PIMA COUNTY

PROCUREMENT

Vendor Self Service: Account Maintenance

Revise April 2019

Pima County Vendor Relations
vendors@pima.gov

Table of Contents

Login to Vendor Self Service system, once vendor activation and registration is complete.

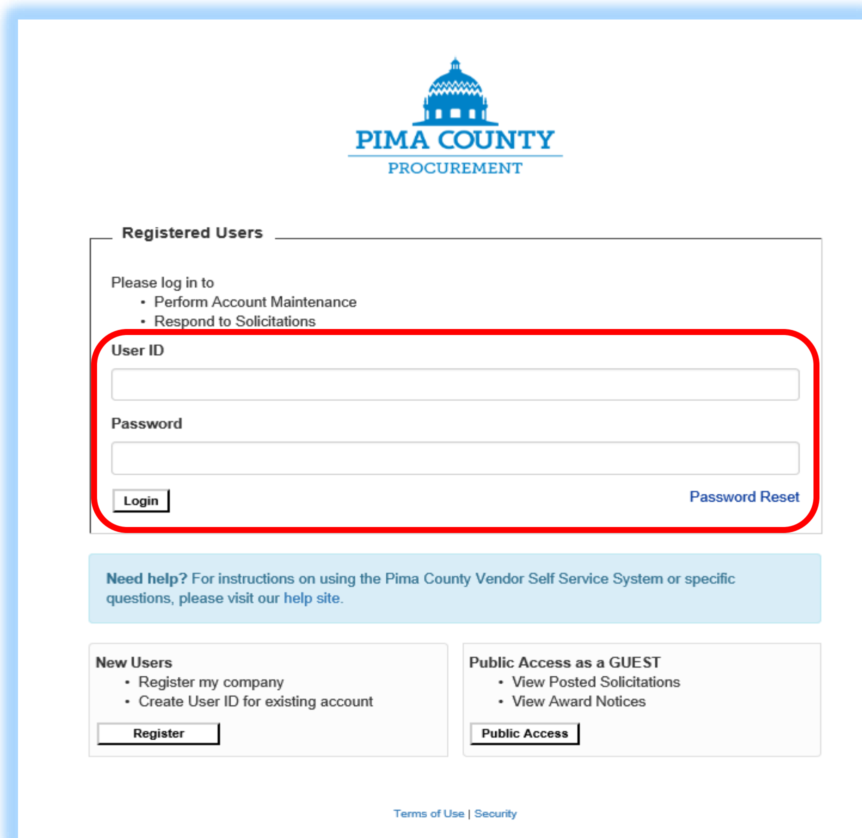
It is recommended that the vendor periodically reviews their account information to make sure is current and accurate.

Vendor account modifications will not be applied automatically. An automated process of matching up VSS and Pima County Internal Database must be completed before any account modifications will become final. During this time, the account modifications will be indicated in Pending Status.

Registered Users

Login to the Vendor Self Service system, using the User ID and Password you created on the registration process. Select **Login** to proceed and continue to **Account Information**

- If you know your Company or Individual name is registered with Pima County, and do not remember the User ID and Password; contact your account administrator or Vendor Relations at 520-724-8465 to assist with updating your password



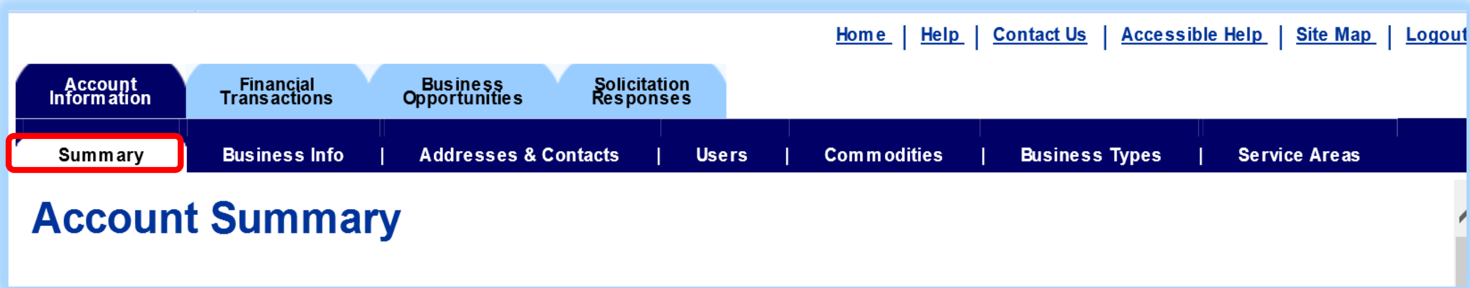
New Users - Search for an Existing Account

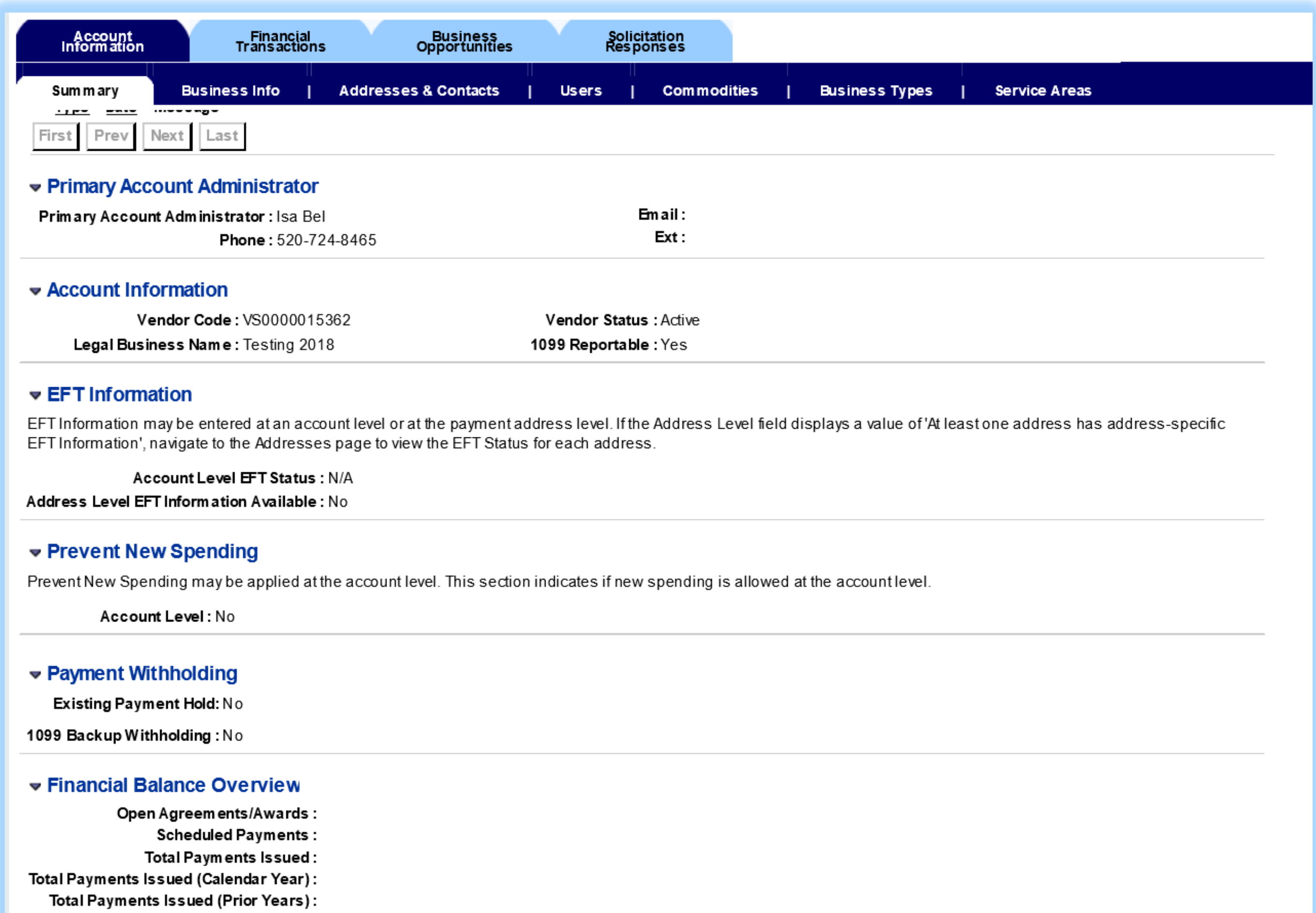
- If you are not certain you are registered with Pima County, please refer to the "**Pima County Vendor Self Service Guide**" located on the Procurement Homepage http://webcms.pima.gov/cms/One.aspx?portalId=169&pageId=90700

Account Information - Summary

After, logging into the Vendor Self Service with your User ID and Password, the **Account Summary** tab will display.

- Account Summary will allow you to view your account's general information.
- Only the Account Administrator and/or Full Access users will be able to make changes to the address fields.

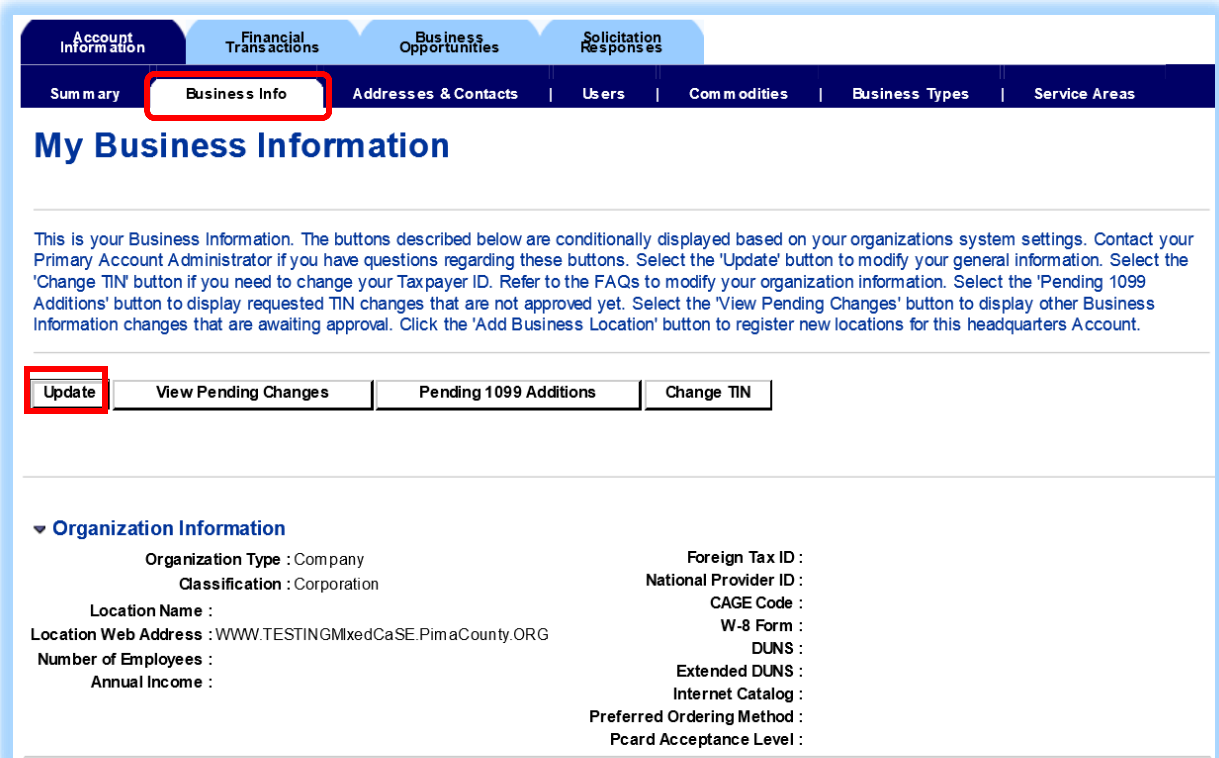




Account Information - Business Information

My Business Information will allow you to update your organizations Information, DBA and your 1099 legal address.

- Select the **'Update'** button to modify

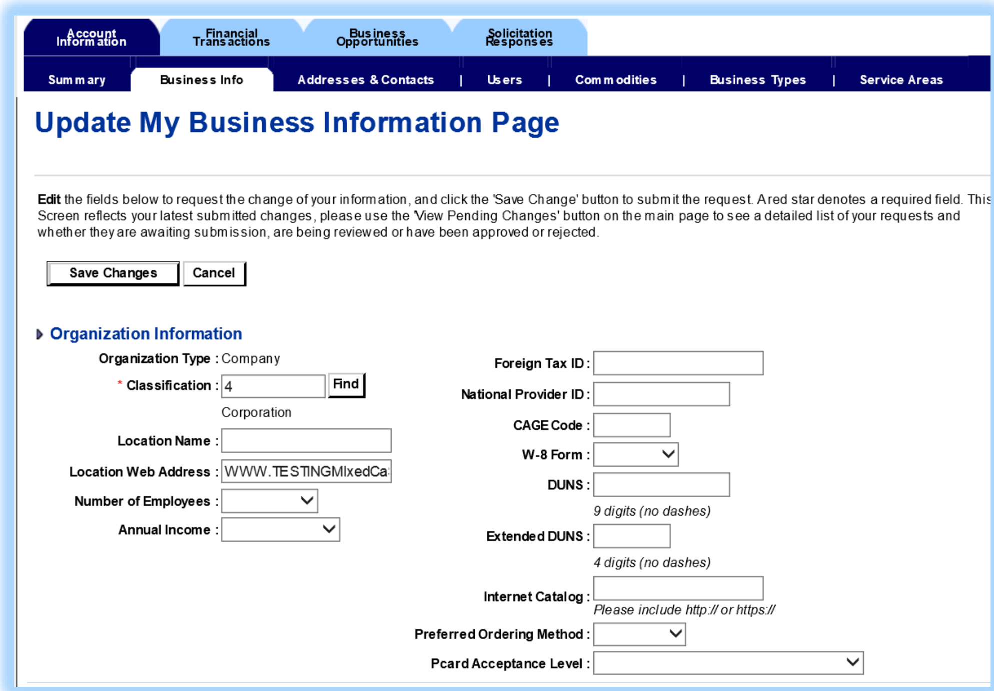


Please Note: If you need to make changes to Legal Name or Taxpayer ID number contact Vendor Relations by email vendors@pima.gov or call 520-724-8465.

Account Information - Business Information
Update My Business Information Page

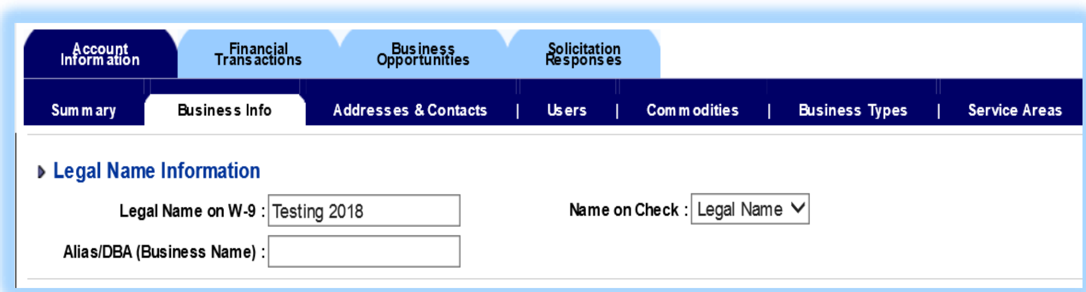
Organization Information allows you to update your Organizations

- Location Name
- Web Address
- Number of Employees
- Annual Income
- Cage Code
- DUNS Number



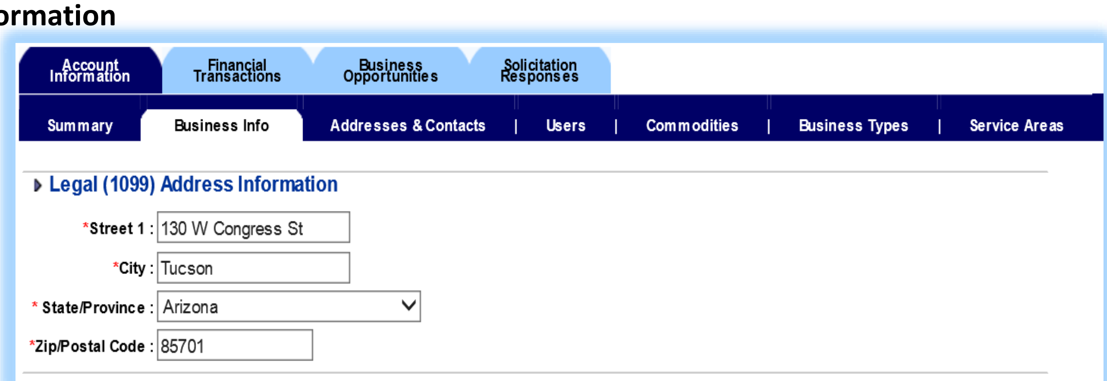
Legal Name Information allows you to update your Organization

- Alias/DBA (Business Name)



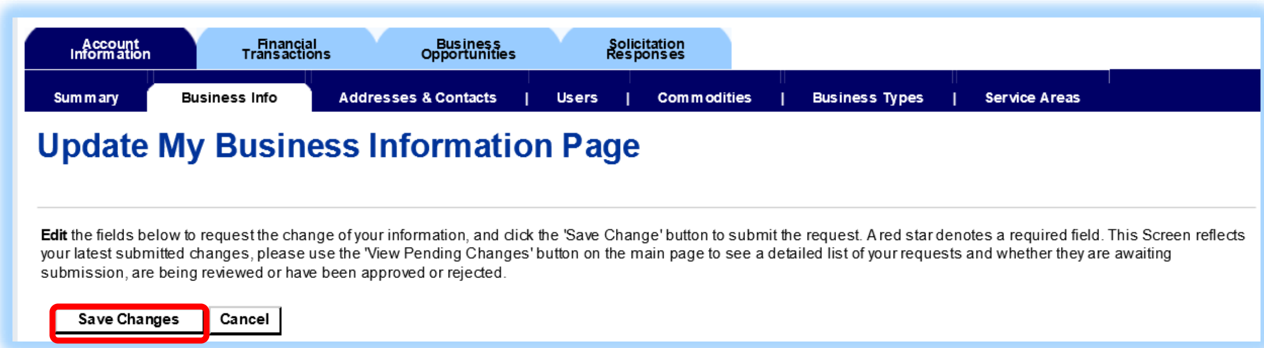
Legal (1099) Address Information allows you to update your Organization

- 1099 legal Address



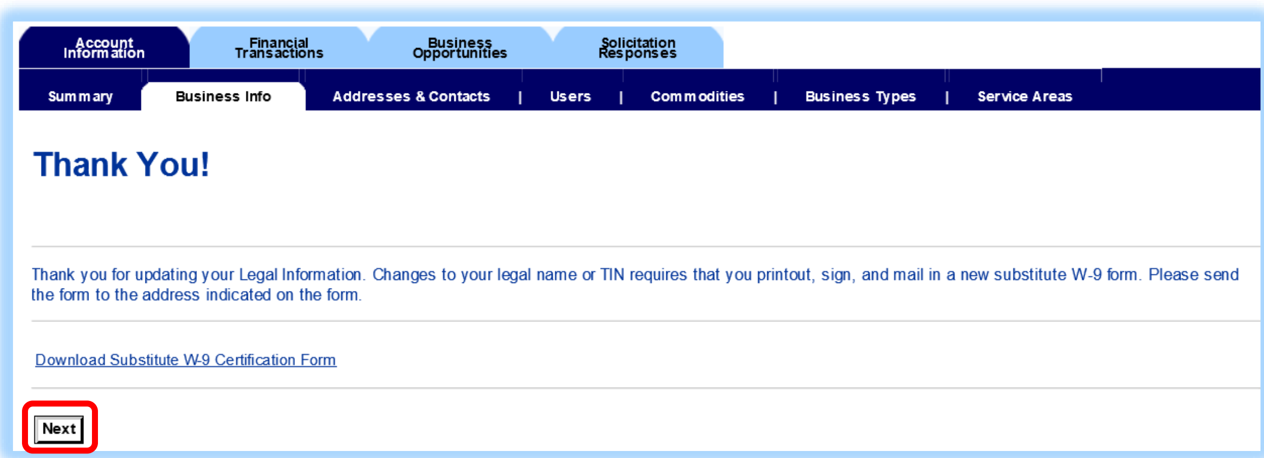
Account Information - Business Information
Update My Business Information Page – continue

Once you have edit your record click the '**Save Changes'** button to submit the request.



Thank you! page will display

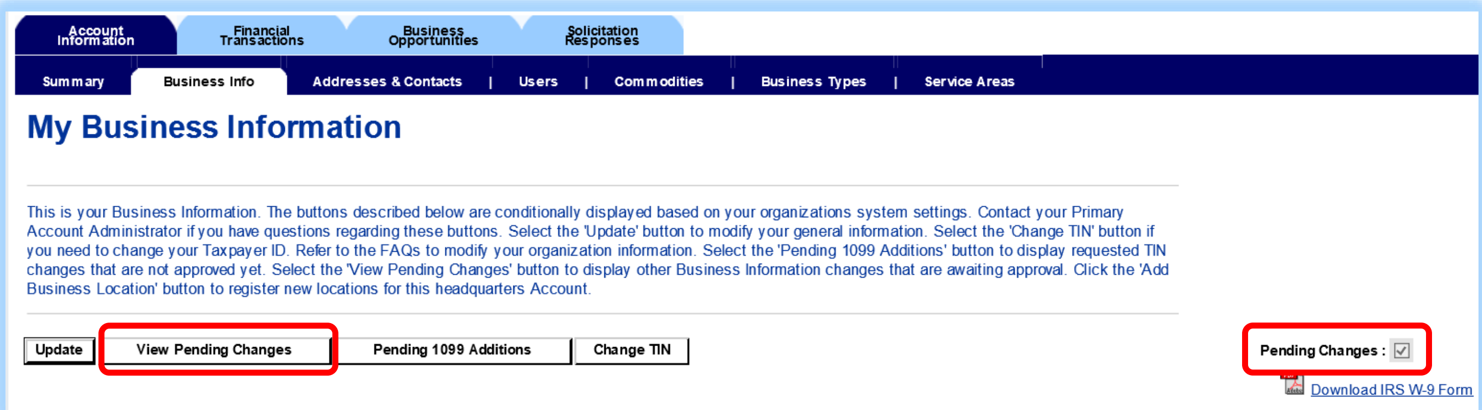
- click the **Next** button



Account Information - Business Information
Update My Business Information Page – continue

Use the ‘**View Pending Changes**’ button to see a detailed list of your changes

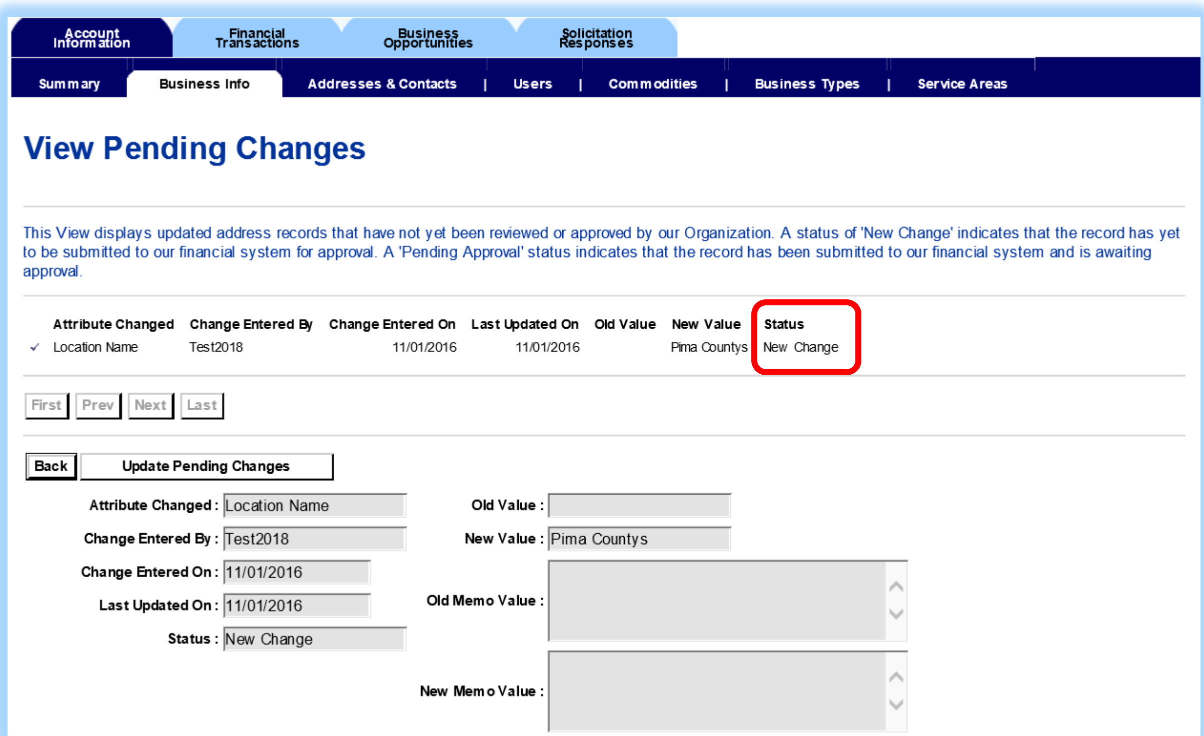
- **Pending Changes** box should be checked mark awaiting to be reviewed and approved by Vendor Relations



View Pending Changes

This View displays updated information that not yet has been reviewed or approved

- A status of **‘New Change’** indicates that the record has to be submitted and you will be able to updated your Pending Changes if you have entered some information in error by selecting **Update Pending Changes**
- A status of **‘Pending Approval’** indicates that the record has been submitted to Vendor Relations and is awaiting approval.

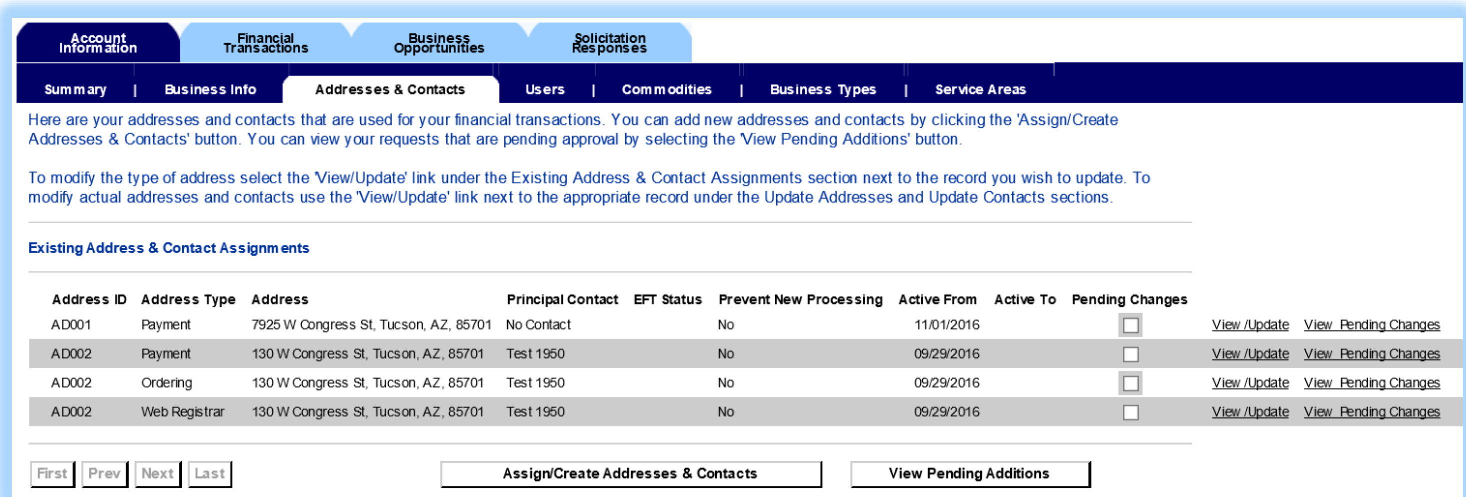


Account Information – Addresses & Contacts
Existing Address & Contact Assignments

This section allows you to view, add or modify addresses on your vendor record.

- the default **Ordering Address** will be used to issue Purchase Orders and other awards documents to your organization. **The Principal contact person associated with the Default Ordering address will be sent the solicitation email notices.**
- the default **Payment Address** will be used to mail your payment to your organization

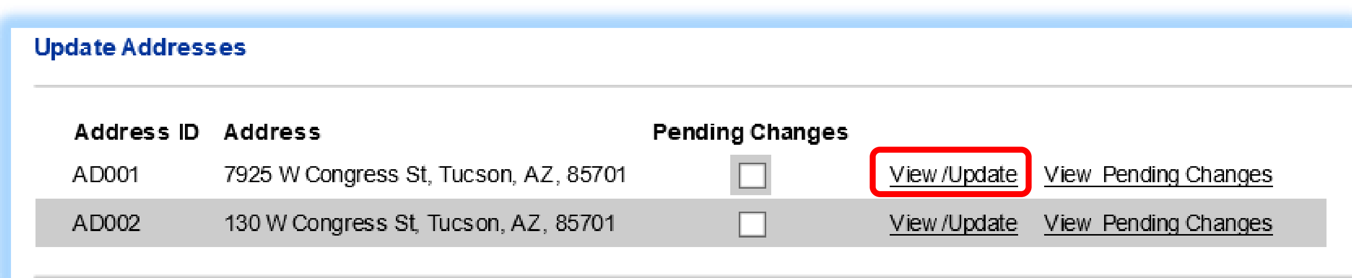
> **Please Note:** you cannot delete an address once it has been added, you will only be able to add a new address or modify an existing address.



Update Addresses

Identify the **Address ID** you wish to modify

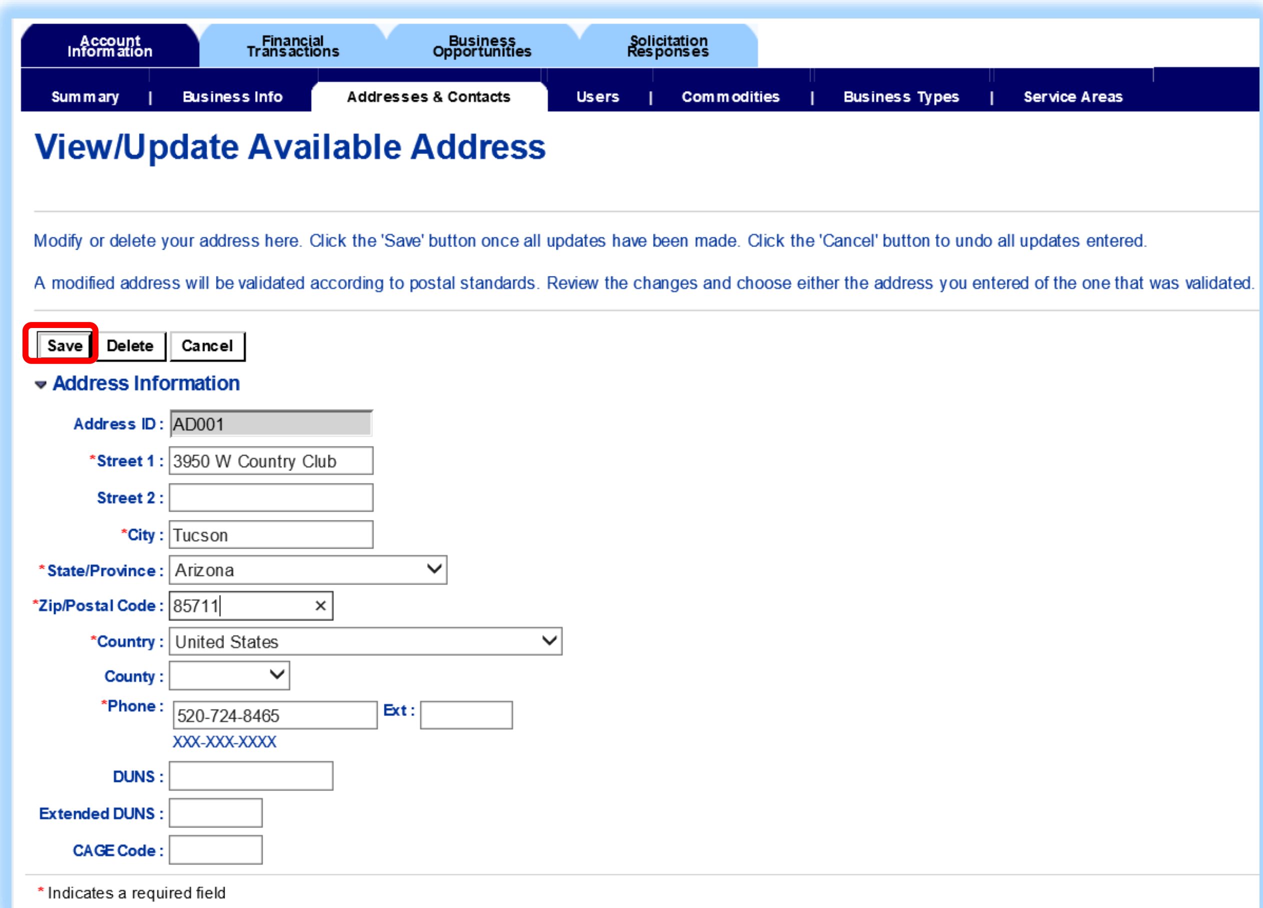
- Click the **View/Update** link



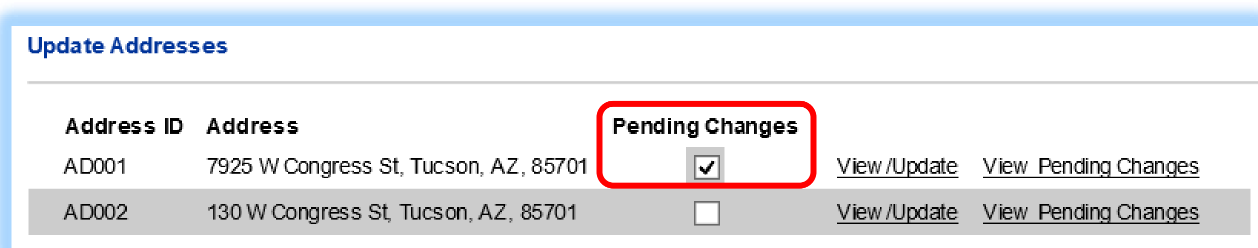
Account Information – Addresses & Contacts
View/ Update Available Address

Update Addresses

- Modify the **Address Information**, click the **Save** button once all updates have been made



- **Pending Changes** box will be checked to indicate that the address update is pending approval



Account Information – Addresses & Contacts
View/ Update Available Contact

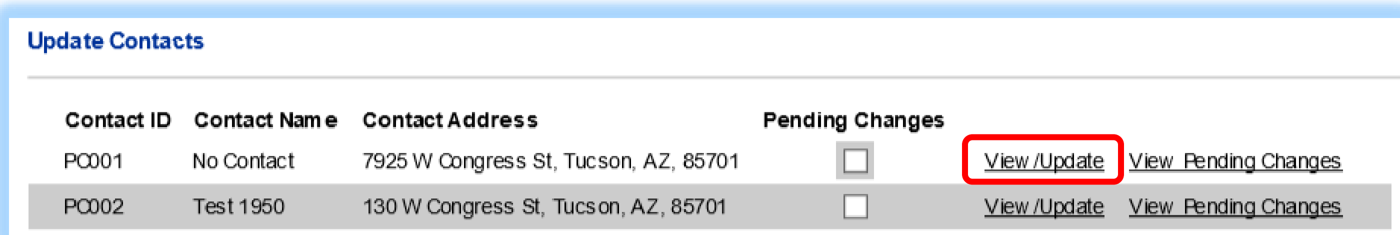
Update Contacts

This section allows you to view, add or modify contacts on your vendor record.

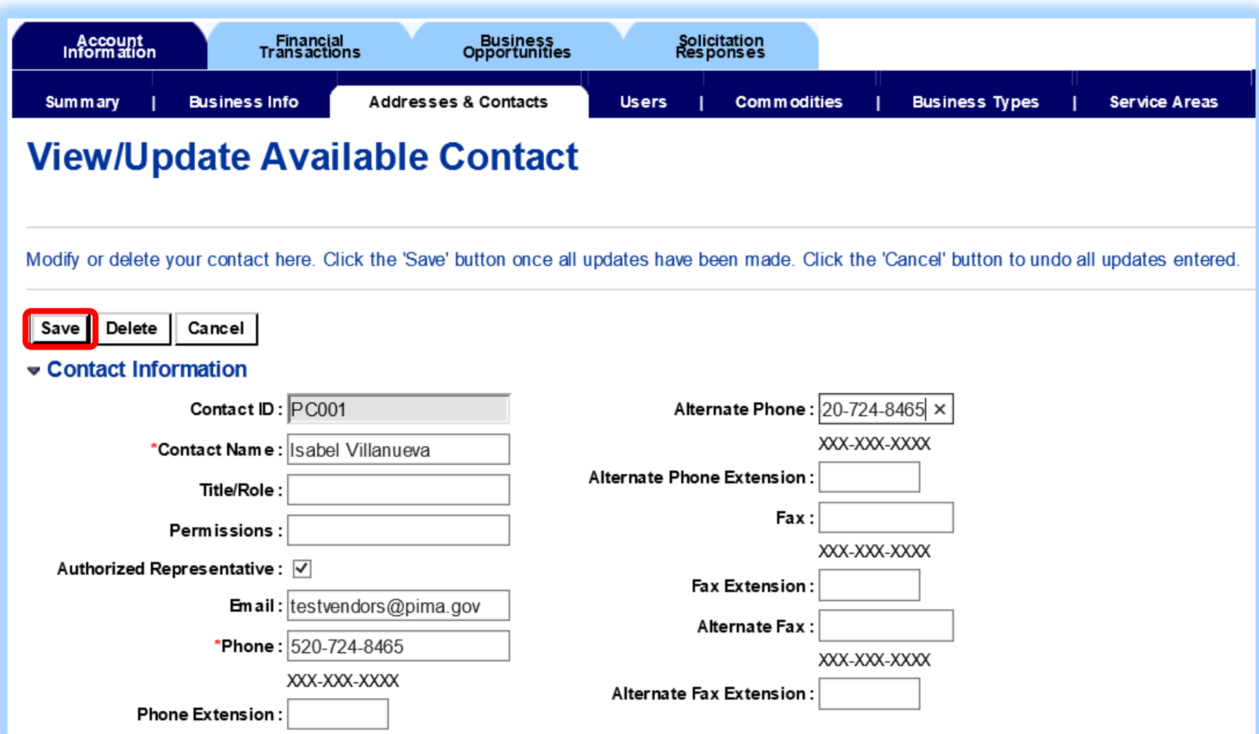
Please Note: you cannot delete a contact once it has been added, you will only be able to add a new contact or modify an existing contact.

Identify the **Contact ID** you wish to modify

- Click the **View/Update** link



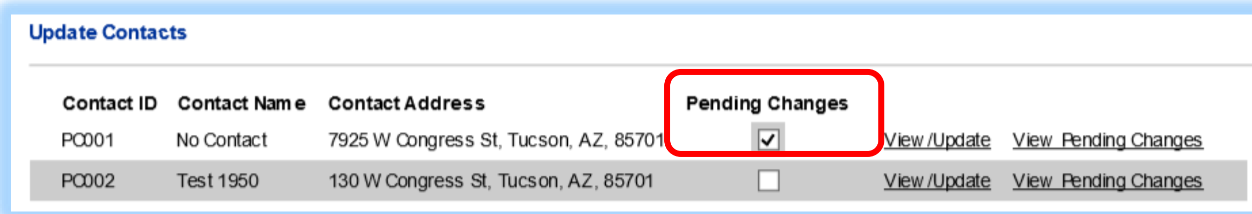
- Modify the **Contact Information**, click the **Save** button once all updates have been made



Account Information – Addresses & Contacts
View/ Update Available Contact

Update Contacts

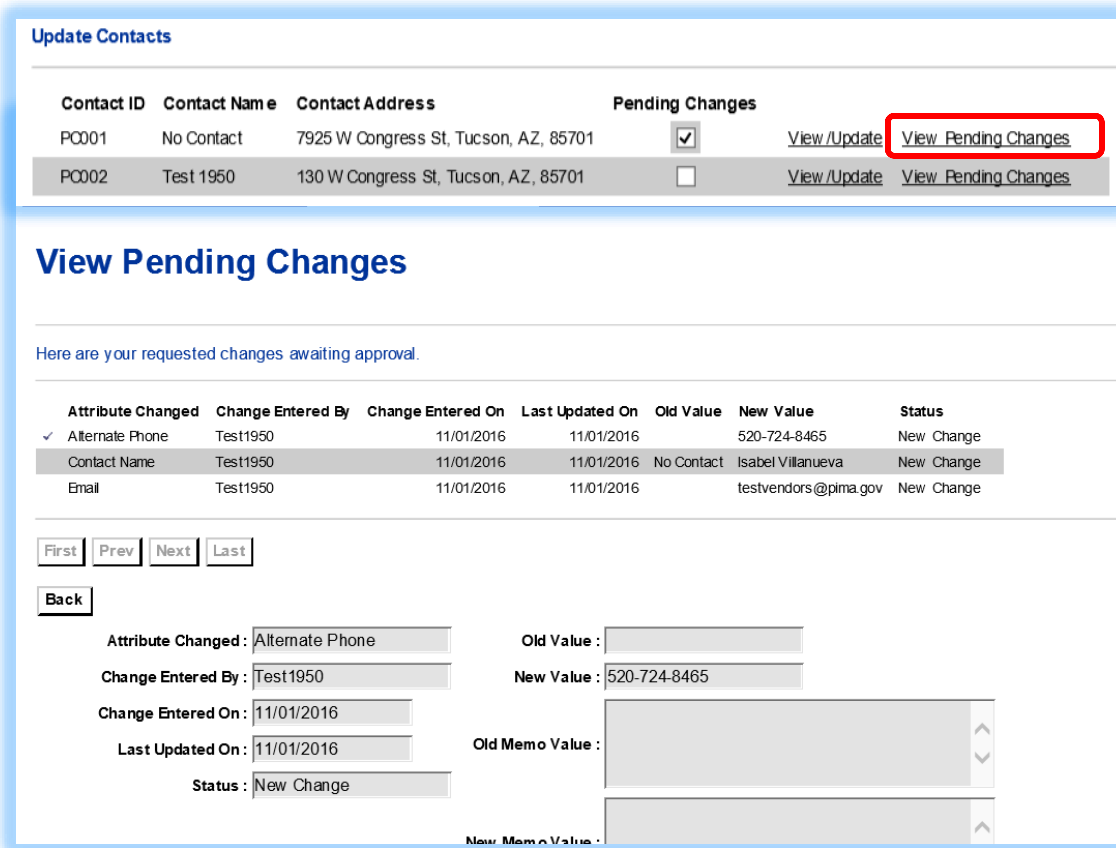
- **Pending Changes** box will be checked to indicate that the contact update is pending approval



View Pending Changes

This View displays updated information that not yet has been reviewed or approved

- A status of **'New Change'** indicates that the record has to be submitted and you will be able to updated your Pending Changes if you have entered some information in error by selecting **Update Pending Changes**
- A status of **'Pending Approval'** indicates that the record has been submitted to Vendor Relations and is awaiting approval.

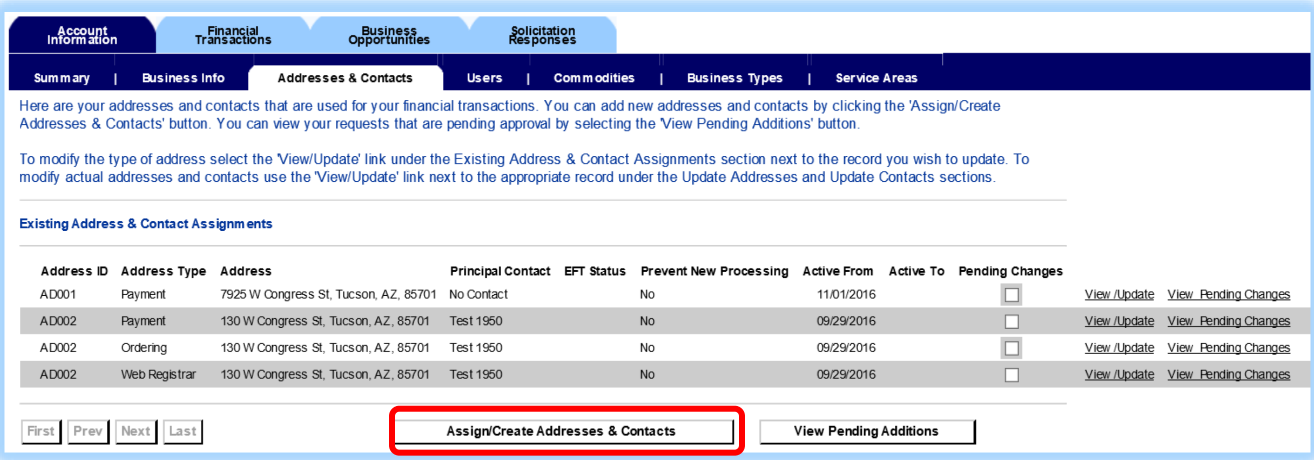


Account Information – Addresses & Contacts
Assign/ Create Addresses & Contacts

Add New Address

This section allows you to add a new Payment or Ordering Address.

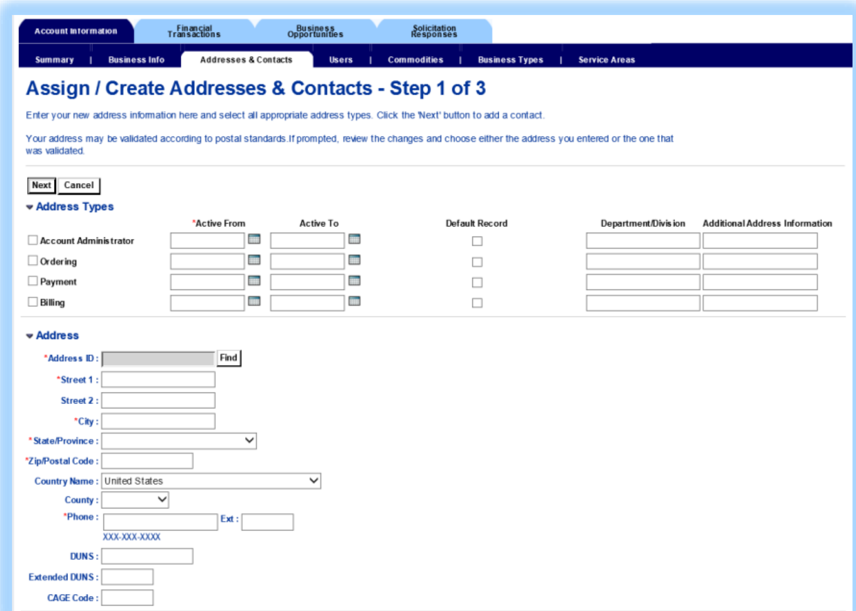
- Before you add a new address, verify that the address is not listed
- Click, the **Assign/Create Addresses & Contacts** button



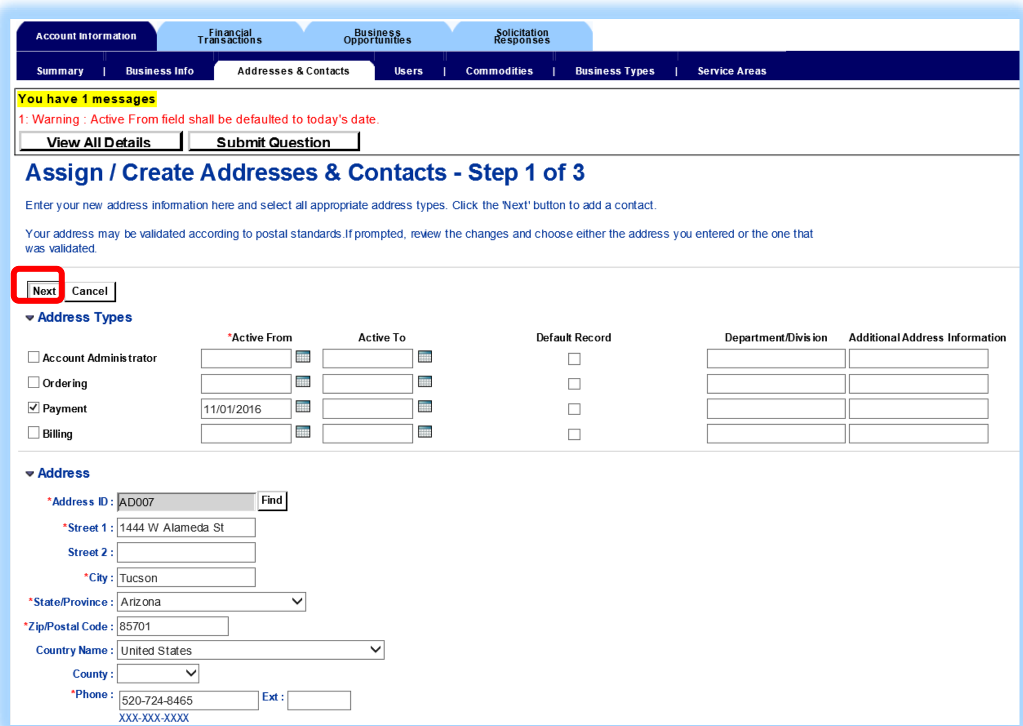
Account Information – Addresses & Contacts
Assign/ Create Addresses & Contacts – Step 1 of 3

Add New Address

- Select the **Address Type** you are adding to your vendor record
    - The **Active From** date will auto populate with the current date if left blank.
    - Complete the required fields for the new address, then click the **Next** button to proceed to Step 2



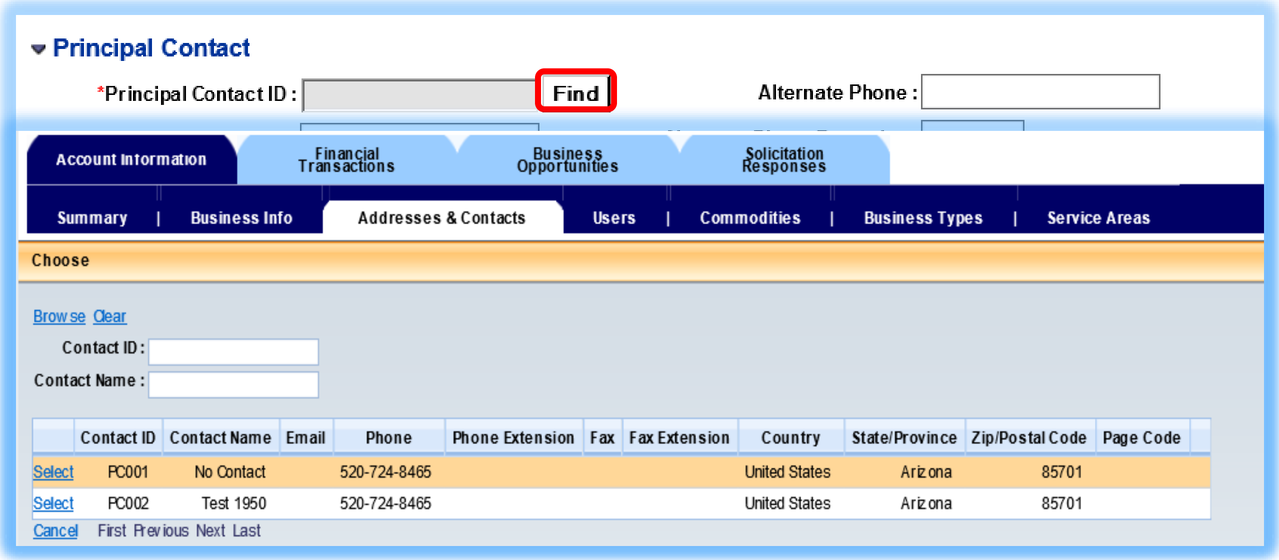
- You will receive a **Warning** message that the Active from date has been defaulted to today's date
- Click, the **Next** button



Account Information – Addresses & Contacts
Assign/ Create Addresses & Contacts – Step 2 of 3

Use an Existing Contact

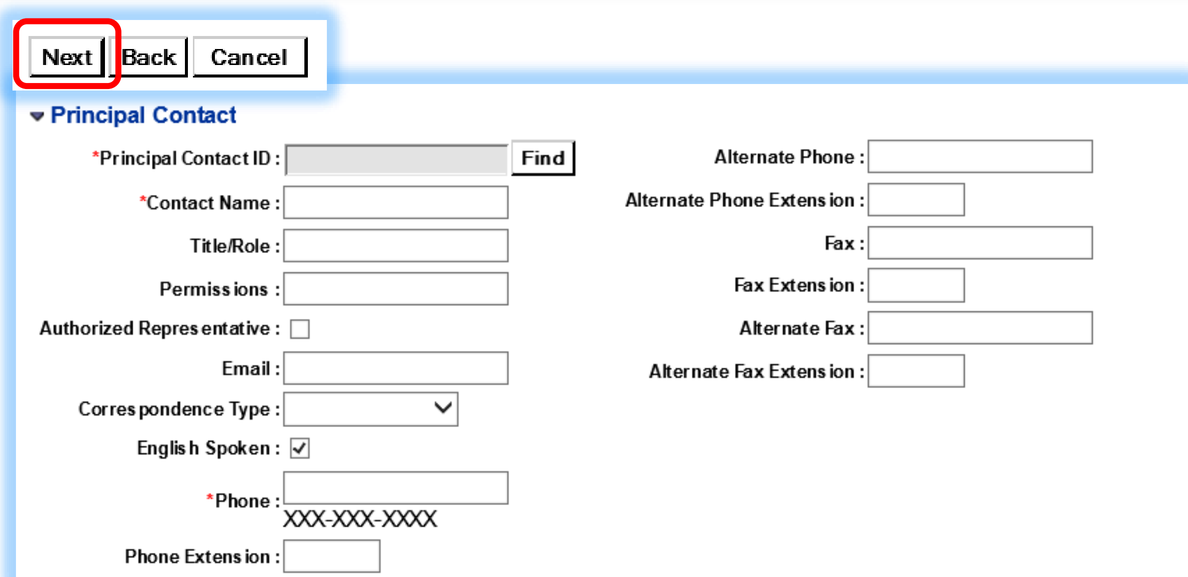
- You can use an existing contact by clicking the **Find** button and selecting the existing contact



Add New Principal Contact

- Complete the required fields for the new contact

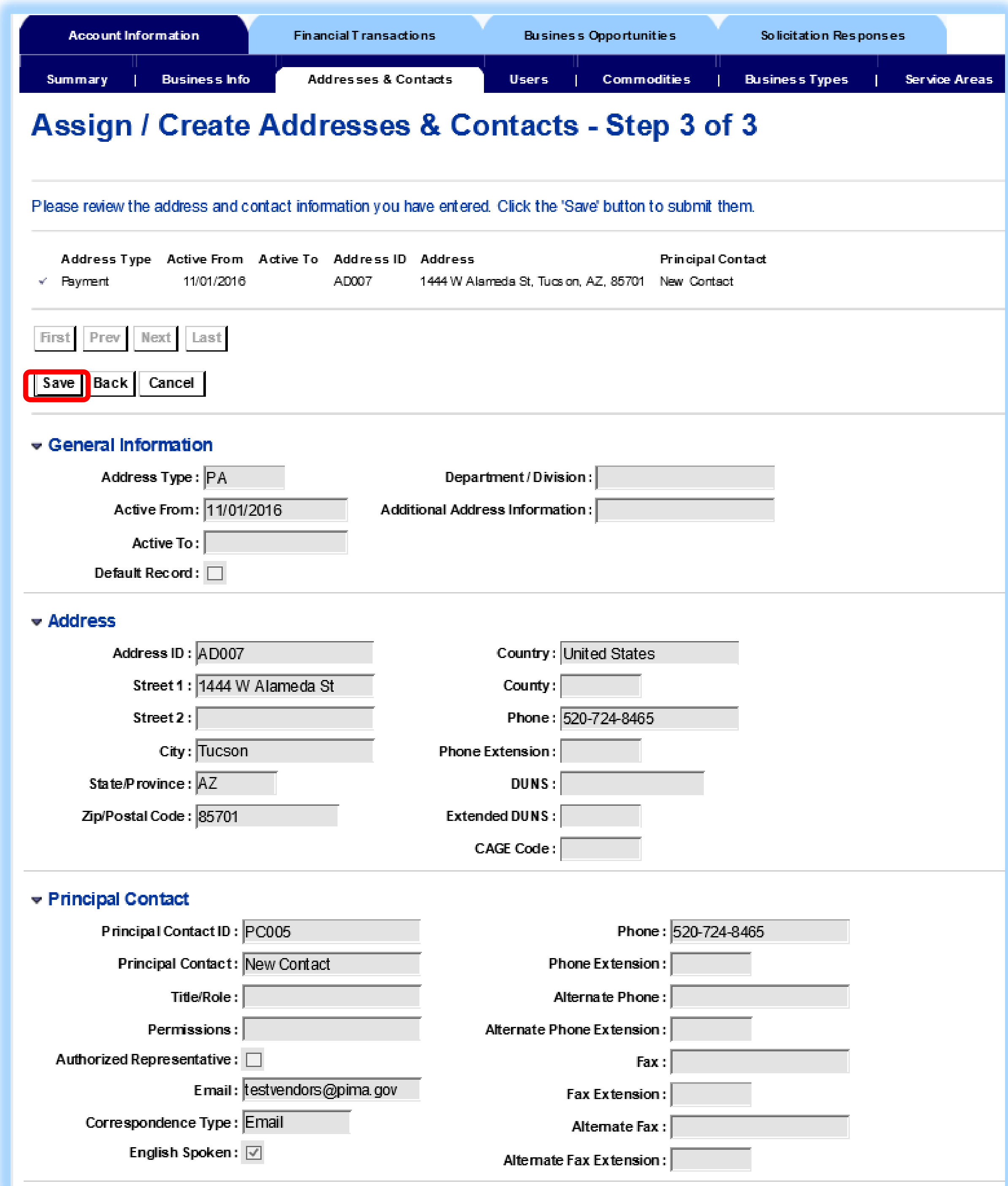
Please Note: if you entered an **Email** address, then **Correspondence Type** should be email. If you did not enter an email address, then **Correspondence Type** should be Postal Service



Account Information – Addresses & Contacts
Assign/ Create Addresses & Contacts – Step 3 of 3

Review Address and Contact information

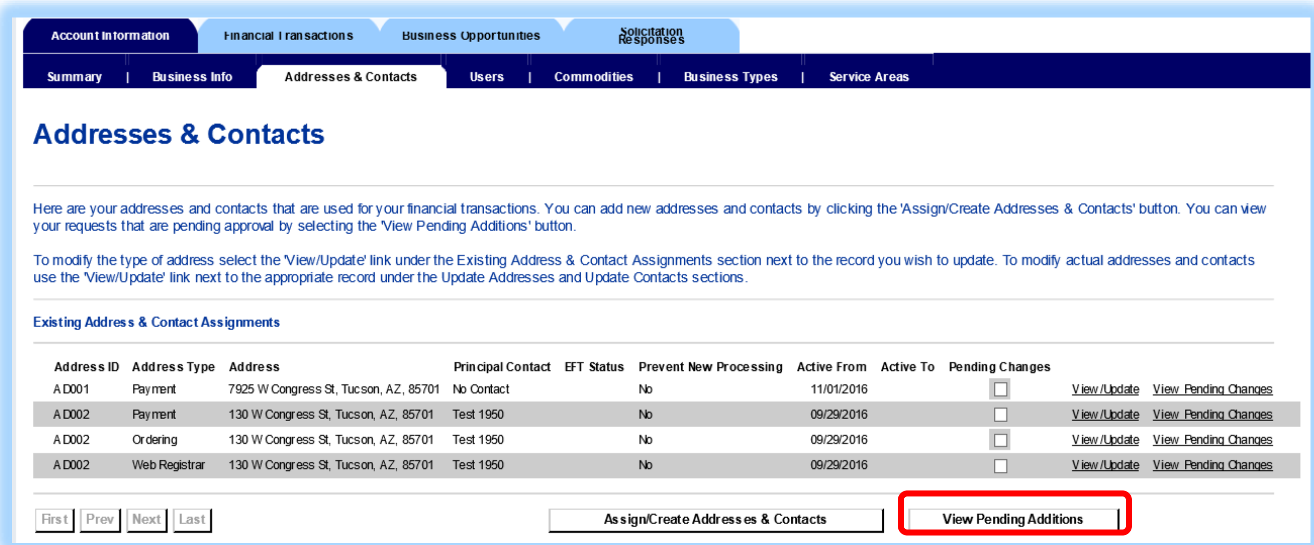
- Click the **Save** button to submit the new changes



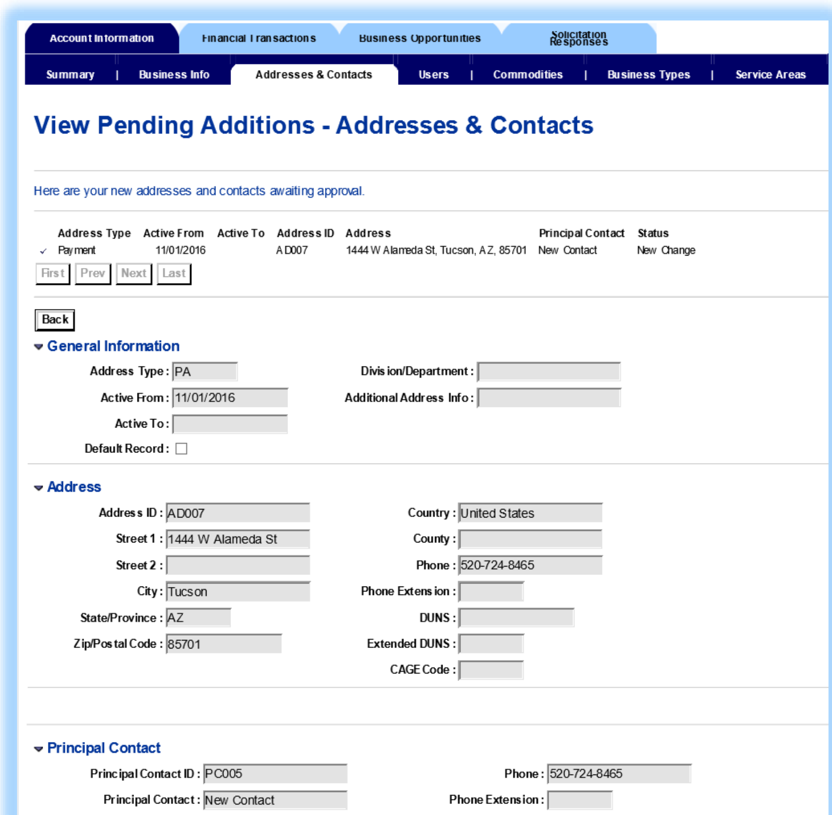
Account Information – Addresses & Contacts
Assign/ Create Addresses & Contacts – Step 3 of 3

Review Address and Contact information

- Click the **Save** button to submit the new changes



View Pending Additions – Addresses & Contacts

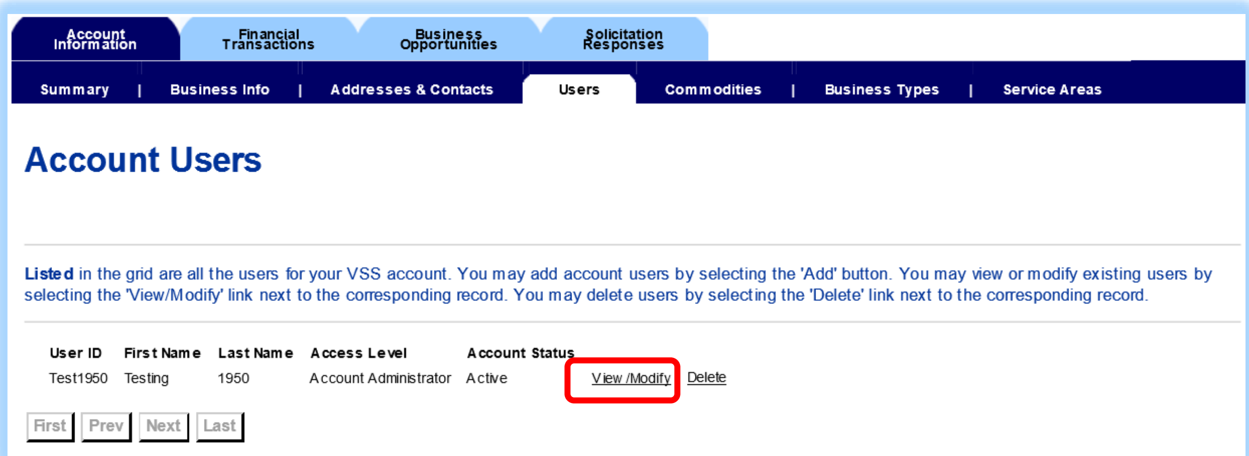


Users

Account Users- If you wish to receive email Solicitations you must be a registered user on the vendor account. Multiple users can be registered once the record has been submitted.

This section allows you to maintain your Account Users.

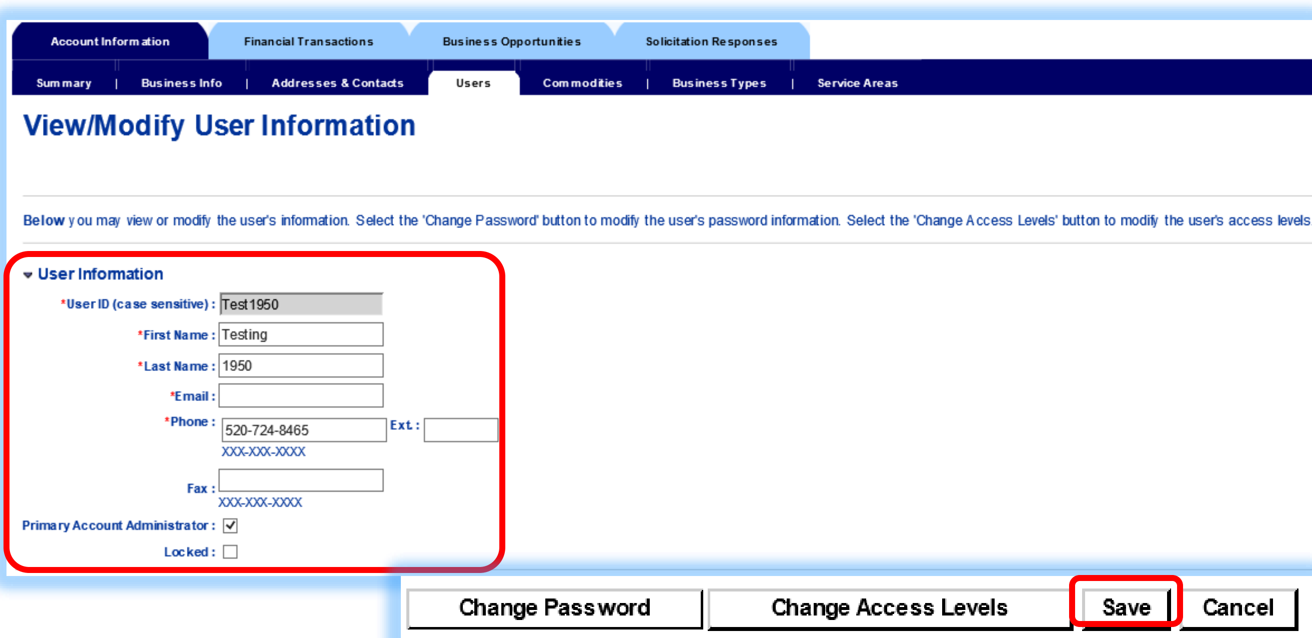
- You can update, delete or add another User ID
- Click the **View/Modify** link to update an existing User ID
- Click the **Delete** button to delete existing User ID



View/ Modify User Information

User Information

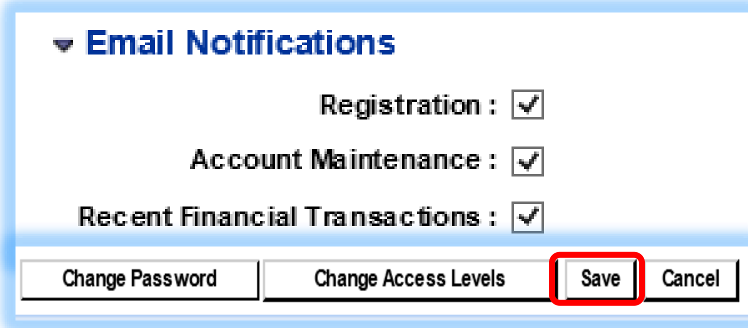
- You may view or modify the User Information
- Select **Locked** checkbox if the user account should be locked
- Click the **Save** button



Account Information – Users
View/ Modify User Information

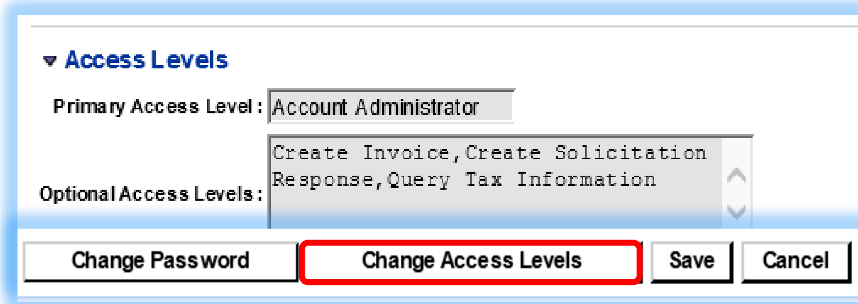
Email Notifications

- You can select the options for Email Notifications
- Click the **Save** button

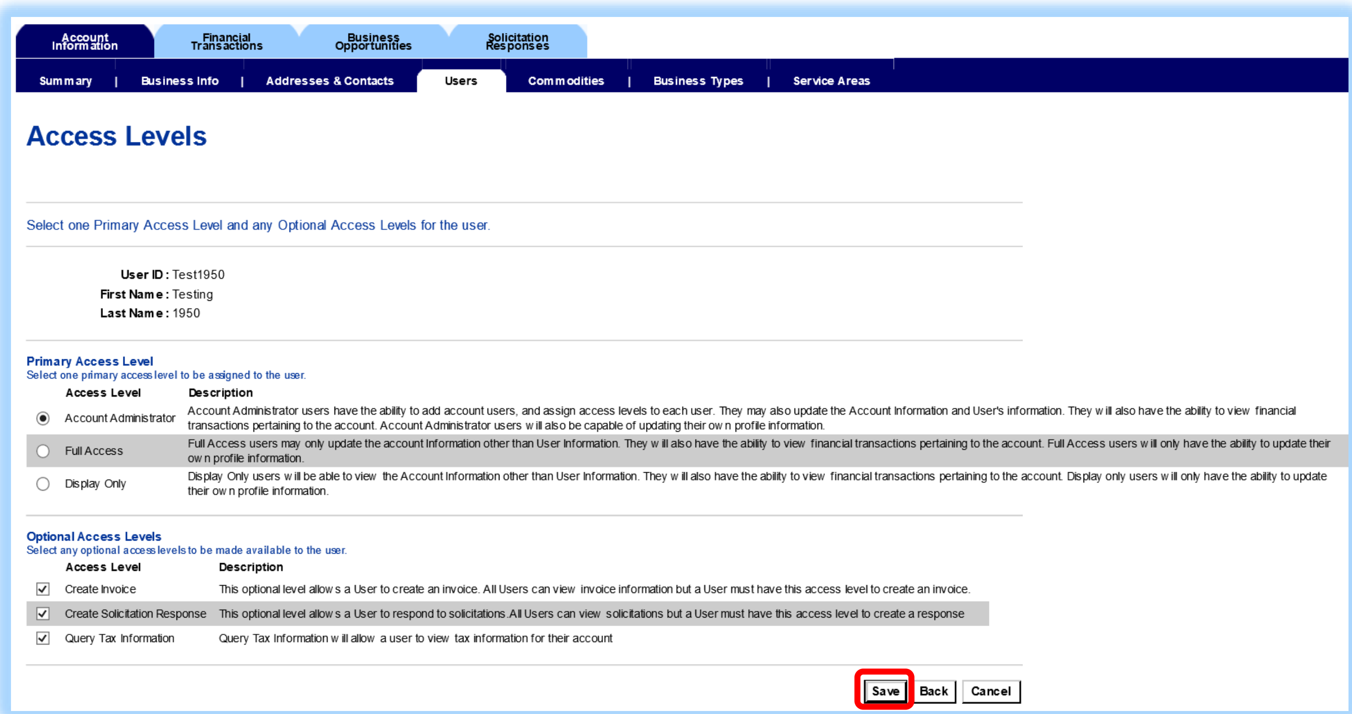


Access Levels

- You can modify the user's Access Levels
- Select **Change Access Levels** button



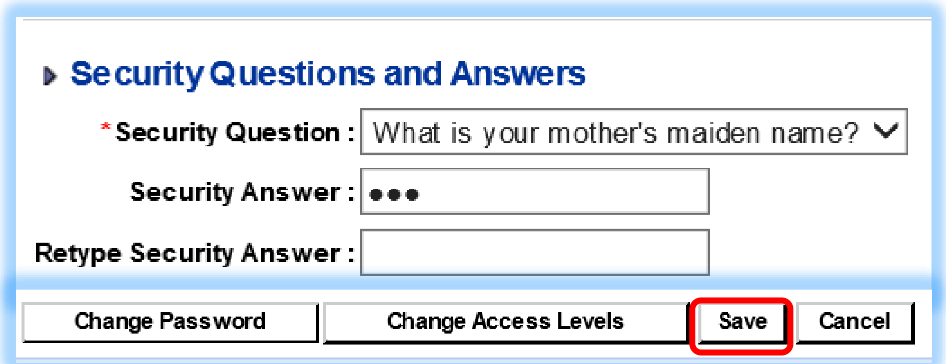
- Update the **Primary Access Level** and **Optional Access Levels** for the existing user
- Click the **Save** button



Account Information – Users
View/ Modify User Information

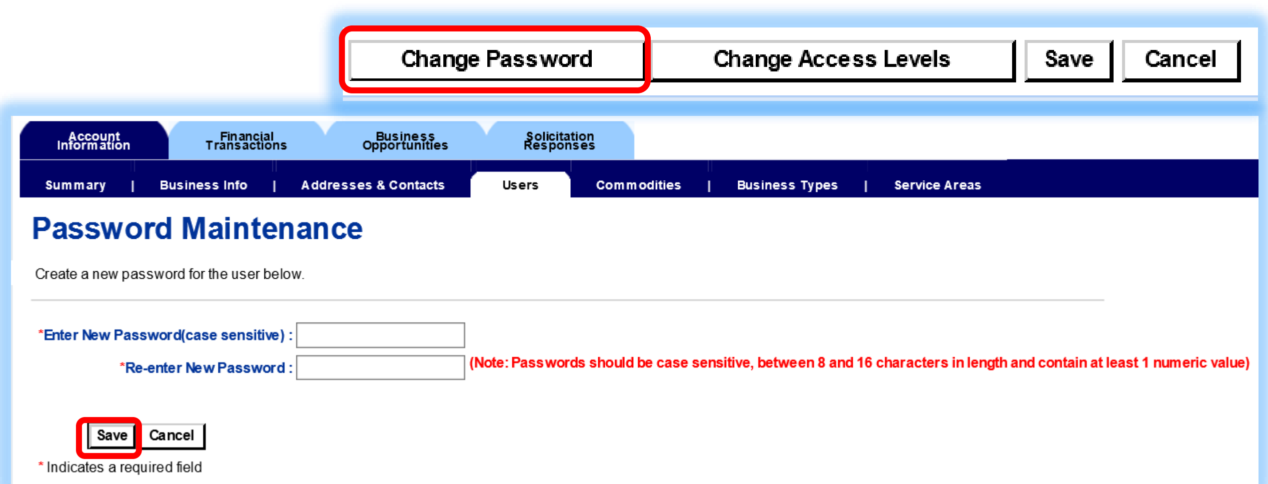
Security Questions and Answers

- Update the Security Question and Answer for the existing User
- Click the **Save** button



Password Maintenance

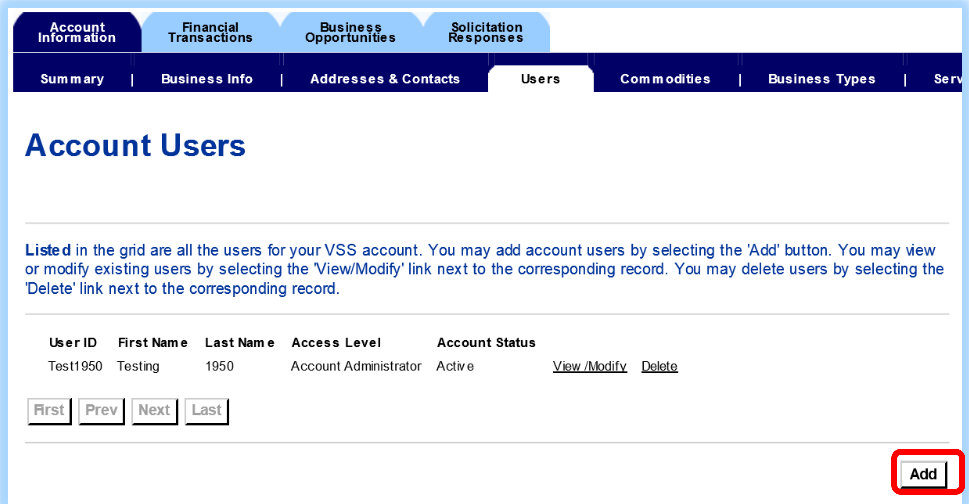
- Select the **Change Password** button on the bottom of the page to modify the user's password information
- Create a new password
- Click the **Save** button to save the new password for the existing user



Account Information – Users
Account Users

Add Account Users

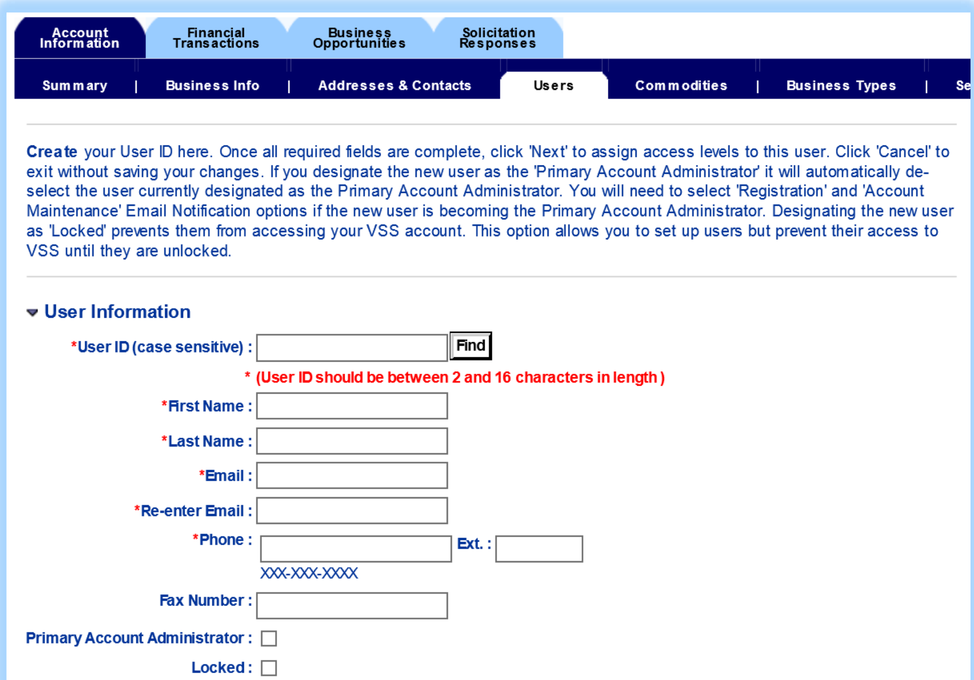
- Select the **Add** button



Please Note: The Primary Account Administrator is the only user that has the ability to add new users. If that person is no longer with your company, contact Vendor Relations by email at vendors@pima.gov or phone 520-724-8465 to assist with updating your vendor account.

Users Information

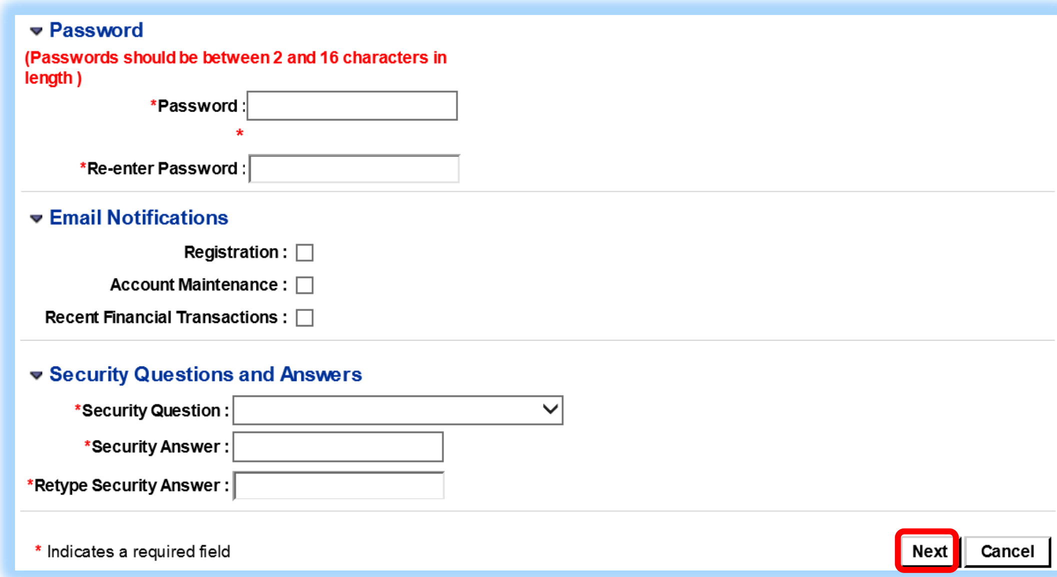
- Create a new User ID and complete the required fields
- Select the **Primary Account Administrator** checkbox if the new user is to become the primary account holder
- Select **Locked** checkbox if the new user account should be locked



Account Information – Users
Account Users

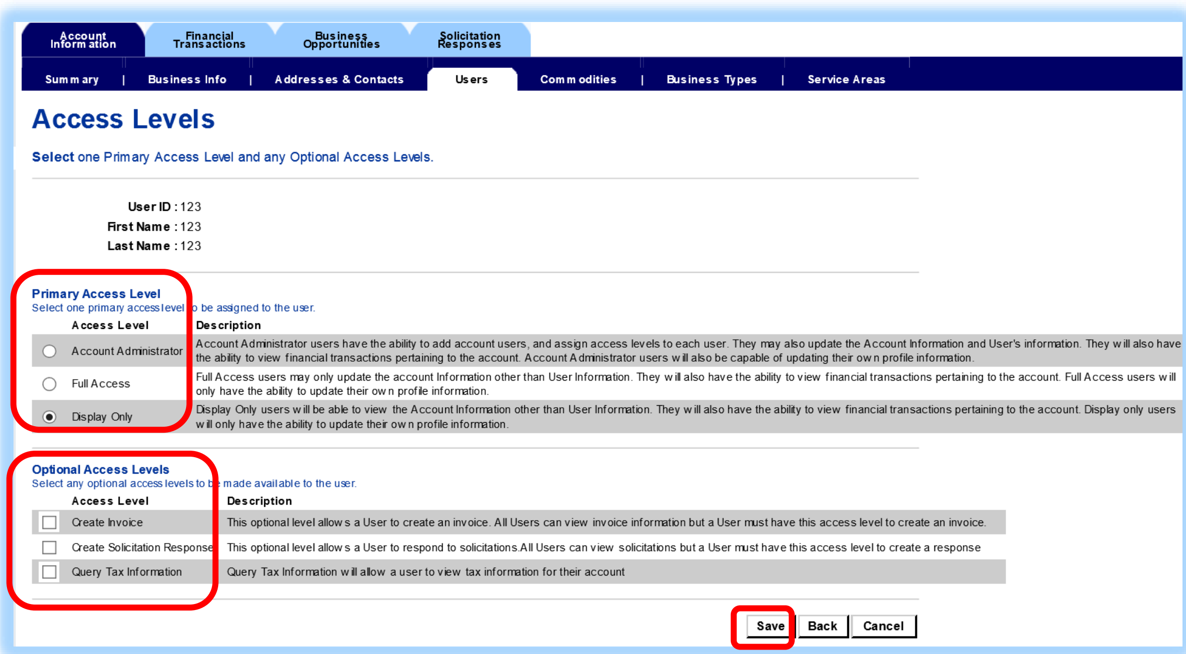
Password

- Create a new Password
- Select the Email Notifications
- Select the Security Questions and Answers
- Click the **Next** button



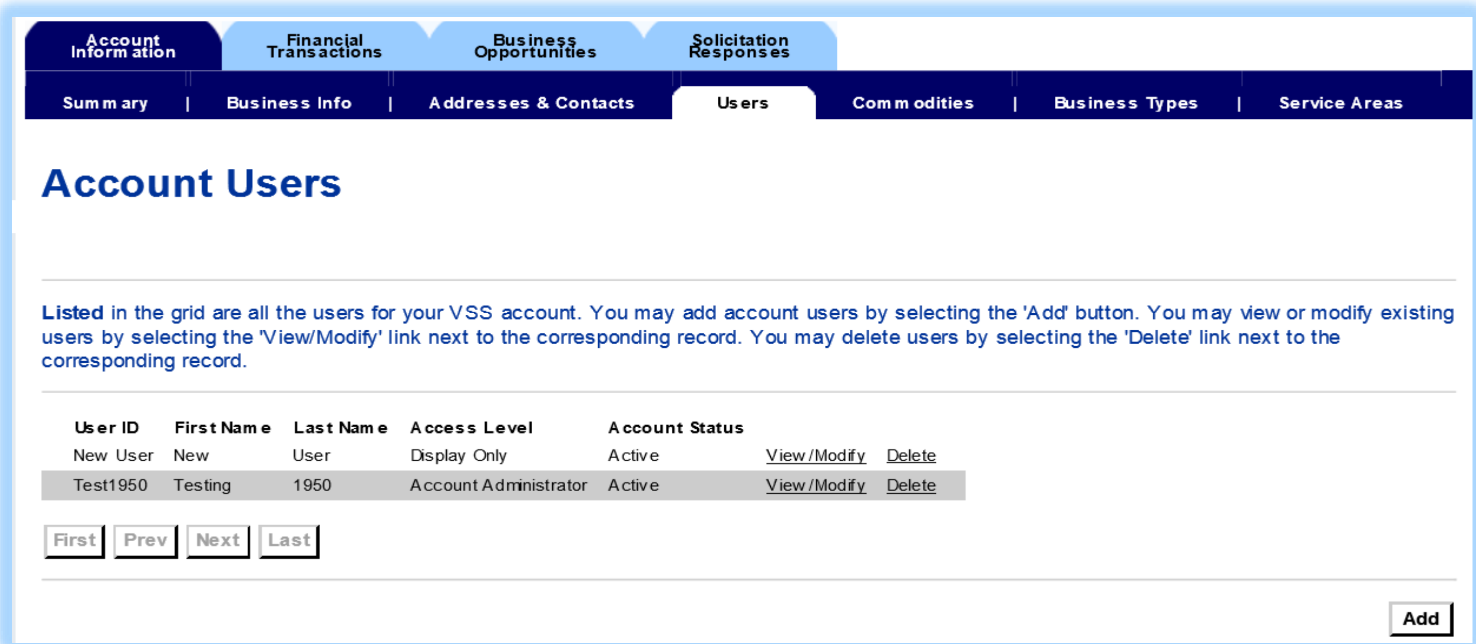
Access Levels

- Select the appropriate **Primary Access Levels** and **Optional Access Levels** for the new account user
- Click the **Save** button to complete the process



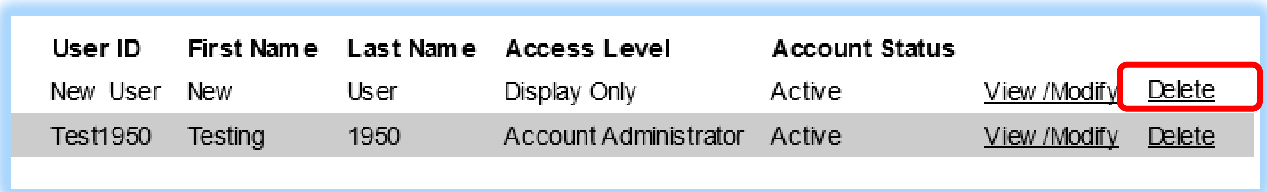
Account Information – Users
Account Users

- New User ID will display on the Account Users Page

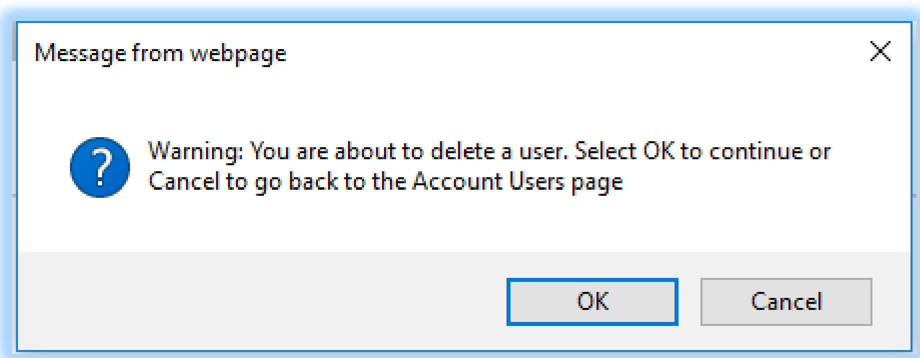


Account Information – Users
Remove Account Users

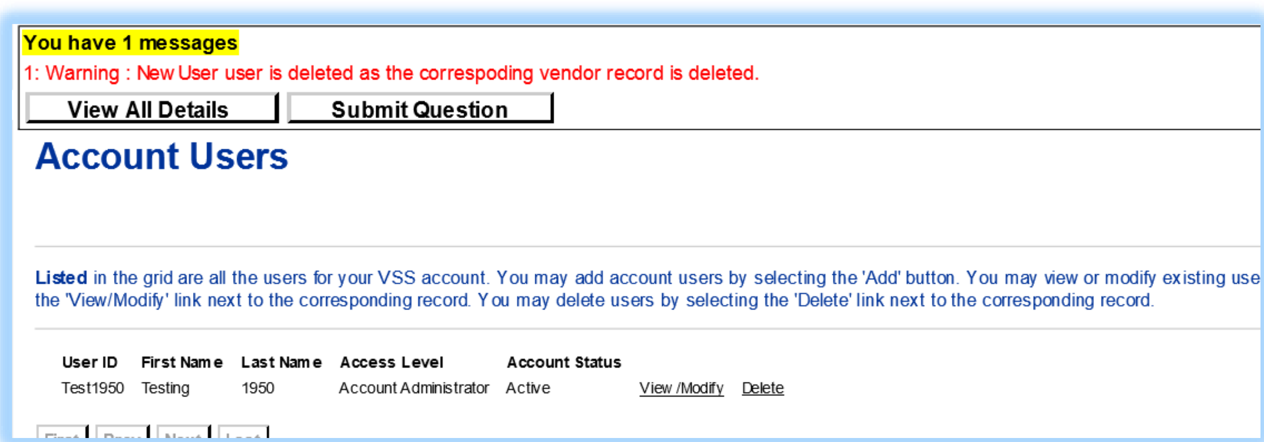
- Click the **Delete** link on the Account User you want to remove



- Select **OK** in the following confirmation message window



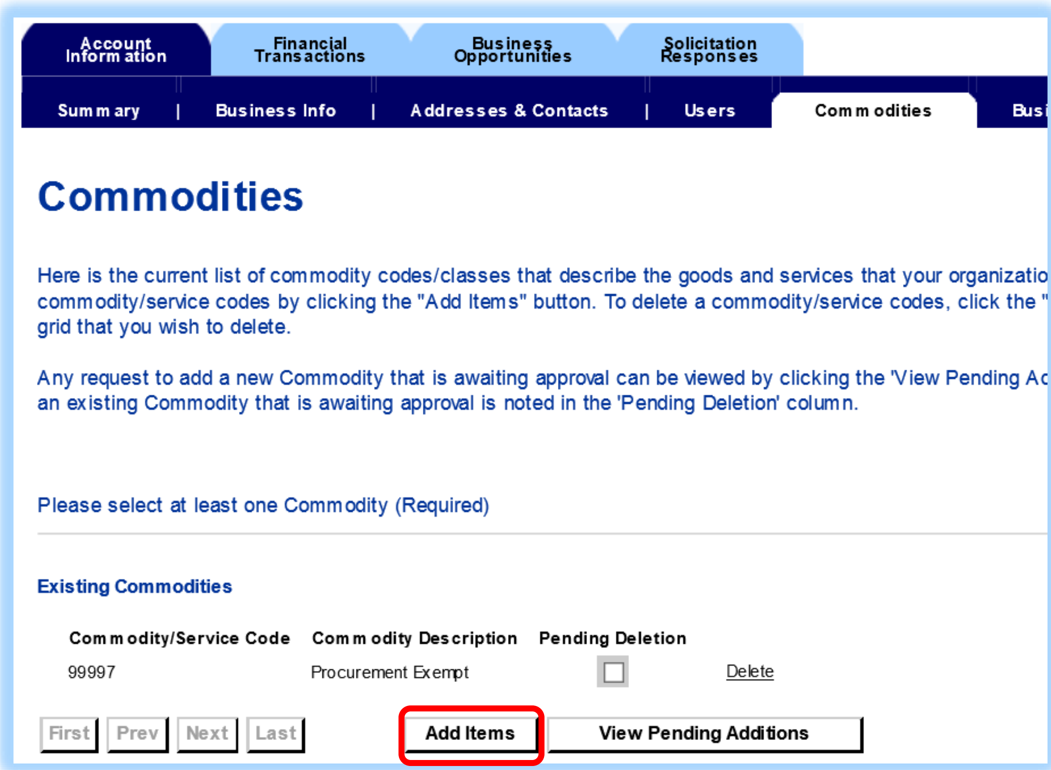
- The user then will be removed from the list
- Note: The Primary Account Administrator may not be deleted



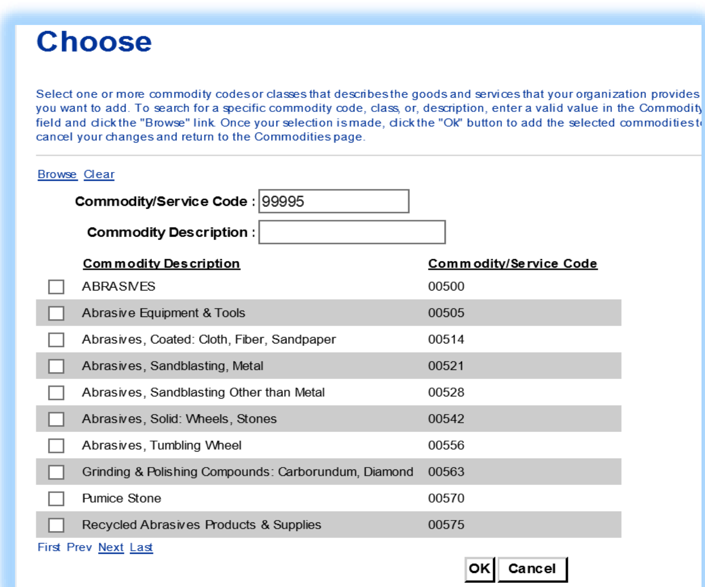
Account Information – Commodities
Add Items

This section allows you to maintain a list of the commodity codes associated with your organization.

- 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 Items** button

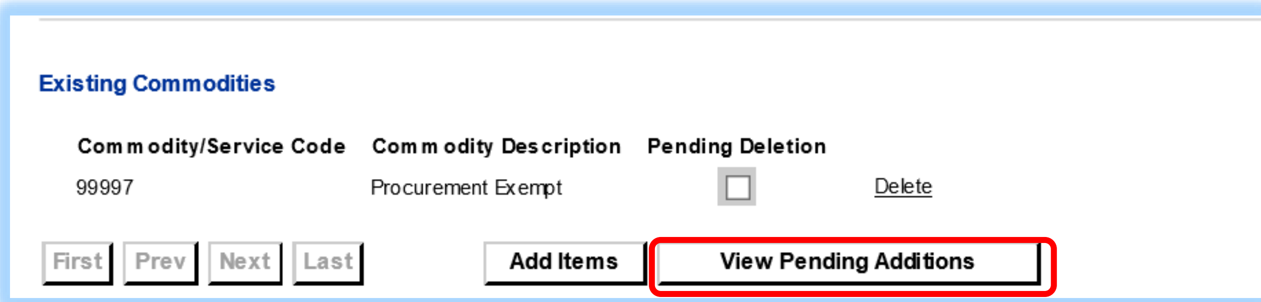


- Search by Commodity Code **OR** Commodity Description.
- You can use an asterisk (*****) to search
- Click the "**Browse**" link
- Place a check mark next to the commodity
- Click the "OK" button to add the Commodity Code



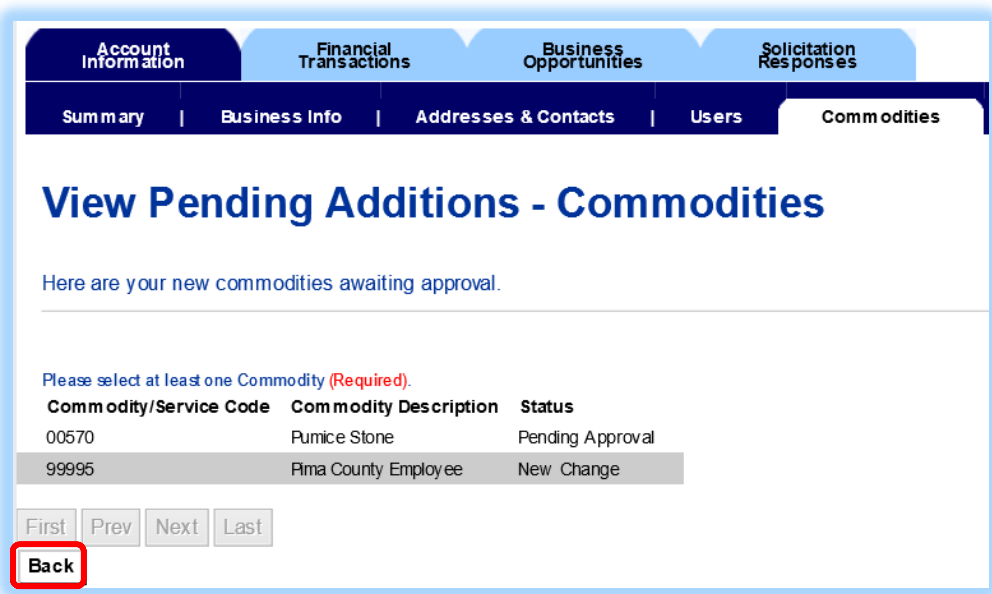
Account Information – Commodities
Add Items

On the Commodities page you can click the **View Pending Additions** to view the codes you added



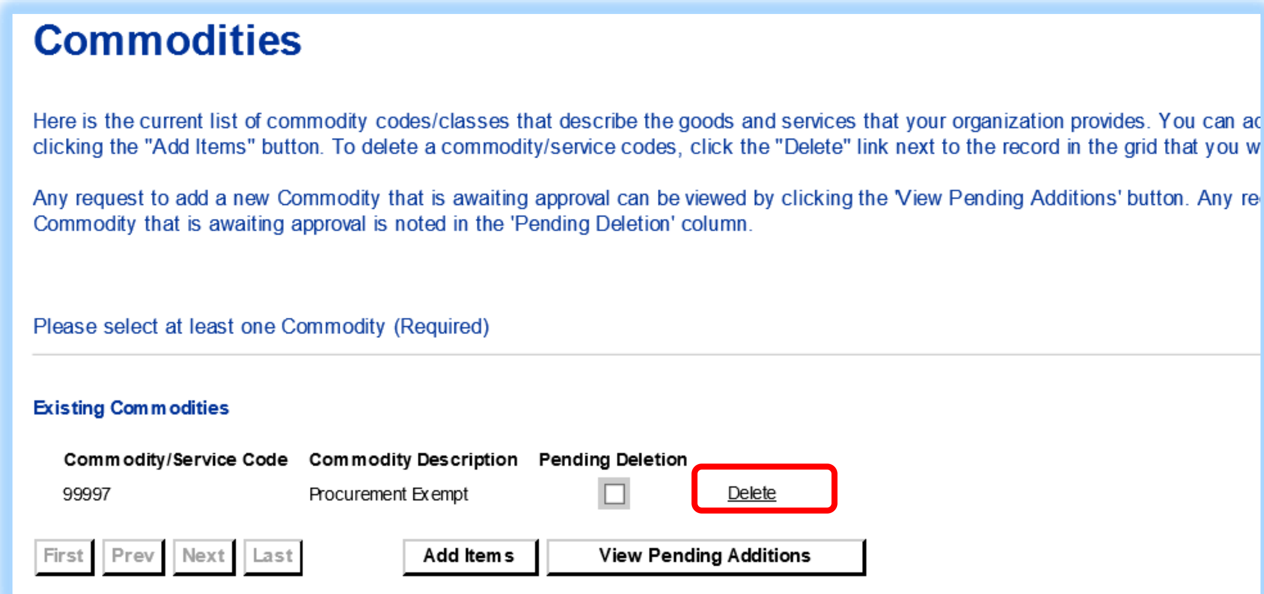
View Pending Additions – Commodities

- Commodities awaiting approval
- Click the **Back** button to return to your vendor account

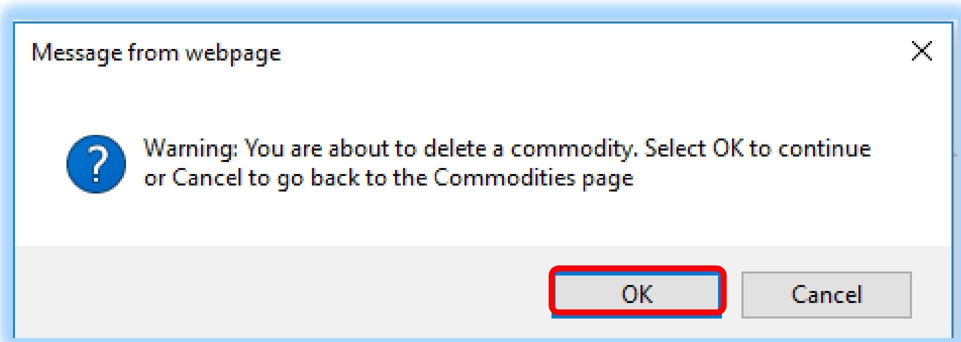


Account Information – Commodities
Remove Commodity Code

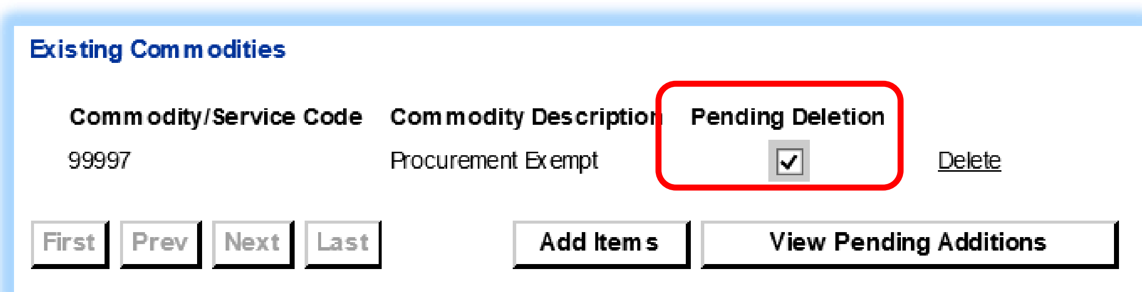
- Click the **Delete** link on the Commodity code you want to remove



- Select **OK** on the confirmation message window



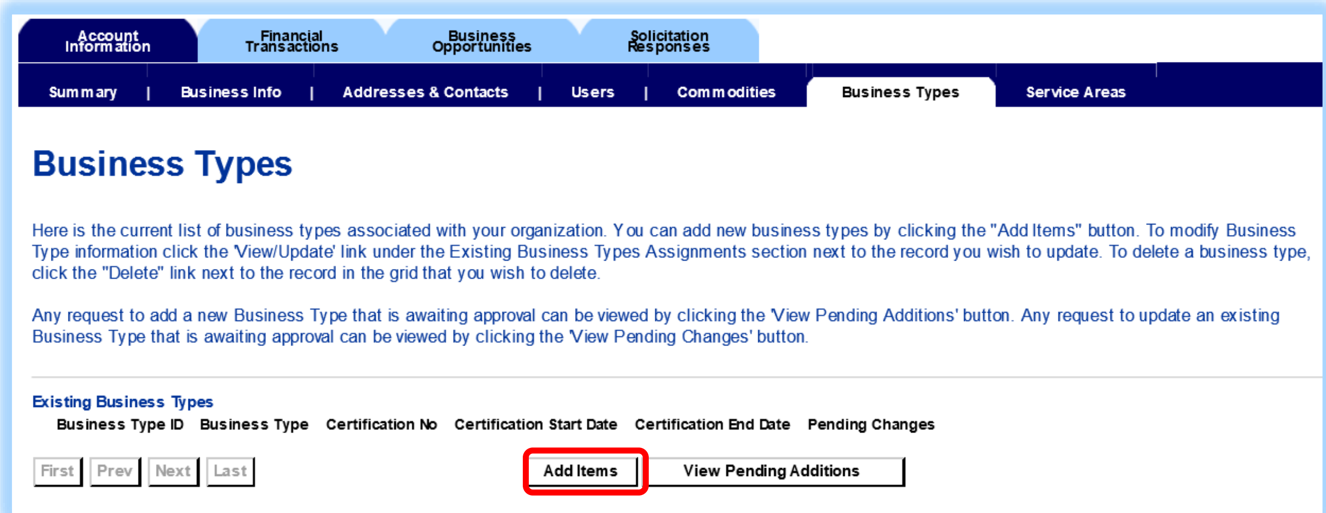
- The **Pending Deletion** box should now have a checkmark



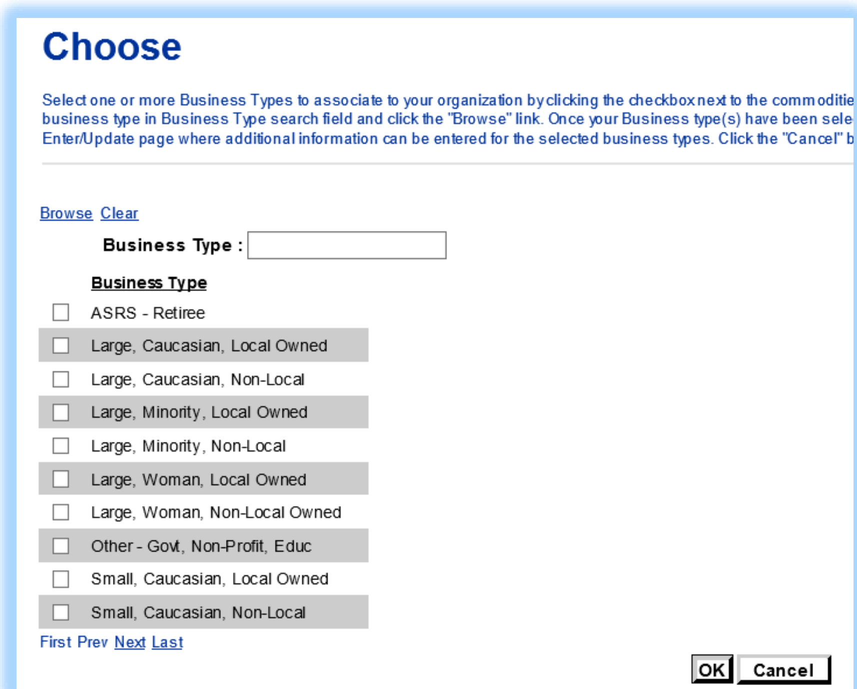
Account Information – Business Types
Add Items

This section allows you to maintain a list of the business types associated with your organization.

- Click the **Add Items** button

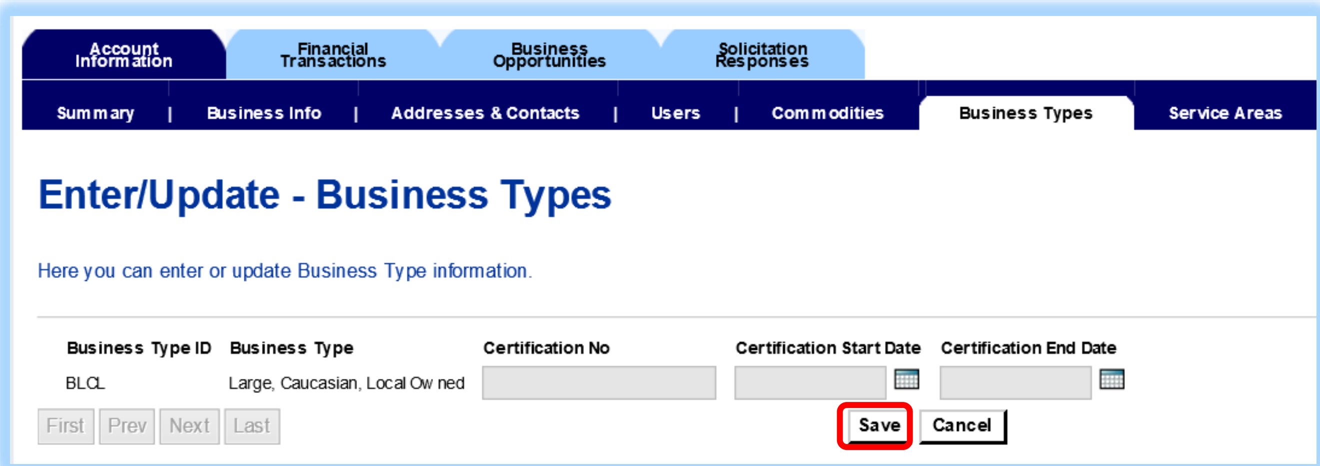


- Select the Business Type that applies
- Click the **Next** button to view additional Business Types from the list
- Place a check mark next to the Business Type you selected
- Click the **OK** button to add the Business Type

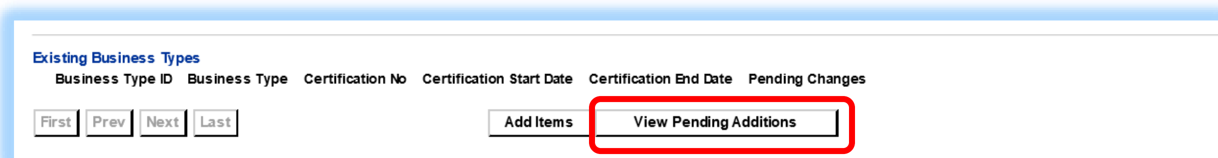


Account Information – Business Types
Enter/Update – Business Types

- Click the **Save** button to add the Business Type

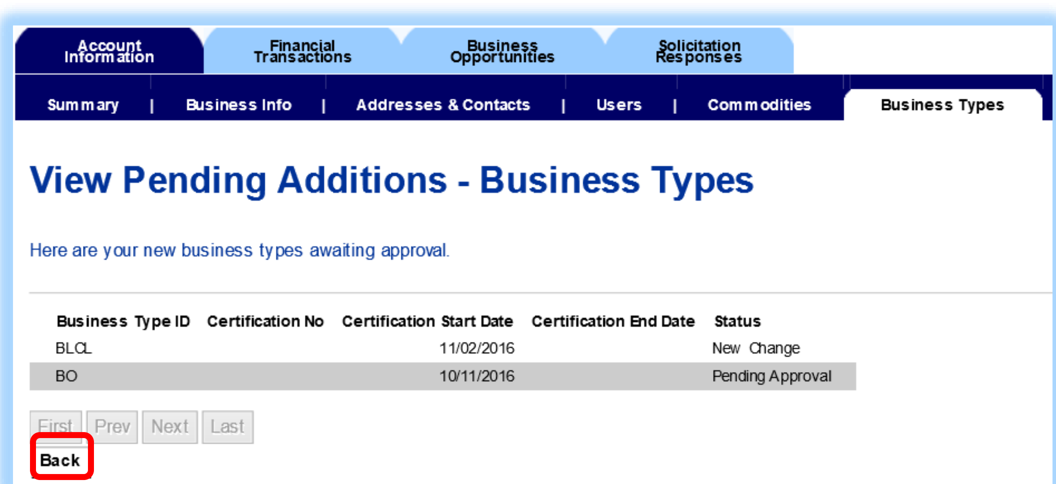


On the Business Types page, you can click the **View Pending Additions** to view the codes you added.



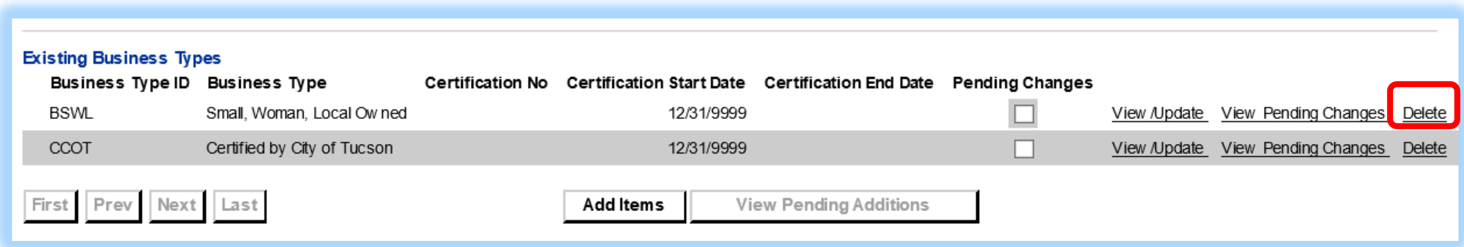
View Pending Additions – Business Types

- Business Types awaiting approval
- Click the **Back** button to return to your vendor account

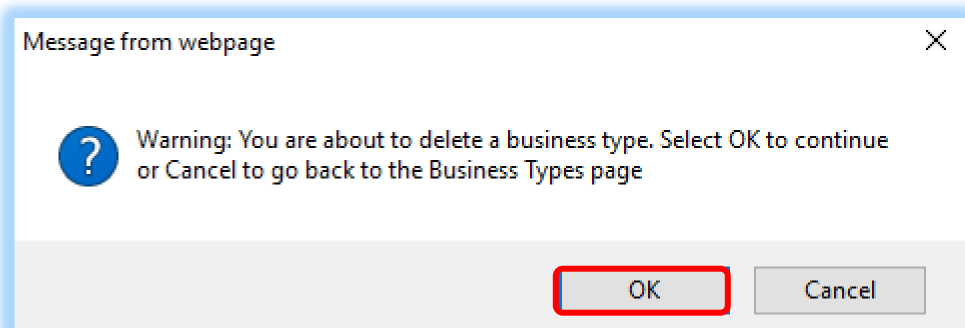


Account Information – Business Types
Remove Business Types

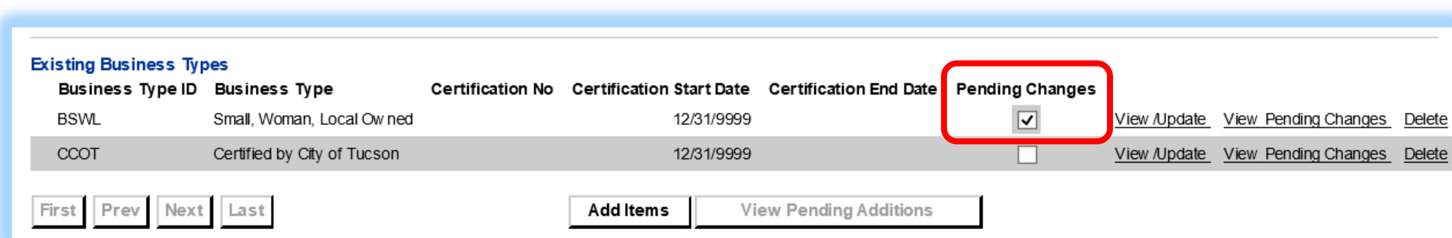
- Click the **Delete** link on the Business Types you want to remove



- Select **OK** on the confirmation message window



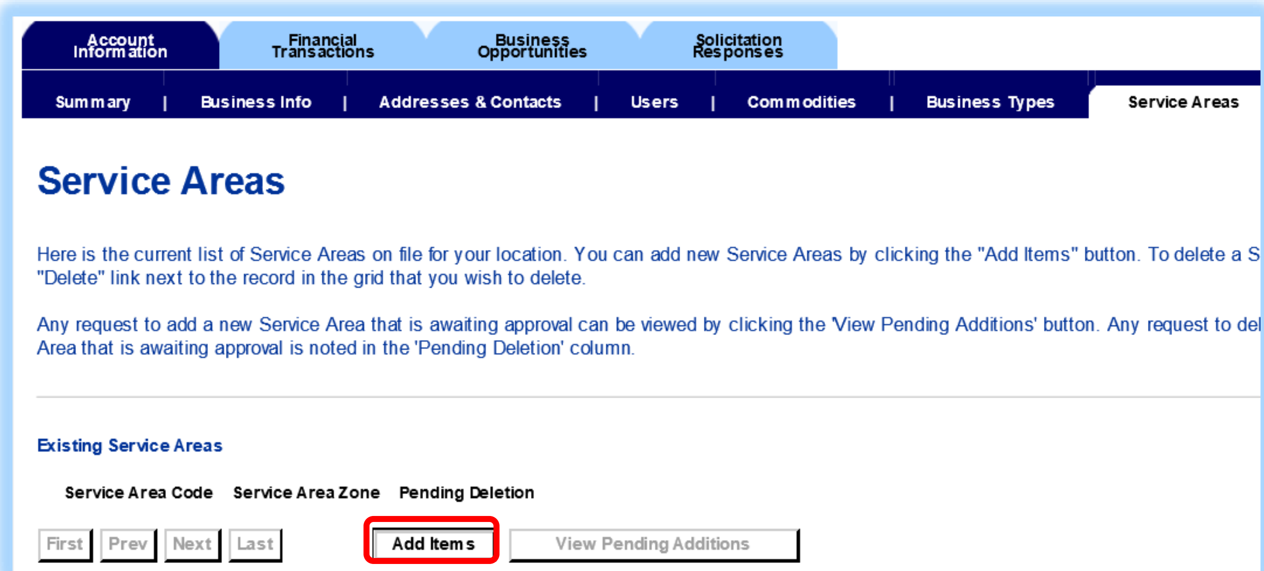
- The **Pending Deletion** box should now have a checkmark



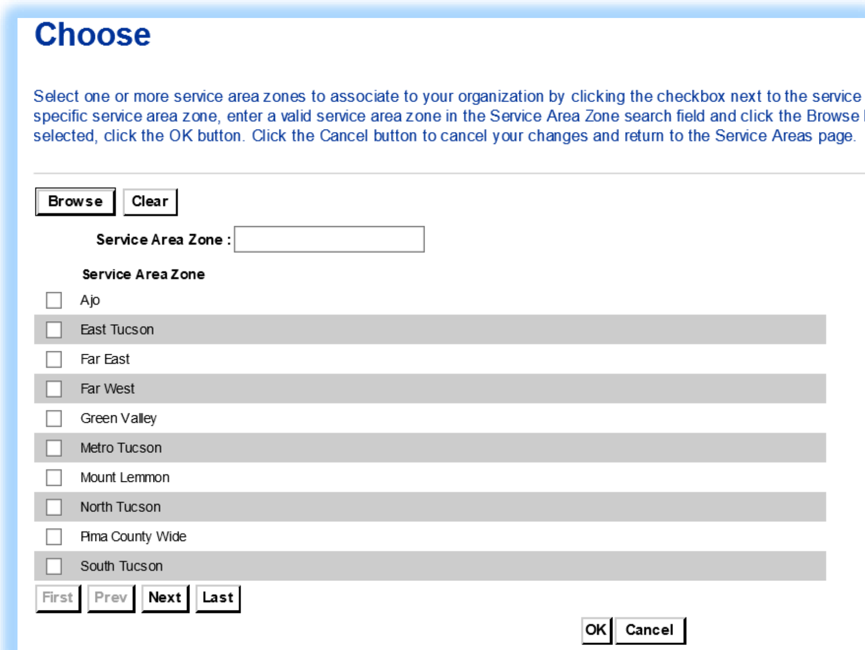
Account Information – Service Areas

This section allows you to maintain a list of Service Areas zones associated with your organization location.

- Click the **Add Items** button

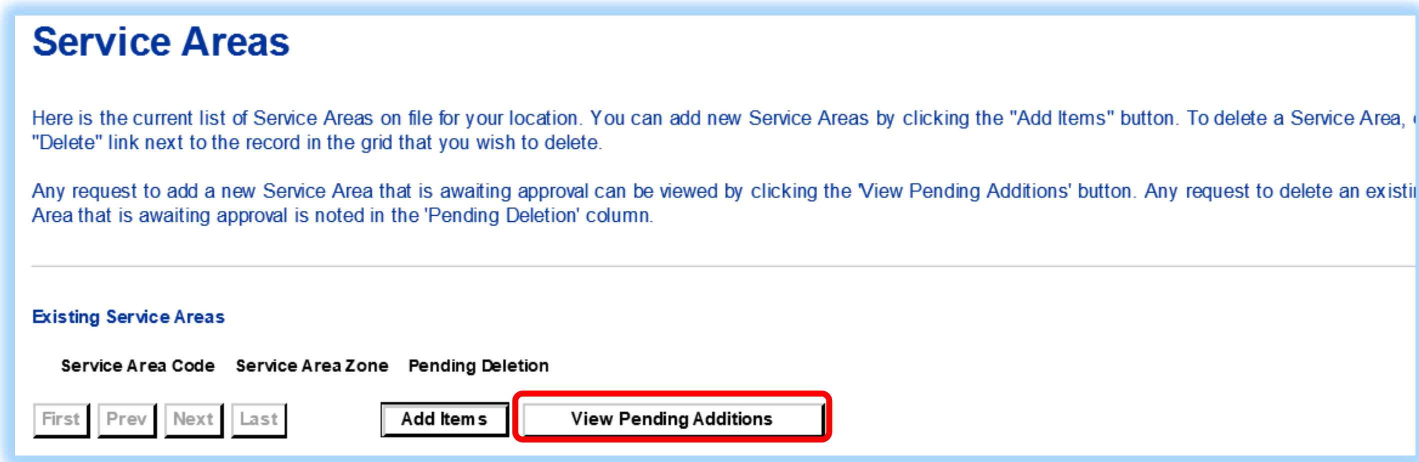


- Select the Service Areas for your location
- Click the **Next** button to view additional Service Area from the list
- Place a check mark next to the Service Area you selected
- Click the **OK** button to add the Service Area



Account Information – Service Areas

On the Service Areas page, you can click the **View Pending Additions** to view the zones you added.



View Pending Additions – Service Areas

- Service Areas awaiting approval
- Click the **Back** button to return to your vendor account