Munis Self Service
Vendor Self Service 2018.1

Contents

1 VENDOR SELF SERVICE OVERVIEW

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

Using VSS, vendors can enter and maintain their contact and remittance information, discount and payment terms, designated contact persons, and 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. This information is entered by users in your organization using Munis 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 Munis 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 MSS General Administration User Guide for details on modifying VSS permissions. Style

1.1.1 Vendor Self Service Users

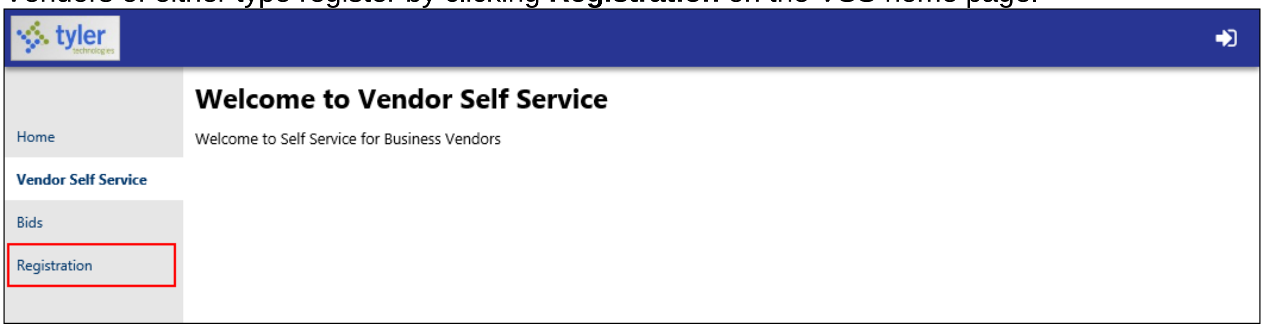
Vendor Self Service requires vendors who exist in your Munis database to register using the VSS website to gain access to their information. To successfully link a vendor's VSS registration with their Munis record, you must provide the vendor with the Munis vendor ID number assigned by your organization.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

Potential vendors who do not exist in your Munis 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 Munis. A user from your organization with Munis vendor maintenance permissions must change the status of the newly created record to Active in Munis. 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.

2 VENDOR REGISTRATION

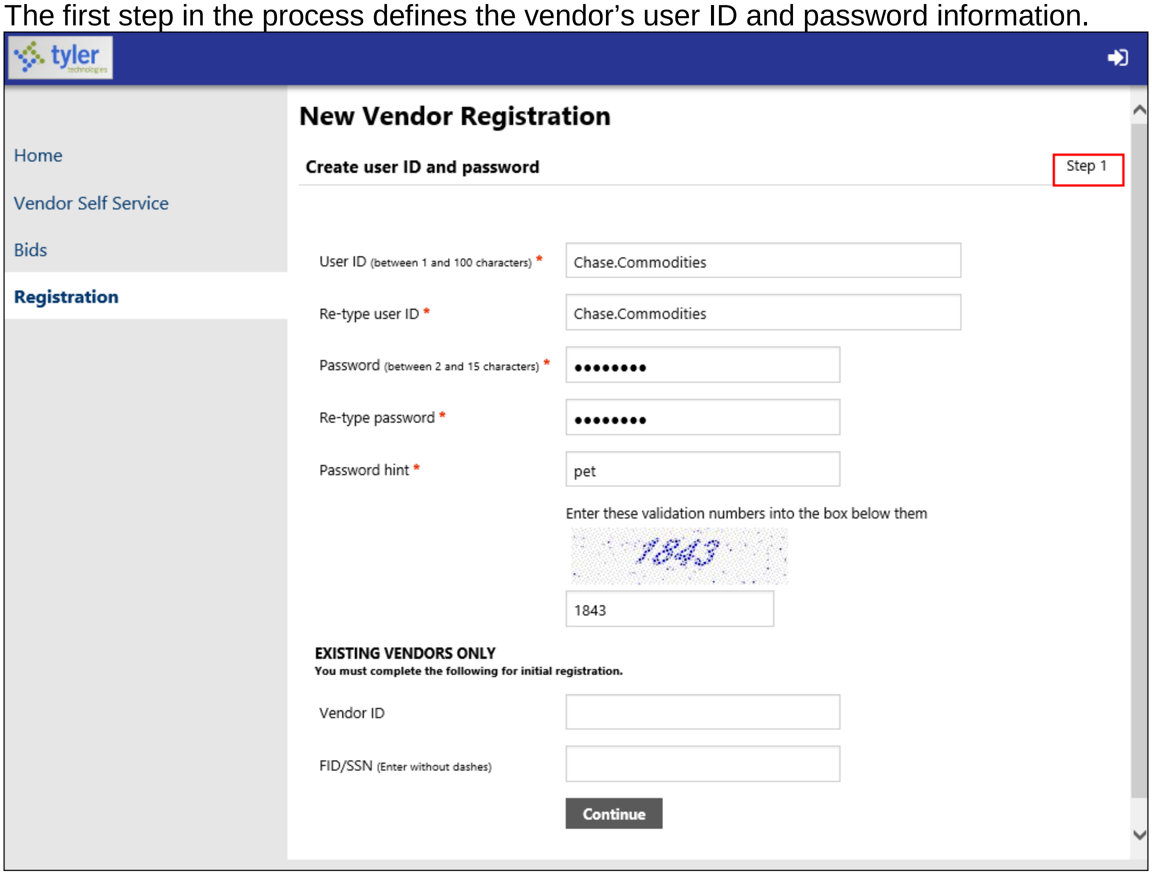
Prospective vendors who do not exist in your Munis database, as well as existing vendors who have already been entered in the Vendors program in Munis, must register to gain access to Vendor Self Service.

Vendors of either type register by clicking **Registration** on the VSS home page.



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.

The first step in the process defines the vendor's user ID and password information.

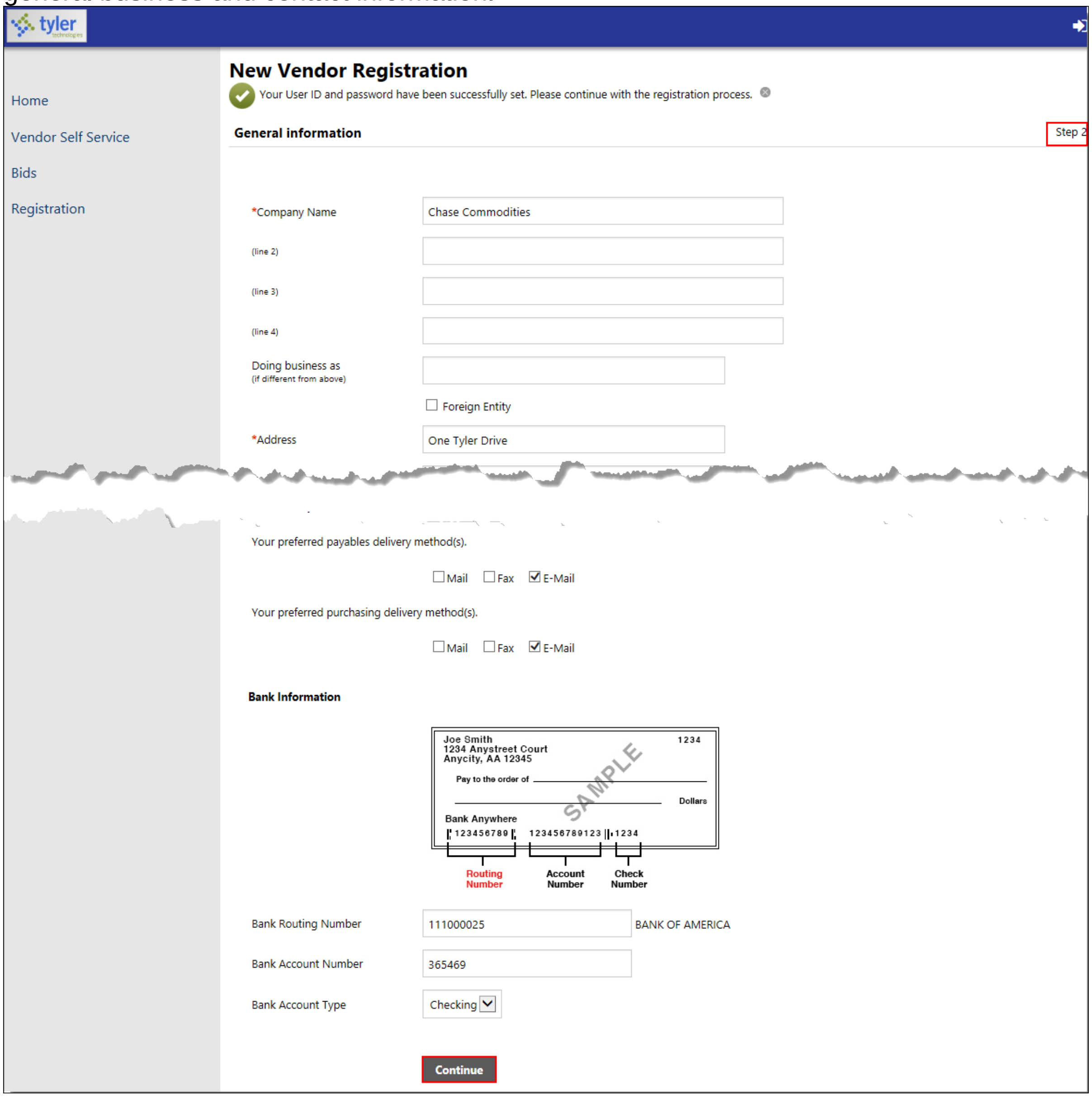


Field	Description
User ID	Defines the vendor's VSS login name. Each user ID must be unique and cannot be greater than 20 characters in length.
Password	Indicates the vendor's login password. The vendor must enter and then retype a login password in the boxes. VSS requires entry of a minimum of two characters for the password and a maximum of 15 characters. VSS password formatting rules are defined by your organization's Self Service administrator on the General Administration page.
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.

Vendors who already exist in your organization's Munis database must complete the fields in the Existing Vendors Only section. You must provide the vendor with the Munis vendor ID assigned by your organization, which is the vendor number in the Munis Vendors program. The value entered in the FID/SSN box must match the value from the Munis vendor record exactly.

When existing Munis vendors complete the Vendor ID and FID/SSN boxes and click **Continue**, VSS verifies the entered information with the vendor record in Munis. If all of the information matches, the vendor is automatically presented with the My Profile page. They do not have to complete the remaining steps of the registration process.

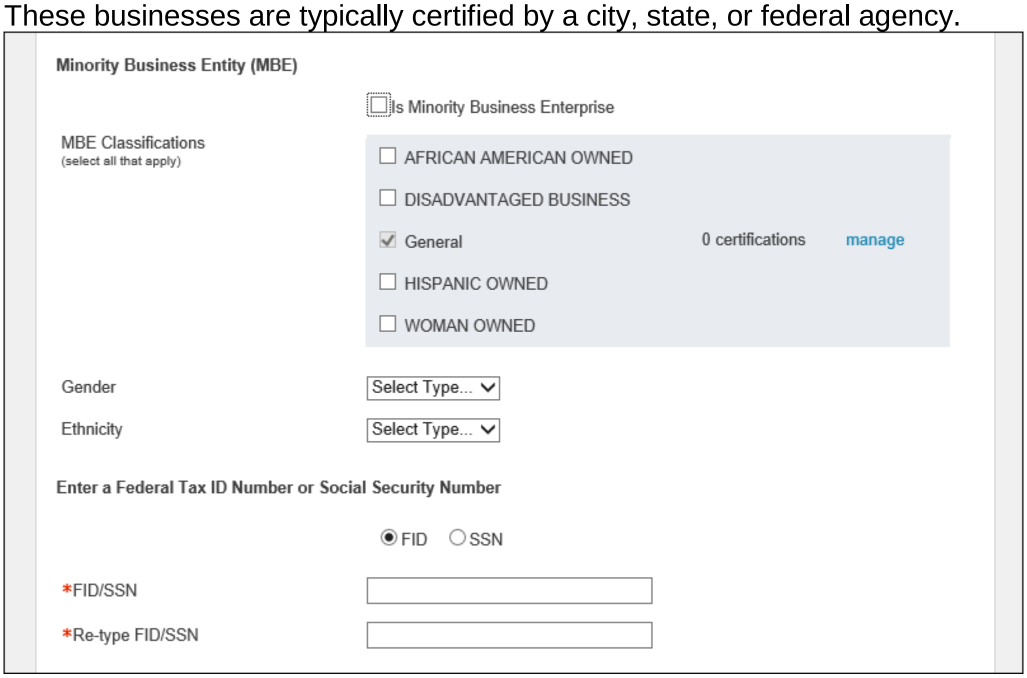
The second step in the new vendor registration process requires the vendor to provide their general business and contact information.



Field	Description
Company Name	Contains the vendor's name or business name. The value entered here appears in the Alpha box in the Vendors program.
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.
Address City State ZIP	Define the vendor's main address. The vendor must enter a two-letter state postal abbreviation code in the State box.
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

Field	Description
	on the Field Settings tab of the Vendor Administration page.
Geographic	Indicates the vendor's geographic code. The codes available for selection are defined in Munis using the Accounts Payable Miscellaneous Codes program.
Send Remittances to the Above Name and Address	If the vendor 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.
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 contact persons are defined later in the registration process.
Web Site	Includes the vendor's website URL.
Vendor Type	Determines the vendor's type. Vendor type codes are defined by your organization using the Accounts Payable Miscellaneous Codes program in Munis. 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.

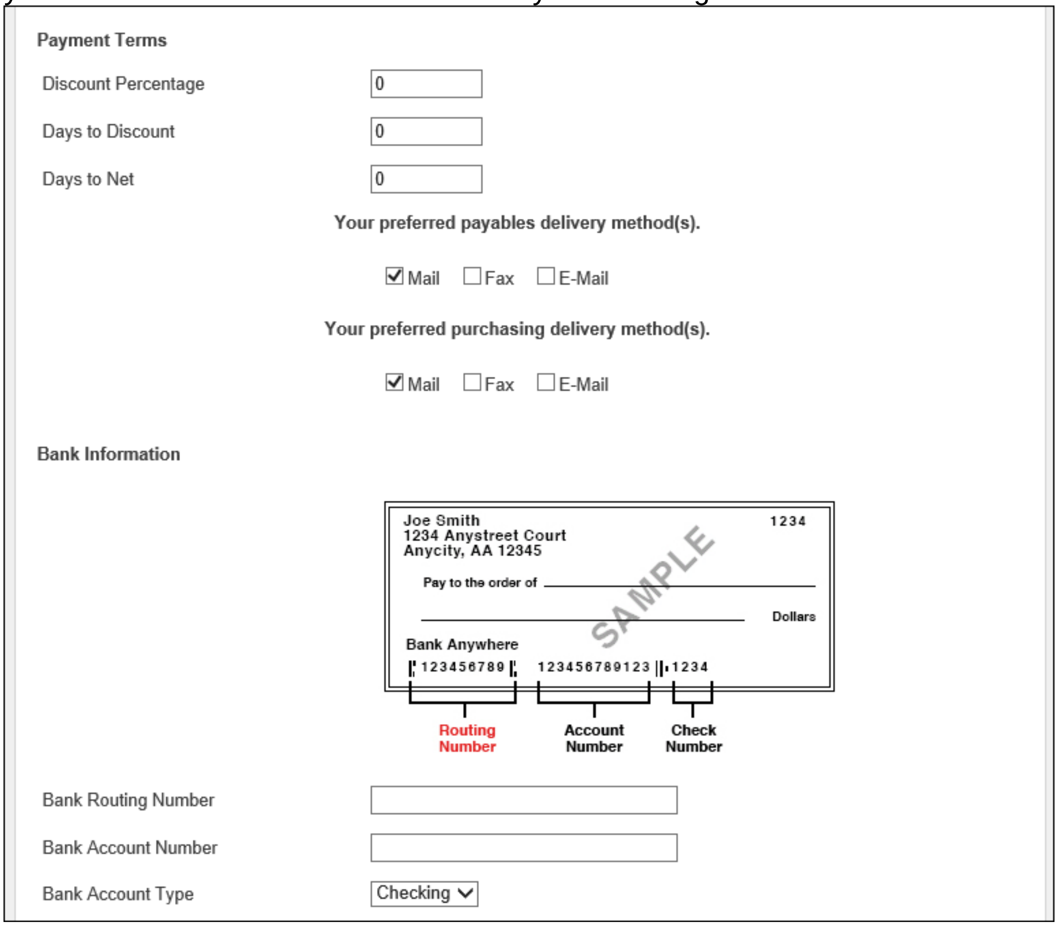
The New Vendor Registration page contains a Minority Business Entity (MBE) section that must be completed by minority business enterprise vendors. A minority business enterprise is typically defined as a business that is at least 51% owned and operated by an ethnic minority. These businesses are typically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



Field	Description
Minority Business Entity (MBE)	
Is Minority Business Enterprise	Indicates that the vendor is a minority business enterprise
MBE Classification	Define which MBE classifications the vendor possesses. The

Field	Description
	classifications displayed in the section are created and maintained by your organization using the Accounts Payable Miscellaneous Codes program in Munis. 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 A—Managing Minority Business Enterprise Certificates for more information.
Gender Ethnicity	Contain the vendor gender and ethnicity codes your organization has defined in Munis 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.
Enter a Federal Tax ID Number or Social Security umber	
	Requires the vendor to select whether to enter a federal tax identification number or a Social Security number, and then enter the value of the selected type. 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. Vendor Self Service automatically completes these fields for existing vendors who entered vendor ID and FID/SSN numbers during step one.

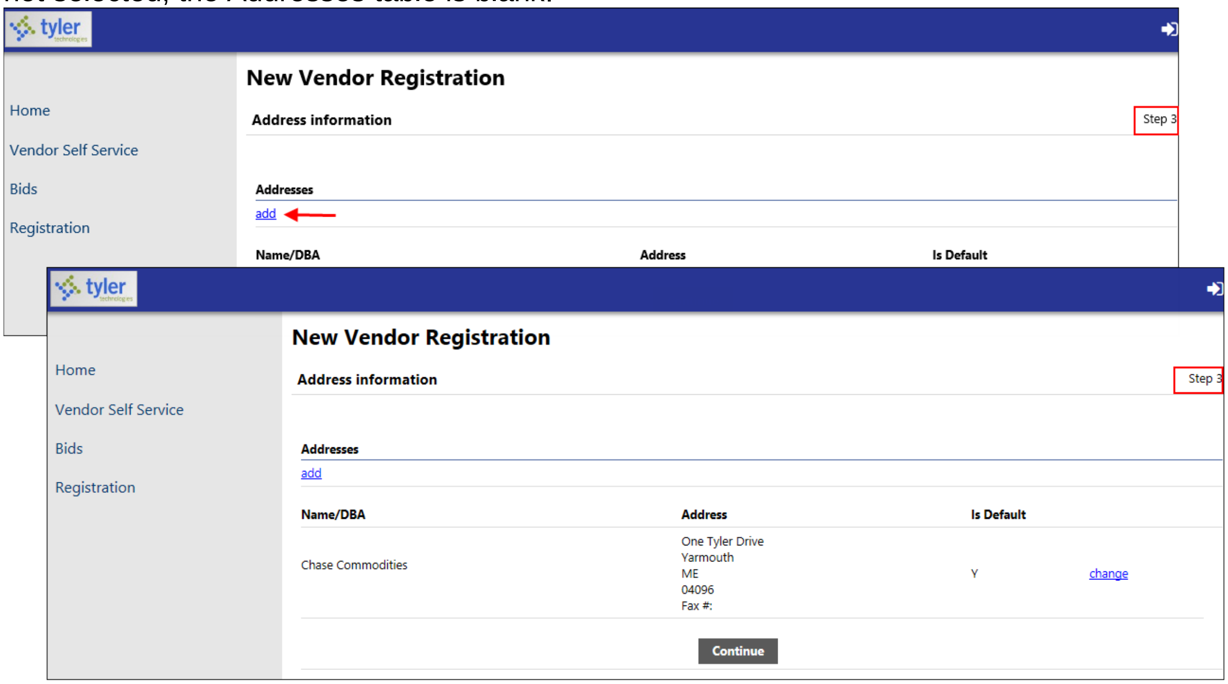
The Payment Terms and Bank Information sections define the vendor's business terms and financial transaction information. However, the Bank Information section only appears when your VSS administrator has enabled entry and viewing of bank information.



Field	Description
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 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.

Field	Description
Bank Account Number	Contains the vendor's bank account number.
Bank Account Type	Indicates the type for the entered account: checking or savings.

Step three of the VSS registration process requires the vendor to enter address information. If the vendor 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.

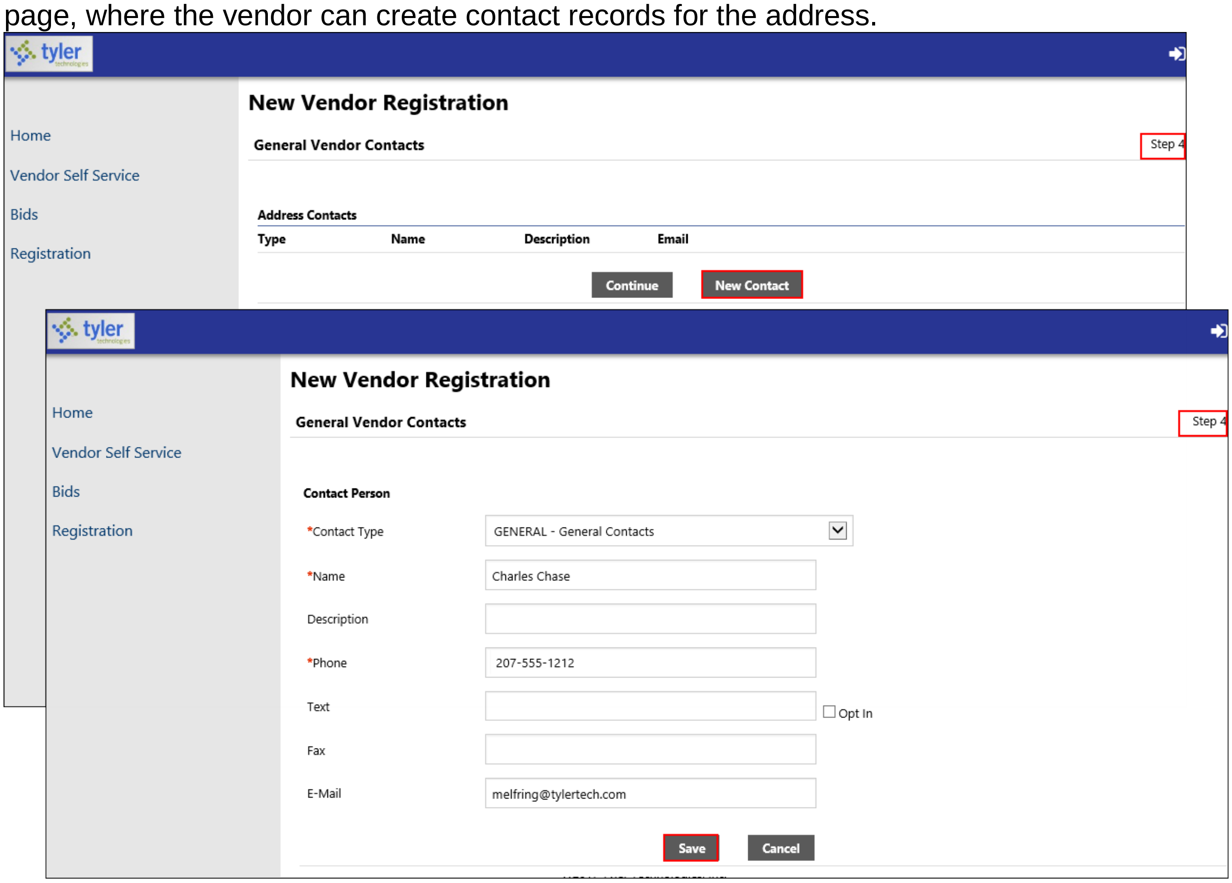
Field	Description
Address Type	Determines the type code of the entered address. The list is not available unless your organization has cleared the Use General Vendor Address Records check box on the Vendor Settings tab of the Accounts Payable Settings program in Munis, and then defined address type codes in the Address Types program.
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. A VSS administrator can hide the fax number from view by clearing the Address Fax Number check box on the Field Settings tab of the Vendor Administration page.
Email	Defines the email address used for the remit address.
Bank Information	

Field	Description
(This section does not appear unless your VSS administrator has enabled entry of bank information on this page.)	
Bank Routing Number	Determines 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	Identifies the bank and routing number to which payments made to the vendor should be sent.
Bank Account Number	Contains the vendor'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.

A vendor 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 vendor can create contact records for the address.



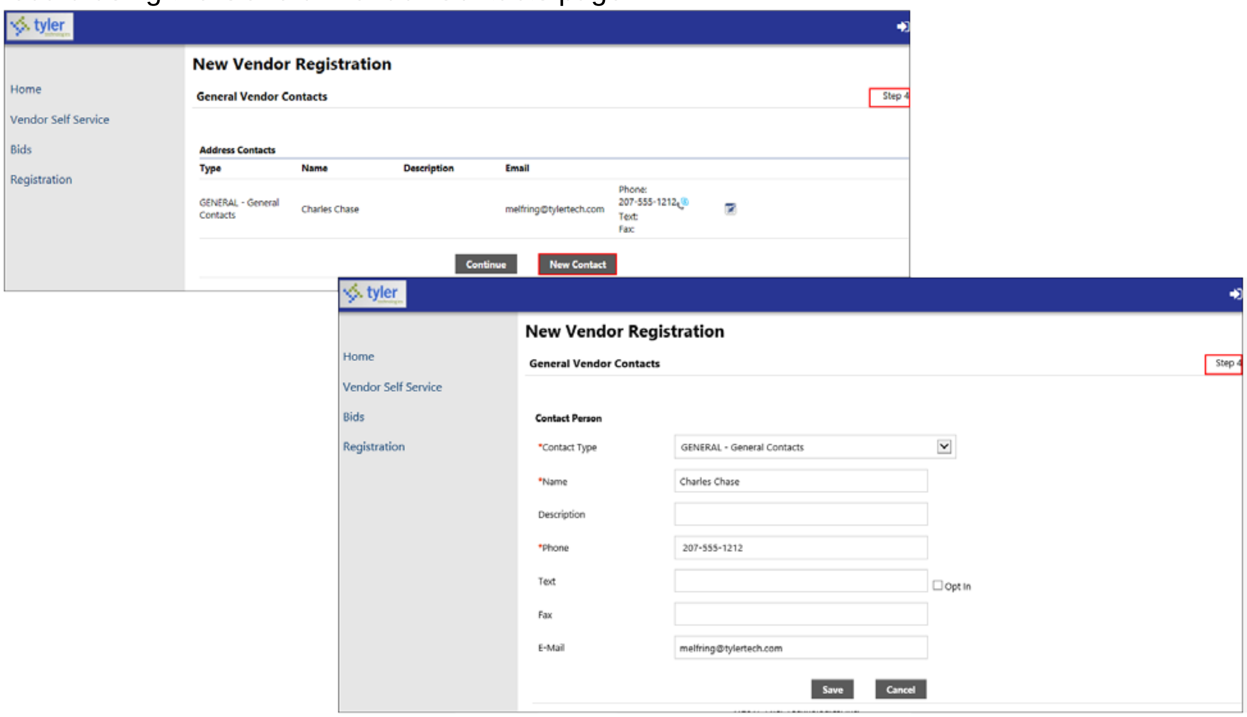
Field	Description
Contact Person	
Contact Type	Determines the contact type code. Contact type codes are defined in Munis using the Contact Types program.

Field	Description
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. A VSS administrator can hide the fax number from view by clearing the Contact Fax Number check box on the Field Settings tab of the Vendor Administration page.

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

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

In step four, the vendor clicks **New Contact** to enter a contact person for the general vendor record using the General Vendor Contacts page.

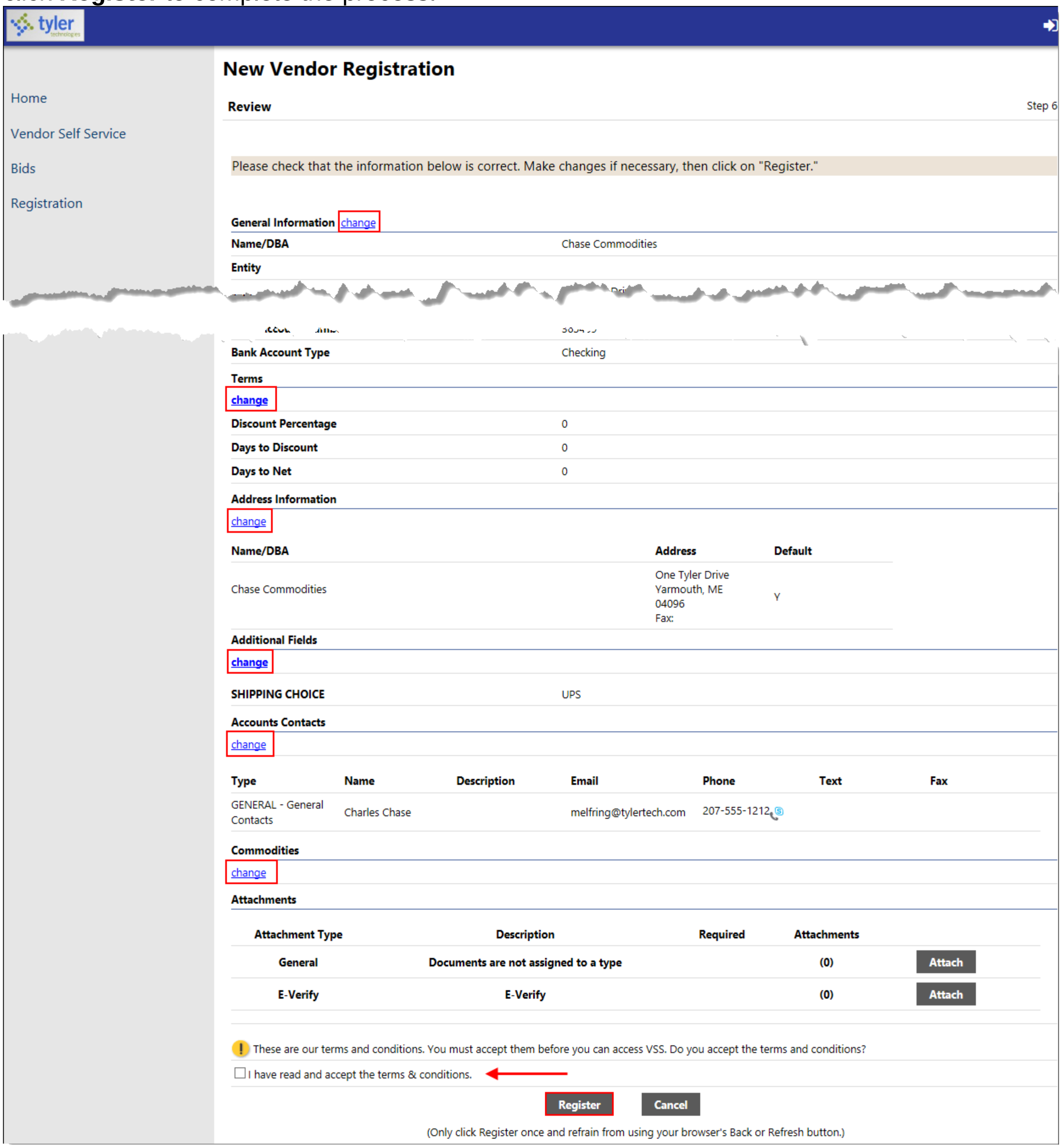


This page contains fields that are identical in function to those from step three, but they apply to the vendor record as a whole and not a single remit address. Clicking **Save** after entering the contact information returns the vendor to the General Vendor Contacts page with the new contact record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

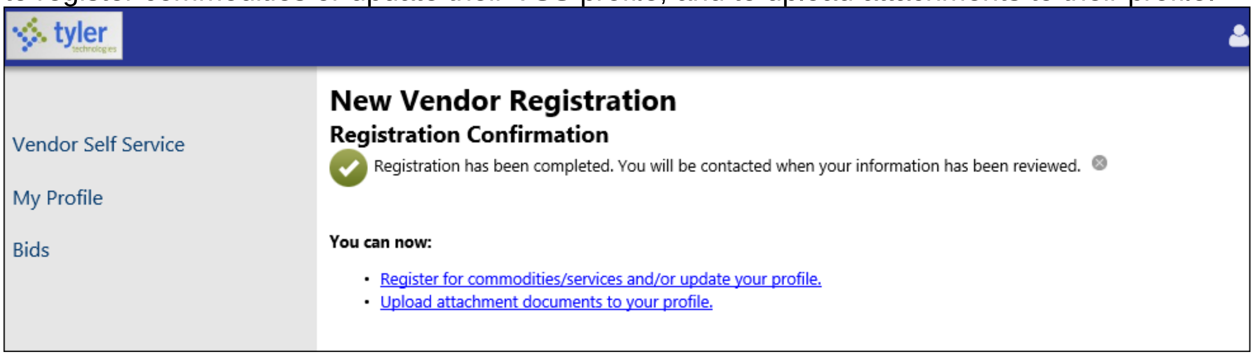
The vendor must click **Continue** to advance to the last step of the VSS registration process, which is the verification step.

On the Review page, the vendor 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.

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.



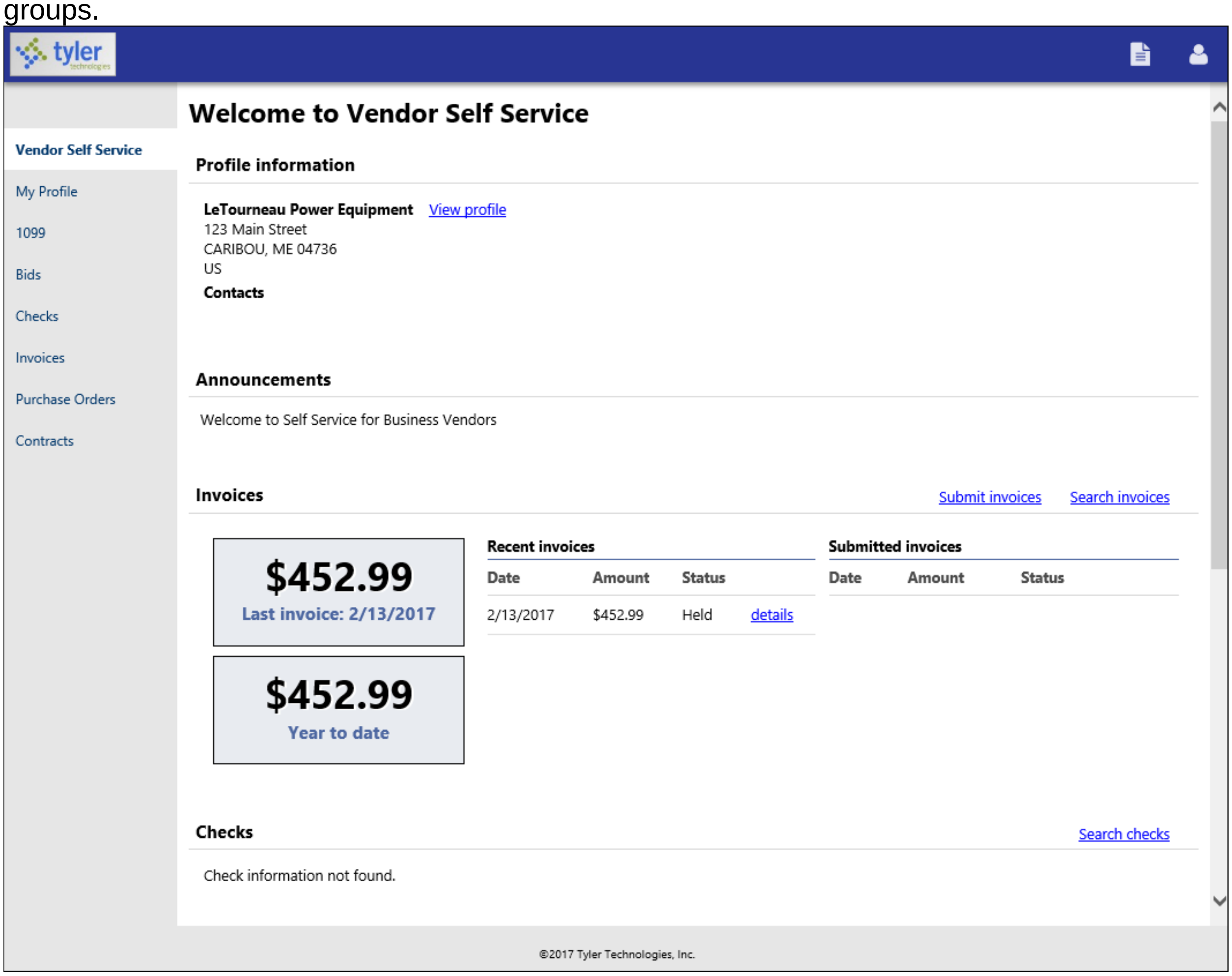
Vendor Self Service displays a registration confirmation page that provides the vendor with links to register commodities or update their VSS profile, and to upload attachments to their profile.



Newly registered vendors only have access to the Home, Vendor Self Service, My Profile, and Bids options on the menu. Your organization's Vendor Self Service administrator must grant the vendor access to additional menu options.

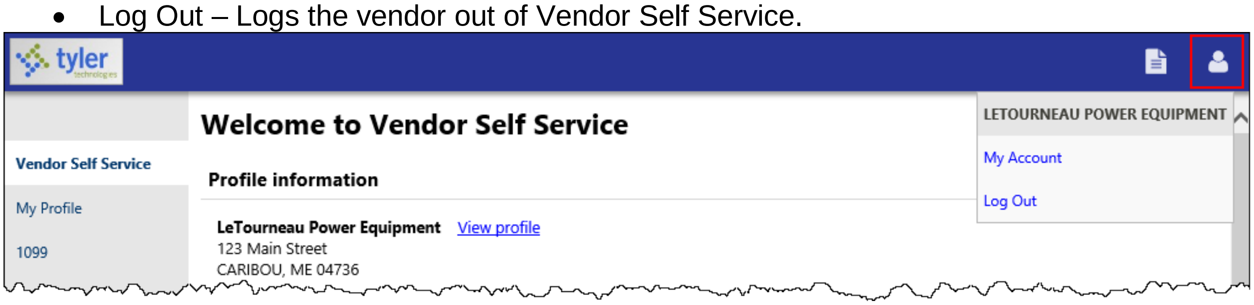
3 VENDOR SELF SERVICE HOME PAGE

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:

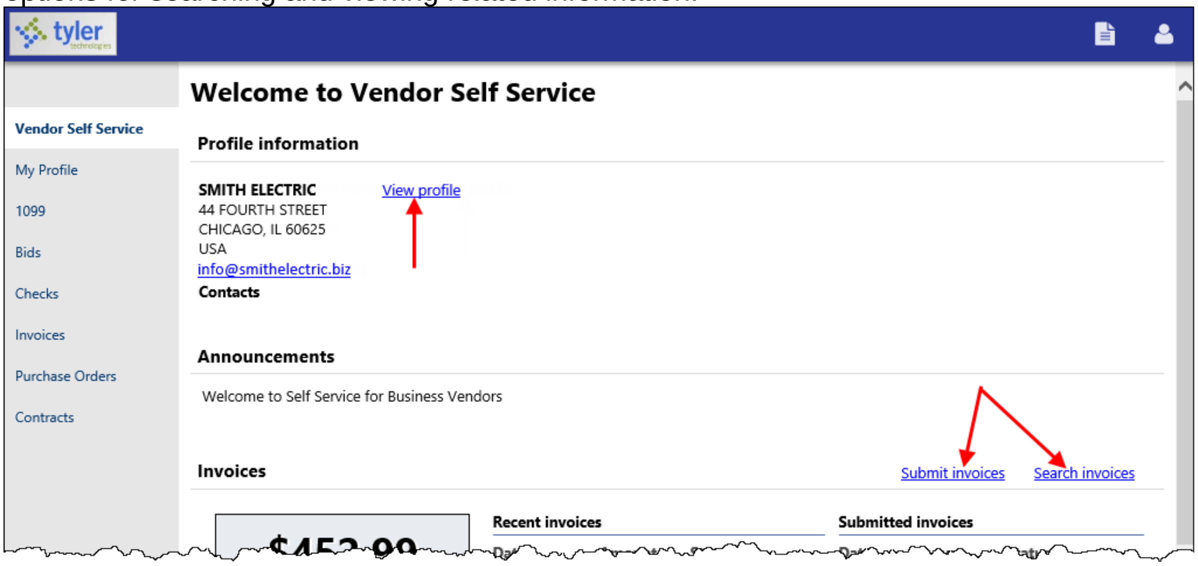
- My Account – Opens the My Account page containing the vendor's account information.
- Log Out – Logs the vendor out of Vendor Self Service.



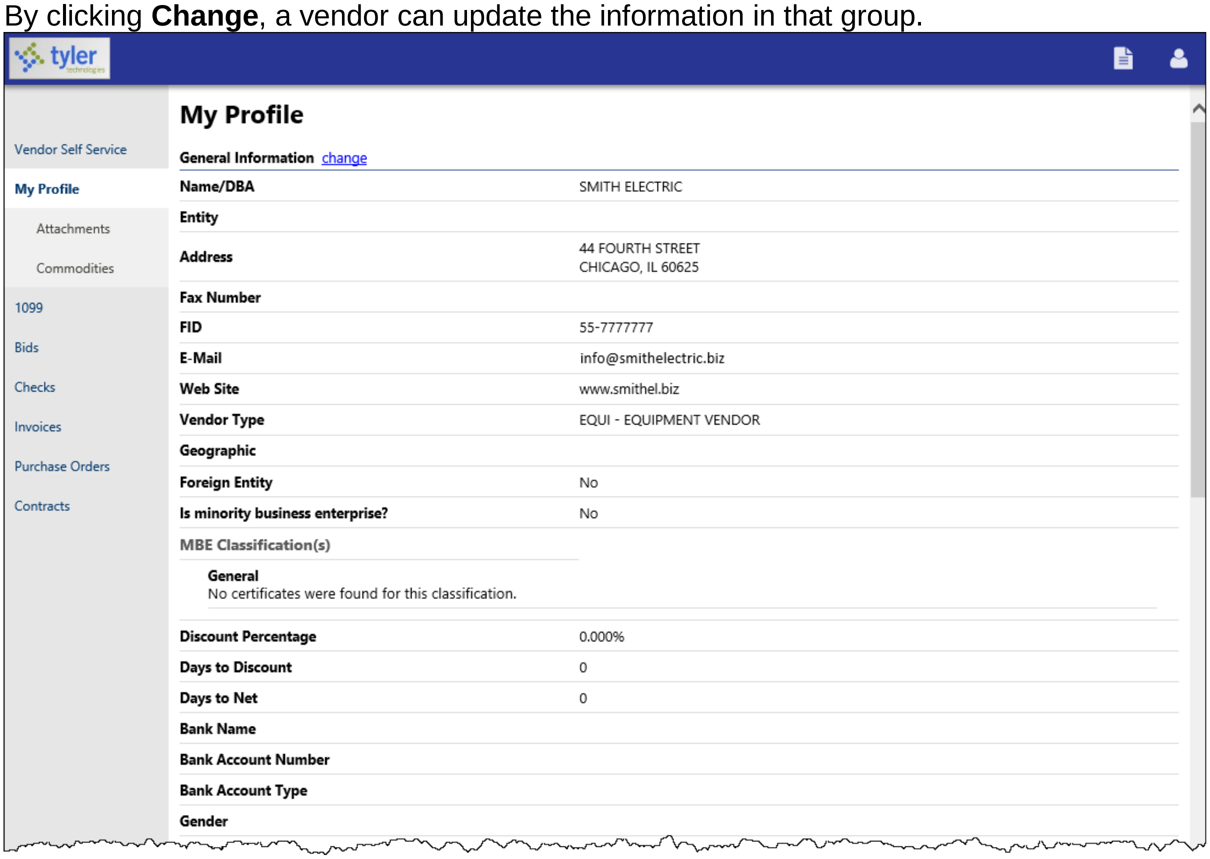
The Resources option in the header provides a menu of links or documents provided by your organization. These options are maintained in Vendor Administration.

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, 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.

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.

Additional Fields

change

SHIPPING CHOICE	USPS

The Current Vendor 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.

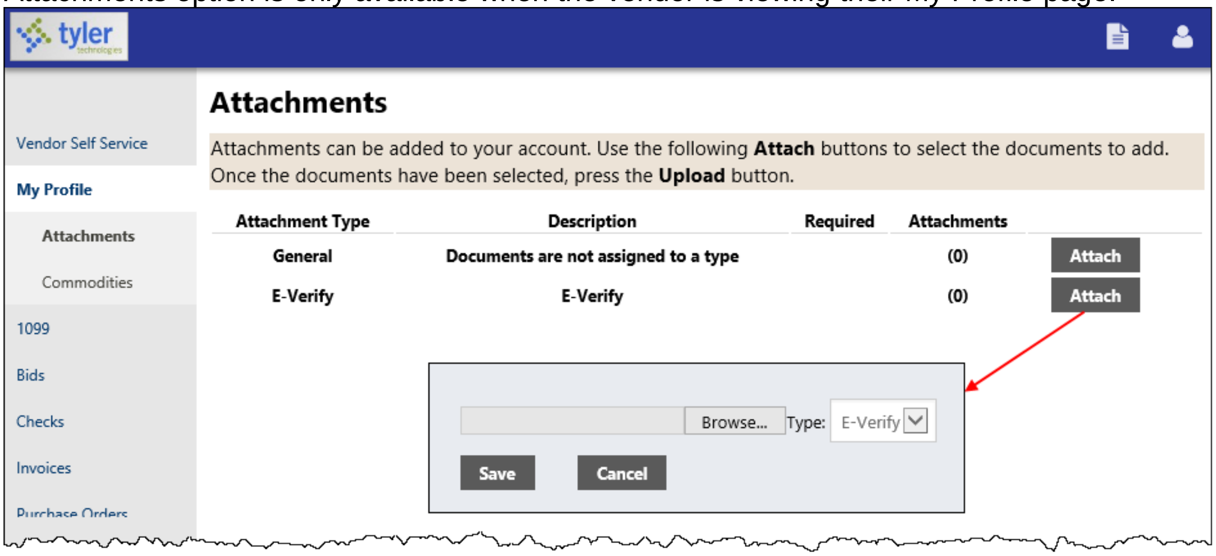
Commodities

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

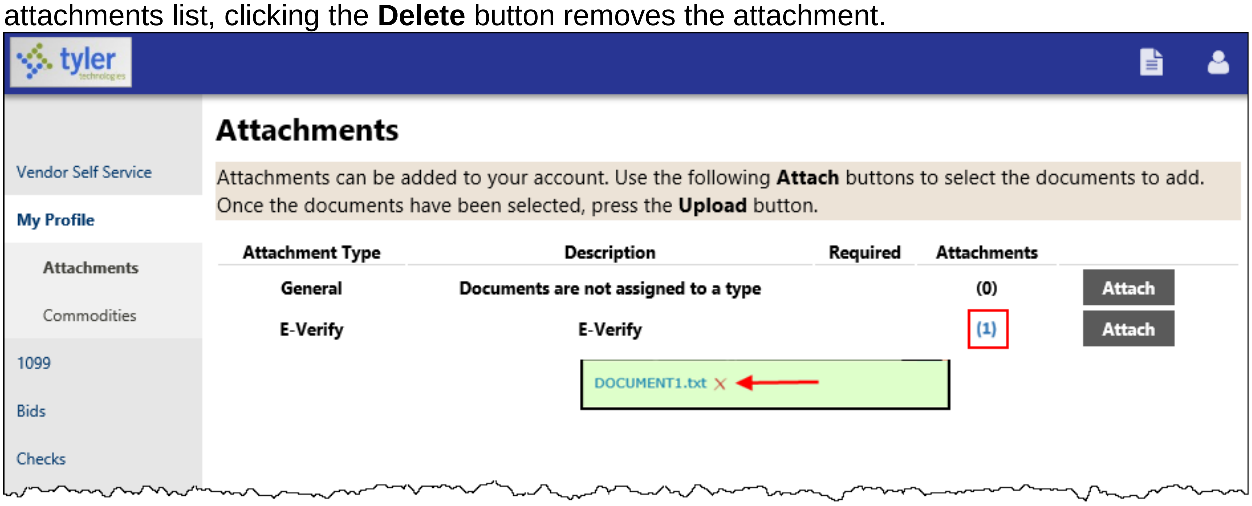
4.1.1 Attachments

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.

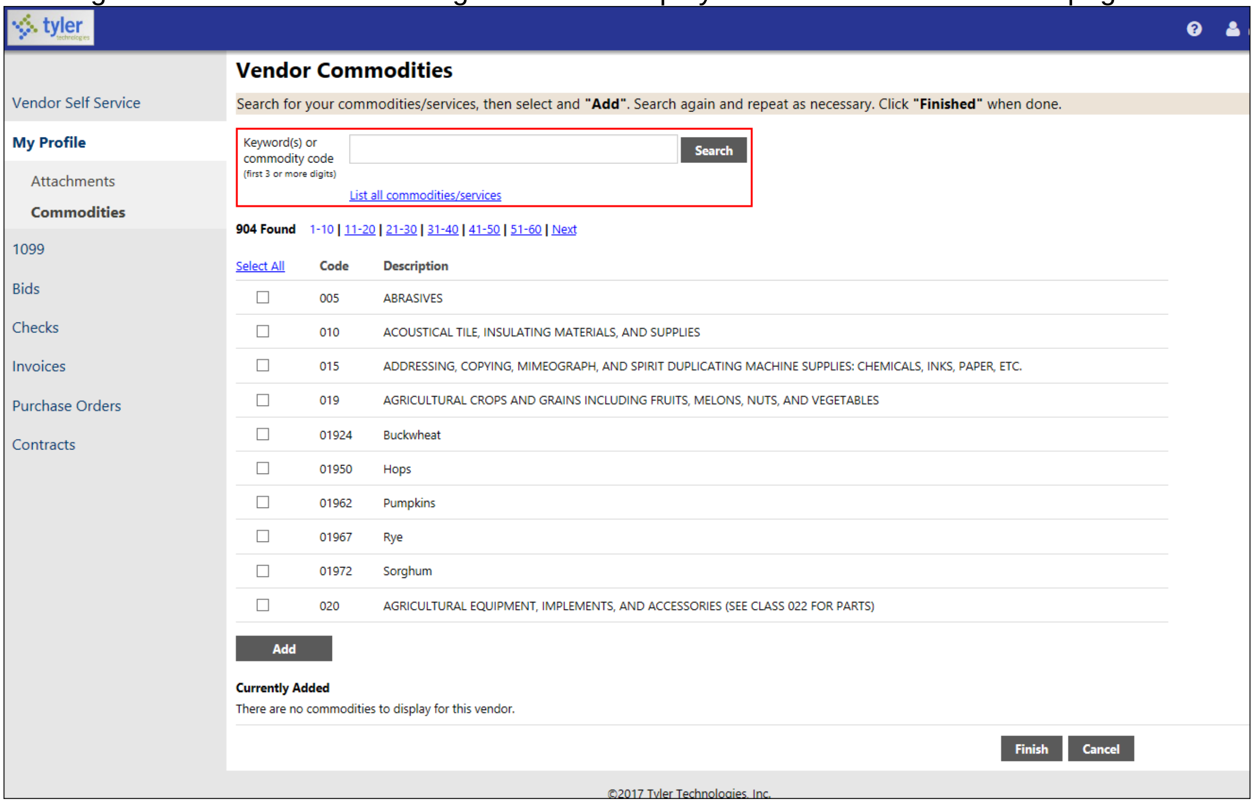


The uploaded files are also added to the vendor record in the Munis Vendors program and they can be viewed using the Vendor Attachments screen in that program.

The vendor cannot maintain their attachments in VSS once they have been uploaded. A Munis 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.

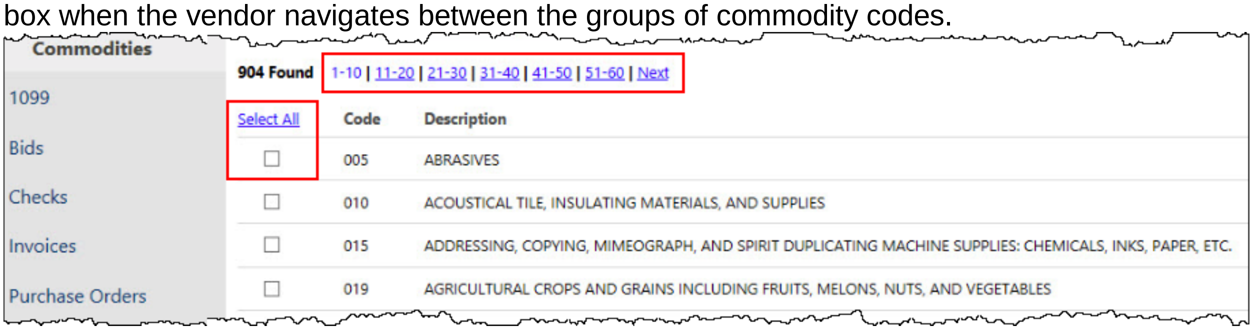
4.1.2 Commodities

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 Munis database. VSS displays the number of codes found during a search and updates the commodity table.

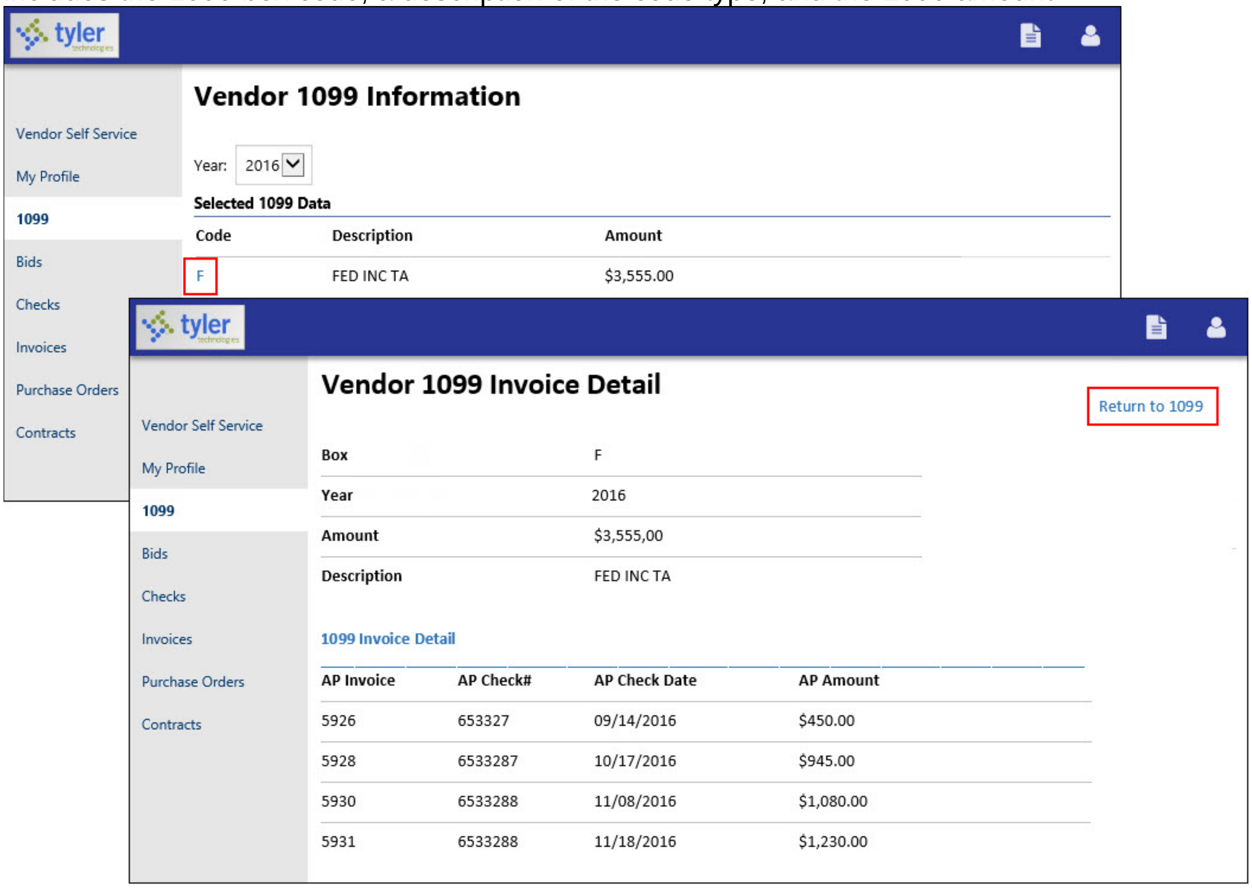
Vendors can view commodities by group using the numbered group selections, or they can identify specific commodities by selecting individual check boxes. If a vendor selects an individual check box within a numbered group selection, VSS saves the value of each check box when the vendor navigates between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



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

4.1.3 1099

The 1099 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.

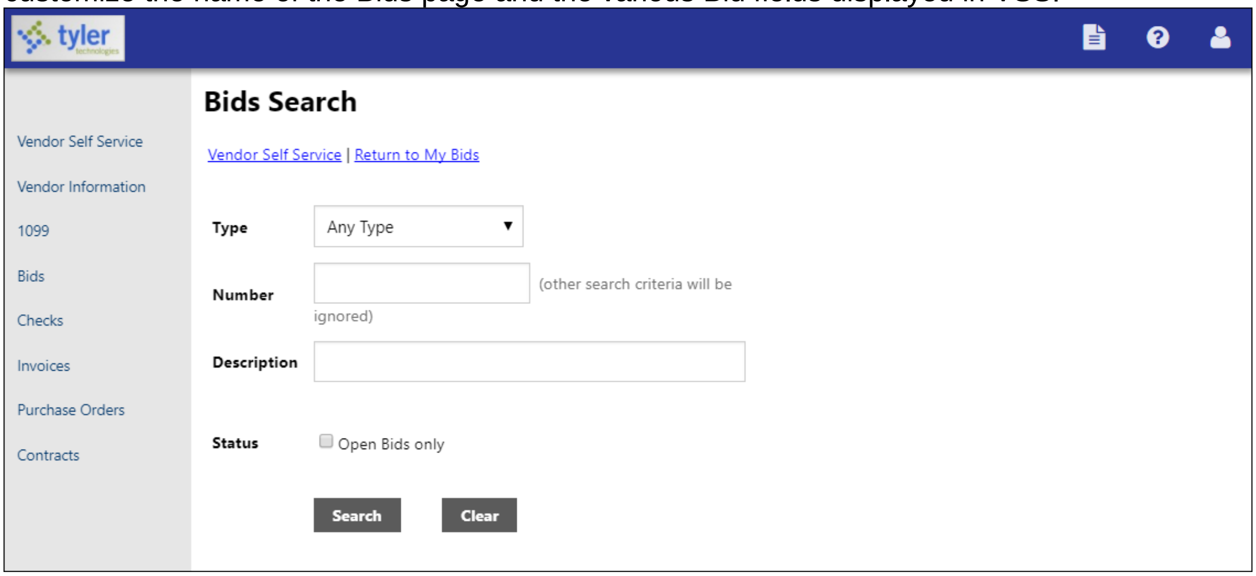


Clicking a code type provides the Vendor 1099 Invoice Detail page. This page displays the general 1099 information, as well as a listing of 1099 invoice details, if they exist for the selected box code. Clicking **Return to 1099** returns the vendor to the Vendor 1099 Information page.

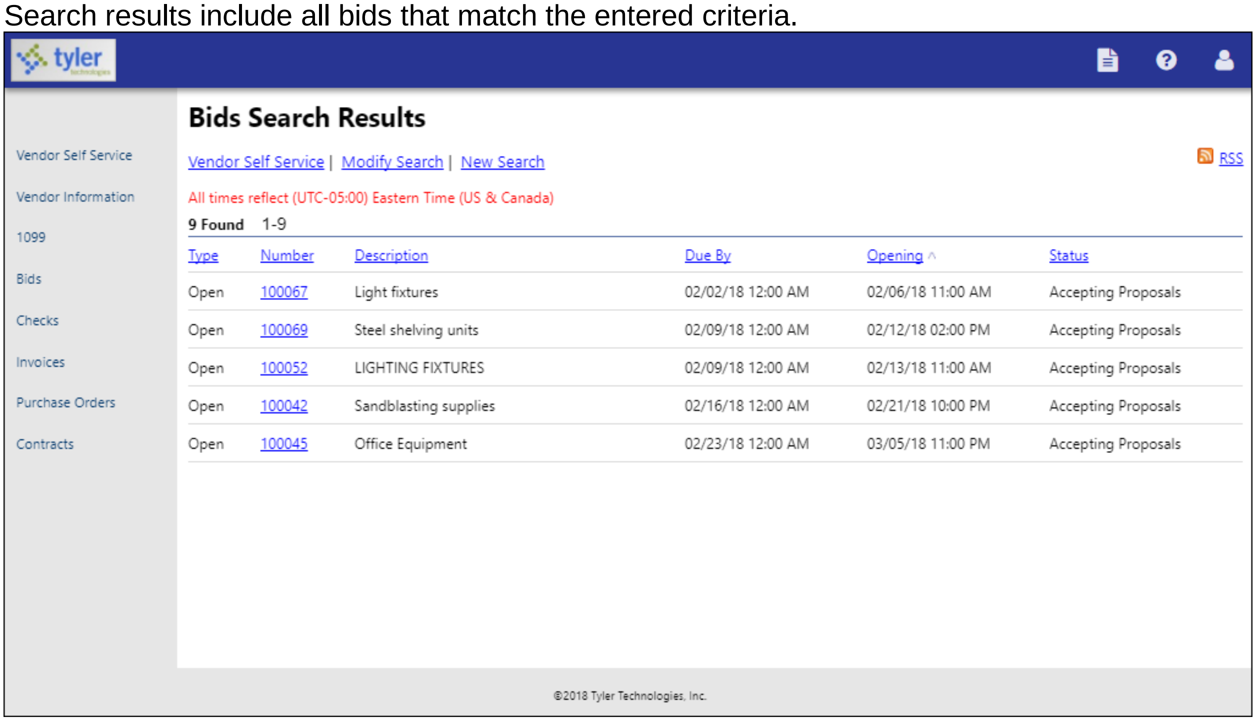
4.1.4 Bids

Bids provides a list of bids available to the vendor from your organization. Bids opens to the Bid search page, which allows vendors to search for bids using the bid number, bid description, or bid status.

Note: The Bids page may be named differently depending on your organization's VSS configuration. Your MSS Administrator can use the Vendor Administration settings in MSS to customize the name of the Bids page and the various Bid fields displayed in VSS.

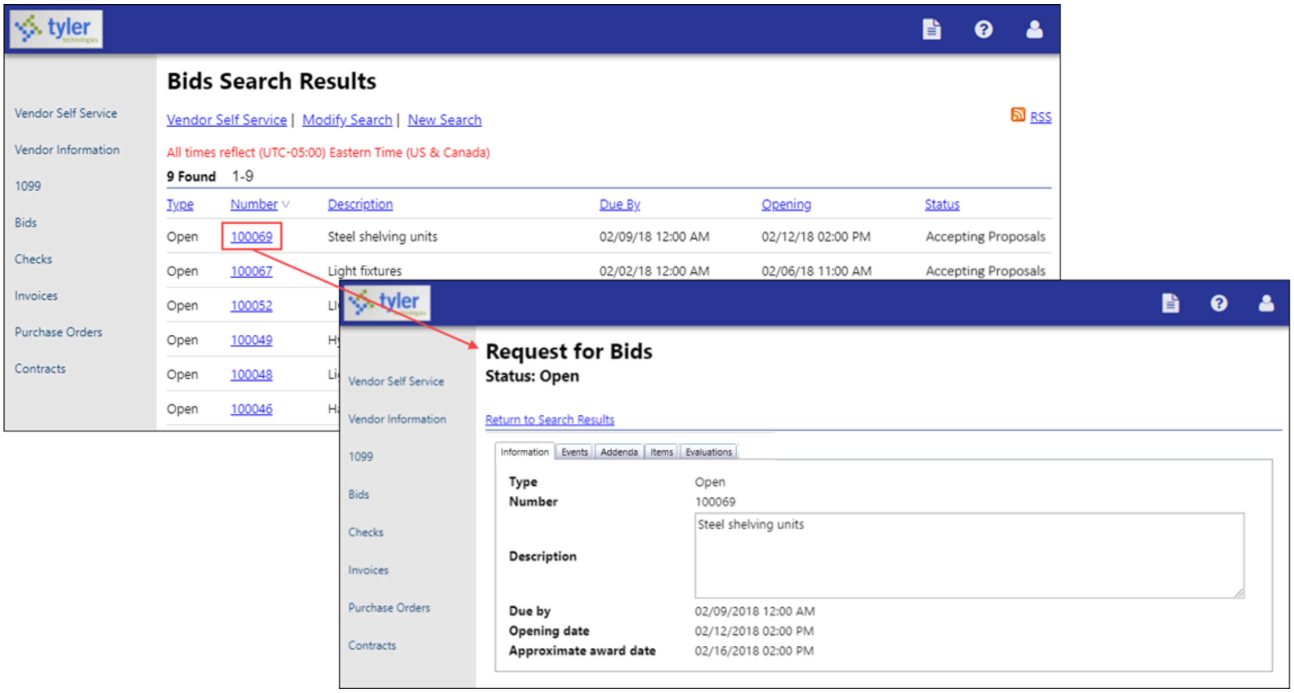


Search results include all bids that match the entered criteria.



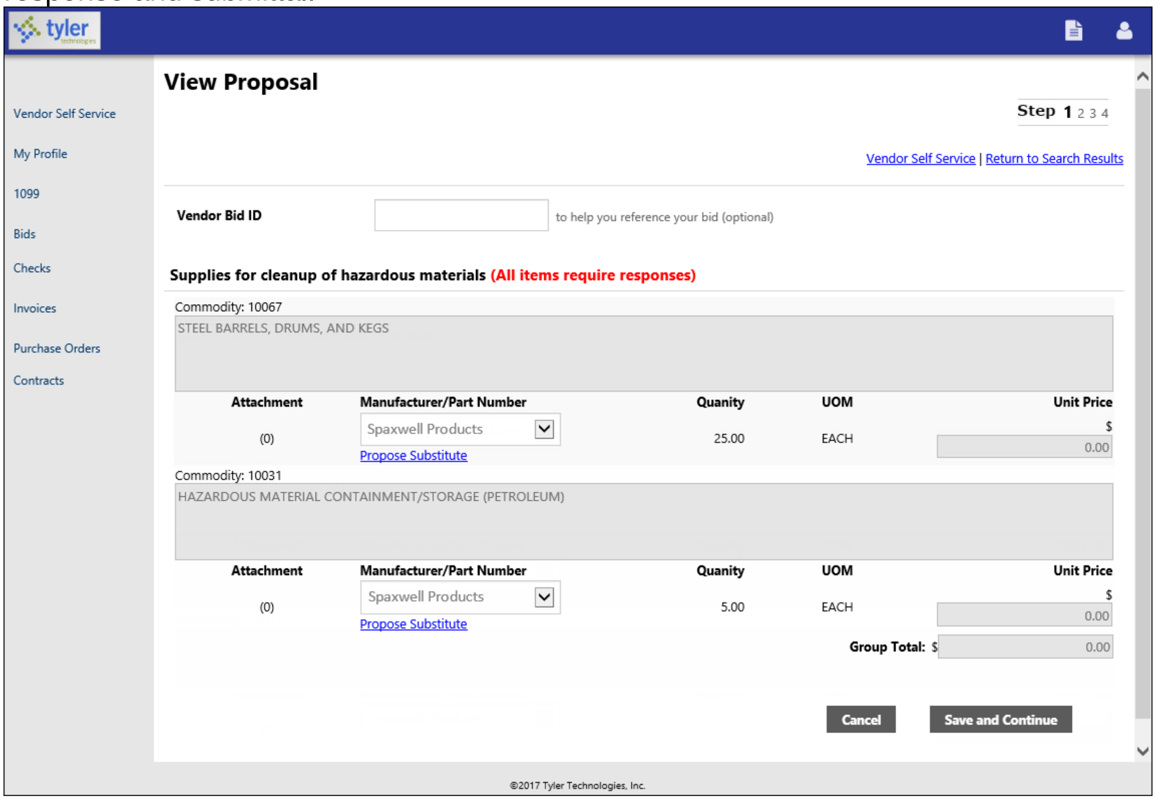
The RSS link allows vendors to subscribe to an RSS feed that is updated when your organization enters or updates bid records.

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.



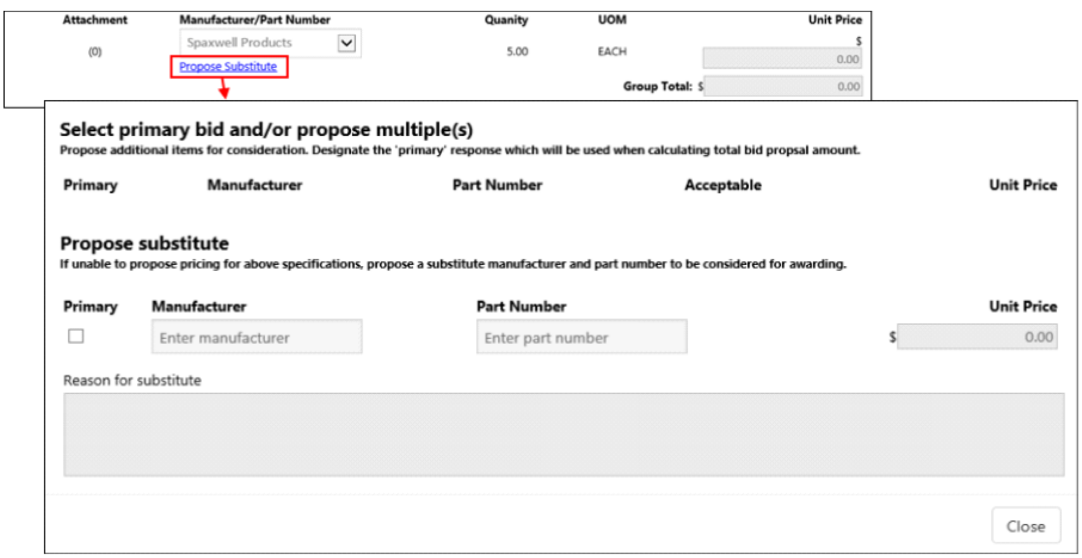
For open bids, the Create Proposal option allows the vendor to submit a proposal for the selected bid request.

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



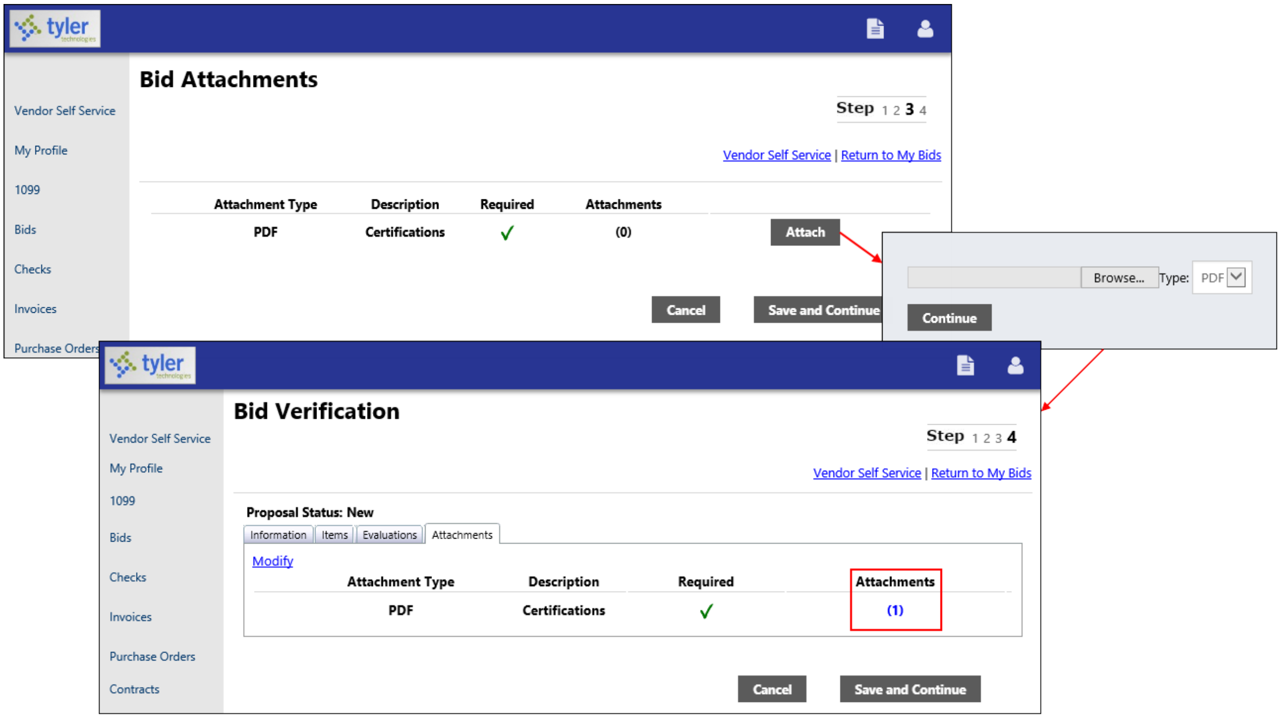
Items listed on a bid display the manufacturer and/or part number if the bid invitation created in Munis Bid Central is configured to include this information.

If your organization uses the Allow Substitute option in Munis Bid Central, the vendor 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 the vendor through the steps required to complete the proposal.

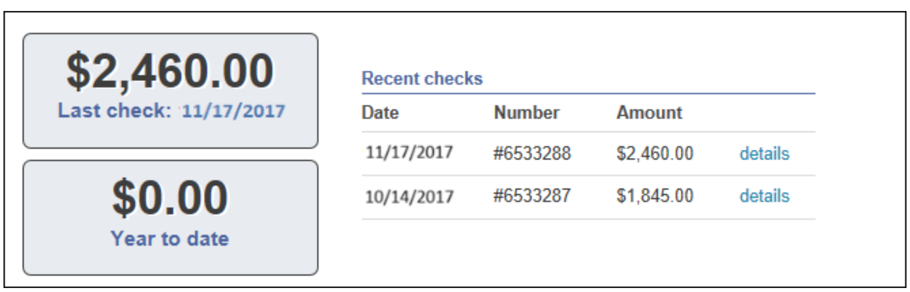
Vendors add attachments to their bid quotes by selecting an attachment type and using the **Browse** button to select the file to attach.



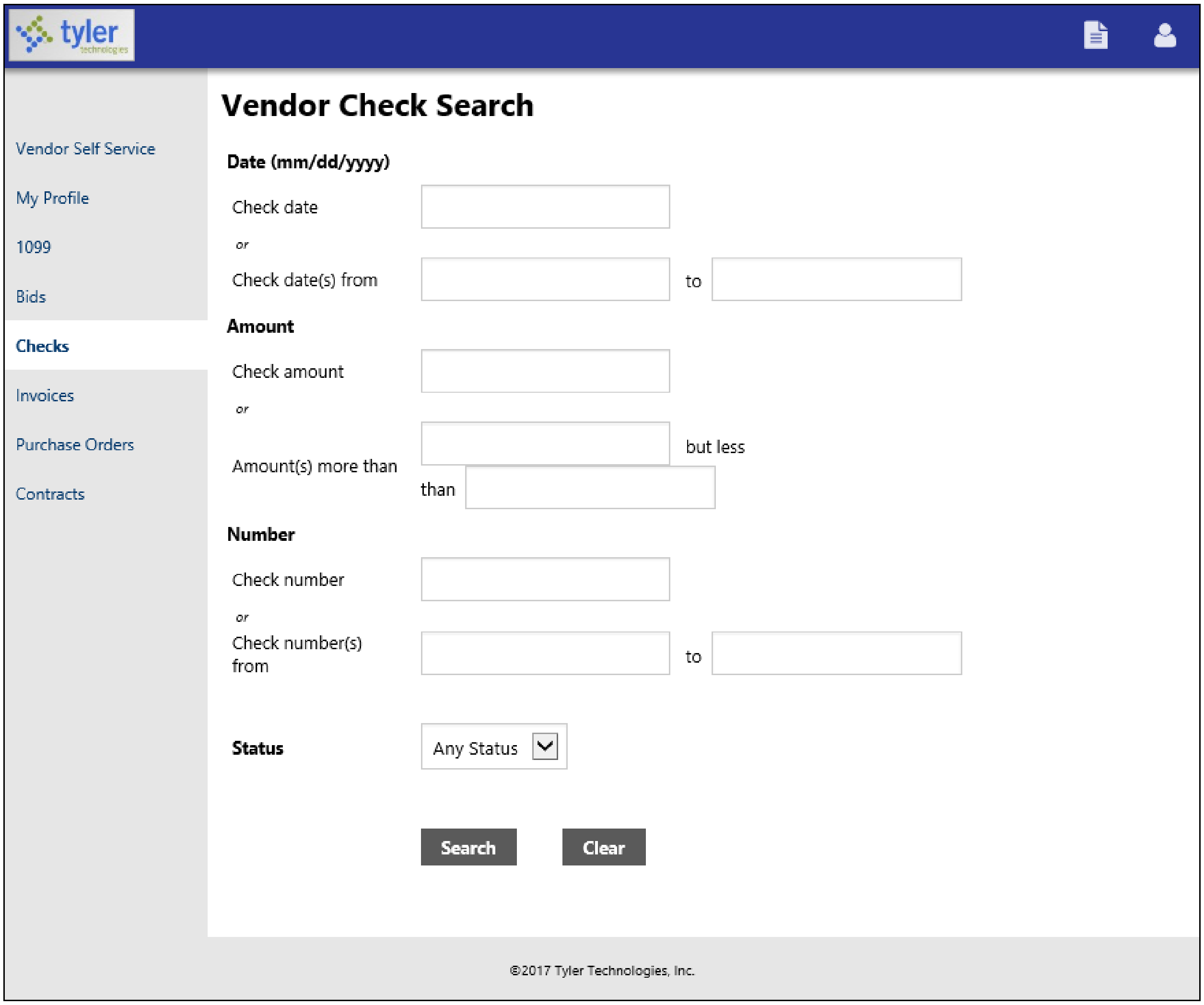
Acceptable attachment types are defined in the Munis Bid Attachment Types program.

4.1.5 Checks

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



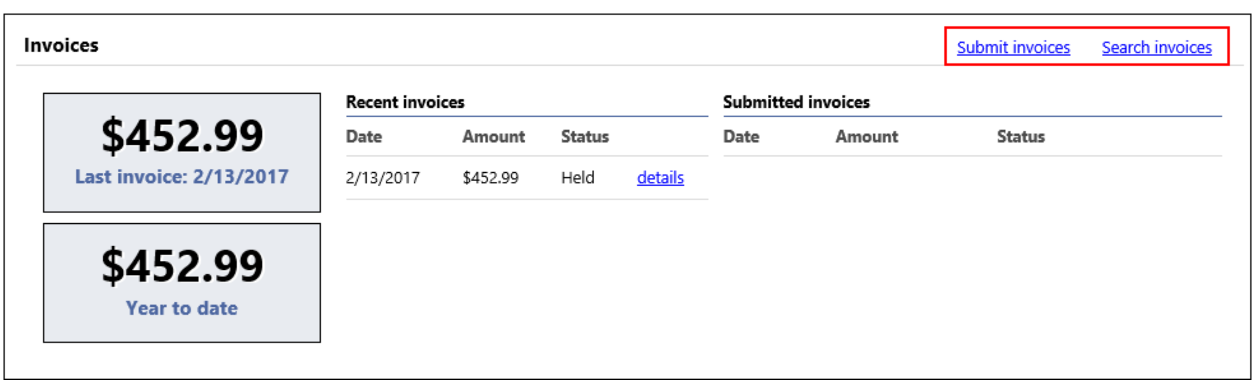
Using the Search Checks option, vendors can find additional check details using the invoice number, date or amount ranges, and status search criteria.



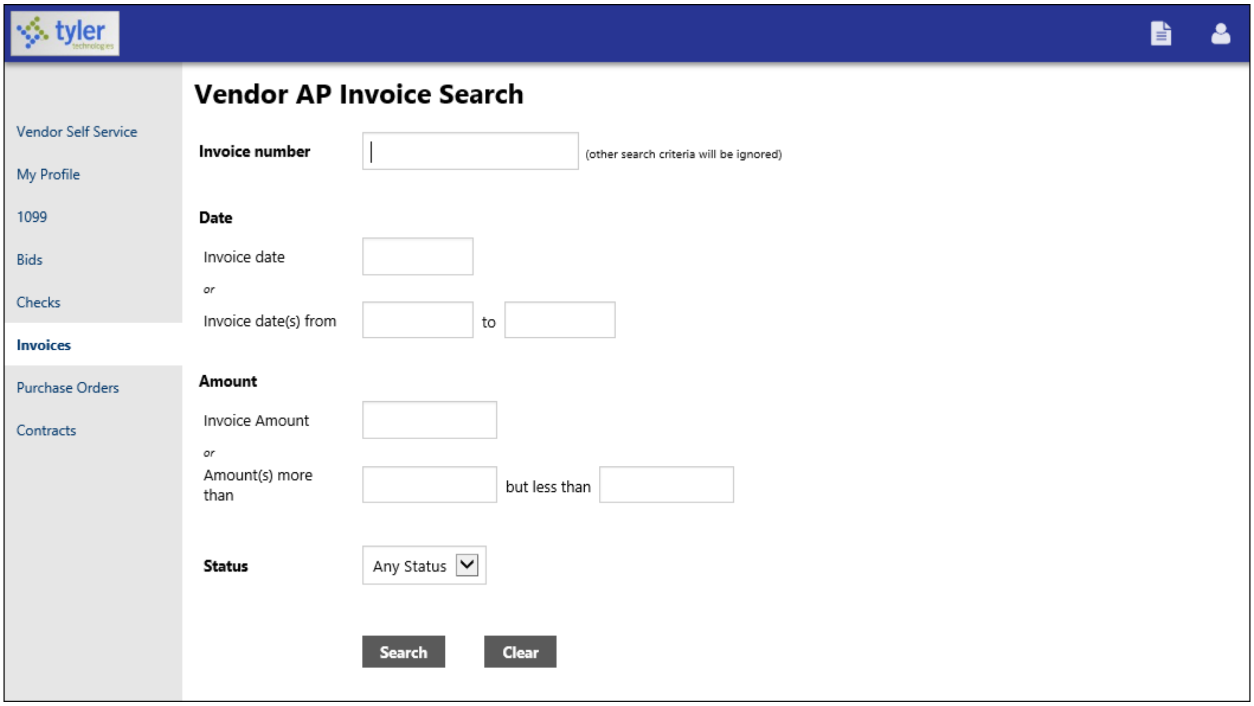
Search Results for checks provides the check date, amount, check number, and status. Use the View option of an individual check to view additional details.

4.1.6 Invoices

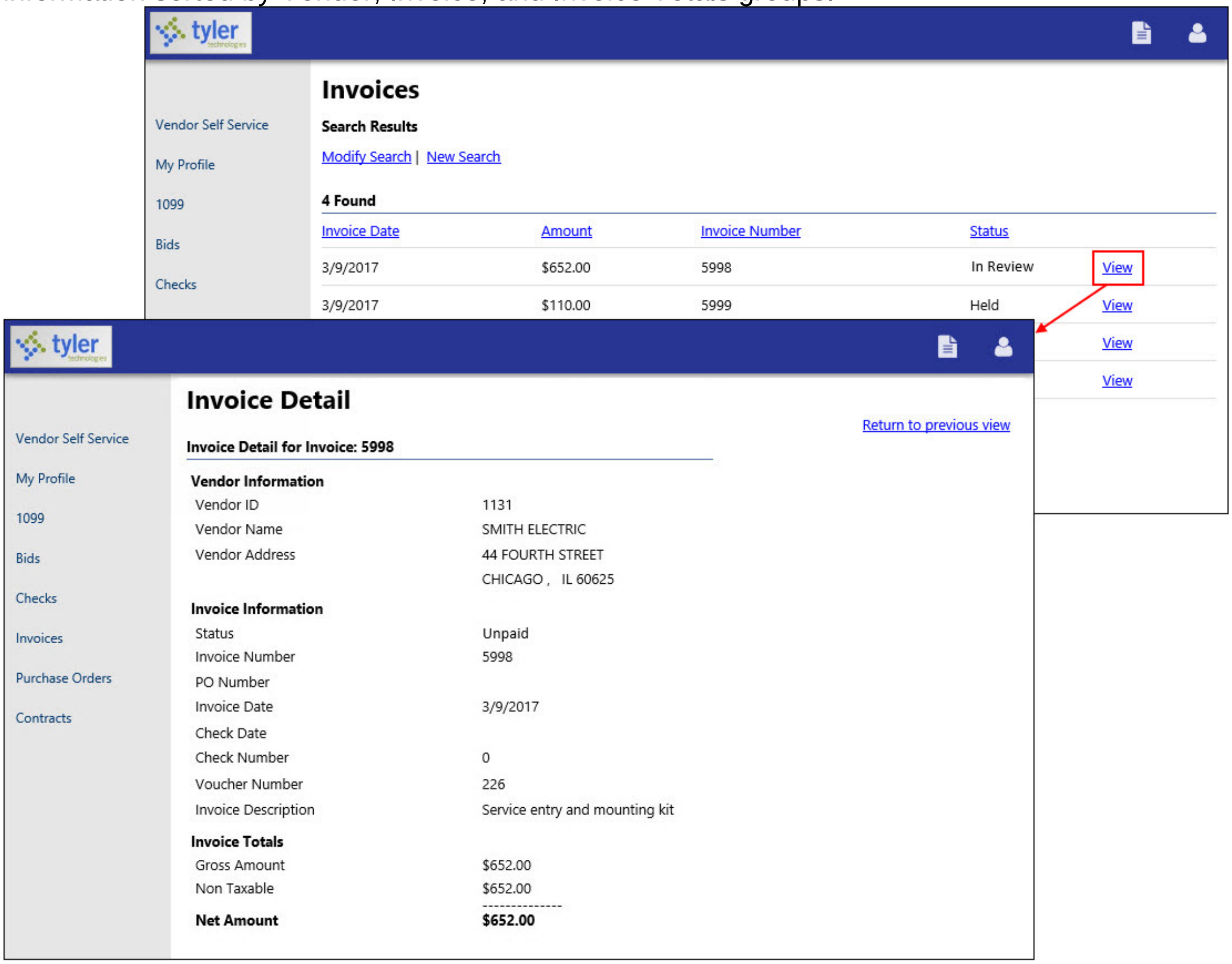
The Invoices group provides vendor details for recent and submitted invoices. Vendors are only able to view invoices that are associated with their vendor ID.



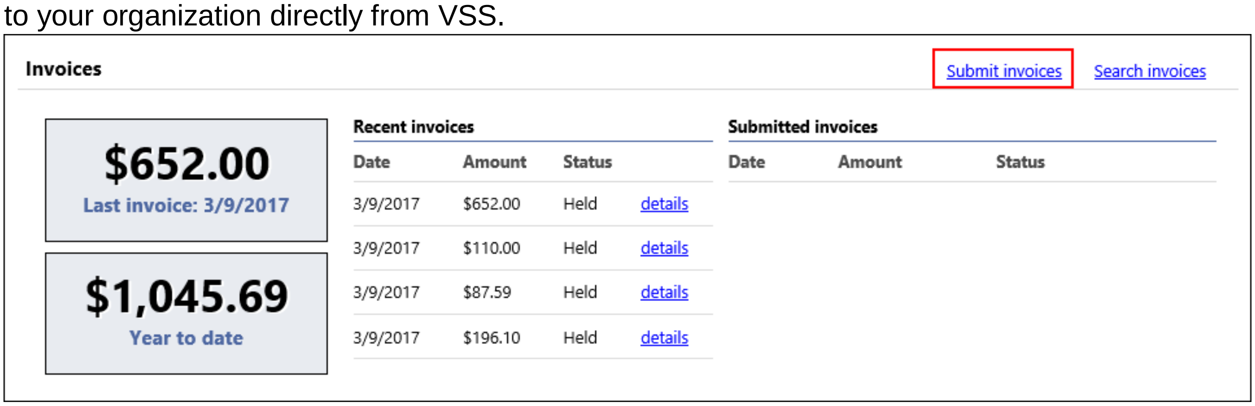
The Search Invoices page allows searches by invoice number, date or amount ranges, and status.



The Search Results page provides the invoice date, amount, invoice number, and status. When the vendor clicks **Details**, 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, Munis Accounts Payable Settings, and Purchase Order Settings enabled, the Submit Invoices option allows vendors to submit invoices to your organization directly from VSS.

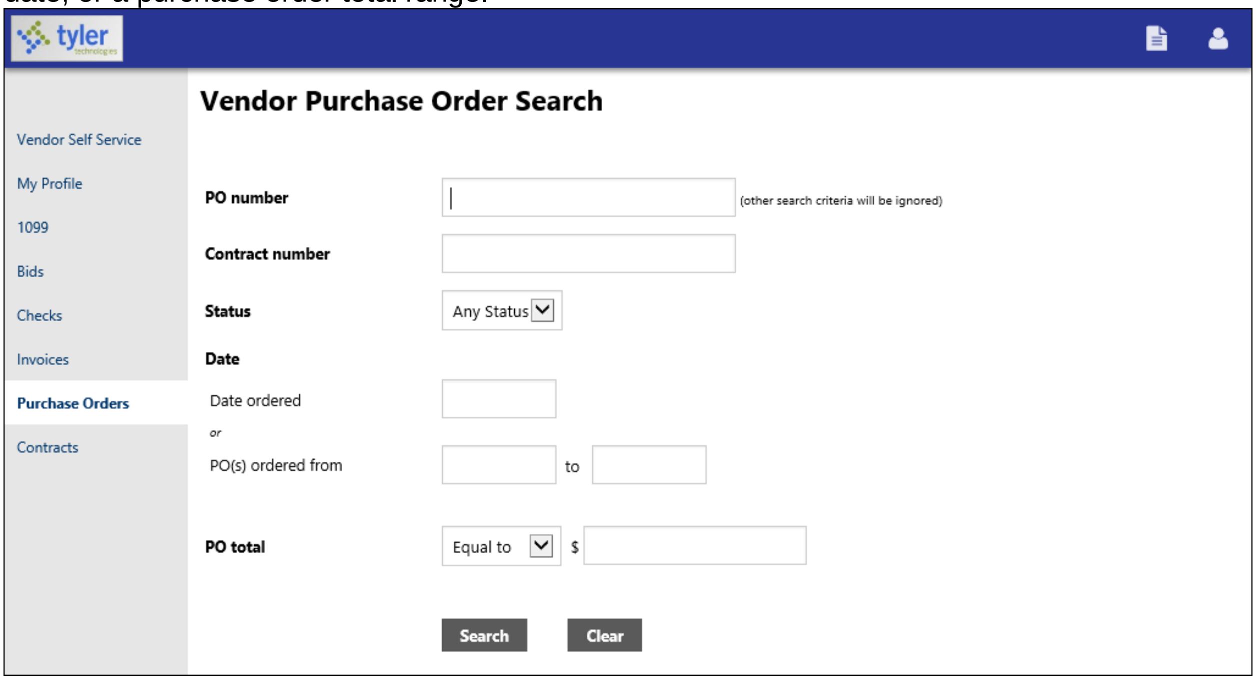


Depending on settings configured for the vendor in Vendor Administration, the Submit Invoices option may require the vendor to indicate a valid purchase order or contract number when they submit an invoice.

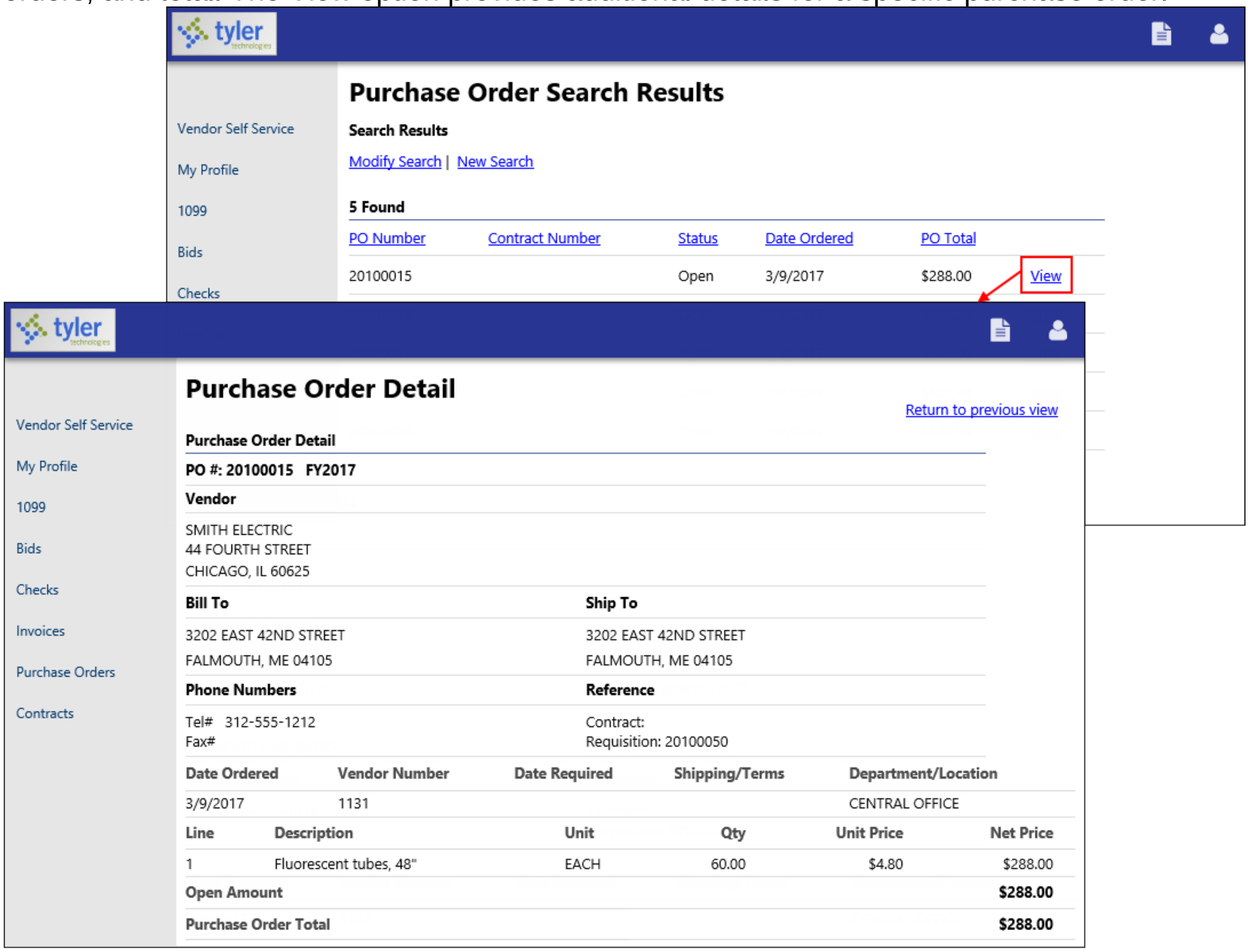
4.1.7 Purchase Orders

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.

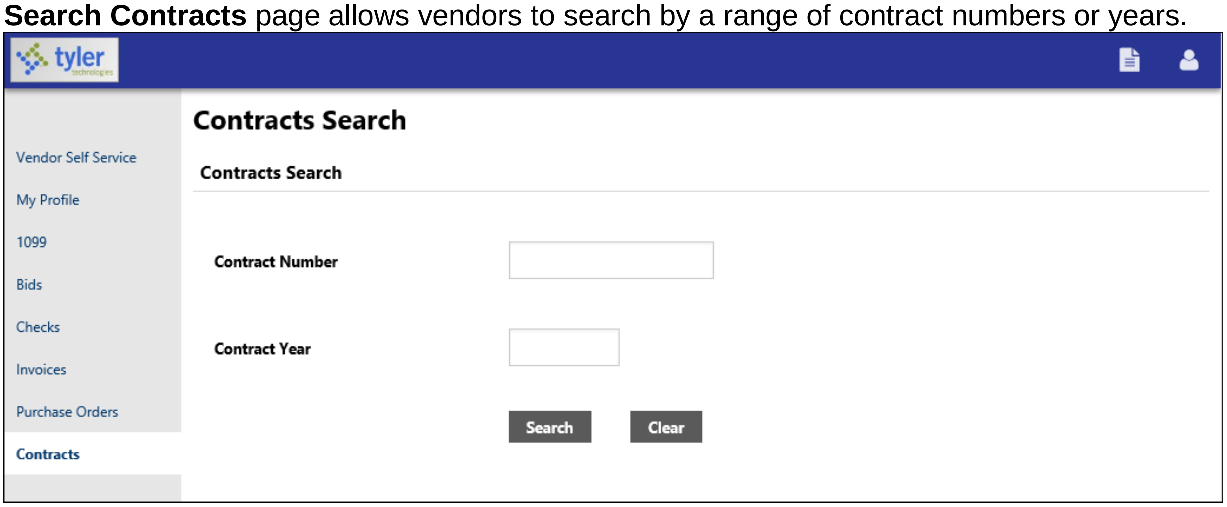


Search results include the purchase order number, contract number (if applicable), status, date orders, and total. The View option provides additional details for a specific purchase order.

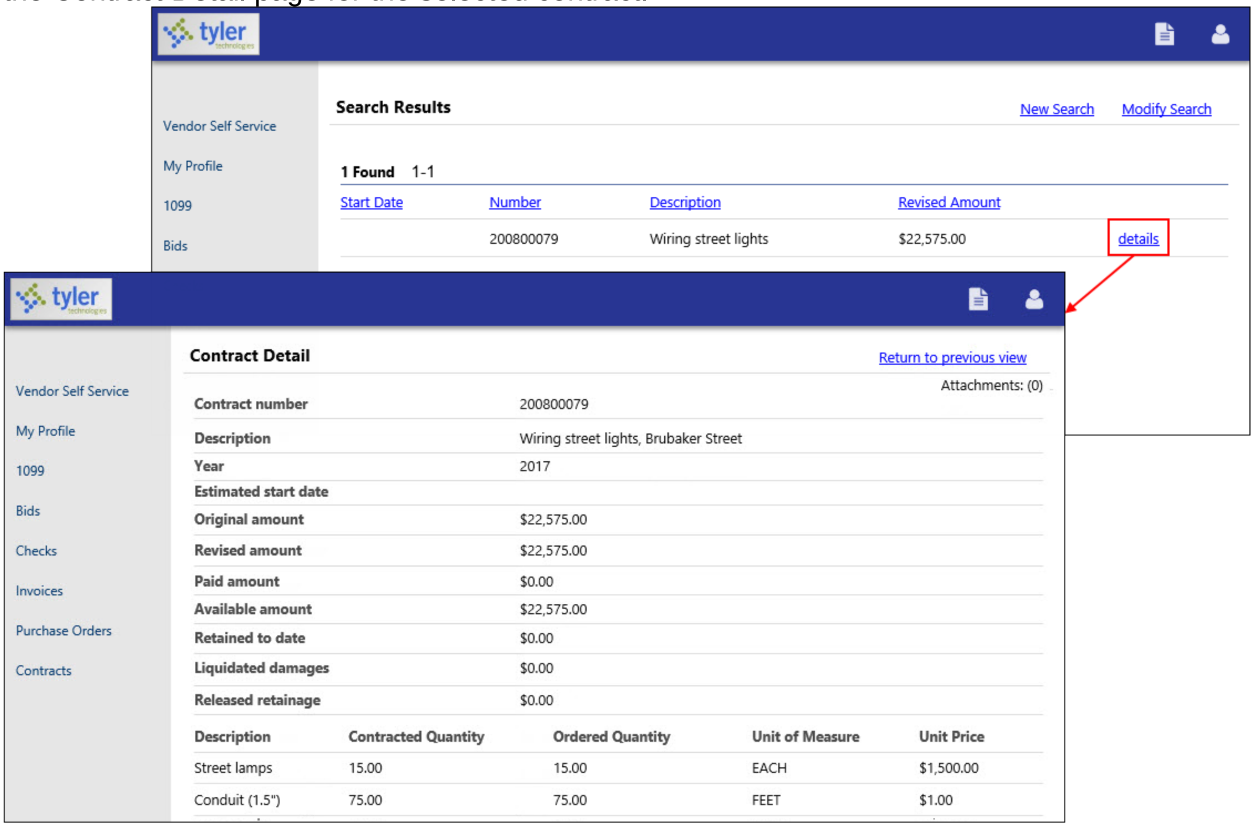


4.1.8 Contracts

Contracts provides contracts the vendor currently holds with your organization. The initial **Search Contracts** page allows vendors to search by a range of contract numbers or years.



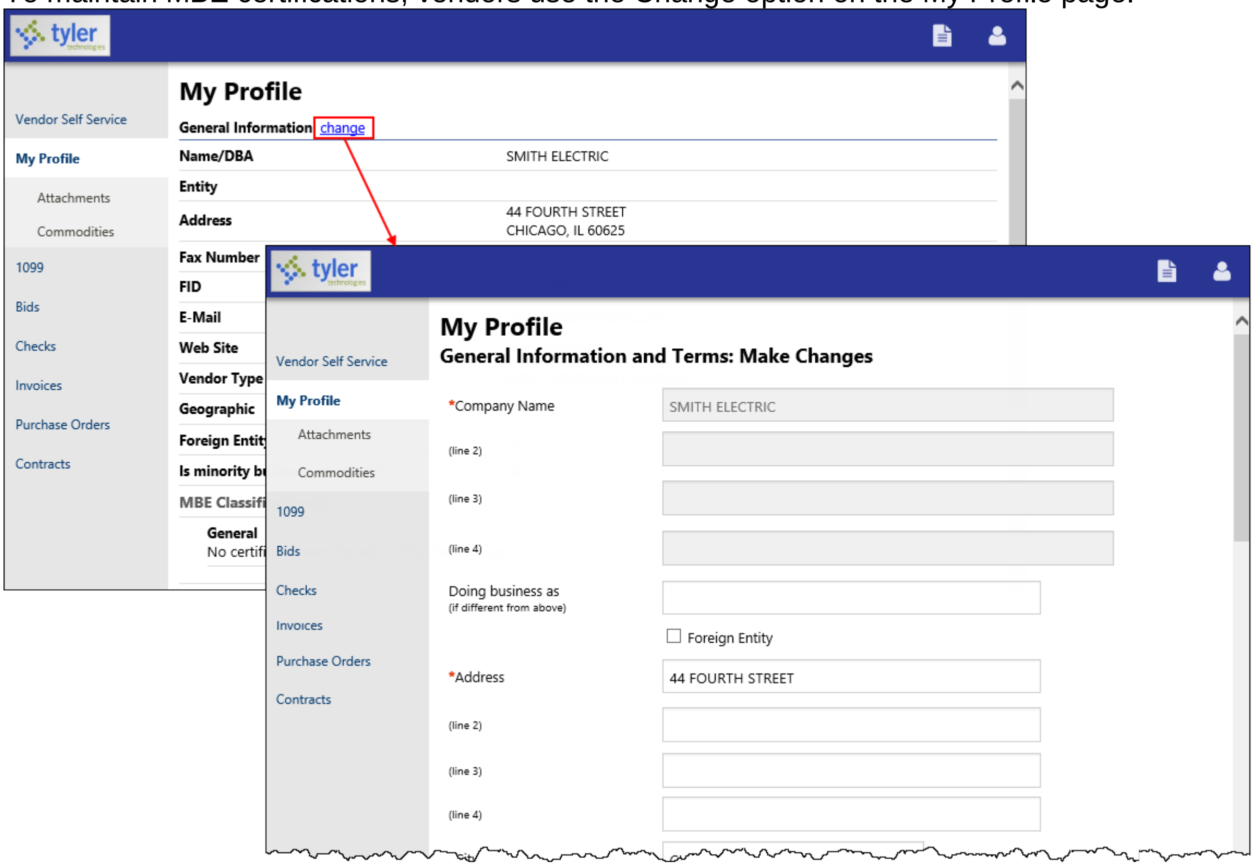
Search results include the contract start date, number, and amount. The Details option displays the Contract Detail page for the selected contract.



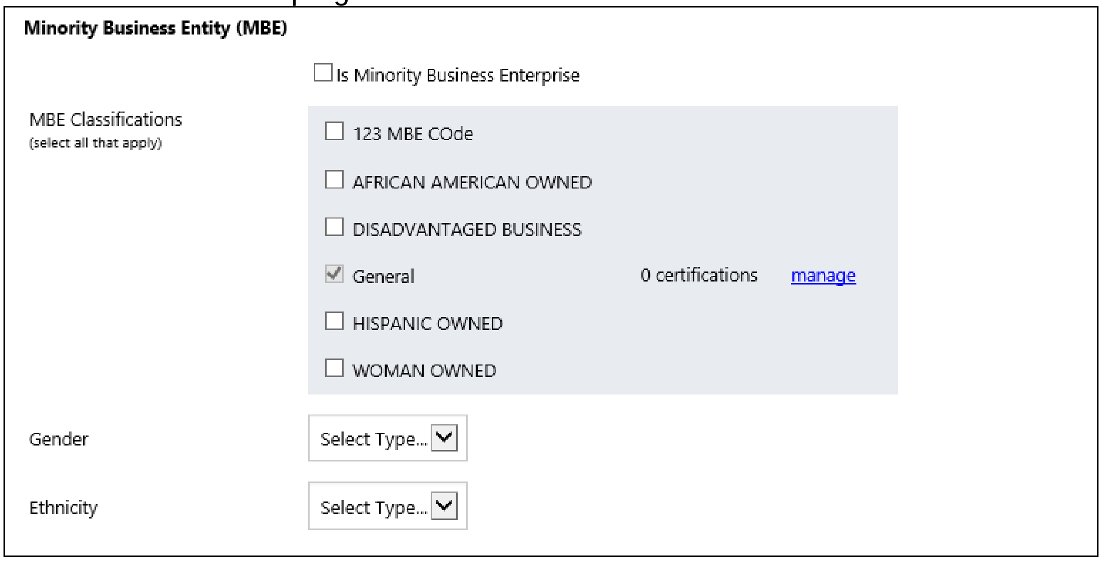
Appendix A—Managing Minority Business Enterprise Certificates

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.

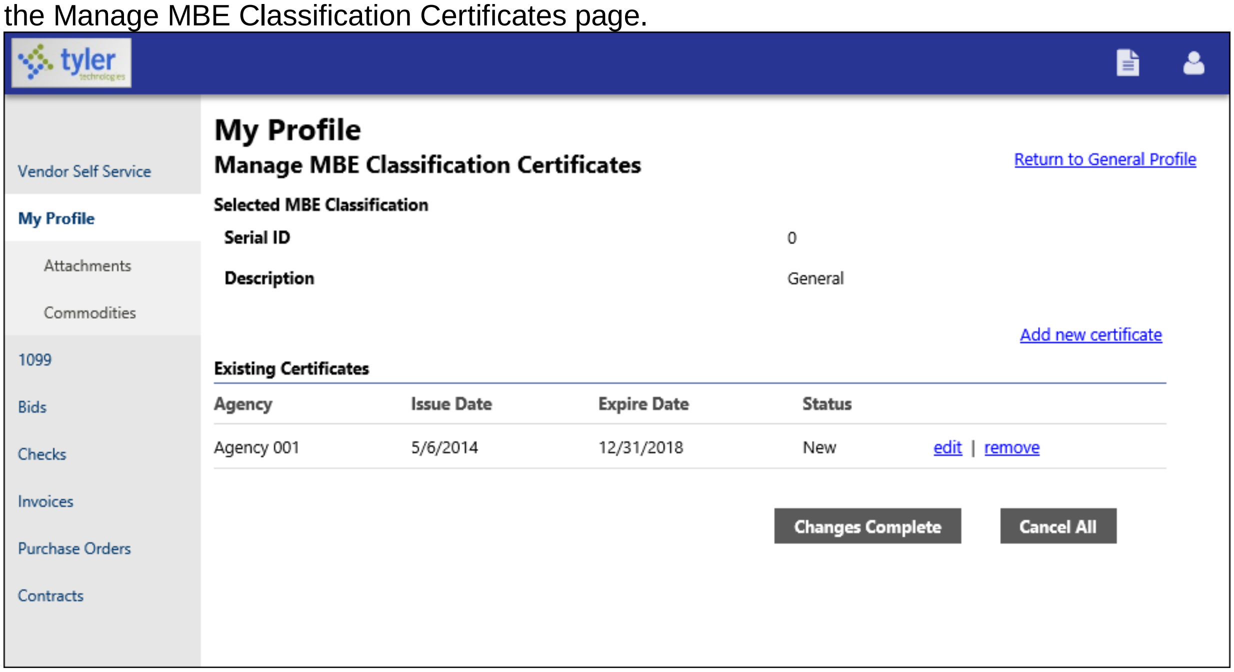
To maintain MBE certifications, vendors use the Change option on the My Profile page.



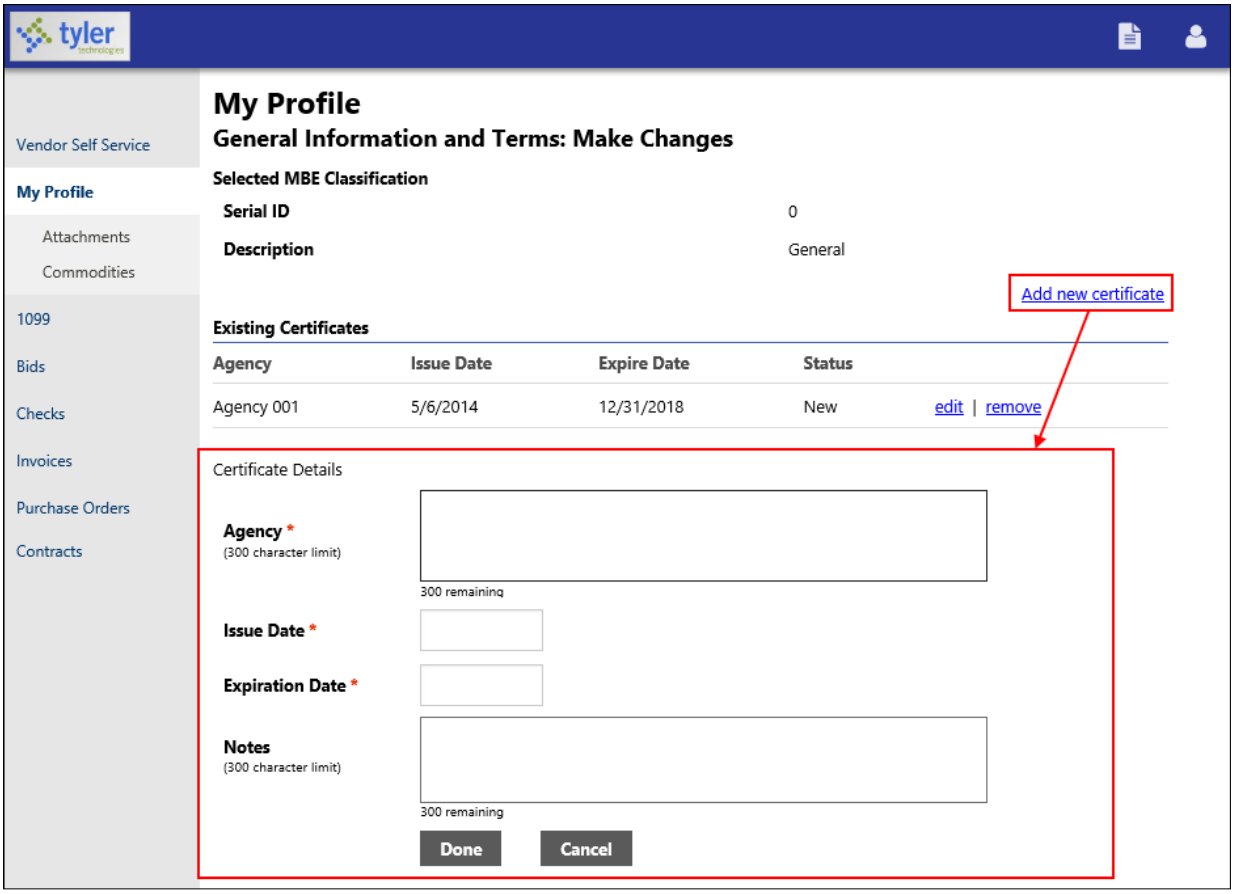
The Minority Business Entity (MBE) section contains the check boxes that indicate if the vendor is a minority business enterprise, and if so, which classifications the vendor possesses. The available classifications are defined by your organization using the Accounts Payable Miscellaneous Codes program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



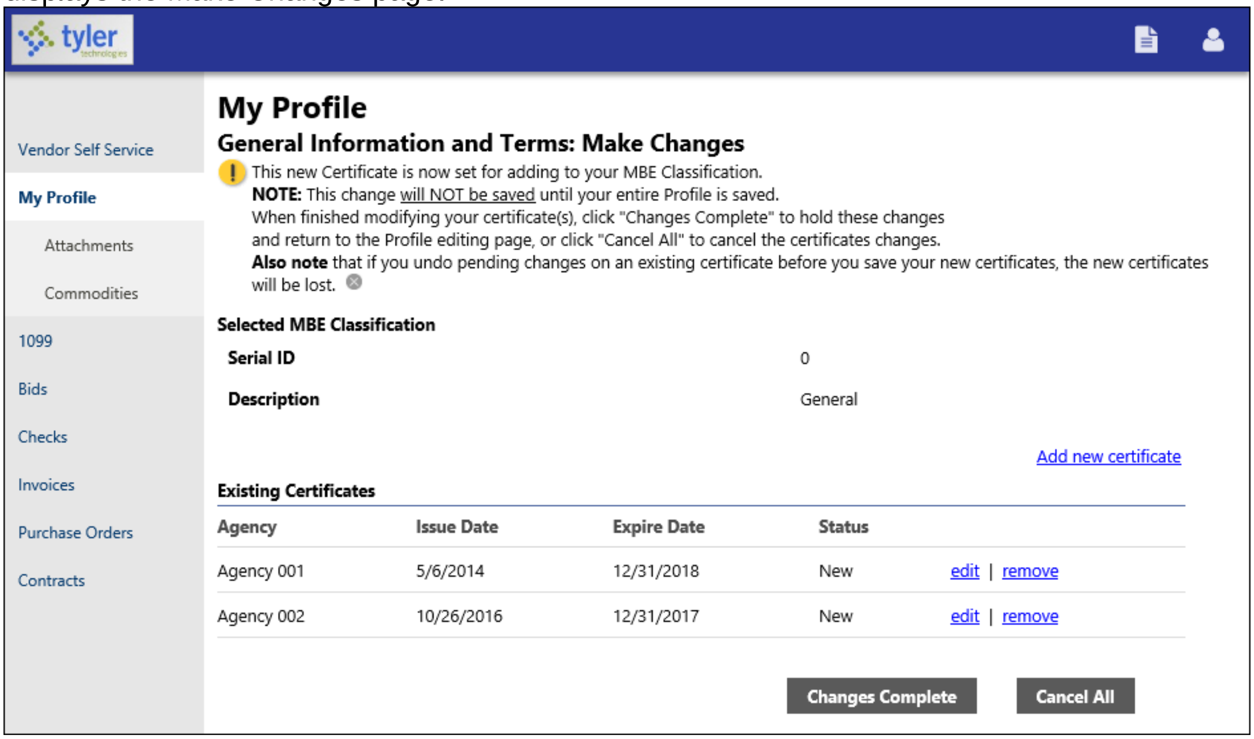
The Manage option for each classification allows a vendor to maintain the classification using the Manage MBE Classification Certificates page.



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.