# 2024

# City of Greenville Vendor Registration Guide

Purchasing Division City of Greenville 12/12/2024

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## Welcome!

Thank you for taking the opportunity to register your firm as an official City of Greenville vendor! Included in this guide are step by step instructions to assist you in registering for our online vendor portal, Vendor Self Service (VSS). As a registered vendor, you will enjoy the benefit of 24 hours a day, 7 days a week access to your existing vendor information including:

- 1099 Data
- Purchase Orders
- Invoicing/Payment Information

Whether you are currently an active vendor (existing vendor) with the City or a vendor registering for the first time, VSS will be your one stop shop for tracking business with the City.

## Find your VENDOR ID on the PDF copy of your check when receiving electronic payment notifications.

Before getting started:

- Create an electronic file of each document required for registration to add to your profile. **All** registrants are required to include a copy of your W-9 (Request for Taxpayer Identification Number and Certification). Locate a copy of the W-9 form online at <u>https://www.irs.gov/pub/irs-pdf/fw9.pdf</u>
- Scan a copy of a voided check or a document from your banking institution listing your routing and bank account number.
- All MWBE vendors create an electronic file of your certification documentation.

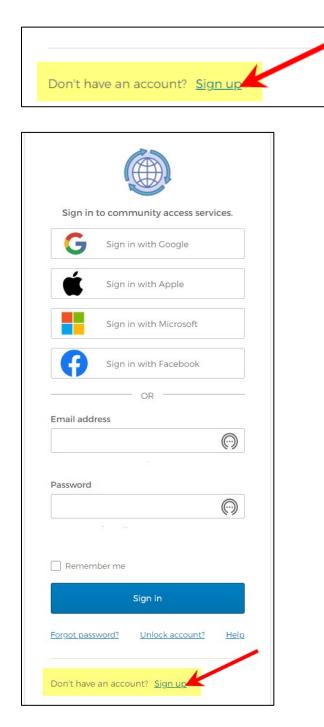
# New Vendor Registration Guide

Ready to begin:

- 1. Visit the City of Greenville VENDOR SELF-SERVICE Home page. https://selfservice.greenvillenc.gov/vss
- 2. Select LOG IN/REGISTER.

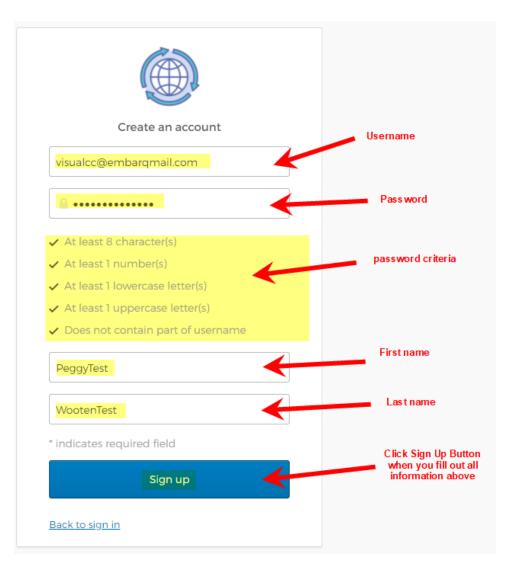
	6
	Welcome to Vendor Self Service
Home	
Vendor Self Service	Log in or register as a user to begin using Vendor Self Service
	Log in / Register
	Welcome to City of Greenville Vendor Self Service—Where you can do business in good company!
	VSS gives existing and potential vendors access to their information online. Contracted Vendors have the ability to view Purchase Orders, invoices, and Payments at any time. All vendors have the option of providing company information, including commodities you provide to be included in the City's database of firms.
	Existing Vendors will need their vendor number and Federal ID# to complete their registration. If your Federal ID# does not match when entered, please send an email to accounts revealed agreenvillence gos.
	Utilize this <u>Vendor Registration Guide</u> to complete your registration. Should you need additional assistance, contact the Purchasing Division at 252-329-4664.
	Minority and Women Business Enterprises The City has adopted a MWBE Plan to enhance our ability to do business with small, minority, and women-owned businesses. Vendor Registration will allow you to select your ownership status and to attach any certifications you may already have. If you are a MWBE and would like to learn more about the program, visit the <u>MWBE Homesage</u> .
	Eligible Local Bidders The City has also adopted a local preference policy. If your business is located within the city limits or extra-territorial jurisdiction (EI), select the appropriate Geographic code during your registration process. Please, be aware that inside city limits refers to the City of Greenville and not the city of your business if different then Greenville. To learn more, view the

3. If no account, select "Sign-Up" at the bottom of the screen.

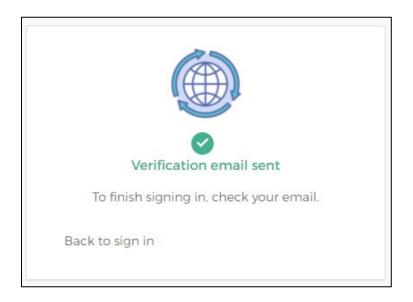


## 4. Example of Signing Up a New Vendor Account

- **a.** Fill out the fields below, your email address.
- **b.** Fill out the username, password (make sure you meet the criteria and write the password down because you will need it later).
- c. Fill out the First Name and the Last Name
- d. Click "Sign Up" Button



5. After you Click Sign Up, you will receive this message.



## 6. You will receive an email to "Activate Account."

- **a.** We cannot "Activate" the user account, this information is sent to the email address that you used as the username.
- **b.** If you do not receive the email, check your Spam, Deleted, or Junk Mail.

0	Welco	me to your Community Access account	October 11, 2021 8:23 AM
$\bigcirc$	From:	Community Access Identity	
	То:	visualcc	
		okta	
		ORCA	
		Hi PeggyTest,	
		Welcome to your Community Access account!	
		Your town uses Community Access using Tyler Technologies and Okta to manage access to town applications.	
		This means you can conveniently access all applications your town has to offer, as well as applications in other towns that are also using Tyler Technologies software.	
		Learn more about Community Access.	
		To verify your email address and activate your account,	
		please click the following link:	
		Activate account	
		This is an automatically generated message from Community Access. Replies are not	
		monitored or answered.	

## 7. After you "Activate" your account, go back to: <u>https://selfservice.greenvillenc.gov/vss/.</u>

- a. Click Home
- **b.** Click Vendor Self Service
- **c.** Click Log in/Register

← → C ① ▲ selfservice.c ∴ Apps	reenvillenc.gov/vss/Vendors/default.aspx	
Home 1	Welcome to Vendor Self Service	
Vendor Self Service		Log in or register as a user to begin using Vendor Self Service

- 8. When your account is activated, it will take you to your profile screen and at this point you can change your password or (we will email the username and password that we initially setup for you).
  - **a.** You must choose which Account you want to use to sign in: Google, Apple, Microsoft or Facebook.

Sign in	to community access services.
G	Sign in with Google
Ú	Sign in with Apple
	Sign in with Microsoft
G	Sign in with Facebook
	OR
Email addı	ress
visualcc@	embarqmail.com
Password	
•••••	

9. Once logged in you can finish registering as a Vendor - click CREATE NEW VENDOR.

	Welcome to Vendor Self Service
Home	
Vendor Self Service	
	No vendor information is linked to your account.
	In order to fully use Vendor Self Service, please either register a new vendor or link to an existing vendor.
	Create New Vendor OR Link to Existing

10. A New Vendor Screen will appear, fill out information as requested. (County & Geographic are for NC Vendors only.) Click Continue when completed.

Your User ID and password have been successfully set. Please continue with the re	gistration process. 🚳			
Enter Vendor Registration Information				
Help				
Company Information	Vendor Address			
Company Name*	Address*			
Line 2 (OPTIONAL)	Line 2 (OPTIONAL)			
Line 3 (OPTIONAL)	Line 3 (OPTIONAL)			
Line 4 (optional)	Line 4 (OPTIONAL)			
Doing business as (if different from above)	City *	State *		
Vendor Type		N/A V		
Foreign Entity	Zip Code *	County		
$\Box$ Send Accounts Payable checks to the above address				
Gend Purchase Orders to the above address E-mail *	Country	Geographic Select Type		
	Fax Number			
Website				
DUNS	Minority Business Enter Minority Business Enterprive Minority Business Enterprise ( Gelect all (hat apply)	ise		
California Permit Number	(select an that apply)			

For MWBE firms: Additional steps are required. <u>All other firms skip MWBE information and complete the</u> remaining fields on this page.

- 11. If a Minority Business please select each classification that applies to your business. (See Red Arrows) If you meet one of the classifications but do NOT have a third party certification (ie. NC Office for Historically Underutilized Businesses, NC Department of Transportation, etc.), please select "Self Certification" in addition to the other classifications selected.
  - a. For each classification, select MANAGE to add detail certification information. (see Black errows)

### **Minority Business Enterprise** Minority Business Enterprise Minority Business Enterprise Classifications (select all that apply) African American 0 certifications manage American Indian Asian American Disabled Disadvantaged Business Enterpr Female (Non-Minority) 0 certifications manage General 0 certifications manage Hispanic or Latino Other Self Certified 0 certifications manage Socioeconomically Disadvantage \*Gender \*Ethnicity Select Type... Select Type... Select Type... UNSPECIFIED AMERICAN INDIAN/ALASKA NATIVE **Payment Terms** ASIAN AMERICAN AFRICAN AMERICAN Your preferred payables delivery method(s). HISPANIC CAUCASIAN 🗌 Mail 🛛 🖉 E-Mail NATIVE HAWAIIAN/OTHER PACIFIC Your preferred purchasing delivery method(s). 🗌 Mail 🛛 🖉 E-Mail

12. On this page, click ADD NEW CERTIFICATE to enter all required information and any notes you desire. Complete the MANAGE step for each of your classifications. NOTE: You will have the opportunity to upload a copy of your certification letter at the end of the registration process.

eneral information			
Help			
Selected MBE Classifica	tion		
Serial ID	3		
Description	African American		
Add new certificate	>		
Existing Certificates			
There are no certificates	associated with this MBE Classification		
Certificate Details  Agency * (300 character limit)			
300 ren	aining		
Issue Date *			
Issue Date * Expiration Date *			
Expiration		]	

## New Vendor Registration Manage MBE Classification Certificates

Help	
Selected MBE Clas	sification
Serial ID	3
Description	African American
Add new certificat	e
Existing Certificate	25
There are no certific Classification	cates associated with this MBE

#### 13. This screen is for entering a different business name, if you do business under another name.

**a.** Click Add to enter information as requested.

	*	Munis Self Service	
	New Vendor Registration		
Home	Address information		
Vendor Self Service			
Registration	Addresses		
<	add		
	Name/DBA	Address	Is Default
		Continue	

14. In this section enter the various Contacts within your company. (General, Accounts Payable, Purchasing) The first entry will automatically populate with your information. Save to continue.

## Vendor Information Contacts Information: Make Changes

Contact Person	
* Contact Type	
Select Type	~
Select Type	
GENERAL - General Contacts	
ACCOUNTS PAYABLE - Accounts Payable Contacts	
PURCHASING - Purchasing Contacts	
Description	
* Phone	
Text	
	🗌 Opt In
-	
Fax	
* E-mail	

15. Select COMMODITIES that best match your goods or service that apply to your business. The City uses the NIGP coding system to classify products and services. If you are not certain of the appropriate code, use the search field to search by keyword. You will receive a confirmation email listing all of the Commodity Codes selected.

🜩 <u>Greenville</u>			🐝 Munis Self Service	Deg In	
$\rightarrow$	Select C	omm	odities	Â	
Home	Select Com	nmoditie	;	Step 35	
Vendor Self Service					
Registration	Search for	Search for your commodities/services, then select and "Add". Search again and repeat as necessary. Click "Finished" when done.			
	Keyword(s) commodity (first 3 or more	code	ucks Search		
		Lis	t all commodities/services		
	3 Found				
	1-3				
	Select All	Code	Description		
		055	AUTOMOTIVE ACCESSORIES FOR AUTOMOBILES, BUSES, TRAILERS, TRUCKS, ETC.		
	•	072	TRUCKS (INCLUDING, DIESEL, GASOLINE, ELECTRIC, HYBRID, AND ALTERNATIVE FUEL UNITS)		
		928	EQUIPMENT MAINTENANCE AND REPAIR SERVICES FOR AUTOMOBILES, TRUCKS, TRAILERS, TRANSIT BUSES AND OTHER VEHICLES		
	Add				
	Currently Ad	dded			
	There are no	commoditi	es to display for this vendor.		
			Continue Cancel		

16. Once you have added all Commodity Codes that apply, select CONTINUE. Review information that has already been entered. You will receive an email outlining the Commodity Codes you select.

• Greenville	×\$. №	tunis Self Service	➡) Log In
	New Vendor Registration		1
Home	Review		Step 37
Vendor Self Service			
Registration	Please check that the information below is correct. Make changes if neces	ssary, then click on "Register."	
	General Information change		
	Name/DBA	FILLMORE TRUCKING	
	Entity		
	Address	1600 PENNSYLVANIA AVENUE WASHINGTON, NC 27836 BEAUFORT COUNTY, USA	
	Fax Number		
	FID	56-1234567	
	Geographic		
	E-Mail	frouse@greenvillenc.gov	
	Web Site		
	Vendor Type	B BUSINESS	
	Gender		
	Ethnicity		
	Foreign Entity	No	
	Minority Business Enterprise (MBE)	Yes	
	MBE Classification(s)	- African American - General	
			-
	©2017 T	yler Technologies, Inc.	

17. Scroll to the bottom of the screen. Attach all required information. <u>All vendors must attach W-9 Form and</u> <u>bank account information.</u> All MWBE vendors please attach certification documents, if you did not previously done so. Finally, select REGISTER.

NOTE: You must accept the TERMS and CONDITIONS to complete registration.

Attachment Type	Description	Required	Attachments	
General	Documents are not assigned to a type		(0)	
Terms and Conditions Message				

18. Once you have registered, you will see the confirmation message below. Your registration is complete. You will also receive an email stating that your registration is complete. You will be notified by the City via email when your information has been reviewed.

New Vendor Registration Cor Registration has be	-
You can now:	
	nodities/services and/or update your profile. nt documents to your profile.

## **EXISTING** Vendor Registration Guide

- 1. Visit the City of Greenville VENDOR SELF-SERVICE Home page. https://selfservice.greenvillenc.gov/vss/vendors/
- 2. Select Log in/Register.

• Greenville	6
	Welcome to Vendor Self Service
Home	
Vendor Self Service	Log in or register as a user to begin using Vendor Self Service
	Log in / Register
	Welcome to City of Greenville Vendor Self Service—Where you can do business in good company!
	VSS gives existing and potential vendors access to their information online. Contracted Vendors have the ability to view Purchase Orders, Invoices, and Payments at any time. All vendors have the option of providing company information, including commodities you provide to be included in the City's database of firms.
	Existing Vendors will need their vendor number and Federal ID# to complete their registration. If your Federal ID# does not match when entered, please send an email to accounts asyable@greenvillenc.goy.
	Utilize this <u>Vendor Registration Guide</u> to complete your registration. Should you need additional assistance, contact the Purchasing Division at 252-329-4664.
	Minority and Women Business Enterprises The City has adopted a MWBE Plan to enhance our ability to do business with small, minority, and women-owned businesses. Vendor Registration will allow you to select your ownership status and to attach any certifications you may already have. If you are a MWBE and would like to learn more about the program, visit the <u>MWBE Homepage</u> .
	Eligible Local Bidders The City has also adopted a local preference policy. If your business is located within the city limits or extra-territorial jurisdiction (ETD), select the appropriate Gregraphic code during your registration process. Please, be aware that inside city limits refers to the City of Greenville and not the city of your business if different then Greenville. To learn more, view the

- 3. If you don't have an email registered to the vendor account click "Sign in with Google"
- 4. Once your email is registered, Select, Link to Existing. (see Below)

		4
	Welcome to Vendor Self Service	
Home		—
Vendor Self Service	No vendor information is linked to your account. In order to fully use Vendor Self Service, please either register a new vendor or link to an existing vendor. Create New Vendor OR Link to Existing	

5. Please enter your VENDOR # (from the City of Greenville) and your FID/SSN to have your vendor information pre-populate. Then select, Link to Existing.

		<u> </u>
	Link to Existing Vendor	
Home		
Vendor Self Service	Q	
	Enter the information below to search for an existing vendor.	
	Vendor Number Vendor FID/SSN	
	Link to Existing	

6. You should be automatically directed to the Vendor Information Section once your account is linked. In this section enter the various Contacts within your company. (General, Accounts Payable, Purchasing) The first entry will automatically populate with your information. Save to continue.

## Vendor Information Contacts Information: Make Changes

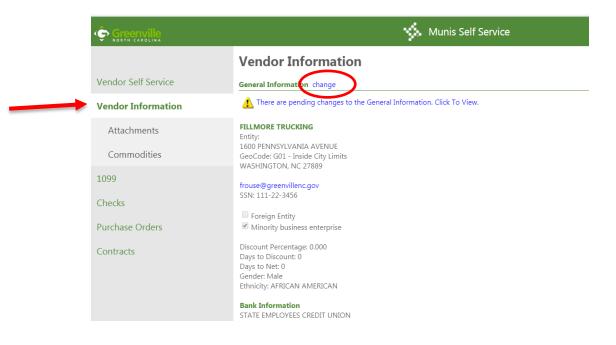
Contact Person	
* Contact Type	
Select Type 🗸	
Select Type	
GENERAL - General Contacts	
ACCOUNTS PAYABLE - Accounts Payable Contacts PURCHASING - Purchasing Contacts	
Description	
* Phone	
Text	
	🗌 Opt In
Fax	
* E-mail	

The next screen will be a "Welcome to Vendor Self-Service" Screen. Select VENDOR INFORMATION to the left. All of your current vendor information will appear.

NOTE: If you were a registered vendor with the City after July 2015, the system may require you to enter a commodity before sending you to the "Welcome to Vendor Self Service" screen.

If so, select COMMODITIES that best match the goods or service. Please select all codes that apply for your business. The City uses the NIGP coding system to classify products and services. If you are not certain of the appropriate code, use the search field to search by keyword.

7. Select CHANGE beside General Information to update the appropriate fields.



- 8. If a Minority Business please select each CLASSIFICATION that applies to your business. (See Red Arrows) If you meet one of the classifications but do NOT have a third party certification (ie. NC Office for Historically Underutilized Bussinesses, NC Department of Transportation, etc.), please select "Self Certification" in addition to the other classifications selected.
  - a. For each classification, select MANAGE to add detail certification information. (see Black errows)

### **Minority Business Enterprise**

Minority Business Enterprise Minority Business Enterprise Classifications (select all that apply)

🔸 🗹 African American 🤇	0 certifications manage
🗆 American Indian	
Asian American	
Disabled	
Disadvantaged Business Enterpr	
🔶 🗹 Female (Non-Minority)	0 certifications manage
🔶 🗹 General	0 certifications manage
Hispanic or Latino	
Other	
➡ 🕑 Self Certified	0 certifications manage
Generation Socioeconomically Disadvantage	
*Gender	*Ethnicity
Select Type 👻	Select Type
Payment Terms Your preferred payables delivery method(s).	Select Type UNSPECIFIED AMERICAN INDIAN/ALASKA NATIVE ASIAN AMERICAN AFRICAN AMERICAN HISPANIC CAUCASIAN NATIVE HAWAIIAN/OTHER PACIFIC
Your preferred purchasing delivery method(s)	107 - 500
	NATIVE HAWAIIAN/OTHER PACIF

9. On this page, click ADD NEW CERTIFICATE to enter all required information and any notes you desire. Complete the MANAGE step for each of your classifications. NOTE: You will have the opportunity to upload a copy of your certification letter at the end of the registration proce

# Vendor Information - General Information and Terms Manage MBE Classification Certificates

## Selected MBE Classification

Serial ID	3	
Description	African Ameri	can
Add new certific		
There are no certi Classification	ficates associated with t	this MBE
	Changes Complete	Cancel All

10. Select CHANGE beside CONTACTS to ADD additional contacts for PURCHASING and ACCOUNTS PAYABLE inquires.

	Munis Self Service						Resources FILLMORE TRUCKING
Vendor Self Service	Address Information	change		Address			▲ Is Default
Vendor Information	Contacts change						
Attachments		changes to the Contact	Information. Click To Vie	2W.			
Commodities	Туре	Name	Title	Email	Phone	Fax	
1099	GENERAL	MILLIARD FILLMORE		frouse@greenvillenc.gov	2523294462		
Checks							
Purchase Orders	Commodities add						
Contracts	Code	Description					
		Hauling Services					
	96239					Remove	
		©20	018 Tyler Technologies, I	nc. Help/Feedback			

#### 11. Next, select ADD NEW CONTACT.

			Munis S	Self Service		Resources FILLMORE TRUCKING
Vendor Self Service		nformation	anges			
Vendor Information	Address Contacts	s Name	Description	Email	Telephone	
Attachments	GENERAL	MILLIARD FILLMORE	·	frouse@greenvillenc.gov	Phone: 2523294462 Text: Fax:	
Commodities			(	Add New Contact Conti	nue	
Checks						
Purchase Orders						
Contracts						
		©2	018 Tyler Technologie	s, Inc. Help/Feedback		

- **12.** Select CONTACT TYPE and complete other fields as requested, Save to continue.
  - **\*\***You can select multiple contacts for each type.

• Greenville		🐝 Munis Self Sen	rice	Deg In
	New Vendor Registration	1		
Home	General Vendor Contacts			Step 4
Vendor Self Service				
Registration	Contact Person			
	*Contact Type	GENERAL - General Contacts		
	*Name	MILLARD FILLMORE		
	Description	President		
	*Phone	252-354-1254		
	Text		Opt In	
	Fax			
	E-Mail			
		Si	ave Cancel	

13. All existing vendors have commodity code "99998" if you registered prior to July 2015. Please select ADD under COMMODITIES to update this information to include the appropriate code(s). Please select all codes that apply for your business. The City uses the NIGP coding system to classify products and services. If you are not certain of the appropriate code, use the search field to search by keyword.

	Munis Self Service					Resources FILLMORE TRUCKING	
Vendor Self Service	Address Informa	tion change		Address			Is Default
Vendor Information	Name/DDA			Address			is Delault
Attachments	Contacts change	ending changes to the Con	tact Information. Cl	lick To View.			
Commodities	Туре	Name	Title	Email	Phone	Fax	
1099	GENERAL	MILLIARD FILLMOR	E	frouse@greenvillenc.gov	2523294462		
Checks							
Purchase Orders	Commodities						
Contracts	add	Description					
	96239	Hauling Services				Remove	
			©2018 Tyler Techn	ologies, Inc. Help/Feedback			*

14. On the left hand side of the screen, click ATTACHMENTS to add your files. <u>All vendors must attach W-9 Form</u> <u>and bank account information.</u> All MWBE vendors please attach certification documents. You must accept the Terms and Conditions to complete registration at the bottom of the page.

Vendor Self Service
Vendor Information
Attachments
Commodities
1099
Checks
Purchase Orders
Contracts

# Vendor Information - General Information and Terms Manage MBE Classification Certificates

Selected MBE Class	ification	
Serial ID	3	
Description	African Americ	an
Add new certificate		
There are no certifica Classification	ates associated with t	his MBE
Cł	anges Complete	Cancel All

15. You may now LOG OUT at the top right once you have added your attachments. Your updates are complete. You will receive an email notification once your changes have been accepted.

# **Password Reset Vendor Self-Service**

## 1. Click on link for Forgot Password

Election in a	~		
aign in t	to community access services.		
G	Sign in with Google		
Ś	Sign in with Apple		
	Sign in with Microsoft		
Ø	Sign in with Facebook		
	OR		
Email addr	055		
	Θ		
Password	Θ		
🗌 Remem	ber me		
	Sign in		
Epropt. pass	word? Unlock.account? Helo		
Don't have	an account? Sign up		

Click on BACK TO LOGIN SCREEN and follow the instructions on the screen to log in.

Log in

Forgot your password?



2. If the password hint does not help, generate a new password by following the link provided in the email sent. Click SUBMIT.



3. A new email will be sent with a temporary password. Follow link back to the login page, and use your username and temporary password to reach the change password screen below.

