Vendor Self Service Guide

Revised October 2016

Vendor Relations Program Coordinator
vendors@pima.gov
520-724-8465
Registration Tips:

Please allow 30 minutes to complete your Pima County vendor account

Before you begin, make sure you have the following information on hand

- Tax ID Number (This can also be your SSN if you are an individual)
- Legal Business Name
- DBA Name (if applicable)
- Contact Information (name, address, email, phone and fax number) for the following:
  - Account Administrator (person responsible for your account)
  - Ordering
  - Payment
- Description of your products and services (Commodity Codes)
  - Note: Commodity codes selected will determine which solicitation email notices your organization will receive. You will not receive notification of bids unless the appropriate commodity code is associated with your vendor account.

Please allow 48 hours for your Vendor Registration to be approved

Note: Vendors must register at least 48 hours in advance and submit a signed W-9 Form, in order to be awarded a contract.
You must be an active registered vendor in the Vendor Self Service (VSS) to be awarded a Contract, Purchase Order or Master Agreement.

A valid email address must be entered to do business with Pima County and to be notified of upcoming solicitations, etc.

To access the Vendor Self Service (VSS), go to the Pima County Procurement Home Page at http://webcms.pima.gov/cms/One.aspx?portalId=169&pageld=90700

- From the Procurement Home Page, click on New Vendor Registration/ Vendor Self Service
  - This opens the VSS Portal
This is the first page of the VSS System.

If you are registering in VSS for the first time, you must verify that you do not exist in the system or if you are a registered vendor, verify that your Vendor Registration is Active. (See next step under Verify Registration)

If you are certain that your Company or Individual data is already entered and your account is active, enter your USER ID and PASSWORD in the Registered Users section and select Login to proceed.

The first step is to verify your registration status:

- Under New Users, click the Register button, this will bring up the Memorandum of Agreement page.
Memorandum of Agreement

You must accept the terms of this Memorandum of Agreement in order to register as a vendor with VSS. If you choose not to accept these terms you will be returned to the HomePage for Guests.

By submitting this electronic vendor registration, you certify and warrant that you are duly authorized, by the Vendor to: (i) register the Vendor; (ii) file, on behalf of the Vendor, all of the information requested in this registration process; and (iii) enter into this Agreement on behalf of the Vendor. By submitting this electronic vendor registration, you hereby agree on behalf of the Vendor and for the benefit of each agency and public body that:

1. The Vendor shall use VSS vendor registration update functionality to update the Vendor's registration information whenever necessary to ensure that the registration information remains accurate and complete at all times.

2. The Vendor hereby warrants that the information provided by the Vendor through the VSS registration and VSS registration update functionality shall at all times be accurate, complete and current. The Vendor further warrants that each agency and public body shall be entitled at all times to rely conclusively on the currency, accuracy and completeness of the information the Vendor has provided through the VSS registration and VSS registration update functionality as of that date even if different information is or has been available to or received by agency or public body personnel through means other than the VSS registration and registration update functionality.

This Agreement shall remain in effect for as long as the Vendor is registered as a VSS vendor. All rights are reserved to cancel the Vendor’s registration at any time. In the event the Vendor’s registration is cancelled, the Vendor shall remain bound to this Agreement in regard to completion of any contract, purchase order or other electronic procurement transaction that was made or administered in whole or in part using VSS.

Registration Tips

- Review the information needed to start a new registration
- Click the Next button to continue

Registration Tips

Already registered? Click here to login. Otherwise, click Next to continue.

Assemble the following information before continuing:

- Information on each location (first location entered will be considered the Headquarters)
- Tax ID Number
- Legal Business name
- Contact Information (name, address, email, phone and fax)
  - Account Administrator (person responsible for your account)
  - Ordering
  - Payment
- Descriptions of your products and services (for example, commodity codes)
Search for an Existing Account

Note *(asterisk) can be used as a wildcard

- Choose to search by “Company” or “Individual” depending on your type of business
  - **Company Search** use your Tax Identification Number (TIN) OR Legal Business Name
  - **Individual Search** use your Last Name AND Last four digits of Social Security Number (SSN)
  - The TIN OR SSN should be entered without dashes
- Click on the corresponding **Search** button

Additional Resources & Information:

- As you complete each step and move to the next step, the system will check for errors. If there are errors:
  - A notification message will be displayed at the top of the page.
  - You must correct the errors indicated before continuing to the next step.
  - Additional Help can be found in the Frequently Asked Questions located on the left hand navigation bar.
DO NOT RE-REGISTER IF YOU APPEAR IN THE LIST

Based on the search results:

After you select search, you will get one of the following results. Proceed to the page number listed to complete the process.

1. Search for an Existing Account/Results Found – Activated YES .......... Page 7

2. Search for an Existing Account/Results Found – Activated NO .......... Page 8

3. Search for an Existing Account/ Results Not Found ............................. Page 11
1. Search for an Existing Account/ Results Found – Activated Yes

If you locate your Legal Name, verify the status – ACTIVATED? Yes

- If you know your log in, click Cancel Registration and return to the Login Screen
  - Log in with your User ID and Password
  - If you forgot your user name or password, contact Vendor Relations at 520-724-8465
    (Note: this is the same as Contact your Administrator)

Search for an Existing Account/Results Found

To activate your account you must have a vendor code. This page will help you determine whether or not you have one. You will not be able to create a new code if one already exists. If the account exists it will be designated as a company or individual based on the information you previously provided. Please select one of the search options below to determine if you already have a vendor code.

- **Company Search**
  
To see if you have a vendor code and have an Employer Identification Number (EIN) on file, first search by TIN:

<table>
<thead>
<tr>
<th>Taxpayer Identification Number</th>
<th>OR</th>
<th>Legal Business Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OR

- **Individual Search**
  
To see if you have a vendor code and have a Social Security Number (SSN) on file enter your Last Name and last four digits of your Social Security Number.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Last 4 digits of SSN</th>
</tr>
</thead>
<tbody>
<tr>
<td>villanueva</td>
<td>7856</td>
</tr>
</tbody>
</table>

The following exists for the information you entered:

<table>
<thead>
<tr>
<th>Vendor Number</th>
<th>Legal Business Name</th>
<th>Alias/DBA Name</th>
<th>Activated?</th>
</tr>
</thead>
<tbody>
<tr>
<td>V50000001259</td>
<td>ISABEL C VILLA NEVA</td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>

Has your account been found and listed above?

- Yes, but it is already registered
  
Click the “Contact your Administrator” link to determine who you need to contact for access.
2. Search for an Existing Account/ Results Found – Activated No

If you locate your Legal Name, and your account is not Active, Activated? NO

- Select Click here to activate your account

**Account Verification**

- Enter information to authenticate you as a valid user for this account
- Verify your account by entering your **TIN OR SSN** in the Vendor Verification Password box
  - Click the **Submit** button, this will take you to the **My User Information** Page
Please note: Required fields are marked with a red asterisk *

My User Information

- User ID: (case sensitive); save this user ID you will need this to continue with activation of your account
- First Name: use Proper Case
- Last Name: use Proper Case
- Email:
- Re-enter Email:
- Phone: XXX-XXX-XXXX
- Password: (case sensitive); save this password you will need this to continue with activation of your account
- Re-enter Password:
- Security Question:
- Security Answer: (case sensitive)
- Re-enter Security Answer: (case sensitive)
- Click the Next button

My User Information

Create your user ID here. You will be assigned the role of Primary Account Administrator. Please see the Frequently Asked Questions for additional details about the Primary Account Administrator role.

** General Information **
- User ID (case sensitive): PimaTest
  (User ID should be between 2 and 16 characters in length)
- First Name: Joe
- Last Name: Smith
- Email: testvenders@pima.gov
- Re-enter Email: testvenders@pima.gov
- Phone: 520-734-8465 Ext.: 
  XXX-XXX-XXXX
- Fax: 
  XXX-XXX-XXXX

** Password **
- Password (case sensitive): ********
  (Passwords should be between 2 and 16 characters in length)
- Re-enter Password: ********
- Security Question: What is your mother's maiden name? *
- Security Answer (case sensitive): ***
- Re-enter Security Answer: ***

* Indicates a required field

Additional Resources & Information:
Verify & Submit Registration

- You will receive four Informational messages in red
- Click the Submit Registration button

You have 4 messages:
1. Information: User access privileges have been changed to Account Administrator (AVS439)
2. Information: User Optional access privileges is updated with Tax inquiry vendor role.
3. Information: User Optional access privileges is updated with Create Invoice User role.
4. Information: User Optional access privileges is updated with Create Solicitation Response User role.

Verify & Submit Registration

Click the 'Submit Registration' button to complete your registration. You may review your registration prior to submitting it by clicking on the 'Back' button or navigating through the registration pages on the left menu.

Submit Registration

Thank You!

- A Thank You page will display
- Click on the X to Exit this page
- Find the VSS Link on the Pima County Procurement Home Page, Vendor Information Tab
- Log in with the User Name and Password you just created
- Verify your vendor account, update any information necessary

You will receive an Email of Acknowledgement of your Vendor Account

- Save Email for Future Reference
- Email will display User ID and Vendor Number

NOTE: You can skip the rest of this guide since you have completed the activation process.
3. Search for an Existing Account/ Results Not Found

- If you are not registered, click the New Registration button
  - Continue with the New Registration instructions
Please note: Required fields are marked with a red asterisk *

My User Information

- User ID: (case sensitive); save this user ID you will need this to continue with activation of your account
- First Name: use Proper Case
- Last Name: use Proper Case
- Email:
- Re-enter Email:
- Phone: XXX-XXX-XXXX
- Password: (case sensitive); save this password you will need this to continue with activation of your account
- Re-enter Password:
- Security Question:
- Security Answer: (case sensitive)
- Re-enter Security Answer: (case sensitive)
- Click the Next button
Verify Email Address, you must click the “Next” button to generate the email.

Verify Email Address

To continue your VSS registration, we must verify your email address. When you receive the email we send you, follow the link provided or copy the link into your browser.

Make sure your own security setting will not block the receipt of this email. To prevent the email from being blocked, add the following address to your email contacts: vendors@pima.gov

An email will be sent to the following address: testvendors@pima.gov

You must click the "Next" button to continue your VSS registration.

Additional Resources & Information:

- As you complete each step and move to the next step, the system will check for errors.
- If there are errors:
  - A notification message will be displayed at the top of the page.
  - You must correct the errors indicated before continuing to the next step.
- Additional Help can be found in the Frequently Asked Questions accessible from the left hand navigation bar.

Thank You!

- If you received the verification email, click the “Close Browser” button.

If you did not receive the verification email, follow the instructions provided on the pop-up window.

Thank You!

A verification email was sent to you.

1. Open the email
2. Click the link provided in the email

Cannot click the link in the email?

1. Copy the link from the email
2. Paste it into your browser

Have not received a Verification Email?

1. Login to VSS as an Activated User using your User ID and Password
2. Correct your email address and click Next
3. Click Next again to verify your email address
Check your Email Inbox, Open the Email from vendors@pima.gov

- Click on the link provided (if you cannot click on the link, copy & paste into your browser)

Isabel Testing:

By clicking the link below, you are verifying the email address that you have created for your Pima County Vendor Self Service (VSS) user information. This email address will be used as a primary method of correspondence.

If you cannot click on the link below, you may copy and paste it into your browser.

http://spxapp/webapp/VSSPROD1/AskSelfService?emailToken=0191360835749333765

Thank You.

Login

- After you click on the link, you will be transitioned to a VSS login page
- Enter the User ID and Password (you created for your account)
- Click the Login button to continue with registration

Login

To continue registration, enter your User ID and Password.

User ID

Password

Login
Step 1: Add Business Location – New Account Registration

Please note: You will be able to “Save and Close” at any time and continue your registration at a later time. If you click “Cancel Registration” at any time throughout the registration process it will completely cancel your registration and you will need to start over.

TIN Type
- Choose one of the following options that best describes your type of business
- Note: If you select the first option, use a “I will use a Social Security Number (SSN)”, be sure you select whether you have a SSN, ITIN or ATIN
Step 1: Add Business Location – New Account Registration - continued

Classification

- Choose one of the following options that best describes your type of business

Choose one of the following options that best describes your type of business

Classification

Select Classification

- Individual
- Sole Proprietor
- Partnership
- Corporation
- Nonresident Alien
- Trust
- Foreign Business Entity
- State Government
- Other Government
- Other
- Joint Venture
- Other Non-Profit Org
- Employee
- Estate
- LLC filing as Partner
- LLC filing as Corp
- LLC filing as Sole Prop
- Church/Religious Org
- Personal Service Corp
- Federal Government
- Resident Alien
- Customer

Hint: Use the Frequently Asked Questions to obtain a definition of the classifications.

Question

- If you have any issues with how you should answer any of these questions, click the Submit Question button or contact Vendor Relations at (520) 724-8465
- Click the Next Button

OR

Question

Select here to submit a question to Vendor Relations or call (520) 724-8465.

Submit Question

Save and Close | Cancel Registration | Next
Step 2: My Business Information

Please note: Required fields are marked with a red asterisk *. Some of the fields are populated with data gathered from the questions you previously answered. If any of the other fields are applicable to your company, please fill them in.

- **Organization Information:**
  - Organization Type: This section will auto-fill
  - Classification: This section will auto-fill; however, you can modify if needed by selecting the drop down.

- **Legal Name Information:**
  - If you have indicated that your organization is an individual, the First Name and Last Name field will appear for you to complete
  - If you have indicated that your organization is a Company, the Legal Name field will appear for you to complete
  - Enter the Name Information using **Proper Case**
Step 2: My Business Information - continued

- **1099 TIN Information**
  - Taxpayer ID Number: Enter your TIN OR SSN

- **Legal (1099) Address Information**
  - Street 1: Enter Street Address, this address is where Pima County will be sending your annual 1099 form, if applicable
  - City:
  - State/Province: Select from pull down list
  - Zip/Postal Code:

- **Discount Information/Executive Compensation**: Optional
- Click the **Next** button
Add Business Location – Address Information Questionnaire

This is a summary of the information provided on the previous page, please enter the following information about your Administrative, Ordering, Payment, and Billing addresses. Review for accuracy.

- **Address Questions** (Select Yes, if you will only be using the Legal Address Information for your Administrative, Ordering, Payment, and Billing address).
  - Answer the questions regarding the address listed above. If this is not the same address that you will use for Payment, Ordering or Billing, you will be able to add more addresses later.
  - Click the Next button.

![Add Business Location - Address Information Questionnaire](image)
Step 3: Addresses and Contacts

Some of the fields are populated with data gathered from the questions you previously answered.

- Uncheck the box next to Billing if you are not a customer. This address is Optional and will only be used if you are a customer with Pima County. A customer is someone who will be paying Pima County.
- Enter Phone Number for address given.

**Contact Information** - required fields are marked with * (red asterisk)

- Please note if you entered an Email address, then Correspondence Type should be email. If you did not enter an email address, then Correspondence Type should be Postal Service
- Enter Principal Contact
- Enter Phone Number
- Enter Email
- Select Correspondence Type (Email from the pull down)
- Click the Next button
Step 4: Additional Business Information

- Commodities: Select all Commodities that apply
  - Description of products and services that your organization provides.
  - Note: Commodity codes selected will determine which solicitation email notices your organization receives. You will not receive notification of bids unless the appropriate commodity code is associated with your vendor account.
- Click, the **Add** button
- Search by Commodity Code OR Commodity Description.
  - You can use an asterisk (*) to search.
- Click the “**Browse**” link
- Place a check mark next to the commodity.
  - Click the “**OK**” button to add the Commodity Code.
- Verify Commodity Code is showing under Commodities
Step 4: Additional Business Information - continued

- Business Types
  - Click the Add button
  - Click the “Next” link to view and select the Business Type that applies
- Place a check mark next to the Business Type you want to add
  - Click the “OK” button to add the Business Type
- Verify Business Type is showing under Business Types
- Click the Next button

Business Types

![Add button]

- Click the “Add” button to identify the appropriate business types for your organization. This information is optional.

<table>
<thead>
<tr>
<th>Business Type ID</th>
<th>Certification Number</th>
<th>Certification Start Date</th>
<th>Certification End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small, Caucasian, Local Owned</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Choose

Select one or more Business Types to associate to your organization by clicking the checkbox next to the commodity business type in Business Type search field and click the "Browse" link. Once your Business type(s) have been selected, click the "Browse" link to view the selected business types. Click the "Cancel" button to cancel the selection.

Business Types

![Add button]

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<tr>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

![OK button]
Vendor Self Service

Registration Summary, verify all information displayed for accuracy

- If you need to correct any information, click the Back button or the Update Information link in the corresponding section
- When information is correct, click the Submit Registration button

Thank You, you have completed the VSS Registration process for Pima County.
Save your log in, password & Vendor Code shown on the Thank you screen for future reference.

- Submit a Complete copy of the IRS W-9 Form to Fax Number 520-724-3646
- Please allow 48 hours to process your vendor registration
- You may “Print this Page” and exit out from VSS

Thank You!

Congratulations, you have completed the registration process. You may now login to Vendor Self-Service using the User ID and Password you just created.

Your Vendor Code is: VS0000015371
*Please save your Vendor Code for future reference

You may login to your VSS account to view and/or update your account information. Click here to login.