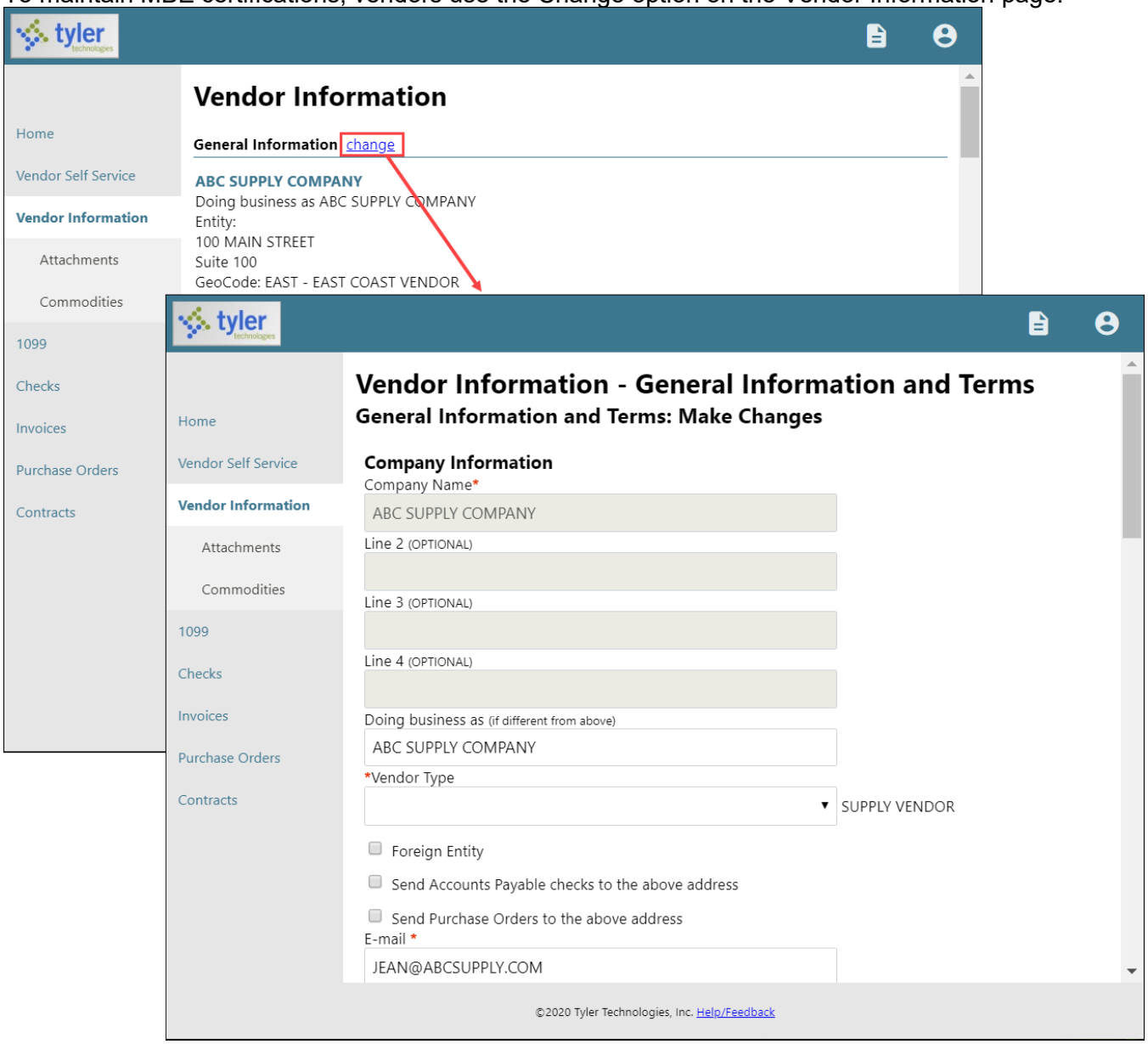


Pages regarding **Work Orders** have been removed as the City of Huntsville does not utilize this feature.

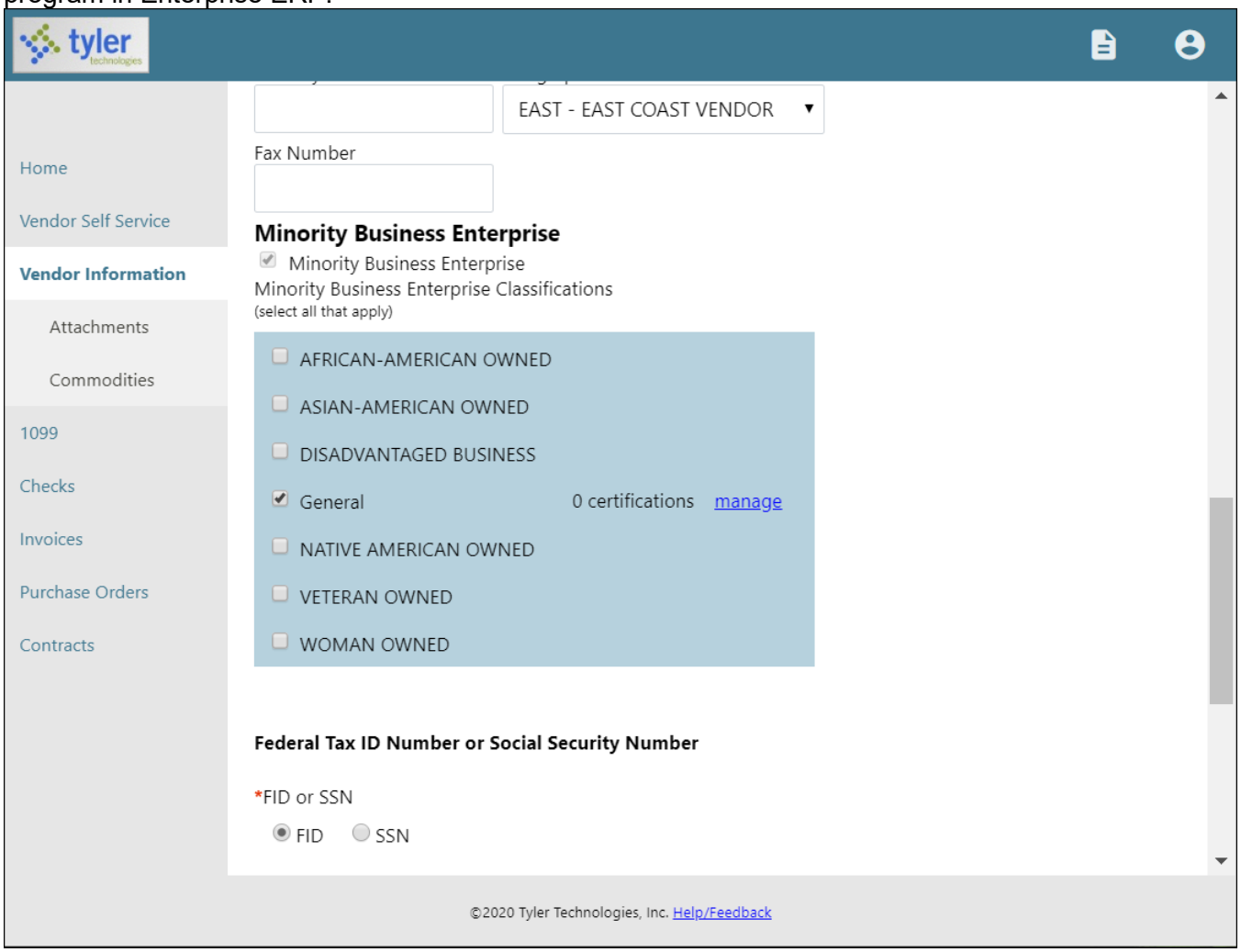
Appendix—Managing Minority Business Enterprise Certificates

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.

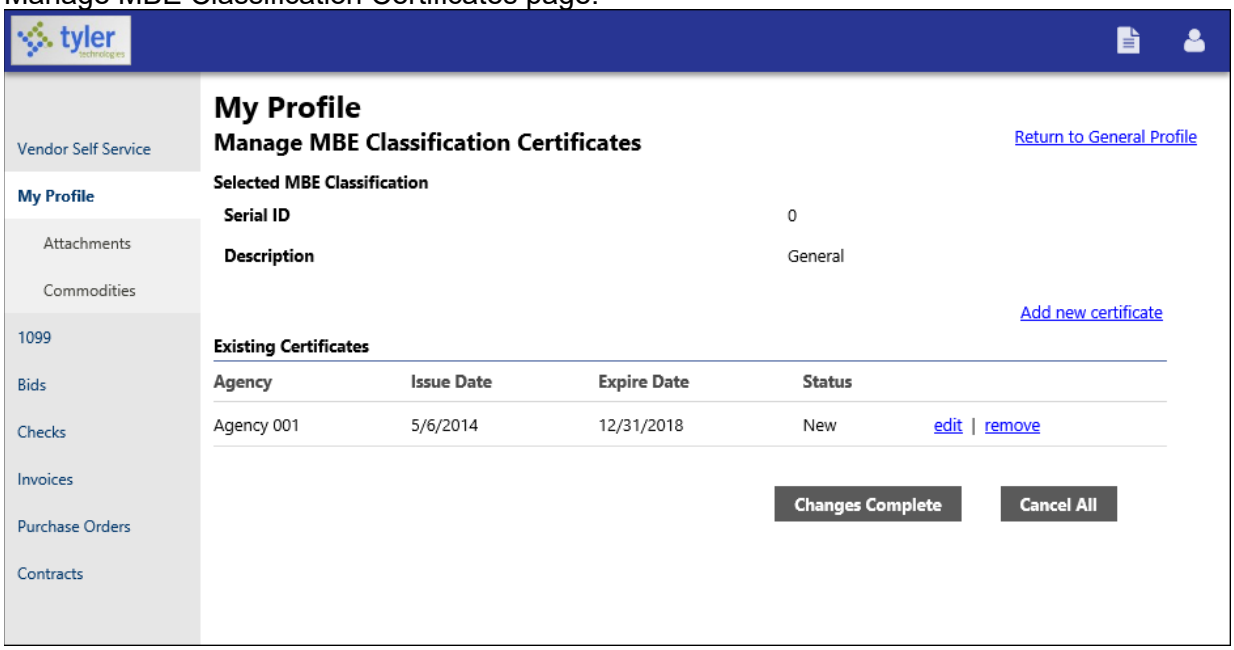
To maintain MBE certifications, vendors use the Change option on the Vendor Information page.



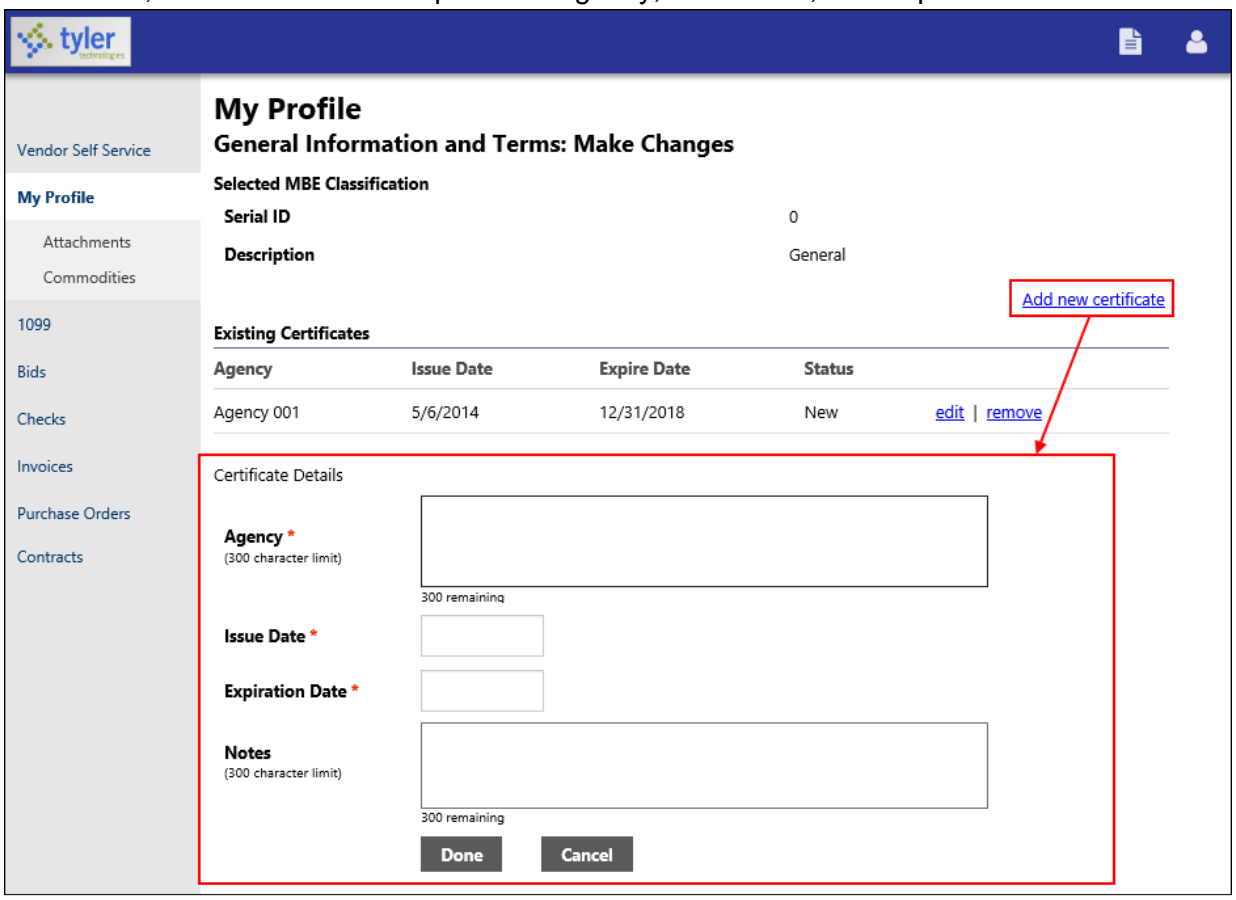
The Minority Business Entity (MBE) section contains the check boxes that indicate if the vendor is a minority business enterprise, and if so, which classifications the vendor possesses. The available classifications are defined by your organization using the Accounts Payable Miscellaneous Codes program in Enterprise ERP.



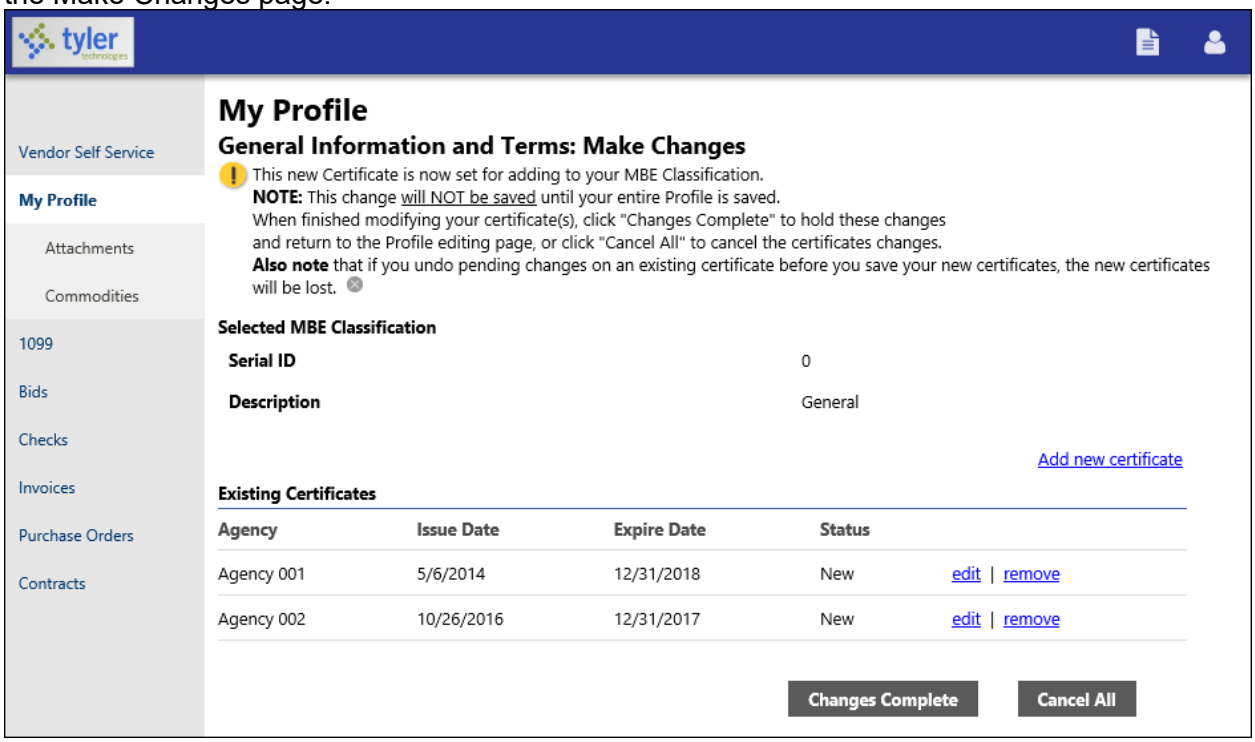
The Manage option for each classification allows a vendor to maintain the classification using the Manage MBE Classification Certificates page.



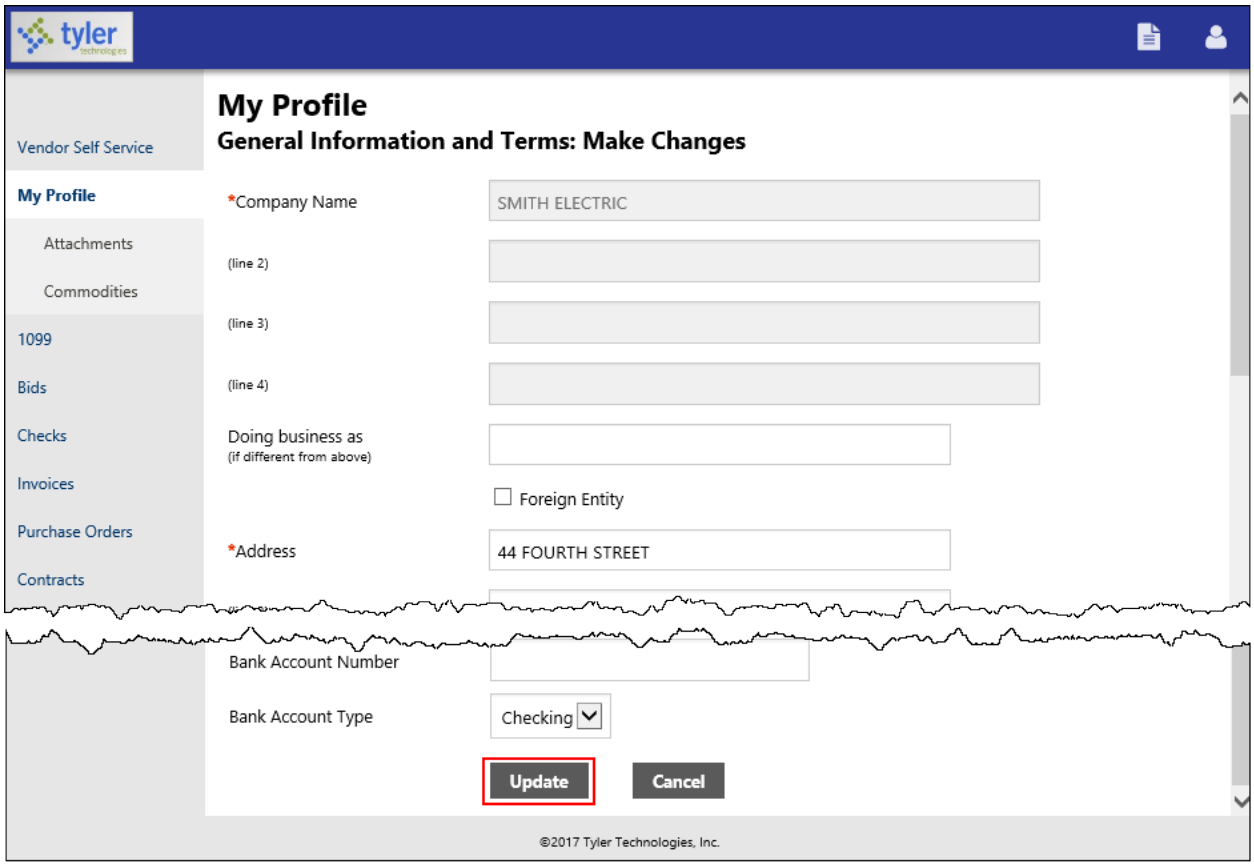
Clicking Add New Certificate refreshes the page to include the Certificate Details section. For new certificates, the vendor must complete the Agency, Issue Date, and Expiration Date fields.



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 a 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 Make Changes page, the vendor must click Update to permanently update their profile with the certificate information.