Vendor Access

User Guide

May 2024

Contents

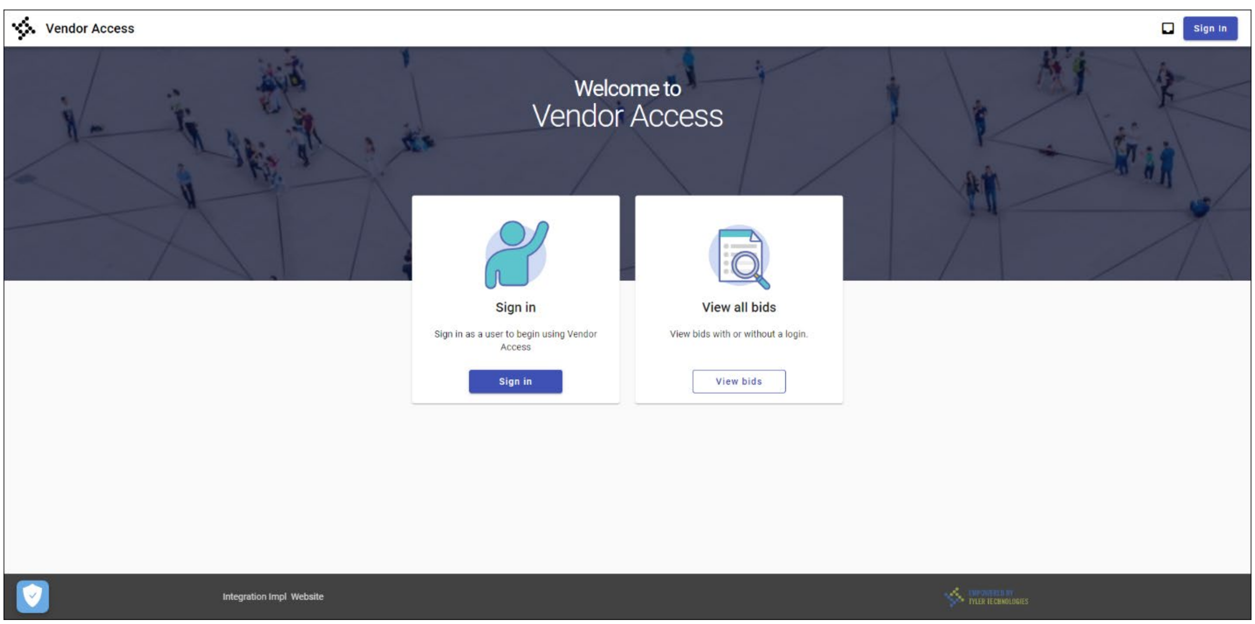
Overview

Vendor Access provides vendors with cloud-based access to information stored in the City's Tyler ERP solution. The information may be drawn from various ERP modules, such as accounts payable, purchasing, contracts, bids, and enterprise assets.

By using Vendor Access, vendors can enter and maintain their contact and remittance information, discount and payment terms, required documentation, 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, bids, purchase orders, invoices, contracts, checks, and work orders is available in Vendor Access. Typically, City staff enters this information using the ERP solution, such as Enterprise ERP, and the information is available to vendors for inquiry purposes.

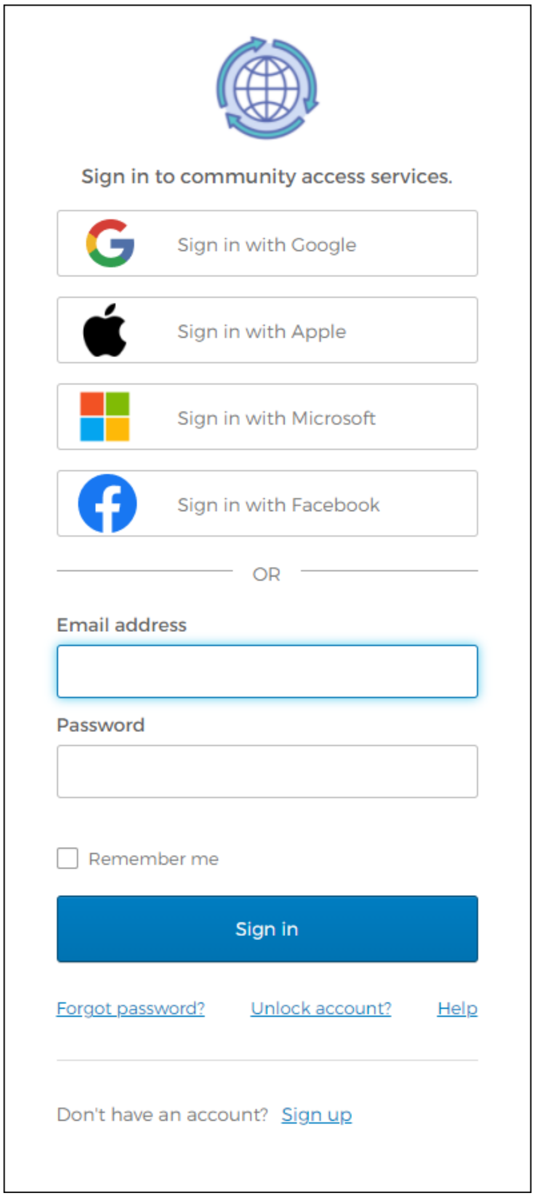
Vendor Access allows vendors to search for and view bid request information, and then use that information to submit a bid offer or quote. The submission process creates bid records in the ERP solution database that can be examined and evaluated by the City's bid management staff. Vendors can either sign in to review any company information already stored or simply view available bids posted by the City, which does not require a Vendor to have an existing account. See welcome page below.



User Accounts

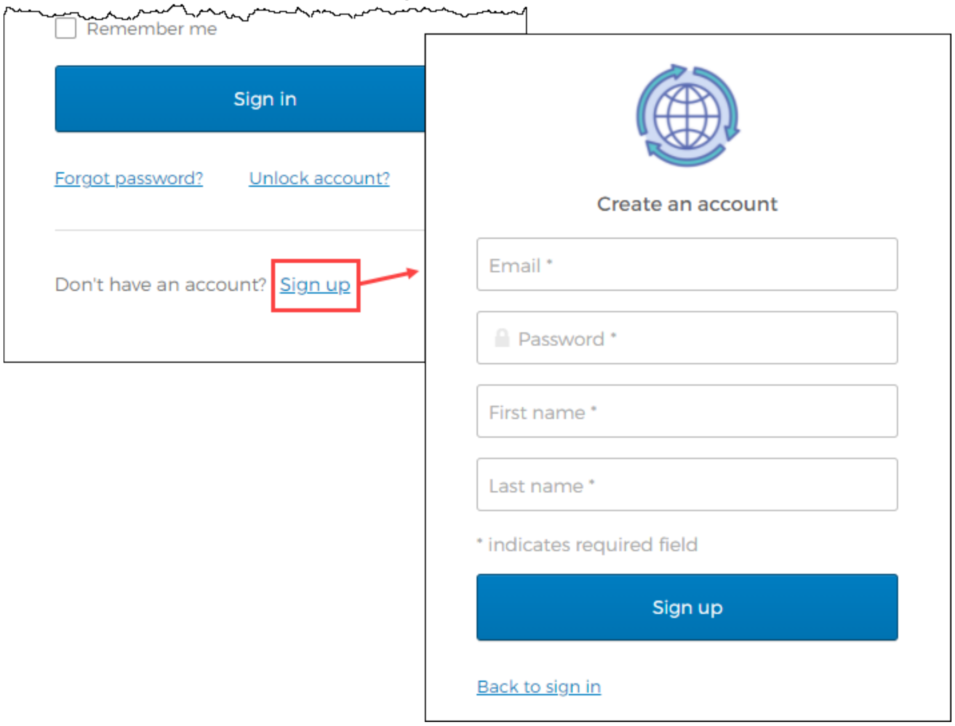
Vendors who access the City's Vendor Access application must create a Tyler Identity log-in account. The log-in account requires an active email address and a password.

When accessing Vendor Access, the application presents the Community Access sign-in screen with options to associate an existing log-in from Google®, Apple®, Microsoft®, or Facebook® with the Tyler Identity account. Otherwise, users can create a new account by clicking the Sign Up link at the bottom of the screen. The Help link on this screen also provides detailed steps for password management, including setting up multi-factor authentication.

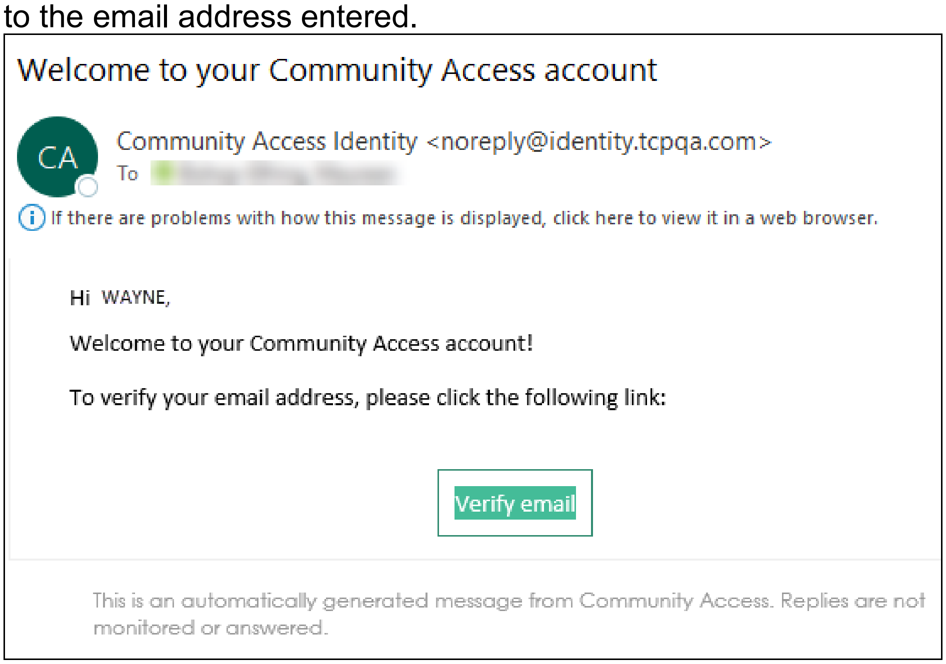


New Users

For first-time users, clicking the Sign Up link at the bottom of the sign-in screen presents the Create an Account dialog box.



Enter a valid email address, create a password, enter the first and last name, and click Sign Up to create the Tyler Identity account. The application sends a confirmation email to the email address entered.



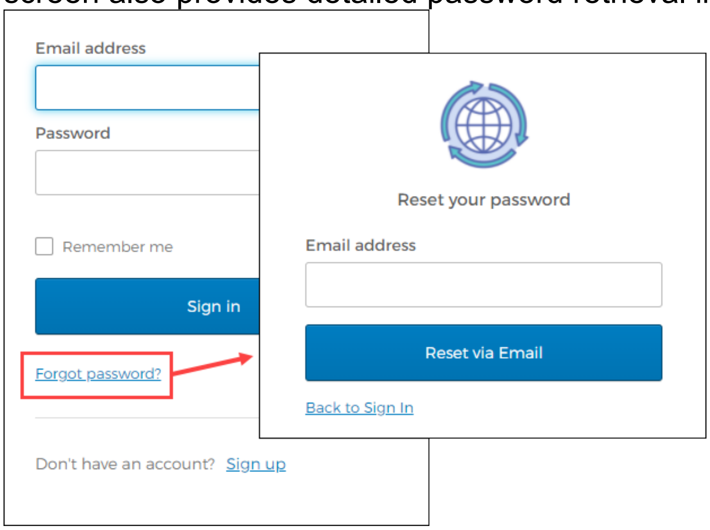
Once the user receives the email and clicks the Verify Email link, Vendor Access presents the User Profile page. Using this page, users can complete their profile information, connect accounts, establish payment methods, and set notification preferences.

Existing Users

For existing users, enter the registered email address and password and click the Sign In button to access the home page.

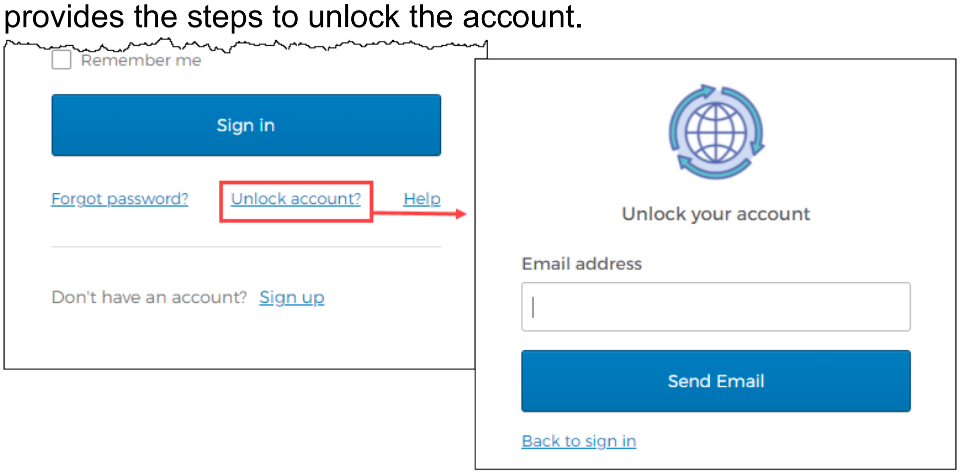
Password Resets

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.



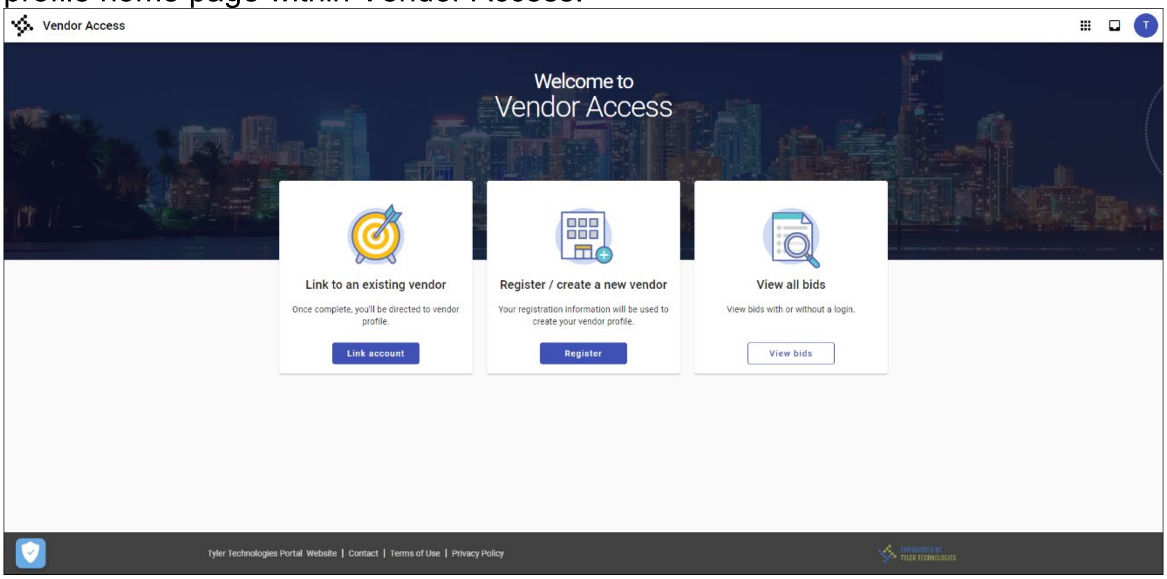
Locked Accounts

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



The Welcome Screen

When you log in to Vendor Access for the first time, the “Welcome to Vendor Access” screen provides options to “Link account” to an existing vendor record from the City's ERP solution, or “Register” to create a new vendor record. Once a vendor profile is established, this screen is bypassed and users are taken directly to their company’s profile home page within Vendor Access.



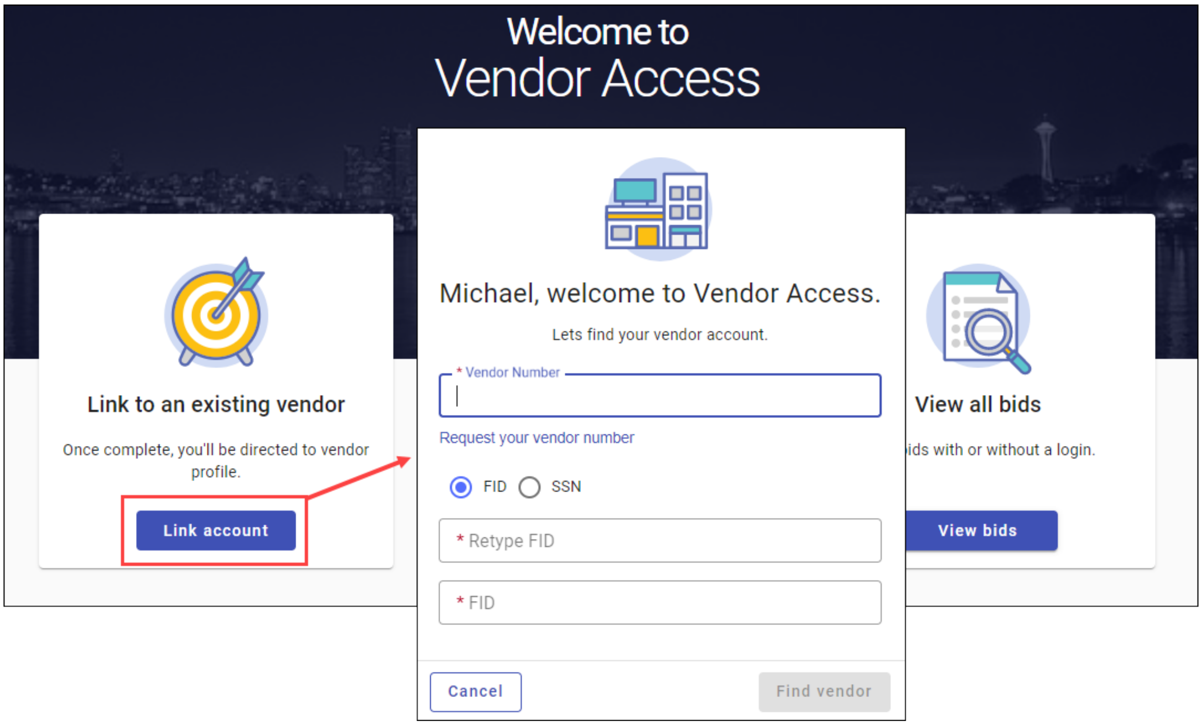
The options available on this screen are as follows:

- Link to an existing vendor—This option associates the currently logged in user with an existing vendor account that has been established with the integrated Tyler product, such as Enterprise ERP. **The vendor number and the Taxpayer Identification Number found in the vendor’s W-9 form are required to verify the account**. See Linking to an Existing Vendor for more information.
- Register/create a new vendor—This option creates a new vendor profile. It is used when the vendor does not have an existing vendor account in the integrated Tyler product. The user must complete the steps to establish the vendor profile, such as providing the business name, location, contacts, and payment information. City staff will then review and approve the vendor's account information before the vendor can use Vendor Access to submit invoices, bid proposals, and so on. For more details, see Registering/Creating a New Vendor.
- View all bids – currently not available.

Linking to an Existing Vendor

If the logged-in vendor has an existing record in the Tyler ERP solution database, Vendor Access provides the Link Account option to establish the connection.

1. Click Link Account to associate the user who is currently logged in with an existing vendor record.



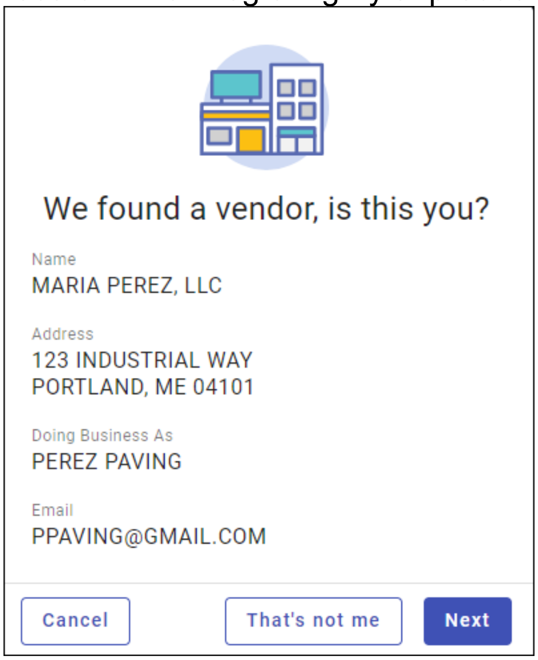
- Enter the vendor number (as established in the ERP solution) and the vendor's federal identifier (FID) to search for the existing vendor record.

The Request Your Vendor Number link provides the contact details for the City's Accounts Payable staff who handles these requests.

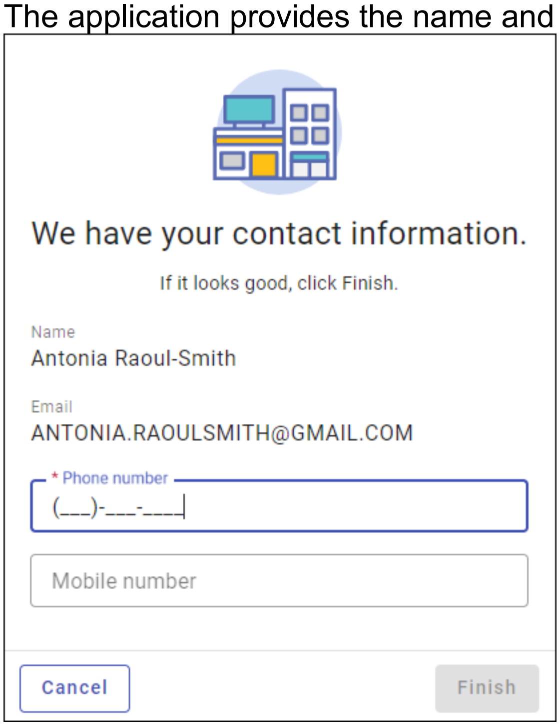
IF HAVING TROUBLE:

PLEASE DO NOT CREATE A NEW RECORD BUT CONTACT ACCOUNTS PAYABLE FOR HELP: accountspayable@cityofmerced.org

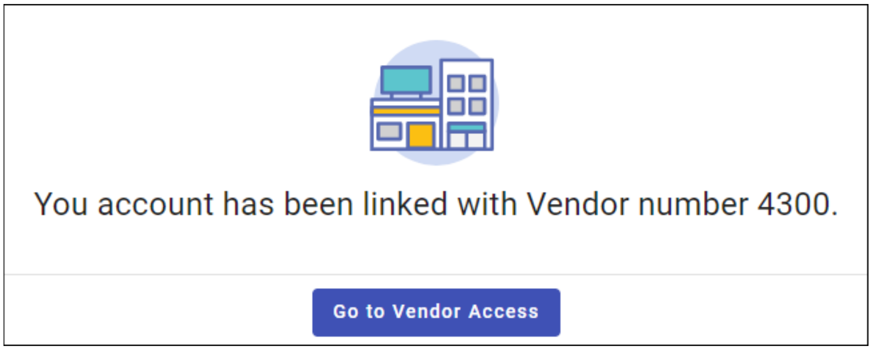
2. Click Find Vendor.
   The application searches and retrieves the vendor information stored on the vendor record in the integrating Tyler product.



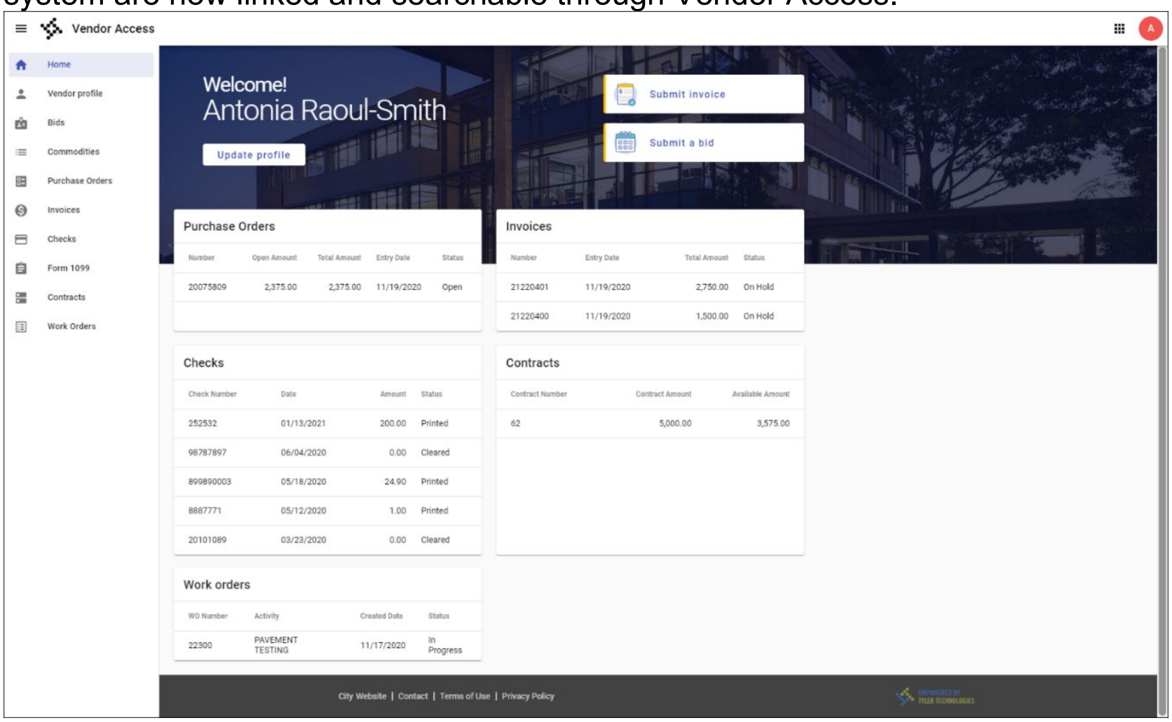
3. If this is the correct vendor, click Next. If not, click That's Not Me to return to the previous screen to re-enter the vendor information and correct any errors.
   The application provides the name and email address of the logged-in user.



4. Enter at least one phone number to use for this email address and then click Finish. The Finish button is not available until the required fields are completed.
The application saves the information and links the vendor account to the logged-in user.



5. Click Go to Vendor Access to open the home page. Invoices, purchase orders, and other such data that are associated with the existing vendor from the integrating system are now linked and searchable through Vendor Access.

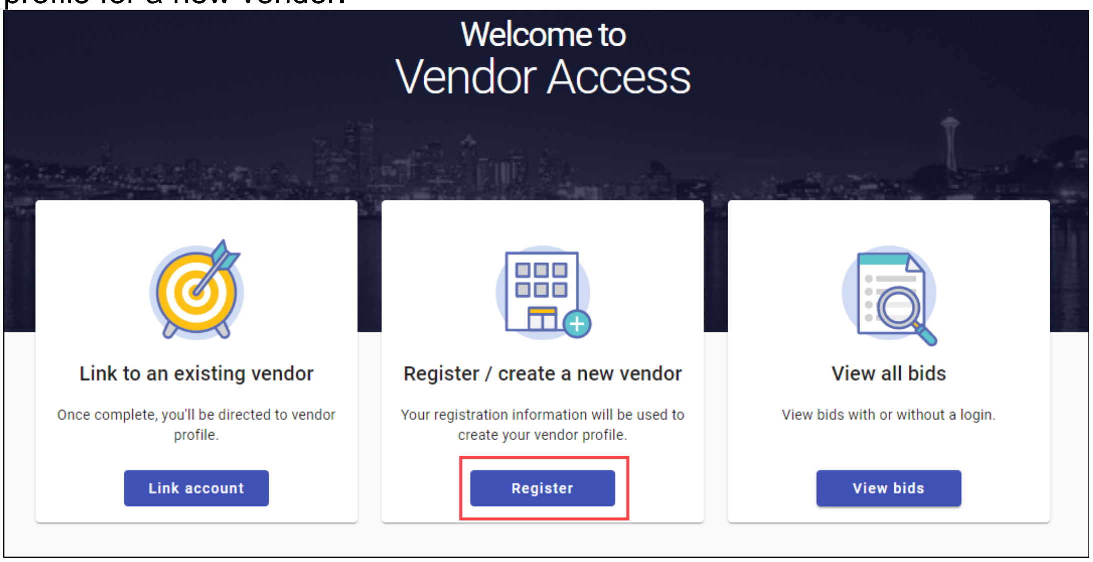


Registering/Creating a New Vendor

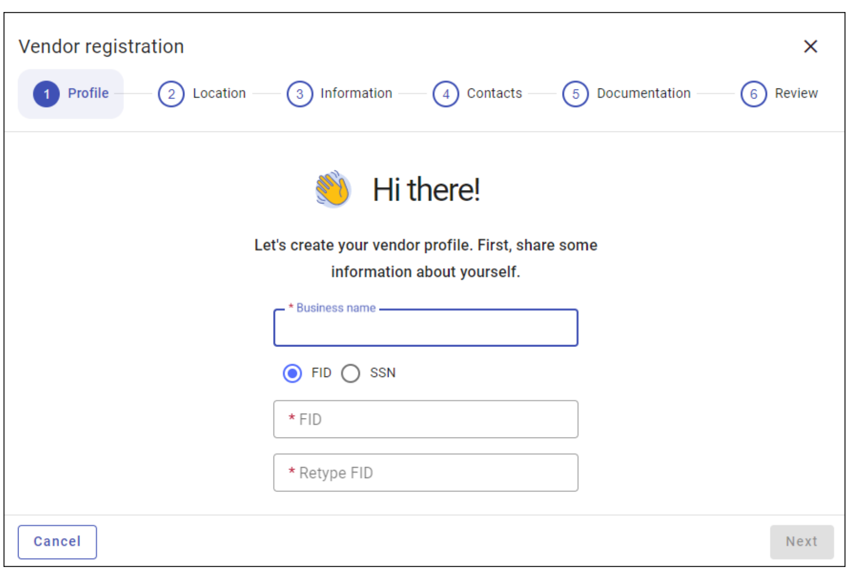
It is important to note that the fields and options that are available on these screens vary depending on your organization's settings. Some options that are shown in these examples may not apply to your specific setup.

To register a new vendor:

1. On the Welcome screen after you log in to Vendor Access, click Register to create a profile for a new vendor.

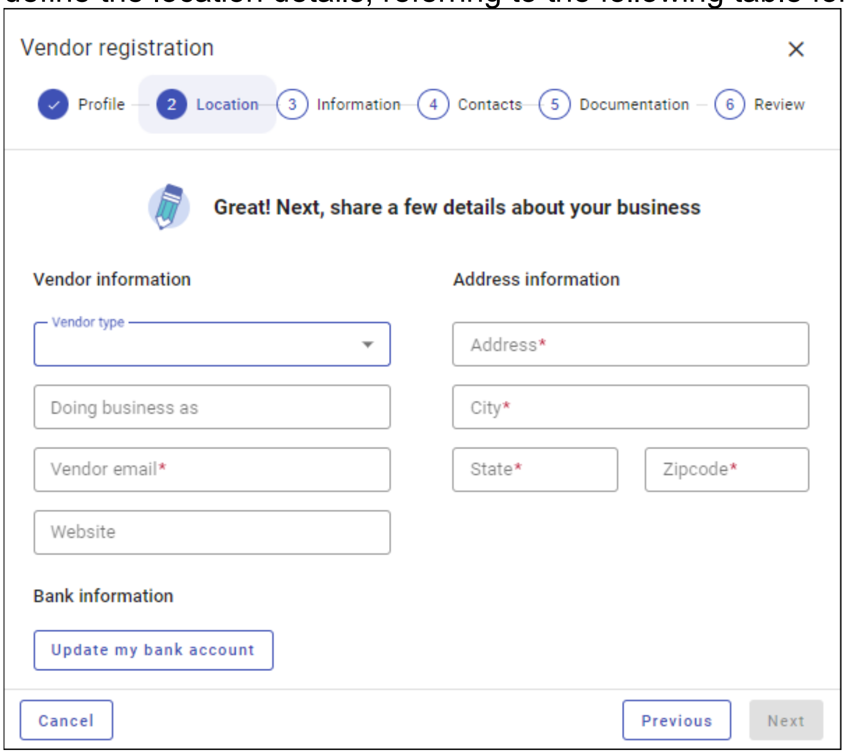


The program provides step 1 of the Vendor Registration with fields to define the vendor's name and federal identification number (FID) or Social Security number (SSN). **Select the FID option**. All fields marked with a red asterisk (*) are required.



Note: Clicking Cancel at any point during the registration process exits the registration screens and removes all of the entered information.

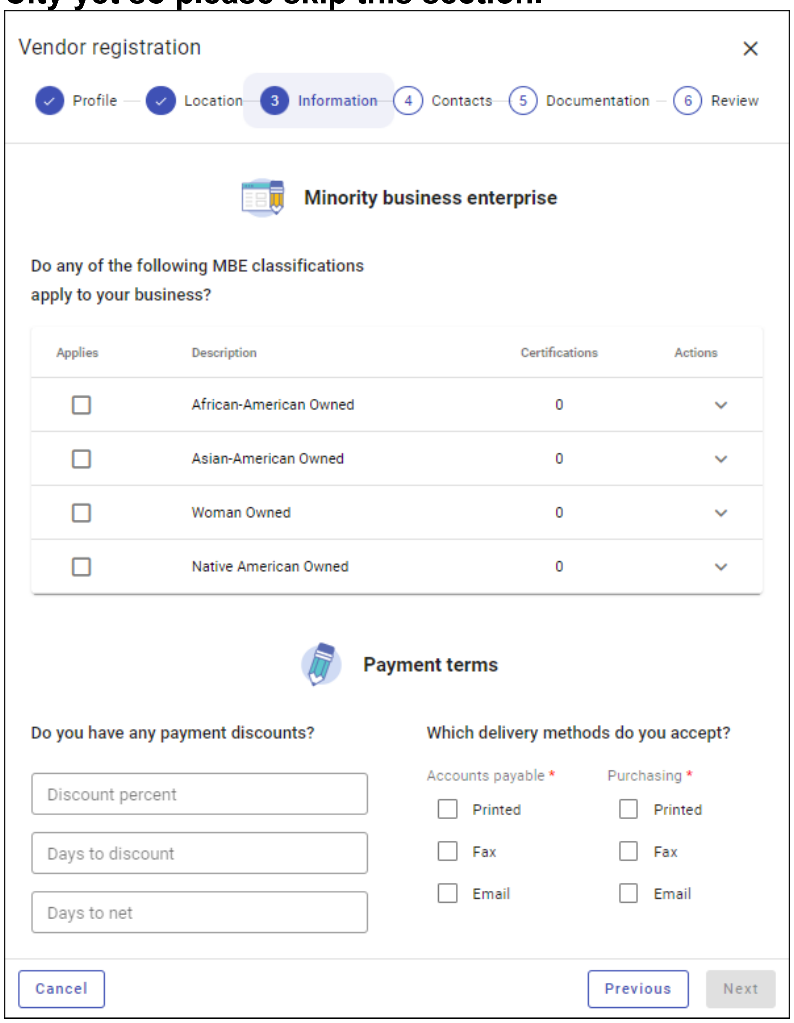
2. Complete the fields and click Next to continue to step 2 of the registration process to define the location details, referring to the following table for information.



Field	Description
Vendor Information	
Vendor Type	Indicates the type of vendor, such as a payroll vendor, employee, or equipment vendor.
Doing Business As	Specifies the vendor's Doing Business As (DBA) name.
Vendor Email	Identifies the vendor's email address.
Website	Indicates the vendor's website address.
Address Information	
Address City	Indicates the vendor's mailing address, including the city, state, and ZIP Code™.

Field	Description
State ZIP Code	
Bank Information *Click Update My Bank Account to add vendor banking information, if applicable. The bank code and account information must exist in the ERP system. Vendor Access verifies the entered information matches the existing bank account information in the ERP system.*	

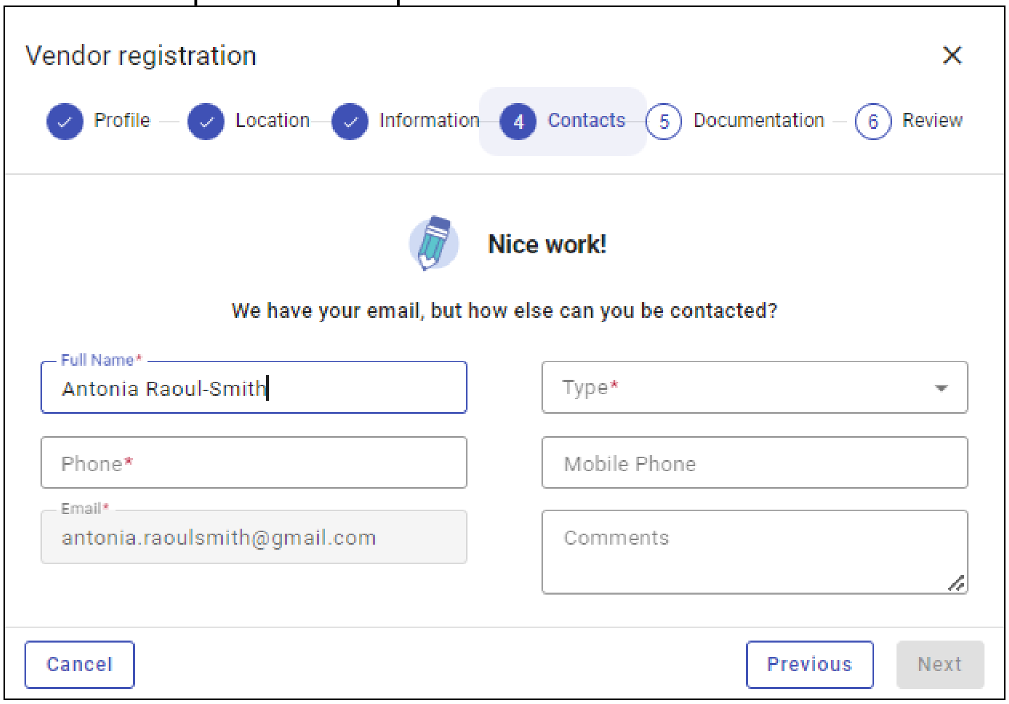
3. After completing the fields, click Next to proceed to step 3 to specify payment terms. **Please note that no minority business categories have not been set for the City yet so please skip this section.**



- If the payment terms are known, complete the fields, referring to the following table for specific field details.
- If the payment terms are not known at this time, click Next to skip this step and proceed to step 4.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td colspan="2">Payment Terms</td></tr>
<tr><td colspan="2">Do you have any payment discounts?</td></tr>
<tr><td>Discount Percent</td><td>Sets the discount percentage offered by the vendor if the invoice is paid within the Days to Discount timeframe.</td></tr>
<tr><td>Days to Discount</td><td>Contains the number of days within which the invoice must be paid to qualify for the vendor discount.</td></tr>
<tr><td>Days to Net</td><td>Holds the number of days allowed from the invoice date to pay the full invoice.</td></tr>
<tr><td colspan="2">Which delivery methods do you accept?</td></tr>
<tr><td>Accounts Payable</td><td>Provides options to select one or more accepted delivery methods for accounts payable:
• Printed—The vendor accepts printed delivery.
• Email—The vendor accepts delivery by email.</td></tr>
<tr><td>Purchasing</td><td>Provides options to select one or more accepted delivery methods for purchasing:
• Printed—The vendor accepts printed purchase orders.
• Email—The vendor accepts purchase orders by email.</td></tr>
</table>

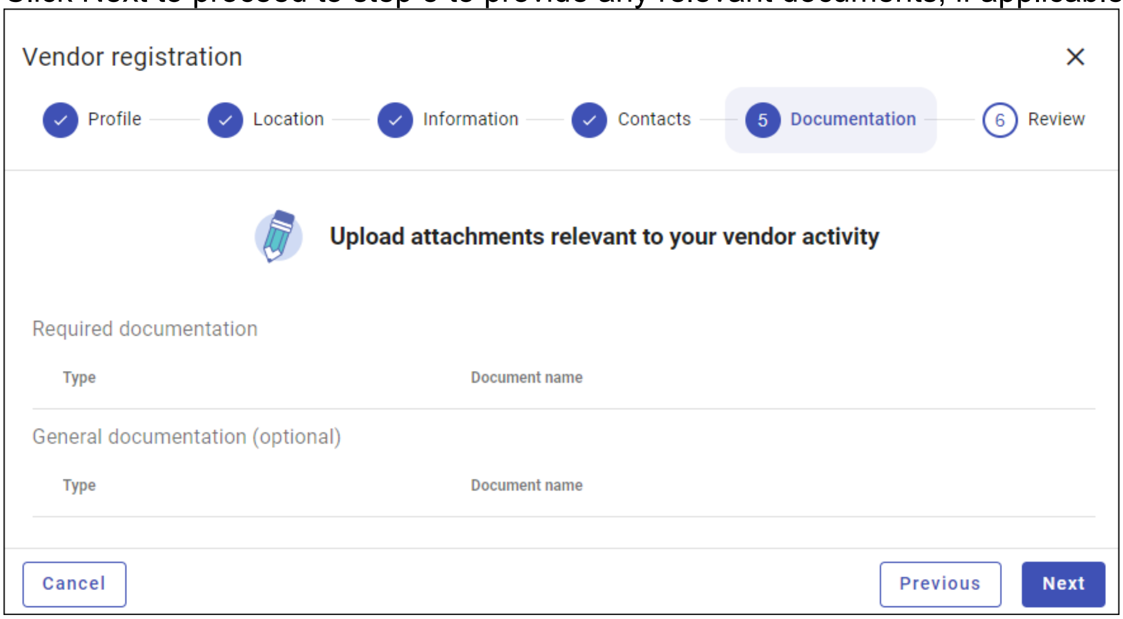
4. Click Next to proceed to step 4 to define the contacts.



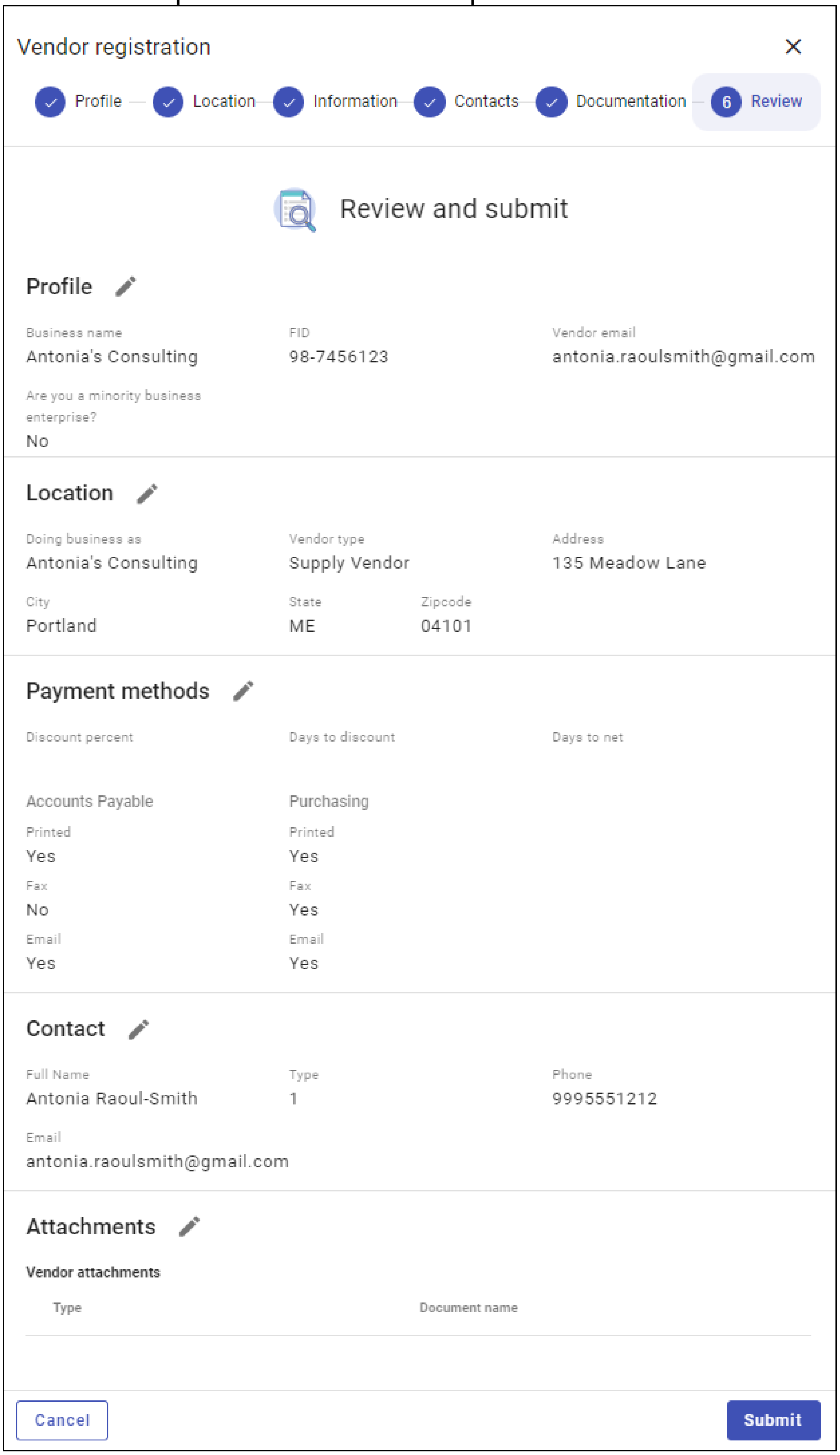
Field	Description
Full Name	Indicates the full name of the person registering as a vendor. The app automatically completes this information based on the email address you provided when logging in. For example, if you logged in through Google, the full name associated with your Google account is provided in this field.
Type	Specifies the type of contact: • General Contacts • Accounts Payable Contacts • Purchasing Contacts
Phone	Establishes the phone number of the contact. A phone number is required.
Mobile Phone	Indicates the mobile phone number of the contact, if different from the phone number entered in the Phone field.
Email	Identifies the email address of the contact.

Field	Description
	The app automatically completes this information based on the email address you provided when logging in.
Comments	Provides a text box to enter any comments associated with the contact information. For example, the contact’s job role or preferred contact method.

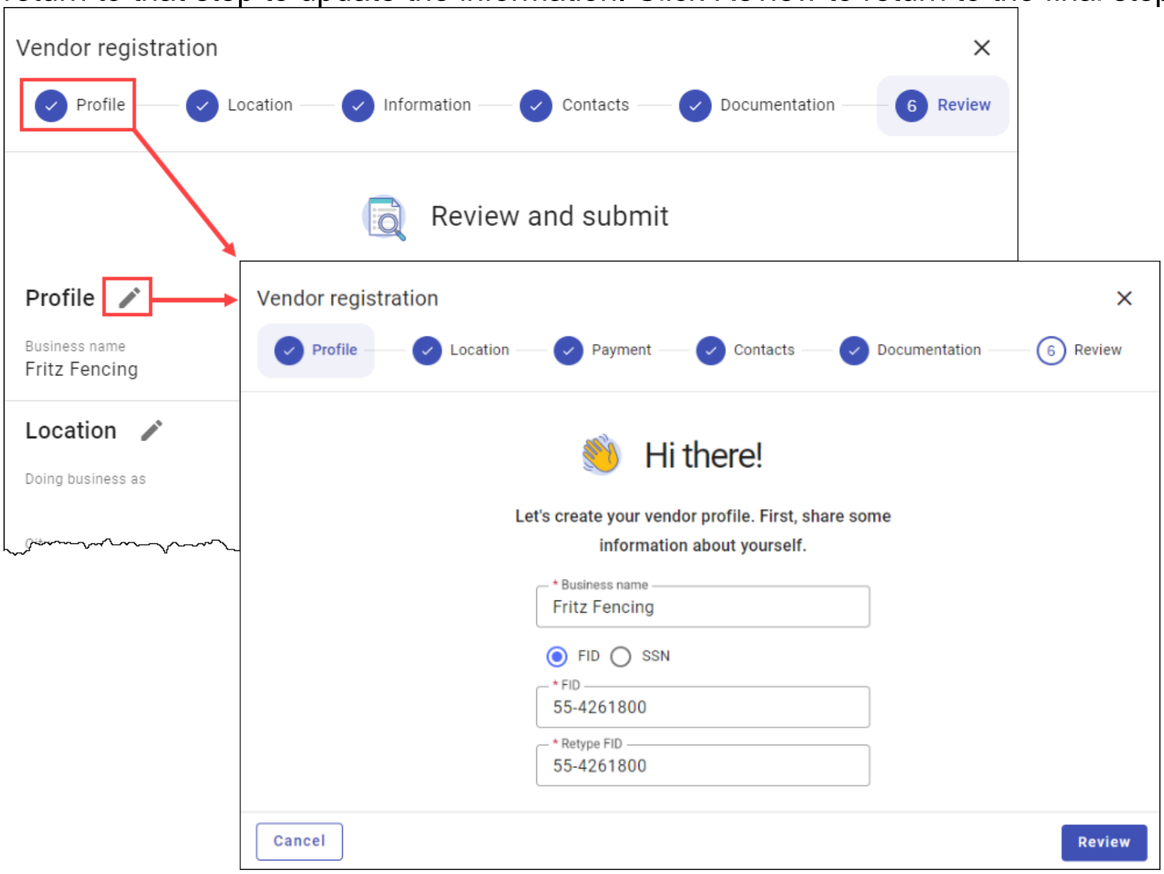
5. Click Next to proceed to step 5 to provide any relevant documents, if applicable.



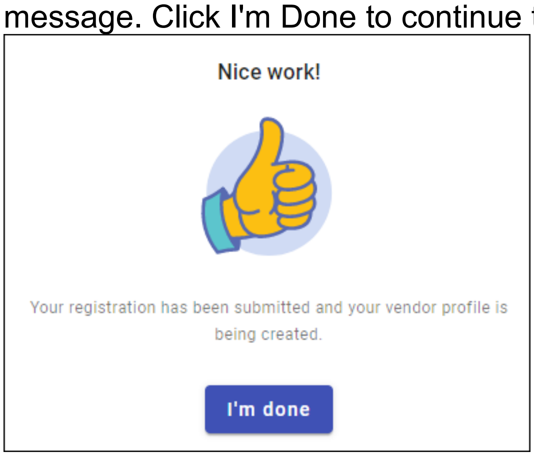
6. Click Next to proceed to the final step to review the entered information.



7. Review the information and click Submit to complete the registration. To make changes, either click the step or click the Edit option beside the step heading to return to that step to update the information. Click Review to return to the final step.

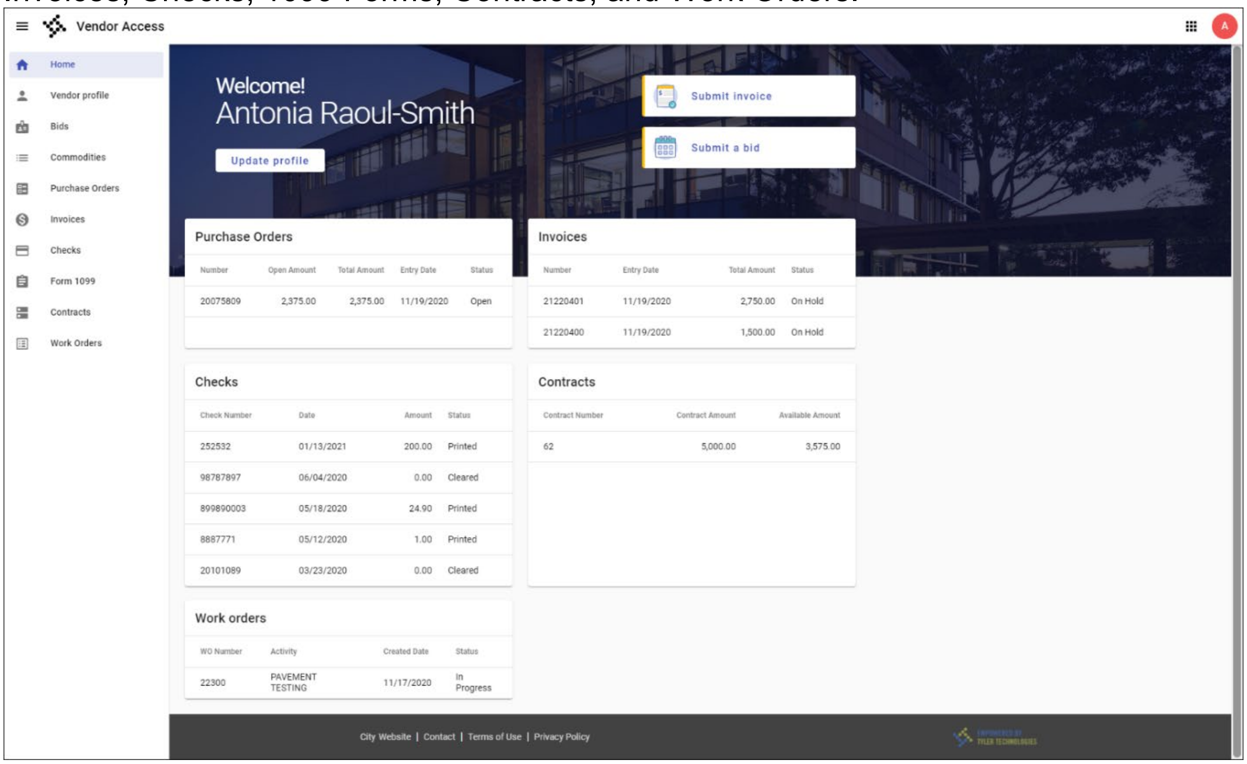


8. Once the vendor registration is submitted, the program provides a confirmation message. Click I'm Done to continue to the Vendor Access home page.

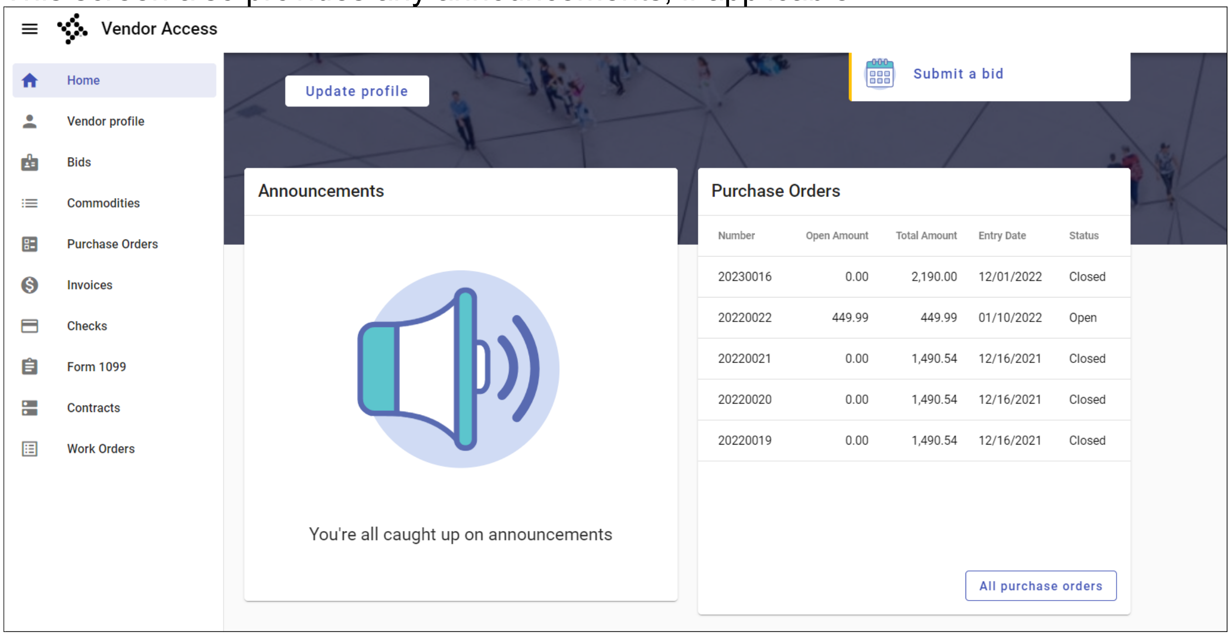


Home Page

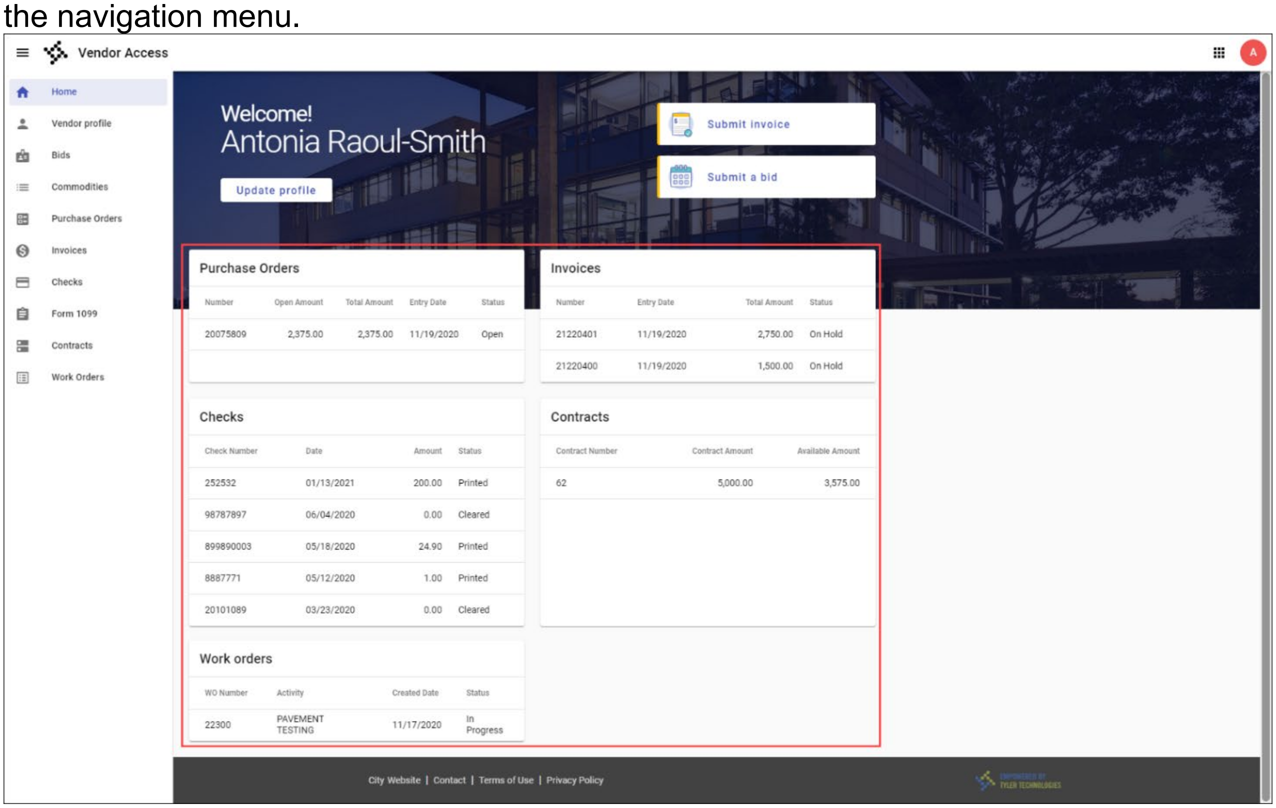
Once a vendor profile is established, the Vendor Access home page serves as the primary landing page when users log in to Vendor Access. It provides the vendor's profile information and access to other options, such as Bids, Purchase Orders, Invoices, Checks, 1099 Forms, Contracts, and Work Orders.



This screen also provides any announcements, if applicable.

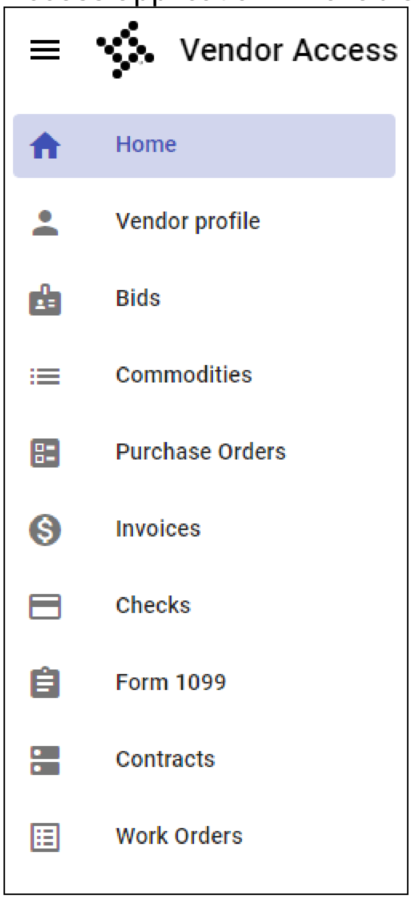


The bottom of the home page provides overview information about the records that are associated with the vendor. These are informational only. To access the records, use the navigation menu.

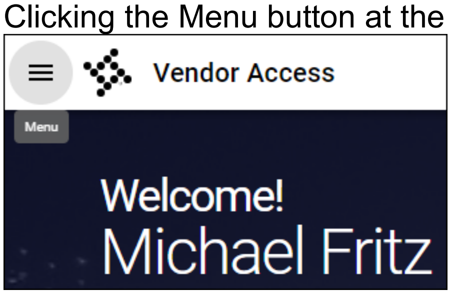


Using the Navigation Menu

The navigation menu serves as the primary means of navigating through the Vendor Access application. Available options vary depending on City policies.



Clicking the Menu button at the top of the page hides or displays the navigation menu.



Submitting an Invoice

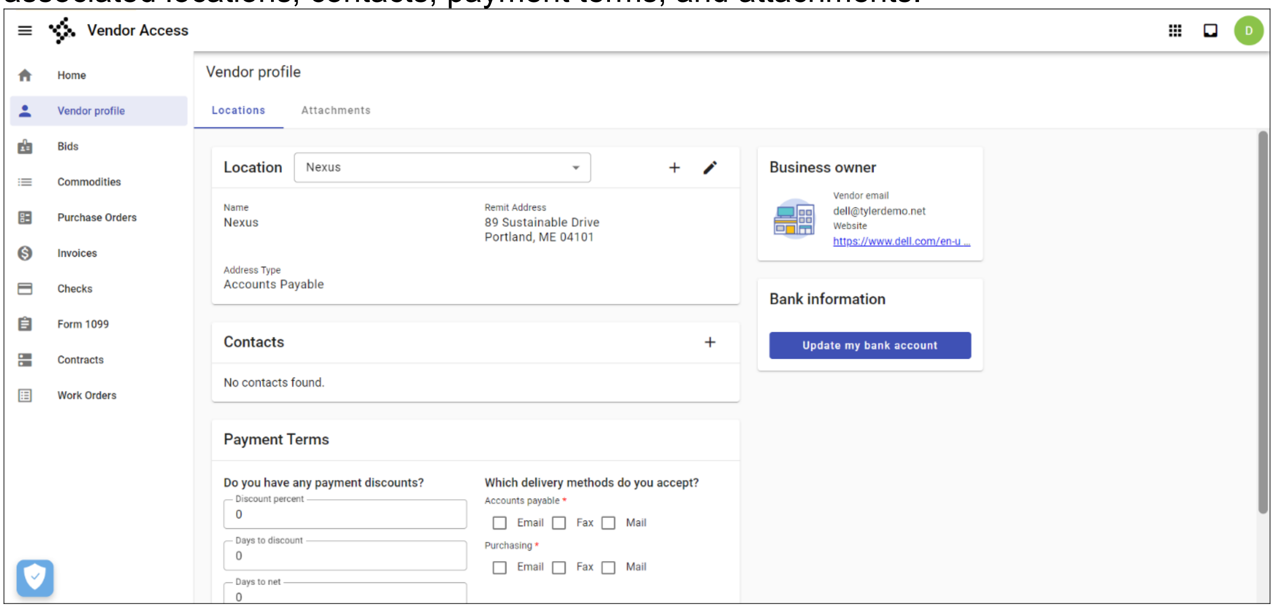
This feature is currently not available.

Submitting a Bid

This feature is not available at the moment.

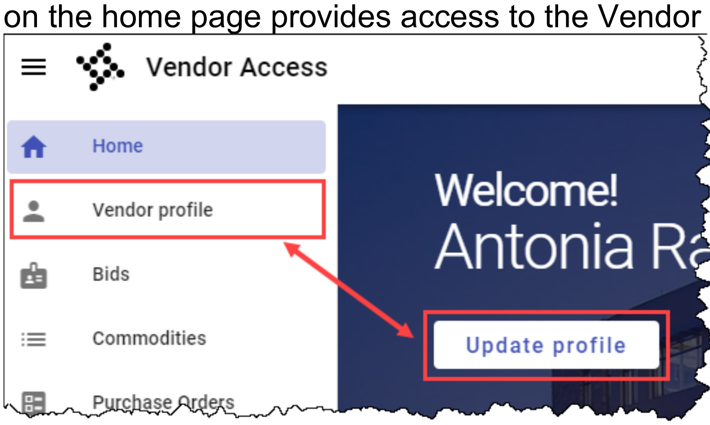
Vendor Profile

The Vendor Profile provides essential information about the vendor, including associated locations, contacts, payment terms, and attachments.



Maintaining Profile Information

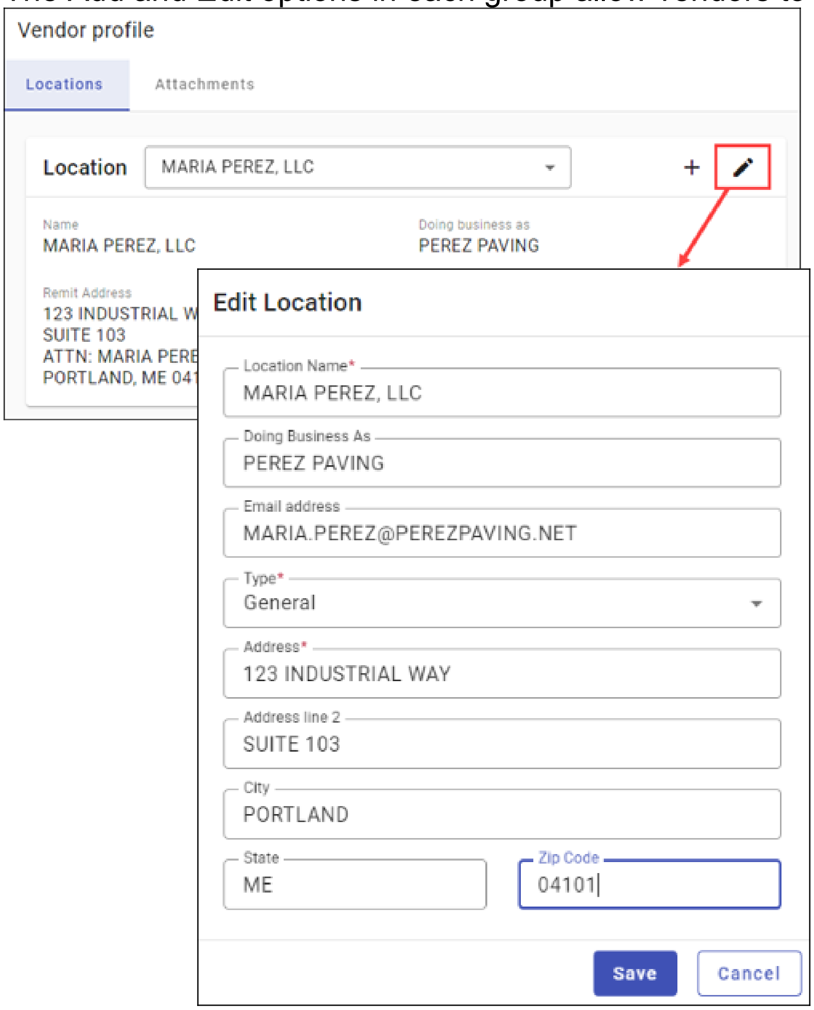
In addition to selecting Vendor Profile in the navigation menu, the Update Profile option on the home page provides access to the Vendor Profile page.



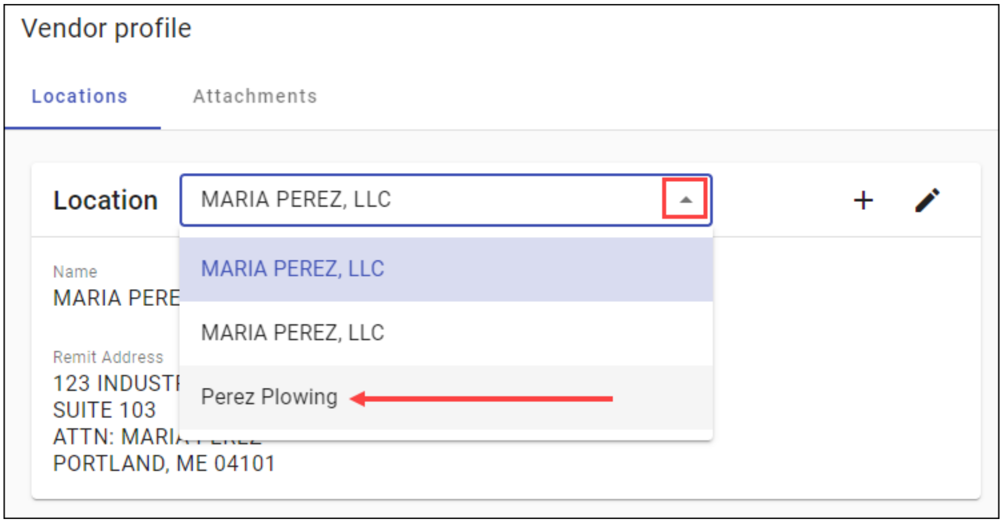
Locations

The Locations tab provides information for a selected location associated with the vendor, including the remit address, contact names and phone numbers, and accepted delivery and payment methods.

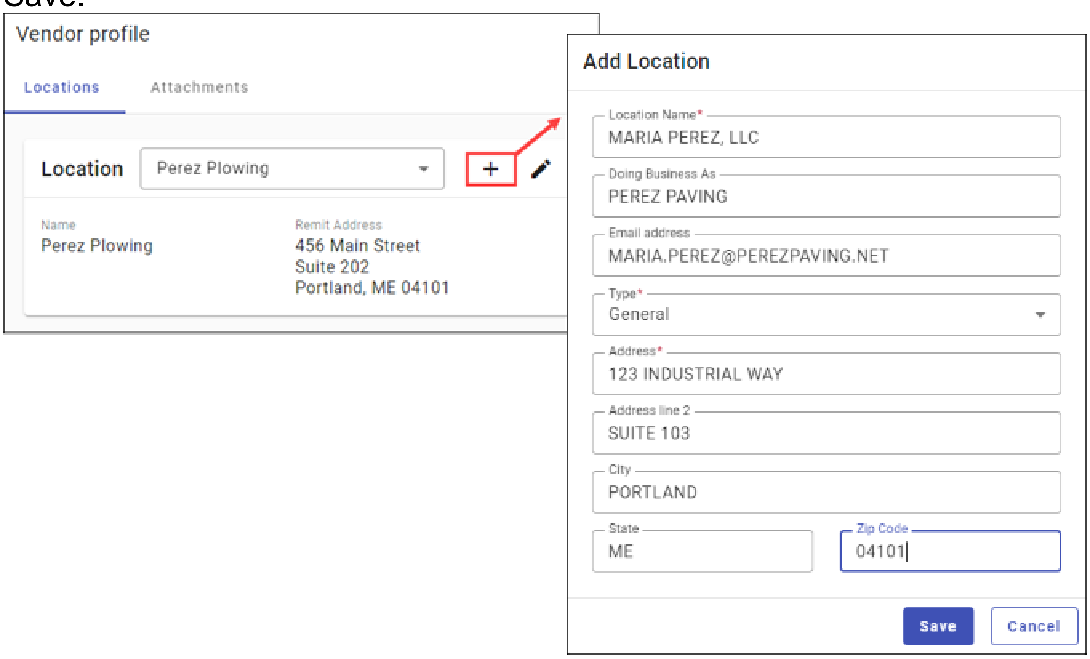
The Add and Edit options in each group allow vendors to maintain the information.



To view or maintain a different location, click the Location list and select the location. The screen refreshes to show the information for the selected location.



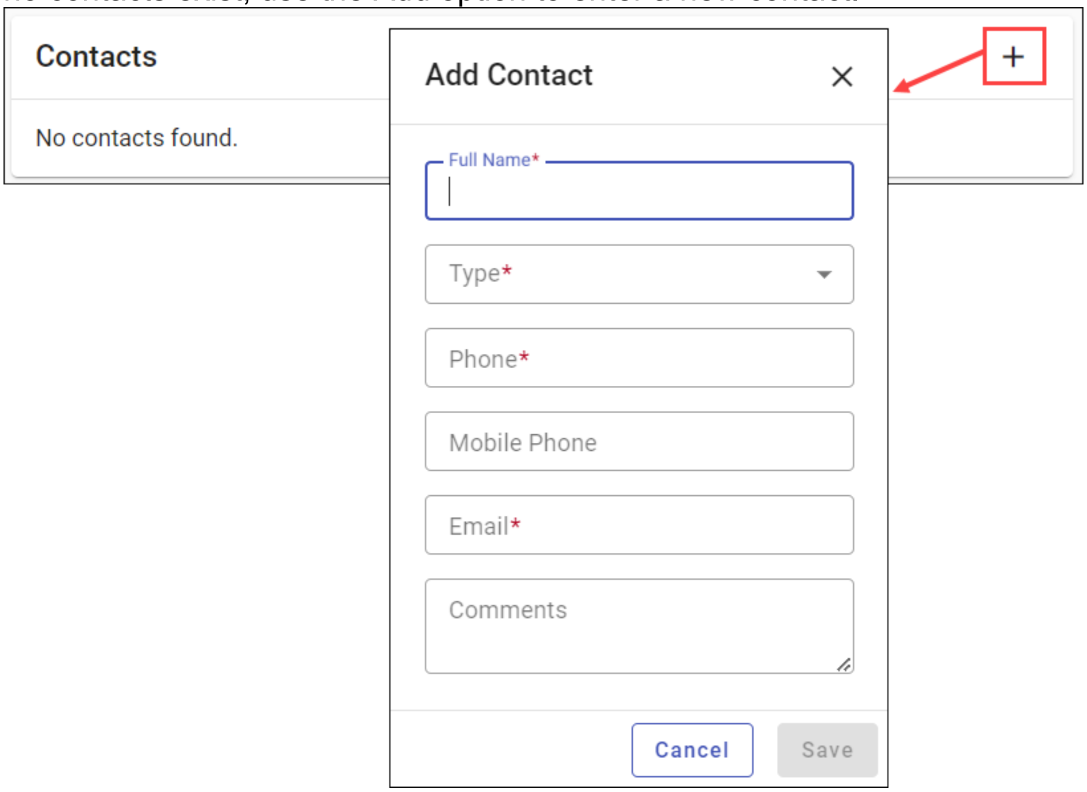
To add a new location, click Add, complete the fields to define the location, and click Save.



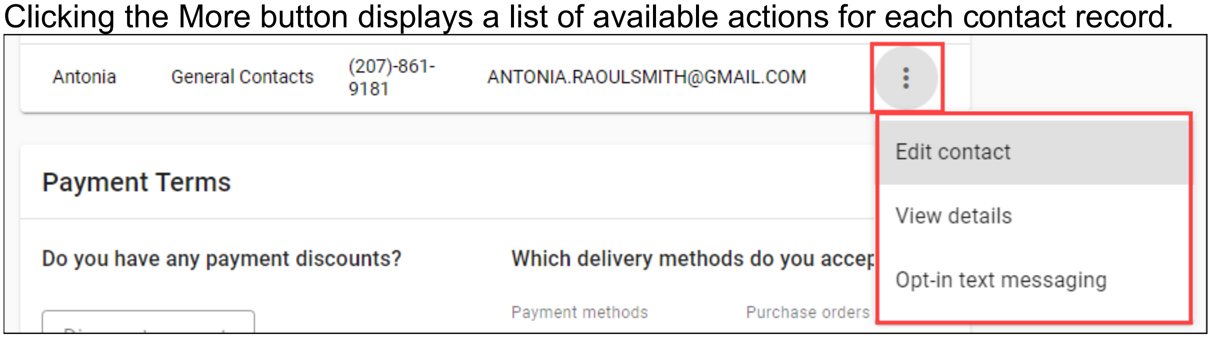
Click Update My Bank Account to add or change bank account information. **Please note that this feature is not yet available.**

Contacts

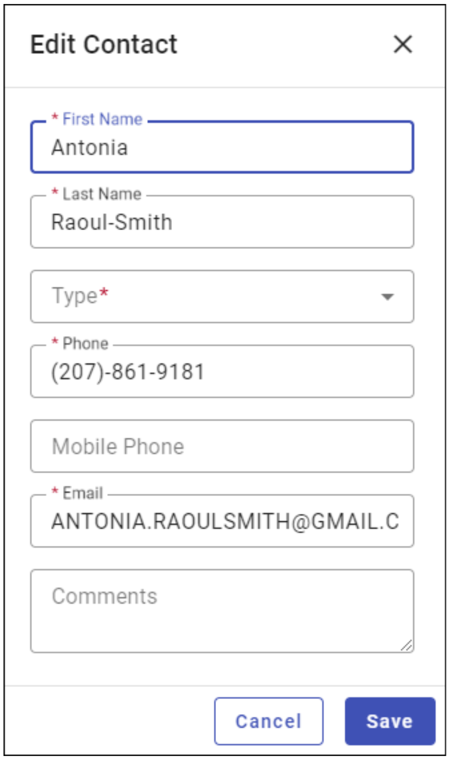
The Contacts group provides a list of contacts associated with the selected location. If no contacts exist, use the Add option to enter a new contact.

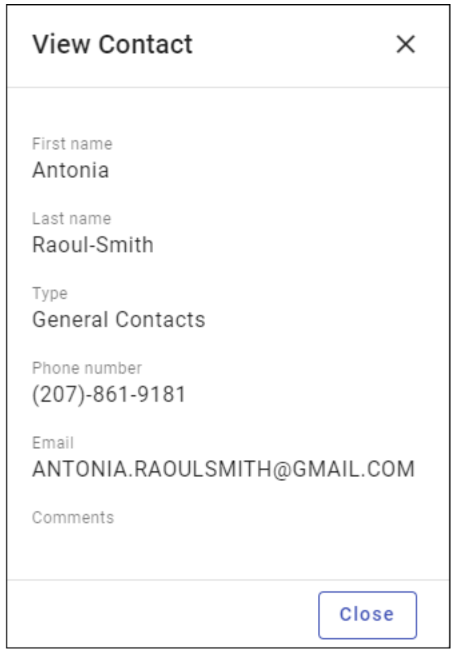


Clicking the More button displays a list of available actions for each contact record.



The Edit Contact and View Details options provide information about the selected contact. The Edit Contact window provides access to the fields to update the information whereas the View Contact window is informational only.

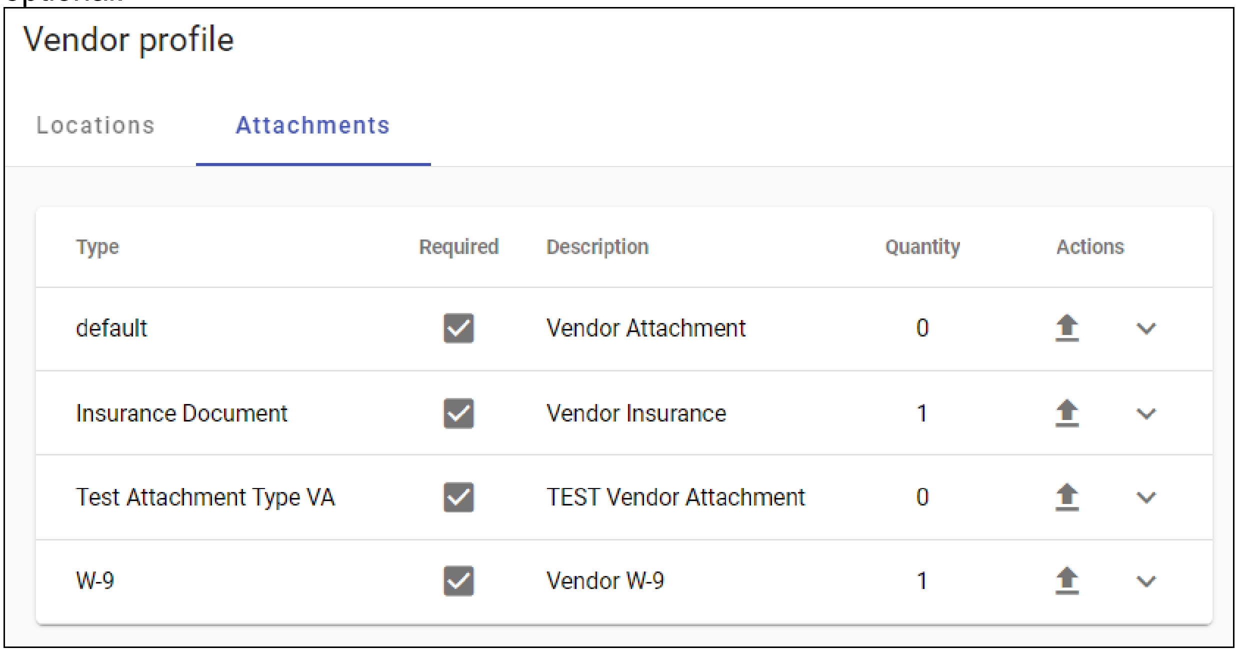




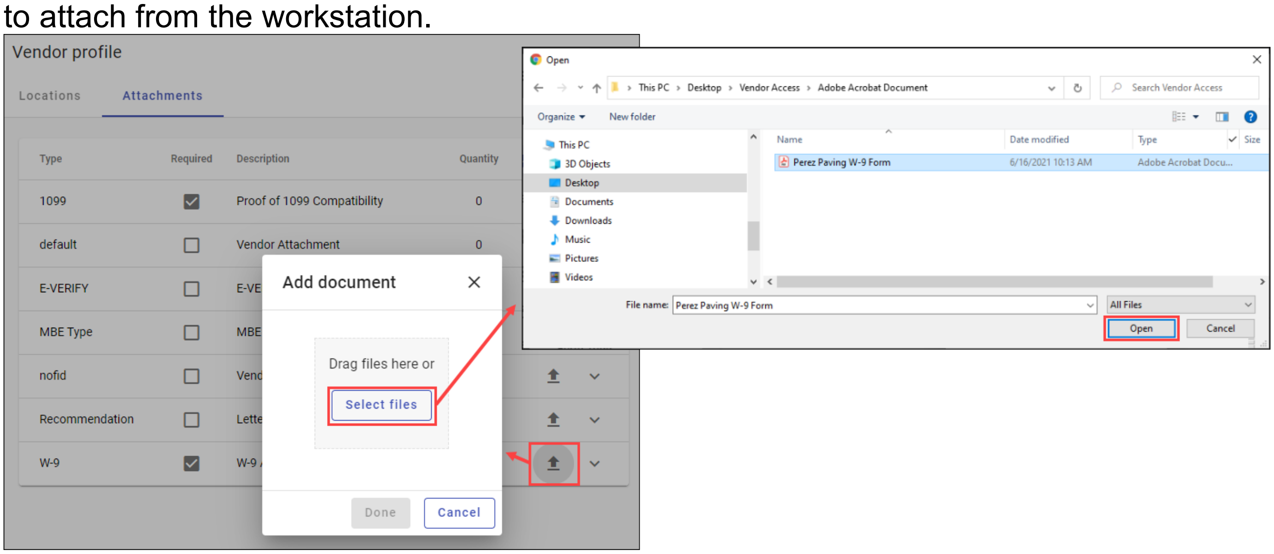
The Opt-In Text Messaging option allows users to receive text messages.

Attachments

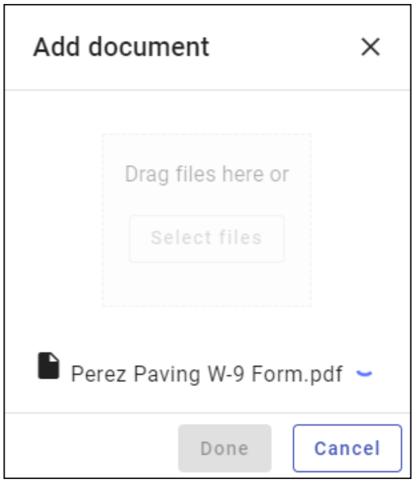
The Attachments tab displays a list of attachment types your organization has established for vendors in your Tyler ERP solution. Attachments may be required or optional.



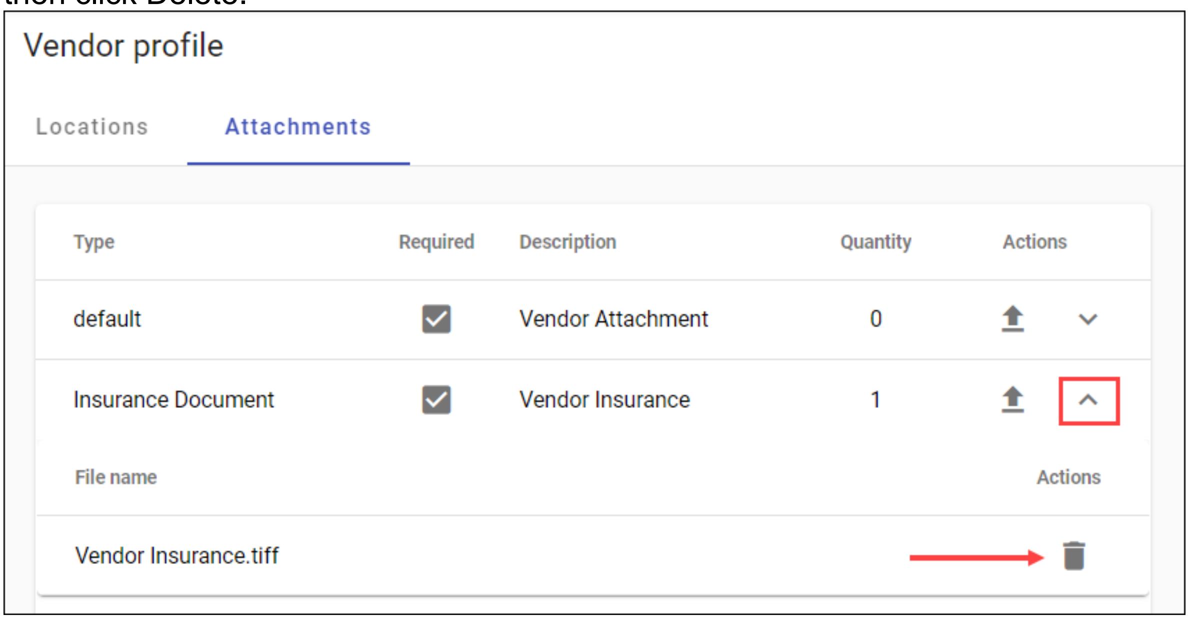
Clicking the Upload button provides the Add Document dialog box for selecting the file to attach from the workstation.



The selected attachment is added to the vendor profile.



To delete an attachment, click the arrow in the Actions column to expand the group, and then click Delete.



Bids

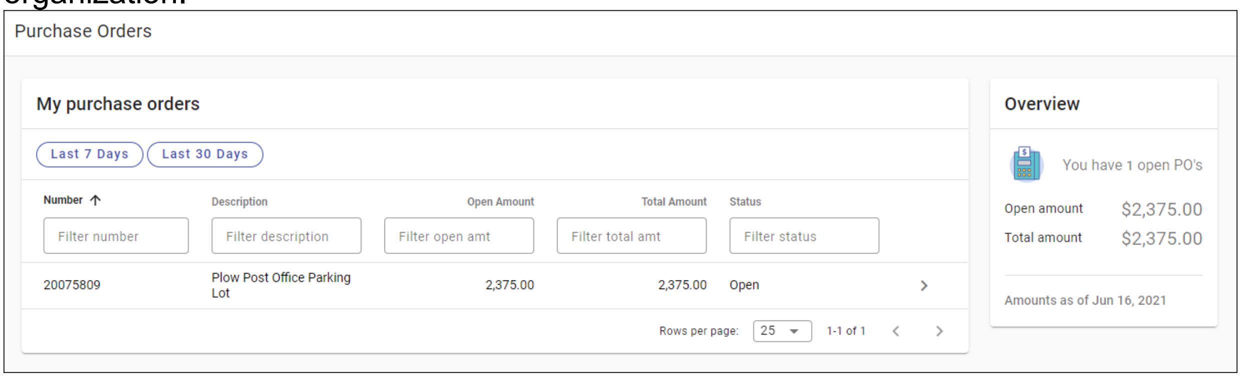
This feature is not available now.

Commodities

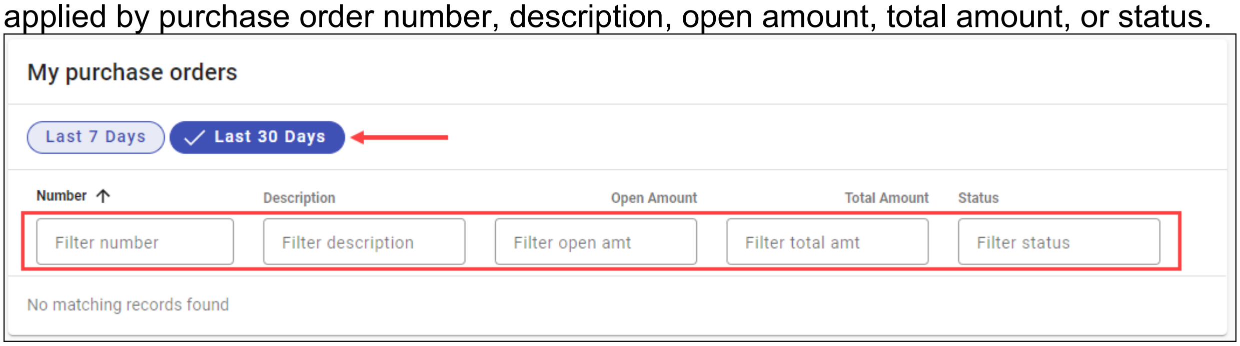
This feature is not currently set up.

Purchase Orders

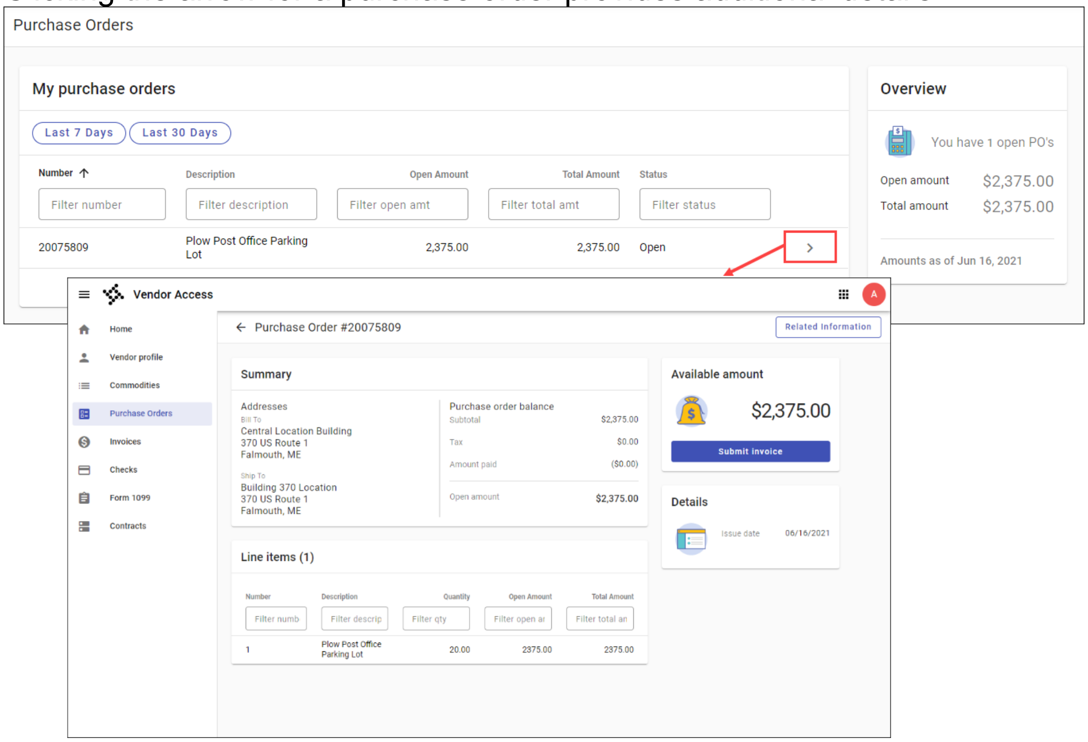
Purchase Orders provides a list of purchase orders issued to the vendor from your organization.



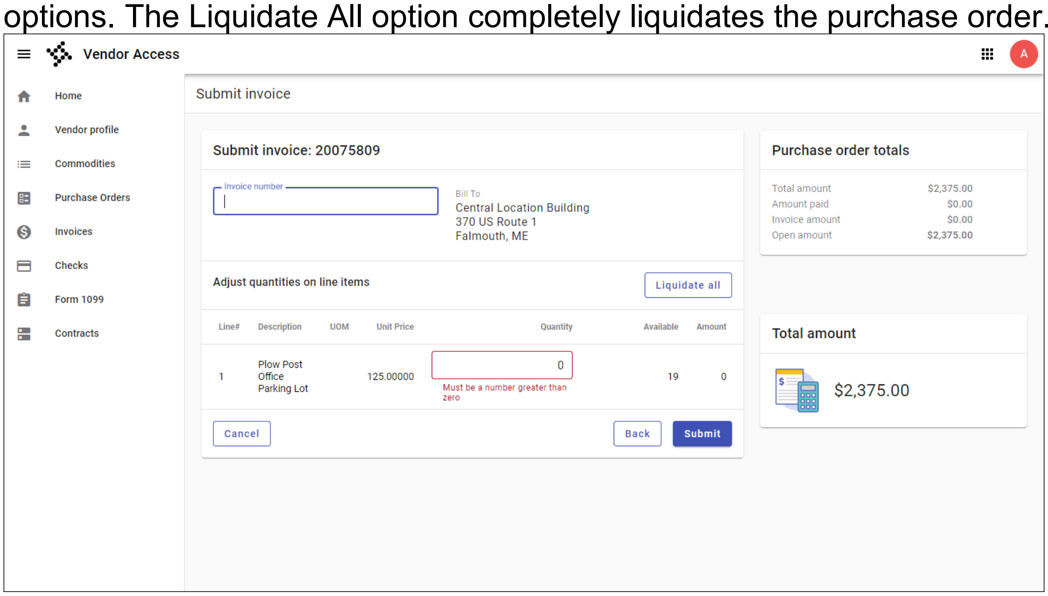
The Last 7 Days and Last 30 Days filters allow vendors to quickly view the purchase orders that have been issued in the past week and past month. Filters can also be applied by purchase order number, description, open amount, total amount, or status.



Clicking the arrow for a purchase order provides additional details.



Clicking Submit Invoice provides a screen with fields to enter the invoice number to submit in reference to the selected purchase order, as well as line-item liquidation options. The Liquidate All option completely liquidates the purchase order.



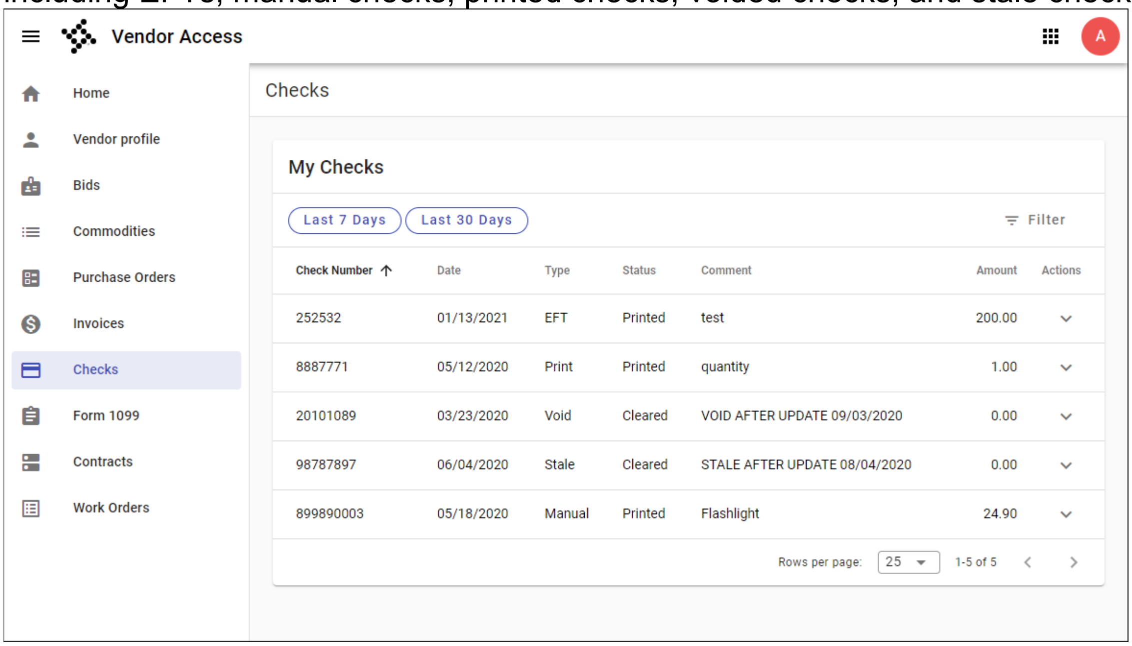
Click Submit to finish submitting the invoice to the organization. Click Back to return to the previous screen of purchase order details. Click Cancel to return to the home page.

Invoices

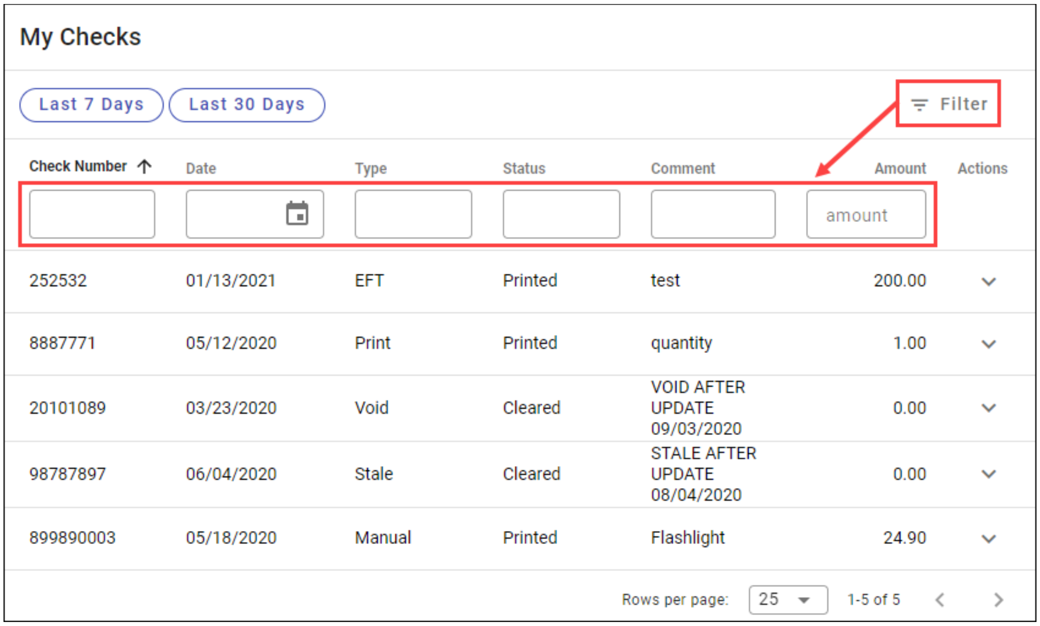
This feature is not set up yet.

Checks

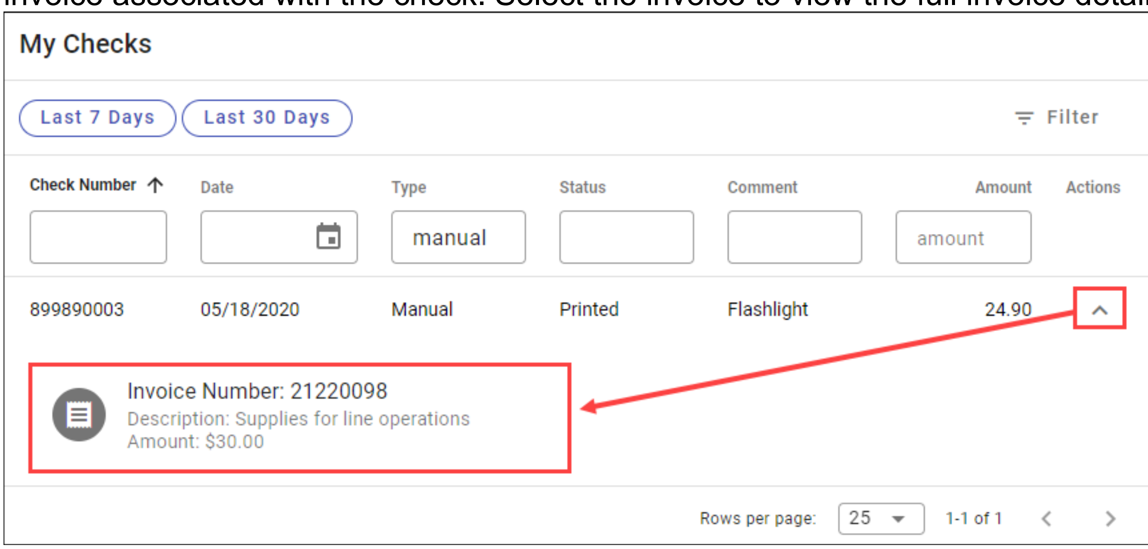
Clicking Checks displays a list of the checks that have been issued to the vendor, including EFTs, manual checks, printed checks, voided checks, and stale checks.



The checks can be filtered by the last 7 days or the last 30 days. Clicking the Filter option provides additional fields to apply specific filter criteria to the results, such as a check number, date, or amount.

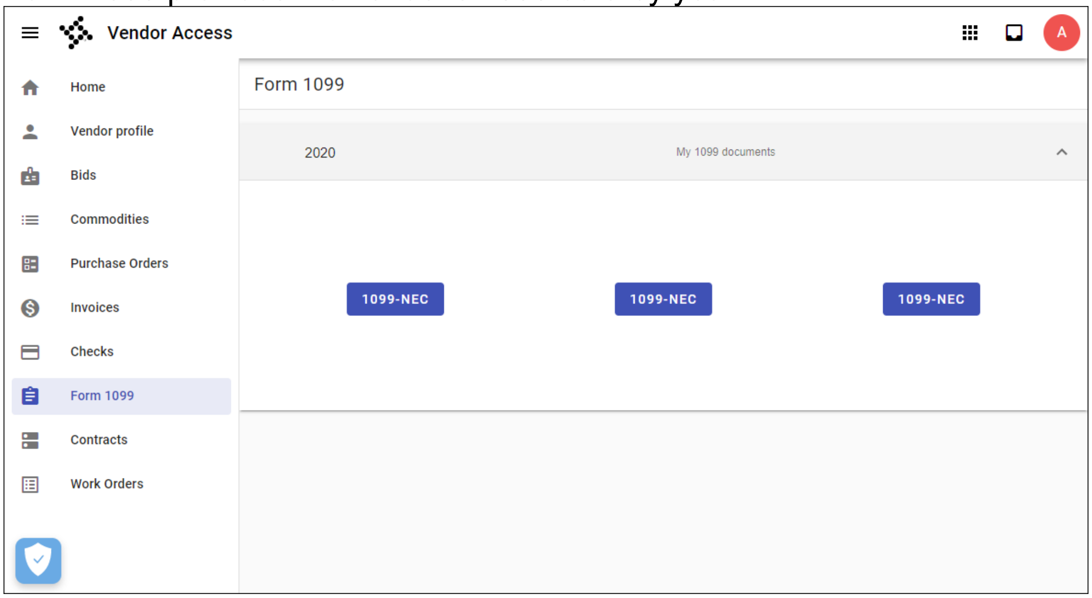


Clicking the arrow for an individual check provides additional information, such as the invoice associated with the check. Select the invoice to view the full invoice details.

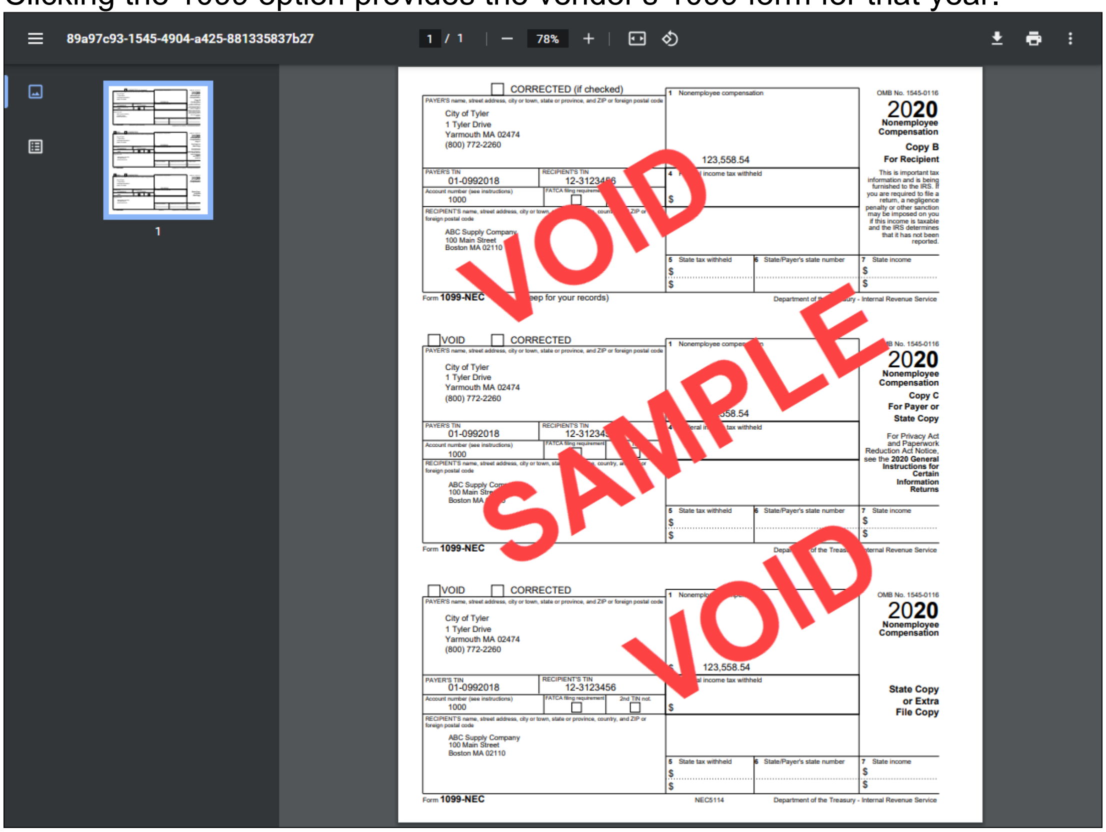


Form 1099

Form 1099 provides the vendor's 1099 data by year.

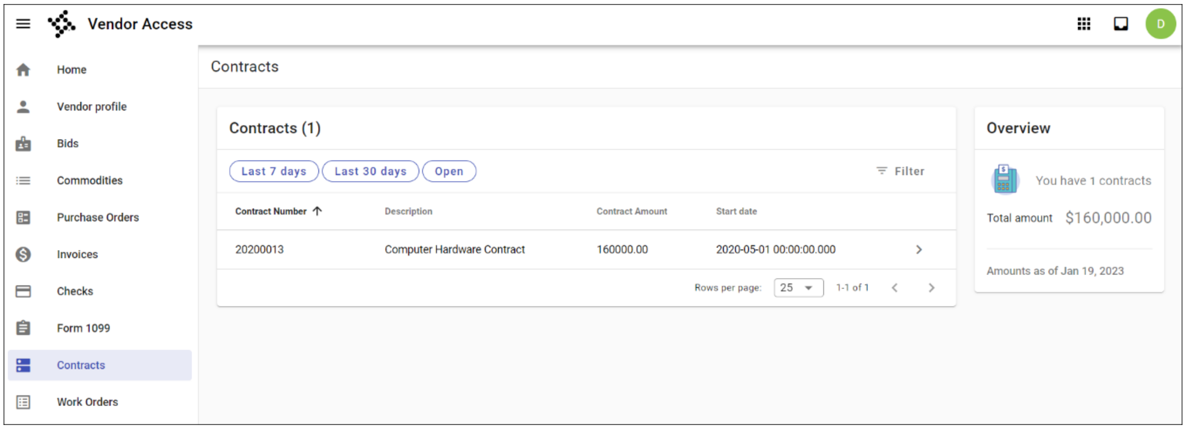


Clicking the 1099 option provides the vendor’s 1099 form for that year.



Contracts

The vendor's associated contracts are provided in the Contracts section.



Click the arrow for a contract to view the contract details, including a summary, general information, the contract balance, available amount, and any associated items.