

Vendor Self-Service Registration User Guide

February 22nd, 2017

Vendor Self Service Overview

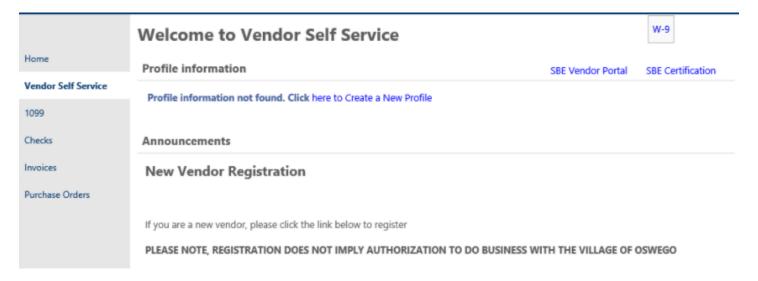
Vendor Self Service (VSS) provides vendors with web-based access to information stored in the Village of Oswego's database. The information is drawn from multiple modules, including Accounts Payable, Purchasing, and Bid Management.

Using VSS, vendors can enter and maintain their contact and remittance information, discount and payment terms, and designated contact people.

A listing of the vendor's current and prior 1099 data, purchase orders, invoices, contracts, and checks is also available in VSS. If applicable, bid information is also available.

Vendor Self Service Home Page

The Vendor Self Service home page contains a banner, navigation menu, and a series of summary information groups.



New Vendor Registration

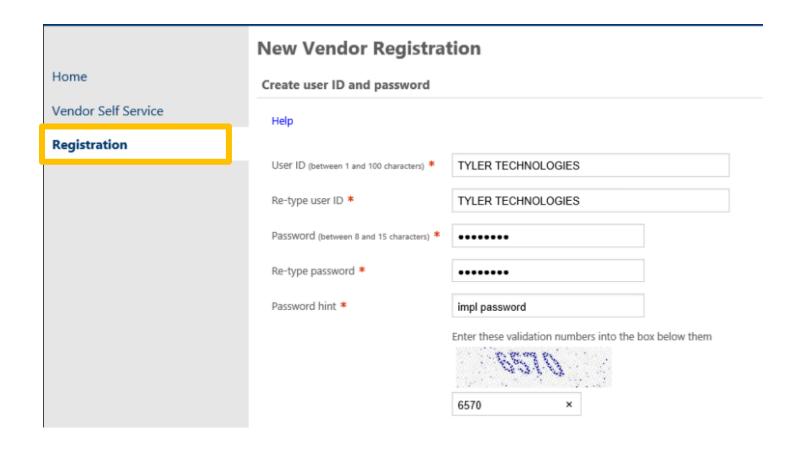
Vendors that have previously done business with the Village will be mailed a letter that includes the Vendor EIN or FID number and vendor number in Munis. This information will be used to login as an existing vendor with the Village.



PLEASE NOTE, IF YOU DID NOT RECEIVE A LETTER FROM THE VILLAGE, IT IS LIKELY THAT YOU HAVE NOT DONE BUSINESS WITH OSWEGO FOR OVER THREE YEARS. IF THIS IS THE CASE, YOU WILL BE REQUIRED TO REGISTER AS A NEW VENDOR WITH THE VILLAGE.

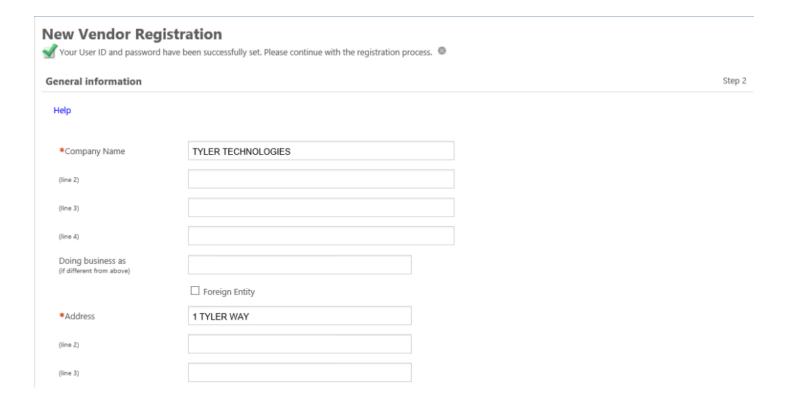
NOTE: To register as a new vendor, click on the Registration link on the home page and create a User ID and Password.

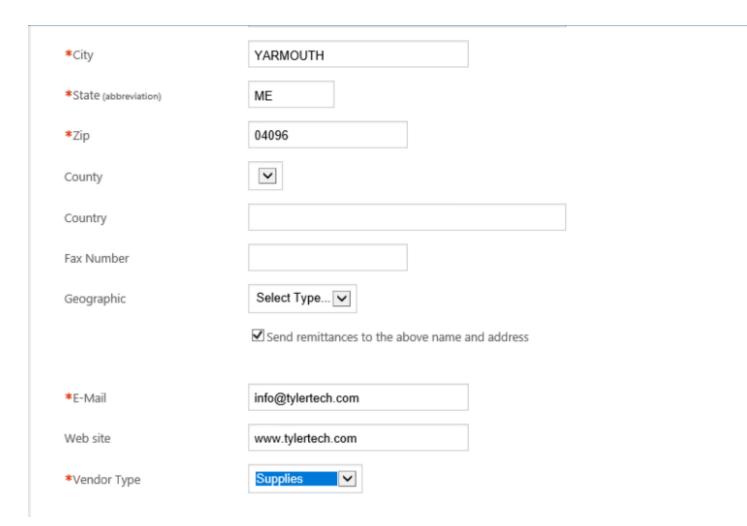
Enter in the validation numbers as they appear in the box to confirm you are not a robot. Skip over the Existing Vendor Information and click continue.





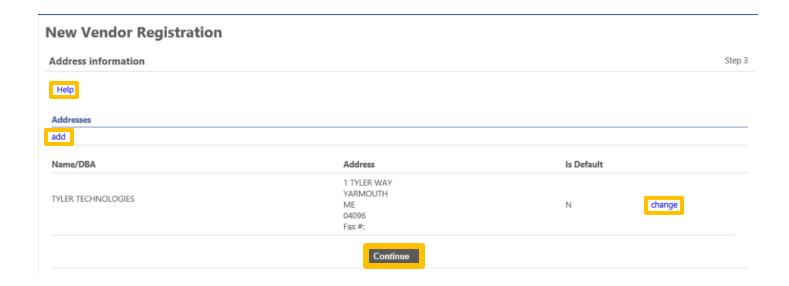
The **SECOND STEP** is to register your vendor address, geographic, and minority business enterprise (MBE) information if applicable.





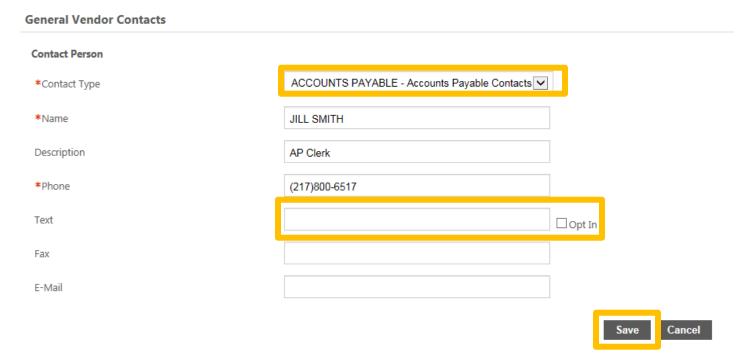
Minority Business Entity (MBE)					
	☐ Is Minority Business Enterprise				
MBE Classifications (select all that apply)	✓ General	0 ce	rtifications	manage	
Gender	Select Type 🗸				
Ethnicity	Select Type 🗸				
Enter a Federal Tax ID Number or Social Security Number					
	* SSN				
*FID/SSN	999-99-9999				
*Re-type FID/SSN	999-99-9999		×		
Payment Terms					
Discount Percentage	0				
Days to Discount	0				
Days to Net	0				
Your preferred payables delivery method(s).	Mail	○Fax	○ E-Mail		
Your preferred purchasing delivery method(s).	Mail	○Fax	O E-Mail		
	Continu	ıe			

The **NEXT STEP** will be to review the address information provided during initial registration steps. Should you desire to update this information, click the blue change link on the right hand side of the address. If you choose to add additional addresses (i.e. Payable, Purchasing etc.) click add in the upper left hand corner. When adding an address you will be prompted to select a payables and purchasing delivery method. Once you have added all the desired addresses for your business, you may click continue.

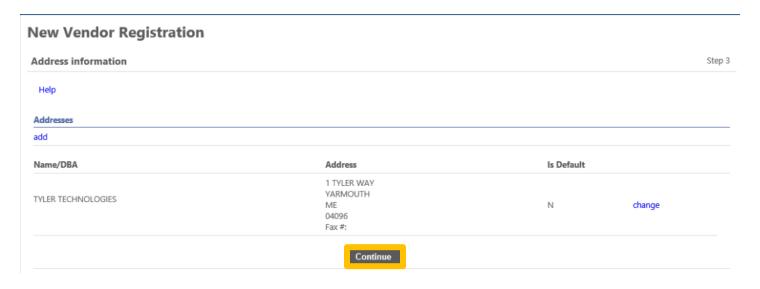


STEP 4 allows you to specify contact people and information specific to your business. To add a new contact, click on the New Contact button. You can select the type of contact (i.e. Accounts Payable, Purchasing, General, Sales or Maintenance). If desired, business contacts can opt in to receive text alerts from the Village. Once the contact information is complete click Save.

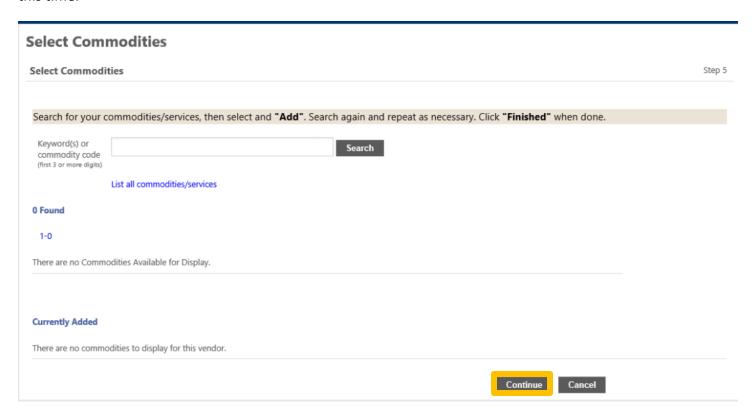
New Vendor Registration



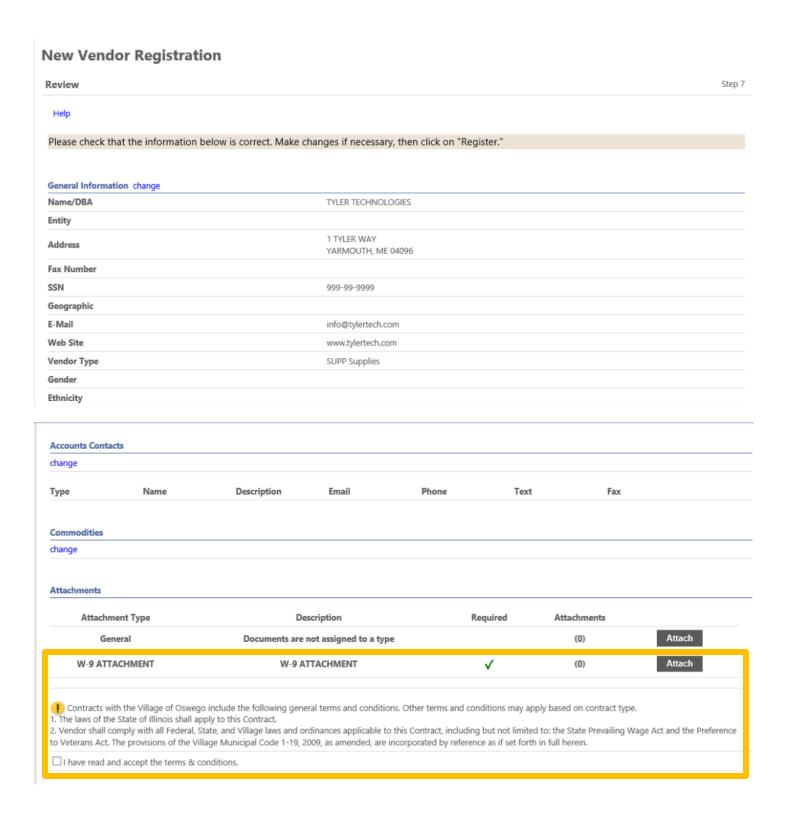
You will be brought back to the main contact screen. Once you have added all necessary contacts for your business click Continue.



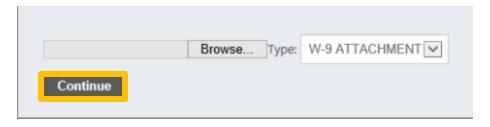
Step 5 can be skipped by clicking continue. The Village is not requiring vendors to register for commodities at this time.



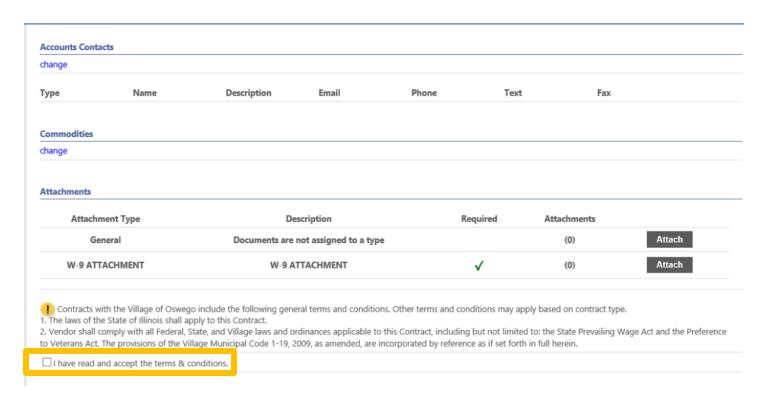
The **FINAL STEP** requires that you review all registration information for accuracy. If changes need to be made, click on the blue change link next to the information header.



NOTE: A W-9 Attachment is required to complete registration as a vendor. Click Attach, upload document then Continue to upload your entity's proper forms.



Once this is completed, review the abbreviated Village Terms and Conditions, then acknowledge that the terms and conditions are accepted.



Once all information is verified, scroll to the bottom of the page and click Register. Please only click register once and refrain from using your browser's Back or Refresh button.



The information will take a minute to save. Once the information has been properly stored you will receive the following prompt:

New Vendor Registration

Registration Confirmation

₹ Registration has been completed. You will be contacted when your information has been reviewed.

You can now:

- Register for commodities/services and/or update your profile.
- · Upload attachment documents to your profile.

If an email address was provided, you will also see an email registration notification.

Attachments

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

Attachments are added by clicking the **Browse** button on the Attachments page, selecting the file to attach, and then clicking the **Upload** button. This causes the page to display a list of files to attach. Vendors can attach an unlimited number of files using this method.

Clicking the **Remove** link next to a file removes it from the attachment list. When the vendor has finished selecting files, they must click **Upload** to upload the files.



The uploaded files are added to the Attachments page.

The uploaded files are also added to the vendor record in the Munis Vendors program and they can be viewed on the Vendor Attachments screen of that program.

The vendor cannot maintain their attachments in VSS once they have been uploaded. Contact the Village of Oswego Finance Staff at finance@oswegoil.org to add, update, or delete the vendor's attached files.

Clicking the vendor name in the banner displays the following menu options:

- Home Returns the vendor to the Munis Self Service home page.
- My Account Opens the My Account page containing the vendor's account information.
- Log Out Logs the vendor out of Munis Self Service.



If the vendor clicks the **Resources** list in the banner, VSS displays a list of resource items. These items are hyperlinks or documents defined and uploaded by your organization's VSS administrator.



Vendor Navigation

Vendors use the navigation menu or the buttons in the group banners to navigate between pages in Vendor Self Service.

