



Vendor Self Service: Account Maintenance

Revise April 2019

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

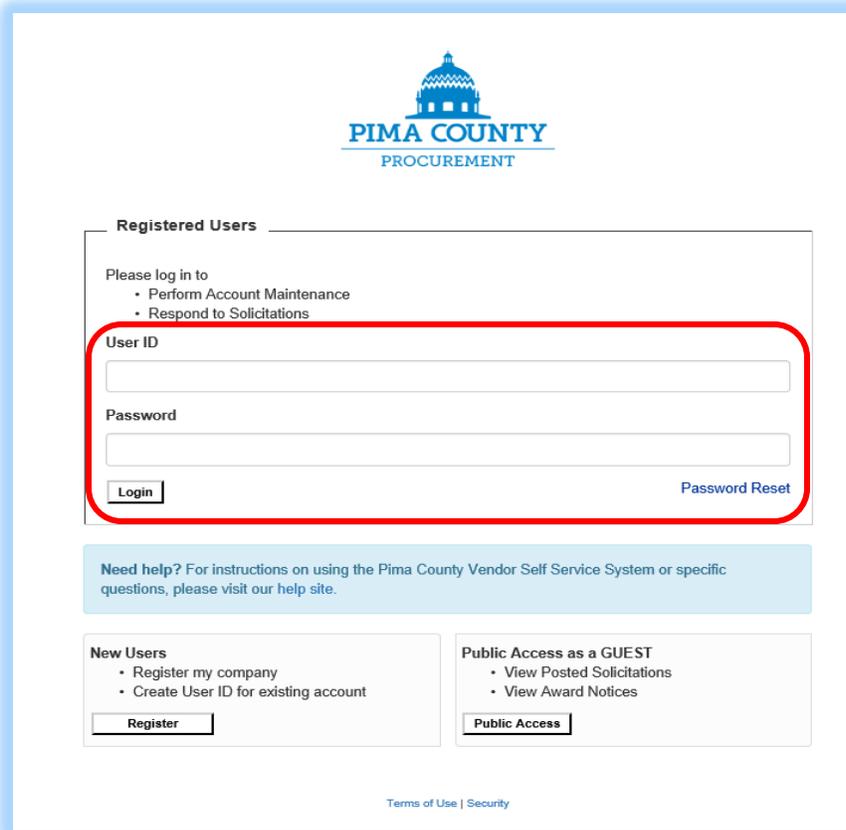
It is recommended that the vendor periodically reviews their account information to make sure is current and accurate.

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



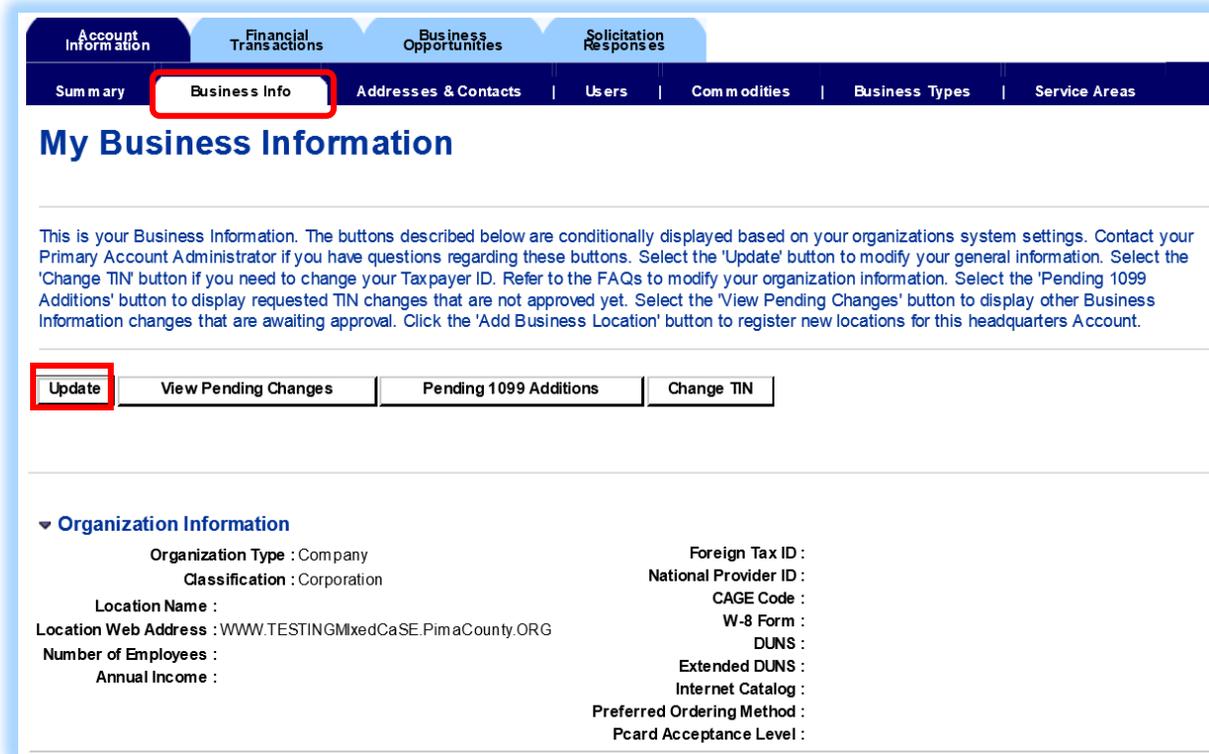
New Users - Search for an Existing Account

- 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 - 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



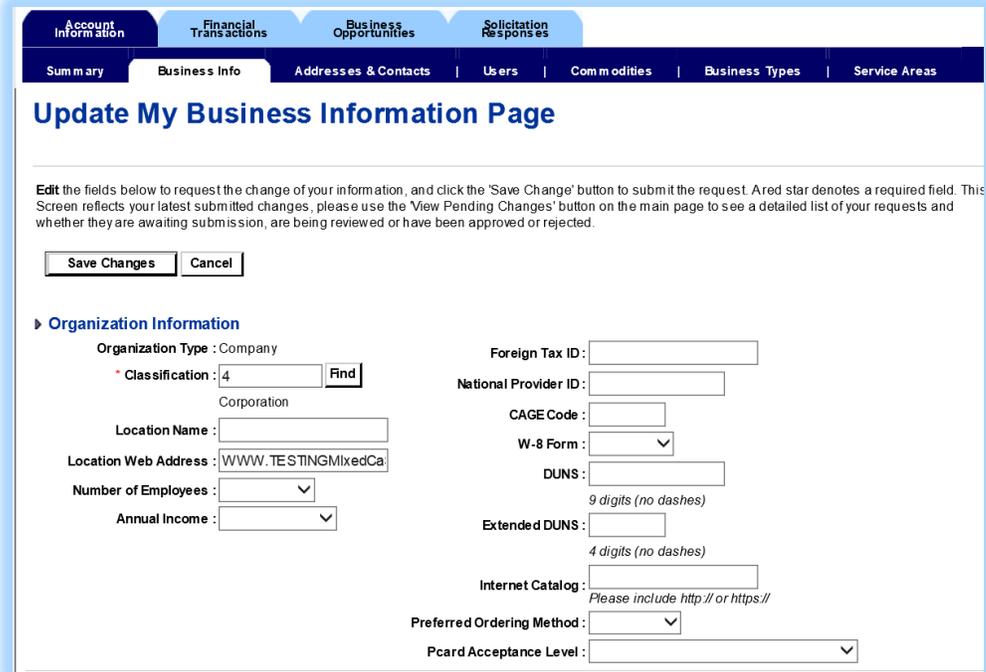
The screenshot shows the 'My Business Information' page. At the top, there are navigation tabs: 'Account Information', 'Financial Transactions', 'Business Opportunities', and 'Solicitation Responses'. Below these is a sub-navigation bar with 'Summary', 'Business Info' (highlighted with a red box), 'Addresses & Contacts', 'Users', 'Commodities', 'Business Types', and 'Service Areas'. The main heading is 'My Business Information'. Below the heading is a paragraph of instructions. Underneath the instructions is a row of buttons: 'Update' (highlighted with a red box), 'View Pending Changes', 'Pending 1099 Additions', and 'Change TIN'. Below the buttons is a section titled 'Organization Information' with a dropdown arrow. This section contains two columns of information: Organization Type, Classification, Location Name, Location Web Address, Number of Employees, and Annual Income on the left; and Foreign Tax ID, National Provider ID, CAGE Code, W-8 Form, DUNS, Extended DUNS, Internet Catalog, Preferred Ordering Method, and Pcard Acceptance Level on the right.

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



Update My Business Information Page

Edit the fields below to request the change of your information, and click the 'Save Change' button to submit the request. A red star denotes a required field. This screen reflects your latest submitted changes, please use the 'View Pending Changes' button on the main page to see a detailed list of your requests and whether they are awaiting submission, are being reviewed or have been approved or rejected.

► **Organization Information**

Organization Type : Company

* Classification : 4 Corporation

Location Name :

Location Web Address : WWW.TESTINGMixedCa

Number of Employees :

Annual Income :

Foreign Tax ID :

National Provider ID :

CAGE Code :

W-8 Form :

DUNS :
9 digits (no dashes)

Extended DUNS :
4 digits (no dashes)

Internet Catalog :
Please include http:// or https://

Preferred Ordering Method :

Pcard Acceptance Level :

Legal Name Information allows you to update your Organization

- Alias/DBA (Business Name)



► **Legal Name Information**

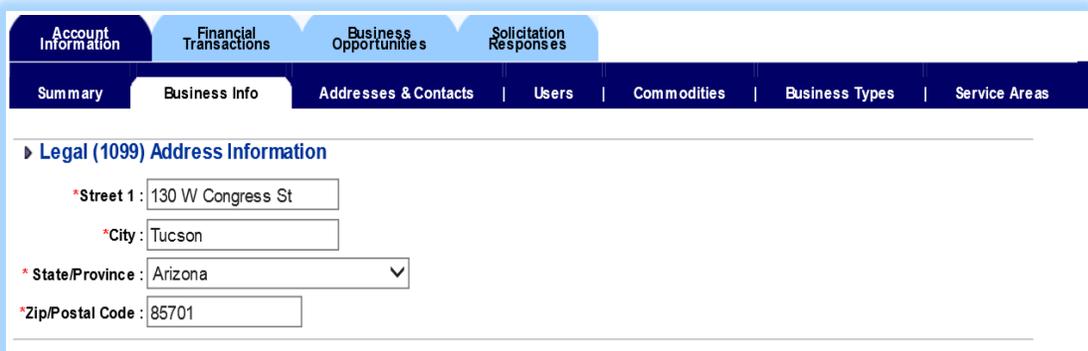
Legal Name on W-9 :

Name on Check :

Alias/DBA (Business Name) :

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

- 1099 legal Address



► **Legal (1099) Address Information**

* Street 1 :

* City :

* State/Province :

* Zip/Postal Code :

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.



Account Information | Financial Transactions | Business Opportunities | Solicitation Responses

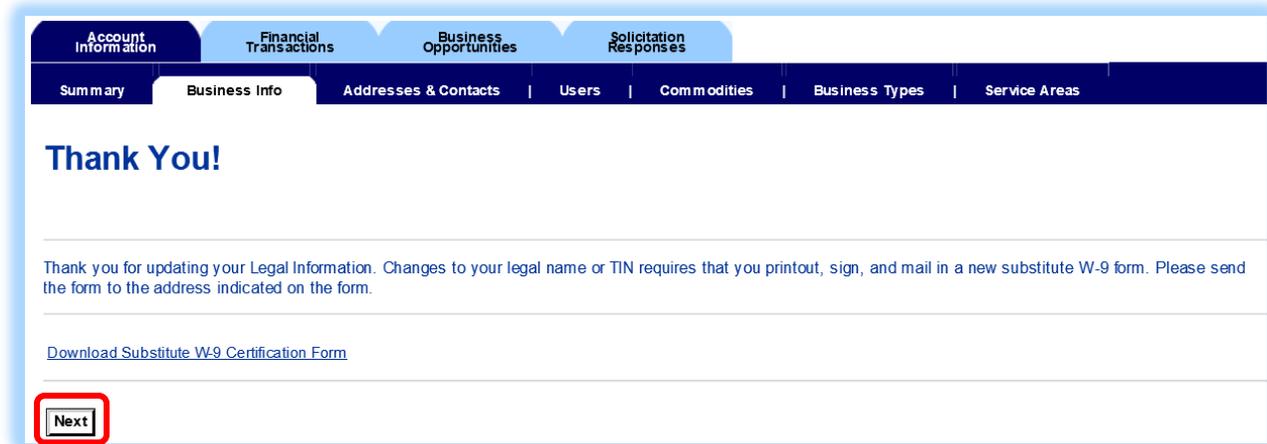
Summary | **Business Info** | Addresses & Contacts | Users | Commodities | Business Types | Service Areas

Update My Business Information Page

Edit the fields below to request the change of your information, and click the 'Save Change' button to submit the request. A red star denotes a required field. This Screen reflects your latest submitted changes, please use the 'View Pending Changes' button on the main page to see a detailed list of your requests and whether they are awaiting submission, are being reviewed or have been approved or rejected.

Thank you! page will display

- click the **Next** button



Account Information | Financial Transactions | Business Opportunities | Solicitation Responses

Summary | **Business Info** | Addresses & Contacts | Users | Commodities | Business Types | Service Areas

Thank You!

Thank you for updating your Legal Information. Changes to your legal name or TIN requires that you printout, sign, and mail in a new substitute W-9 form. Please send the form to the address indicated on the form.

[Download Substitute W-9 Certification Form](#)

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

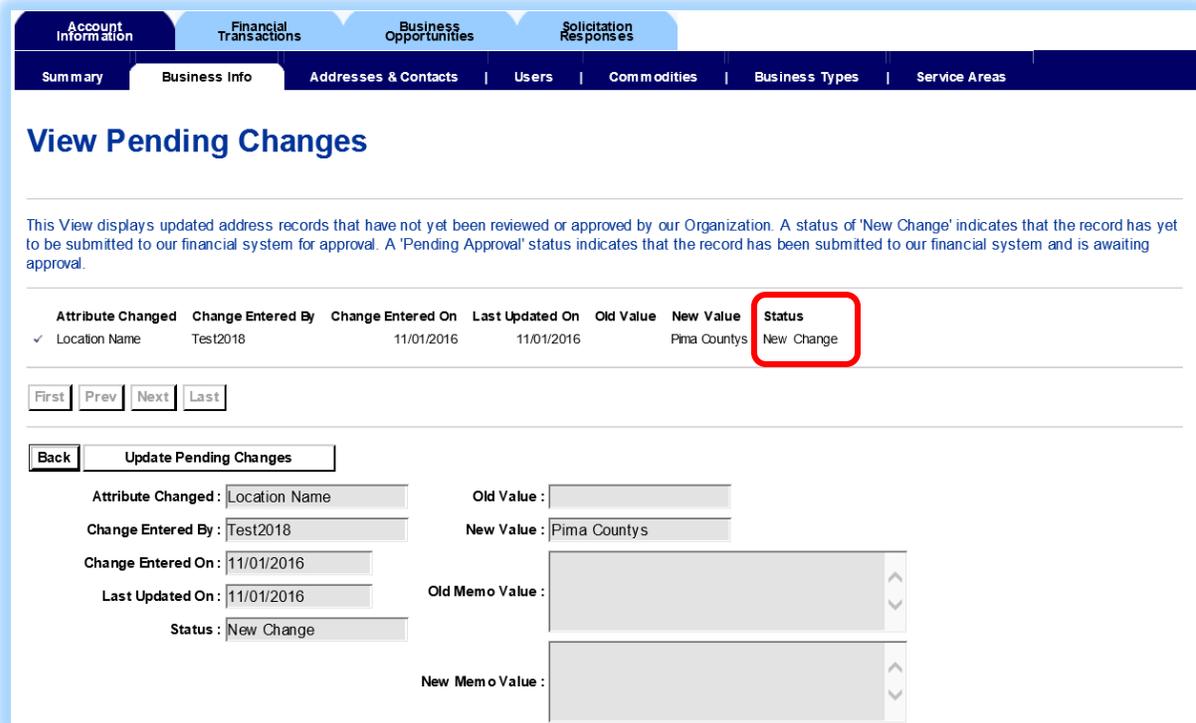


The screenshot shows the 'My Business Information' page. At the top, there are navigation tabs for 'Account Information', 'Financial Transactions', 'Business Opportunities', and 'Solicitation Responses'. Below these are sub-tabs for 'Summary', 'Business Info', 'Addresses & Contacts', 'Users', 'Commodities', 'Business Types', and 'Service Areas'. The main heading is 'My Business Information'. Below the heading is a paragraph of instructions. At the bottom, there are four buttons: 'Update', 'View Pending Changes', 'Pending 1099 Additions', and 'Change TIN'. The 'View Pending Changes' button is highlighted with a red box. To the right, there is a 'Pending Changes' checkbox which is checked, also highlighted with a red box. Below the checkbox is a link to 'Download IRS W-9 Form'.

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.



The screenshot shows the 'View Pending Changes' page. At the top, there are navigation tabs for 'Account Information', 'Financial Transactions', 'Business Opportunities', and 'Solicitation Responses'. Below these are sub-tabs for 'Summary', 'Business Info', 'Addresses & Contacts', 'Users', 'Commodities', 'Business Types', and 'Service Areas'. The main heading is 'View Pending Changes'. Below the heading is a paragraph of instructions. Below the instructions is a table with the following columns: 'Attribute Changed', 'Change Entered By', 'Change Entered On', 'Last Updated On', 'Old Value', 'New Value', and 'Status'. The 'Status' column is highlighted with a red box. Below the table are navigation buttons: 'First', 'Prev', 'Next', and 'Last'. Below these are two buttons: 'Back' and 'Update Pending Changes'. Below the buttons are several input fields for 'Attribute Changed', 'Change Entered By', 'Change Entered On', 'Last Updated On', 'Status', 'Old Value', 'New Value', 'Old Memo Value', and 'New Memo Value'.

Attribute Changed	Change Entered By	Change Entered On	Last Updated On	Old Value	New Value	Status
✓ Location Name	Test2018	11/01/2016	11/01/2016		Pima Countys	New Change

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.

Account Information
Financial Transactions
Business Opportunities
Solicitation Responses

Summary
Business Info
Addresses & Contacts
Users
Commodities
Business Types
Service Areas

Here are your addresses and contacts that are used for your financial transactions. You can add new addresses and contacts by clicking the 'Assign/Create Addresses & Contacts' button. You can view your requests that are pending approval by selecting the 'View Pending Additions' button.

To modify the type of address select the 'View/Update' link under the Existing Address & Contact Assignments section next to the record you wish to update. To modify actual addresses and contacts use the 'View/Update' link next to the appropriate record under the Update Addresses and Update Contacts sections.

Existing Address & Contact Assignments

Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To	Pending Changes		
AD001	Payment	7925 W Congress St, Tucson, AZ, 85701	No Contact		No	11/01/2016		<input type="checkbox"/>	View /Update	View Pending Changes
AD002	Payment	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View /Update	View Pending Changes
AD002	Ordering	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View /Update	View Pending Changes
AD002	Web Registrar	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View /Update	View Pending Changes

First
Prev
Next
Last
Assign/Create Addresses & Contacts
View Pending Additions

Update Addresses

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

- Click the **View/Update** link

Update Addresses

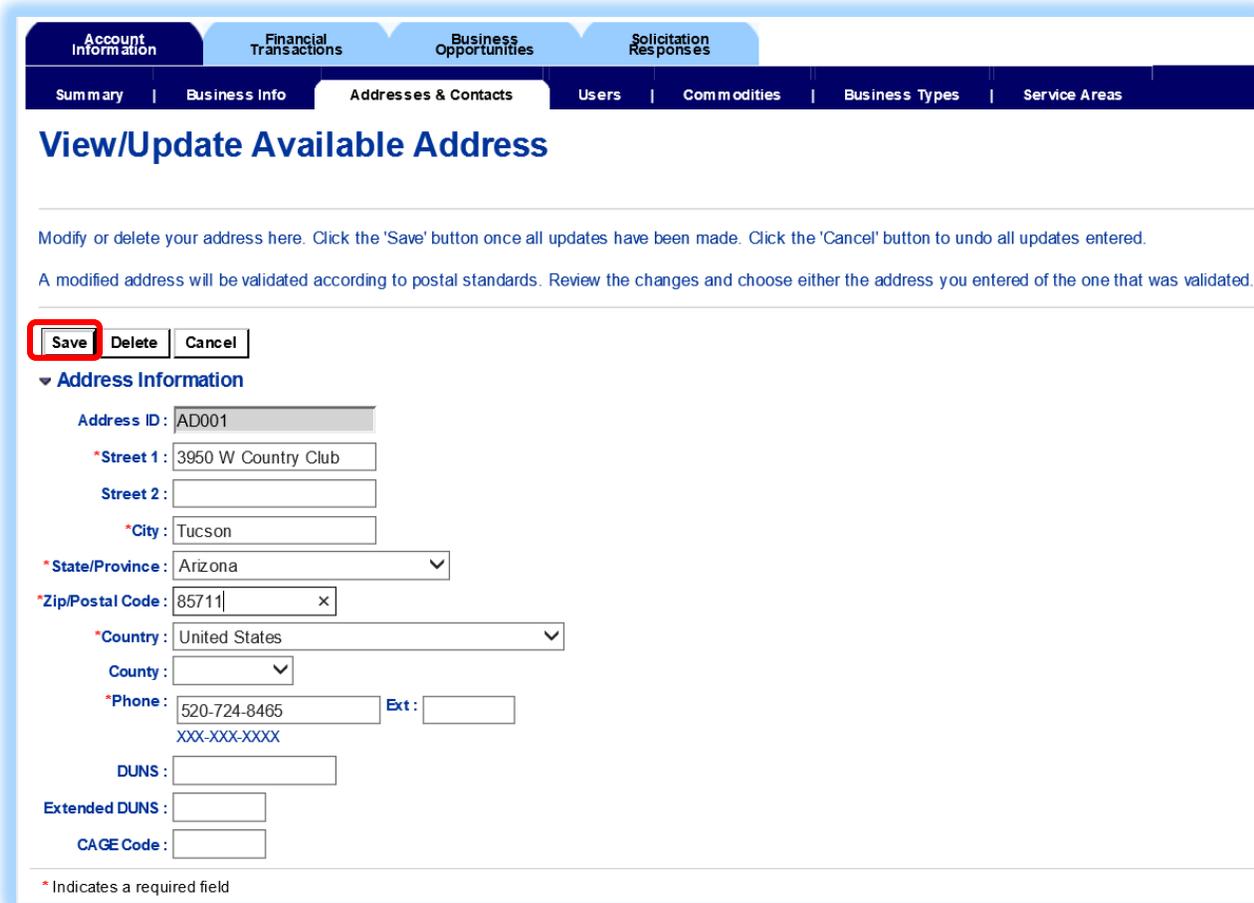
Address ID	Address	Pending Changes		
AD001	7925 W Congress St, Tucson, AZ, 85701	<input type="checkbox"/>	View /Update	View Pending Changes
AD002	130 W Congress St, Tucson, AZ, 85701	<input type="checkbox"/>	View /Update	View Pending Changes

Account Information – Addresses & Contacts

View/ Update Available Address

Update Addresses

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



Account Information | Financial Transactions | Business Opportunities | Solicitation Responses

Summary | Business Info | **Addresses & Contacts** | Users | Commodities | Business Types | Service Areas

View/Update Available Address

Modify or delete your address here. Click the 'Save' button once all updates have been made. Click the 'Cancel' button to undo all updates entered.

A modified address will be validated according to postal standards. Review the changes and choose either the address you entered of the one that was validated.

Save Delete Cancel

▼ **Address Information**

Address ID: AD001

*Street 1: 3950 W Country Club

Street 2:

*City: Tucson

*State/Province: Arizona

*Zip/Postal Code: 85711

*Country: United States

County:

*Phone: 520-724-8465 Ext:

XXX-XXX-XXXX

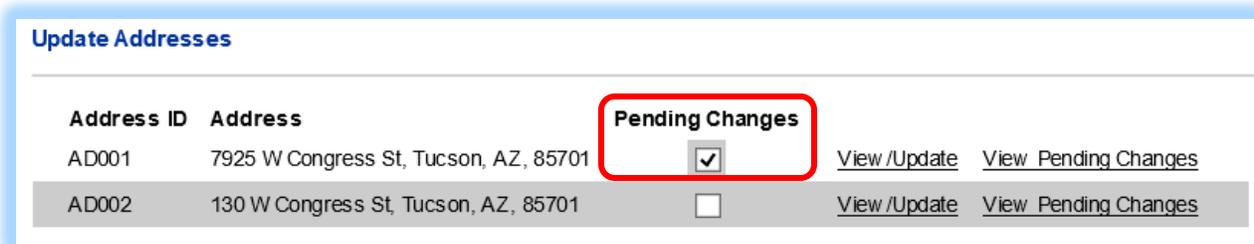
DUNS:

Extended DUNS:

CAGE Code:

* Indicates a required field

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



Update Addresses

Address ID	Address	Pending Changes	View /Update	View Pending Changes
AD001	7925 W Congress St, Tucson, AZ, 85701	<input checked="" type="checkbox"/>	View /Update	View Pending Changes
AD002	130 W Congress St, Tucson, AZ, 85701	<input type="checkbox"/>	View /Update	View Pending Changes

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

Update Contacts				
Contact ID	Contact Name	Contact Address	Pending Changes	
PC001	No Contact	7925 W Congress St, Tucson, AZ, 85701	<input type="checkbox"/>	View/Update View Pending Changes
PC002	Test 1950	130 W Congress St, Tucson, AZ, 85701	<input type="checkbox"/>	View/Update View Pending Changes

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

Account Information

Financial Transactions

Business Opportunities

Solicitation Responses

Summary

Business Info

Addresses & Contacts

Users

Commodities

Business Types

Service Areas

View/Update Available Contact

Modify or delete your contact here. Click the 'Save' button once all updates have been made. Click the 'Cancel' button to undo all updates entered.

Save

Delete

Cancel

▼ Contact Information

<p>Contact ID: <input type="text" value="PC001"/></p> <p>*Contact Name: <input type="text" value="Isabel Villanueva"/></p> <p>Title/Role: <input type="text"/></p> <p>Permissions: <input type="text"/></p> <p>Authorized Representative: <input checked="" type="checkbox"/></p> <p>Email: <input type="text" value="testvendors@pima.gov"/></p> <p>*Phone: <input type="text" value="520-724-8465"/></p> <p style="font-size: x-small; margin-left: 20px;">XXX-XXX-XXXX</p> <p>Phone Extension: <input type="text"/></p>	<p>Alternate Phone: <input type="text" value="20-724-8465"/> x</p> <p style="font-size: x-small; margin-left: 20px;">XXX-XXX-XXXX</p> <p>Alternate Phone Extension: <input type="text"/></p> <p>Fax: <input type="text"/></p> <p style="font-size: x-small; margin-left: 20px;">XXX-XXX-XXXX</p> <p>Fax Extension: <input type="text"/></p> <p>Alternate Fax: <input type="text"/></p> <p style="font-size: x-small; margin-left: 20px;">XXX-XXX-XXXX</p> <p>Alternate Fax Extension: <input type="text"/></p>
--	--

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

Update Contacts						
Contact ID	Contact Name	Contact Address	Pending Changes			
PC001	No Contact	7925 W Congress St, Tucson, AZ, 85701	<input checked="" type="checkbox"/>		View /Update	View Pending Changes
PC002	Test 1950	130 W Congress St, Tucson, AZ, 85701	<input type="checkbox"/>		View /Update	View Pending Changes

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.

Update Contacts						
Contact ID	Contact Name	Contact Address	Pending Changes			
PC001	No Contact	7925 W Congress St, Tucson, AZ, 85701	<input checked="" type="checkbox"/>		View /Update	View Pending Changes
PC002	Test 1950	130 W Congress St, Tucson, AZ, 85701	<input type="checkbox"/>		View /Update	View Pending Changes

View Pending Changes

Here are your requested changes awaiting approval.

Attribute Changed	Change Entered By	Change Entered On	Last Updated On	Old Value	New Value	Status
✓ Alternate Phone	Test1950	11/01/2016	11/01/2016	520-724-8465	520-724-8465	New Change
Contact Name	Test1950	11/01/2016	11/01/2016	No Contact	Isabel Villanueva	New Change
Email	Test1950	11/01/2016	11/01/2016	testvendors@pima.gov	testvendors@pima.gov	New Change

[First](#) [Prev](#) [Next](#) [Last](#)

[Back](#)

Attribute Changed : Old Value :

Change Entered By : New Value :

Change Entered On :

Last Updated On : Old Memo Value :

Status :

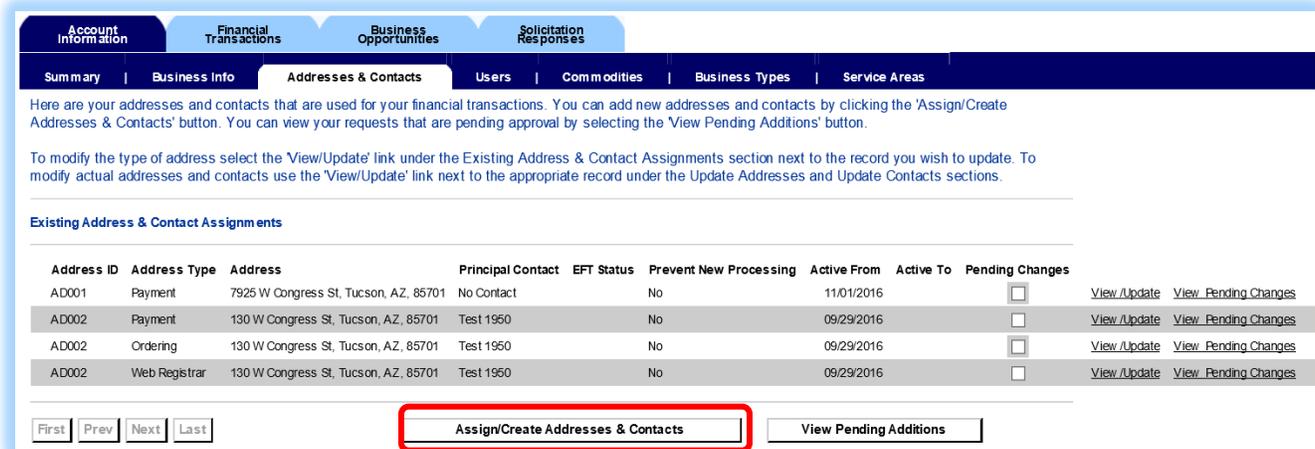
New Memo Value :

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



The screenshot shows a navigation menu with tabs for Account Information, Financial Transactions, Business Opportunities, and Solicitation Responses. Below this is a sub-menu with tabs for Summary, Business Info, Addresses & Contacts (selected), Users, Commodities, Business Types, and Service Areas. The main content area contains instructions on how to add and manage addresses and contacts. A table titled 'Existing Address & Contact Assignments' lists four records with columns for Address ID, Address Type, Address, Principal Contact, EFT Status, Prevent New Processing, Active From, Active To, and Pending Changes. At the bottom, there are navigation buttons (First, Prev, Next, Last) and two main action buttons: 'Assign/Create Addresses & Contacts' (highlighted with a red box) and 'View Pending Additions'.

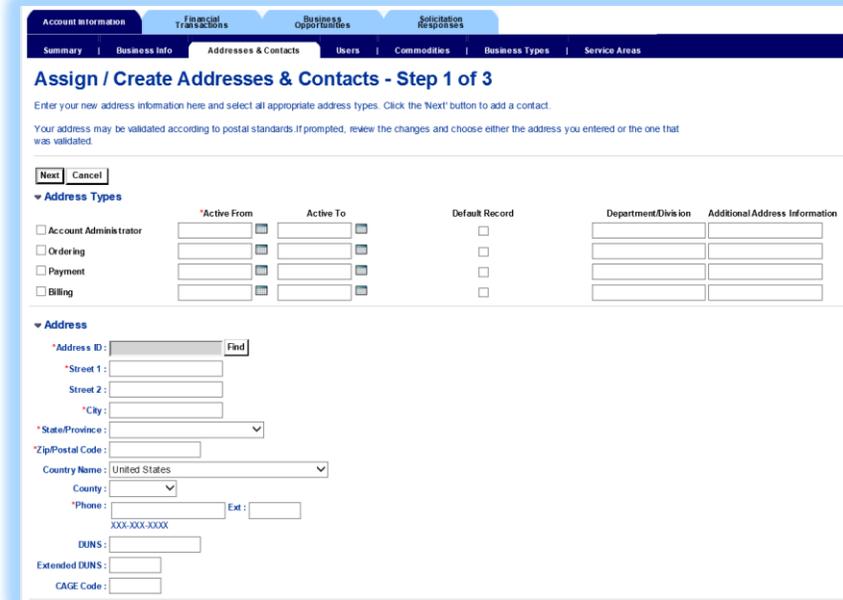
Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To	Pending Changes		
AD001	Payment	7925 W Congress St, Tucson, AZ, 85701	No Contact		No	11/01/2016		<input type="checkbox"/>	View /Update	View Pending Changes
AD002	Payment	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View /Update	View Pending Changes
AD002	Ordering	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View /Update	View Pending Changes
AD002	Web Registrar	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View /Update	View Pending Changes

Account Information – Addresses & Contacts

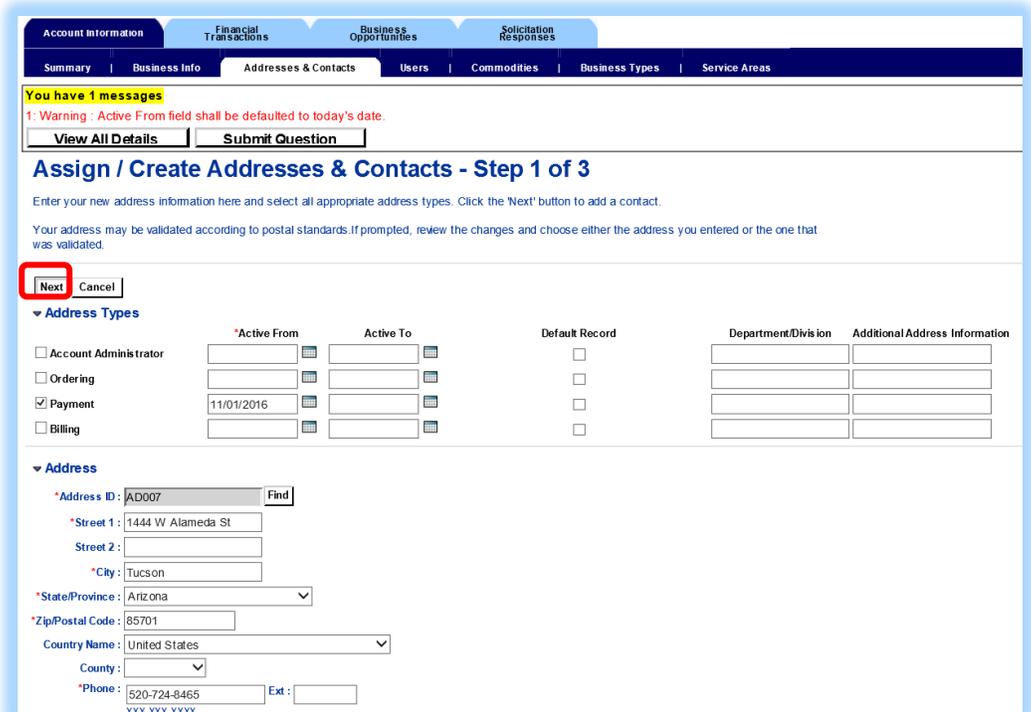
Assign/ Create Addresses & Contacts – Step 1 of 3

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

▼ **Principal Contact**

*Principal Contact ID: **Find** Alternate Phone:

Account Information | Financial Transactions | Business Opportunities | Solicitation Responses

Summary | Business Info | **Addresses & Contacts** | Users | Commodities | Business Types | Service Areas

Choose

[Browse](#) [Clear](#)

Contact ID:

Contact Name:

	Contact ID	Contact Name	Email	Phone	Phone Extension	Fax	Fax Extension	Country	State/Province	Zip/Postal Code	Page Code
Select	PC001	No Contact		520-724-8465				United States	Arizona	85701	
Select	PC002	Test 1950		520-724-8465				United States	Arizona	85701	

[Cancel](#) First Previous Next Last

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

Next | Back | Cancel

▼ **Principal Contact**

*Principal Contact ID: **Find** Alternate Phone:

*Contact Name: Alternate Phone Extension:

Title/Role: Fax:

Permissions: Fax Extension:

Authorized Representative: Alternate Fax:

Email: Alternate Fax Extension:

Correspondence Type: ▼

English Spoken:

*Phone: XXX-XXX-XXXX

Phone Extension:

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
Financial Transactions
Business Opportunities
Solicitation Responses

Summary
Business Info
Addresses & Contacts
Users
Commodities
Business Types
Service Areas

Assign / Create Addresses & Contacts - Step 3 of 3

Please review the address and contact information you have entered. Click the 'Save' button to submit them.

Address Type	Active From	Active To	Address ID	Address	Principal Contact
✓ Payment	11/01/2016		AD007	1444 W Alameda St, Tucson, AZ, 85701	New Contact

First Prev Next Last

Save Back Cancel

▼ General Information

Address Type: Department / Division:

Active From: Additional Address Information:

Active To:

Default Record:

▼ Address

Address ID: Country:

Street 1: County:

Street 2: Phone:

City: Phone Extension:

State/Province: DUNS:

Zip/Postal Code: Extended DUNS:

CAGE Code:

▼ Principal Contact

Principal Contact ID: Phone:

Principal Contact: Phone Extension:

Title/Role: Alternate Phone:

Permissions: Alternate Phone Extension:

Authorized Representative: Fax:

Email: Fax Extension:

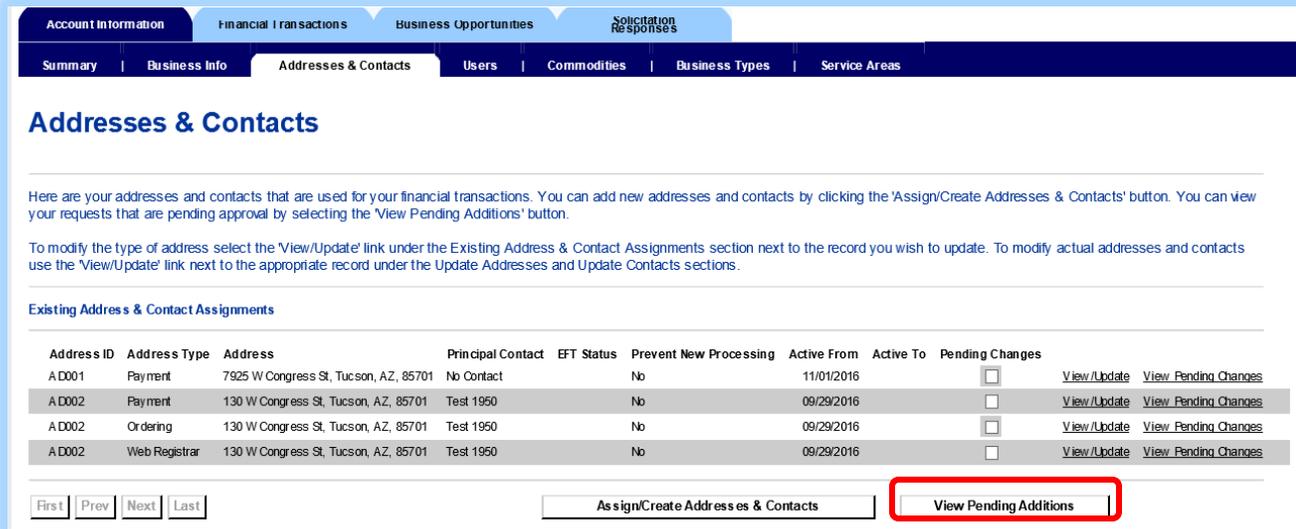
Correspondence Type: Alternate Fax:

English Spoken: Alternate Fax Extension:

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



Addresses & Contacts

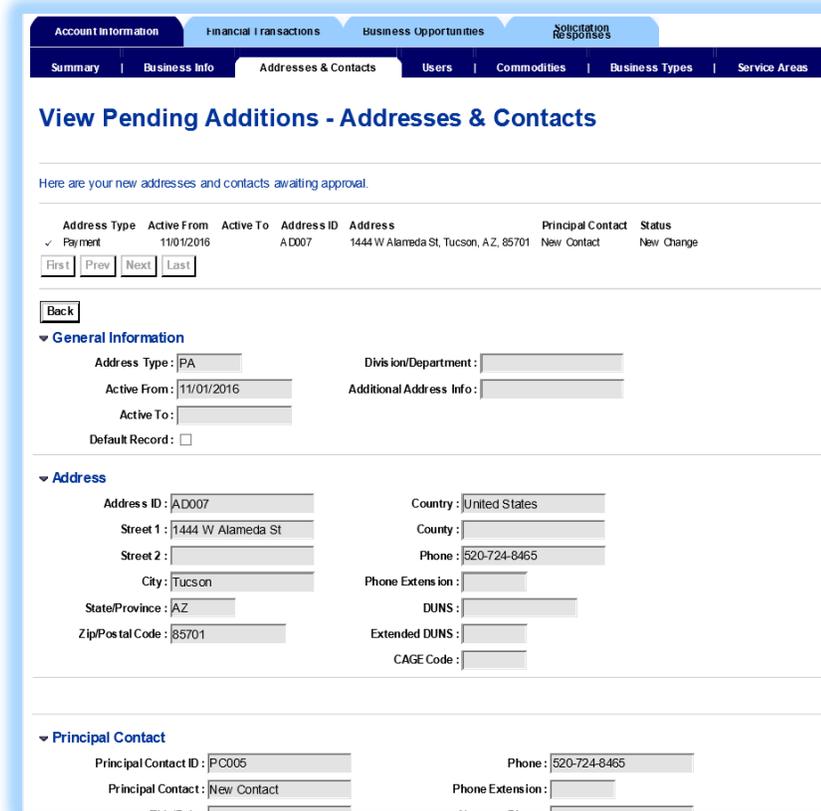
Here are your addresses and contacts that are used for your financial transactions. You can add new addresses and contacts by clicking the 'Assign/Create Addresses & Contacts' button. You can view your requests that are pending approval by selecting the 'View Pending Additions' button.

To modify the type of address select the 'View/Update' link under the Existing Address & Contact Assignments section next to the record you wish to update. To modify actual addresses and contacts use the 'View/Update' link next to the appropriate record under the Update Addresses and Update Contacts sections.

Existing Address & Contact Assignments

Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To	Pending Changes		
A D001	Payment	7925 W Congress St, Tucson, AZ, 85701	No Contact		No	11/01/2016		<input type="checkbox"/>	View/Update	View Pending Changes
A D002	Payment	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View/Update	View Pending Changes
A D002	Ordering	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View/Update	View Pending Changes
A D002	Web Registrar	130 W Congress St, Tucson, AZ, 85701	Test 1950		No	09/29/2016		<input type="checkbox"/>	View/Update	View Pending Changes

View Pending Additions – Addresses & Contacts



View Pending Additions - Addresses & Contacts

Here are your new addresses and contacts awaiting approval.

Address Type	Active From	Active To	Address ID	Address	Principal Contact	Status
✓ Payment	11/01/2016		A D007	1444 W Alameda St, Tucson, AZ, 85701	New Contact	New Change

General Information

Address Type:
 Division/Department:

Active From:
 Additional Address Info:

Active To:

Default Record:

Address

Address ID:
 Country:

Street 1:
 County:

Street 2:
 Phone:

City:
 Phone Extension:

State/Province:
 DUNS:

Zip/Postal Code:
 Extended DUNS:

CAGE Code:

Principal Contact

Principal Contact ID:
 Phone:

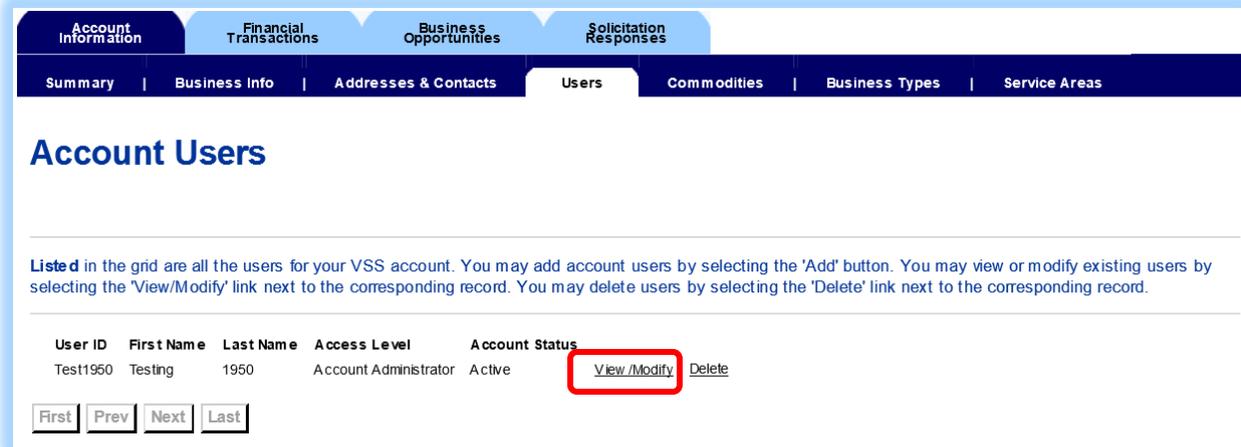
Principal Contact:
 Phone Extension:

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



Account Users

Listed in the grid are all the users for your VSS account. You may add account users by selecting the 'Add' button. You may view or modify existing users by selecting the 'View/Modify' link next to the corresponding record. You may delete users by selecting the 'Delete' link next to the corresponding record.

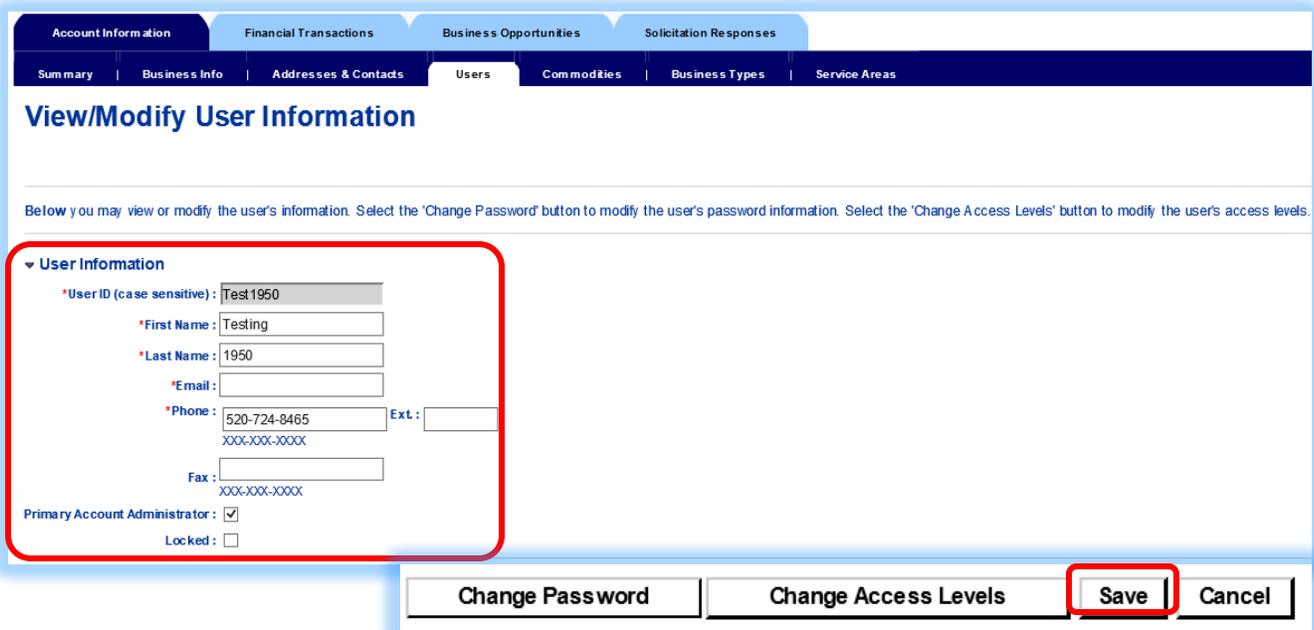
User ID	First Name	Last Name	Access Level	Account Status	
Test1950	Testing	1950	Account Administrator	Active	View/Modify Delete

First Prev Next Last

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



View/Modify User Information

Below you may view or modify the user's information. Select the 'Change Password' button to modify the user's password information. Select the 'Change Access Levels' button to modify the user's access levels.

▼ User Information

*User ID (case sensitive):

*First Name:

*Last Name:

*Email:

*Phone: Ext.:

XXX-XXX-XXXX

Fax:

XXX-XXX-XXXX

Primary Account Administrator:

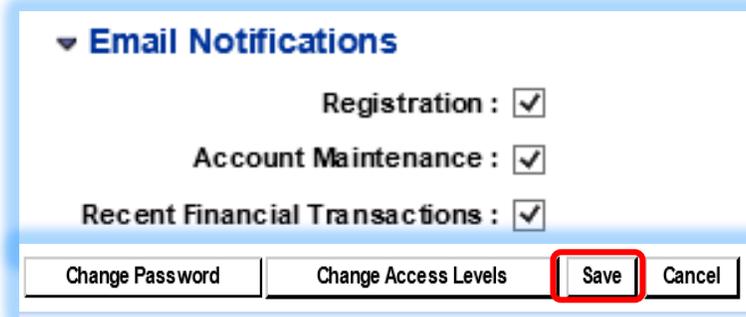
Locked:

Change Password | Change Access Levels | **Save** | Cancel

Account Information – Users View/ Modify User Information

Email Notifications

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



▼ Email Notifications

Registration :

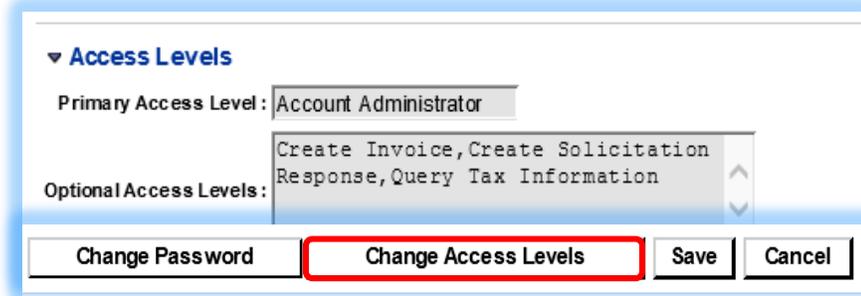
Account Maintenance :

Recent Financial Transactions :

Change Password | Change Access Levels | **Save** | Cancel

Access Levels

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



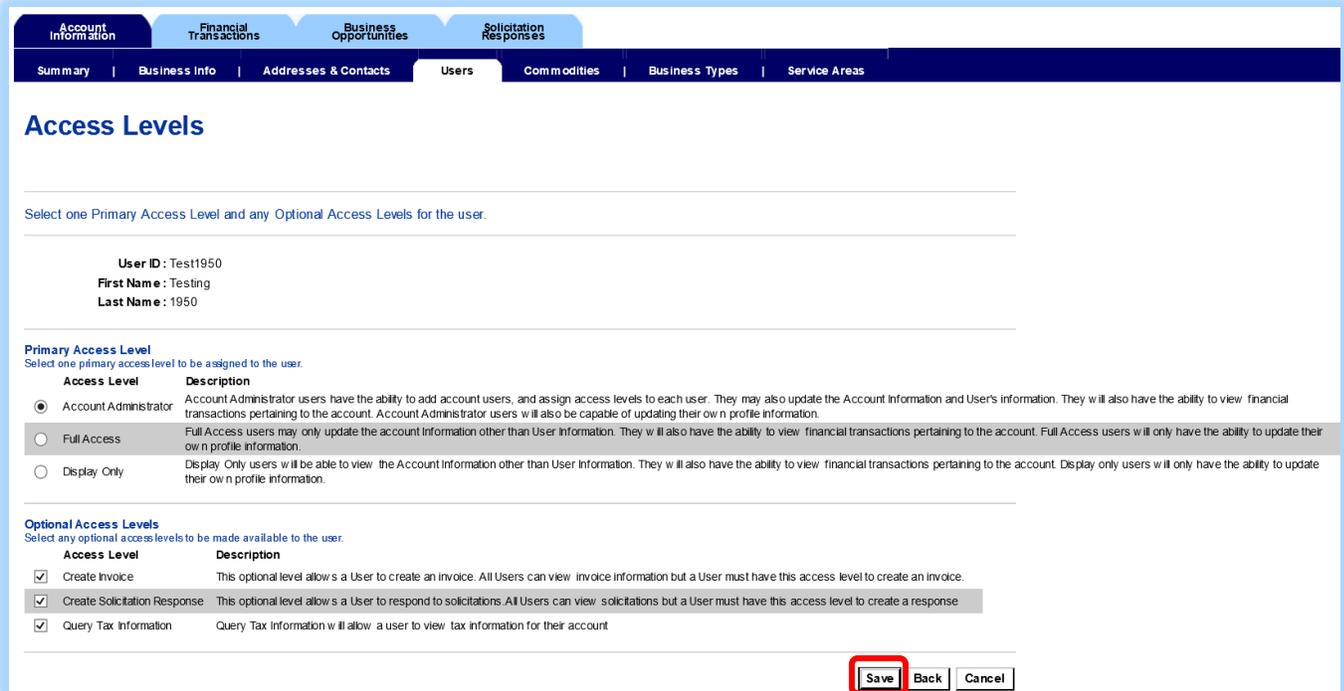
▼ Access Levels

Primary Access Level : Account Administrator

Optional Access Levels : Create Invoice, Create Solicitation Response, Query Tax Information

Change Password | **Change Access Levels** | Save | Cancel

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



Account Information | Financial Transactions | Business Opportunities | Solicitation Responses

Summary | Business Info | Addresses & Contacts | **Users** | Commodities | Business Types | Service Areas

Access Levels

Select one Primary Access Level and any Optional Access Levels for the user.

User ID : Test1950
First Name : Testing
Last Name : 1950

Primary Access Level
Select one primary access level to be assigned to the user.

Access Level	Description
<input checked="" type="radio"/> Account Administrator	Account Administrator users have the ability to add account users, and assign access levels to each user. They may also update the Account Information and User's information. They will also have the ability to view financial transactions pertaining to the account. Account Administrator users will also be capable of updating their own profile information.
<input type="radio"/> Full Access	Full Access users may only update the account information other than User Information. They will also have the ability to view financial transactions pertaining to the account. Full Access users will only have the ability to update their own profile information.
<input type="radio"/> Display Only	Display Only users will be able to view the Account information other than User Information. They will also have the ability to view financial transactions pertaining to the account. Display only users will only have the ability to update their own profile information.

Optional Access Levels
Select any optional access levels to be made available to the user.

Access Level	Description
<input checked="" type="checkbox"/> Create Invoice	This optional level allows a User to create an invoice. All Users can view invoice information but a User must have this access level to create an invoice.
<input checked="" type="checkbox"/> Create Solicitation Response	This optional level allows a User to respond to solicitations. All Users can view solicitations but a User must have this access level to create a response.
<input checked="" type="checkbox"/> Query Tax Information	Query Tax information will allow a user to view tax information for their account.

Save | Back | Cancel

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

▶ **Security Questions and Answers**

* Security Question :

Security Answer :

Retype Security Answer :

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 | Financial Transactions | Business Opportunities | Solicitation Responses

Summary | Business Info | Addresses & Contacts | Users | Commodities | Business Types | Service Areas

Password Maintenance

Create a new password for the user below.

*Enter New Password(case sensitive) :

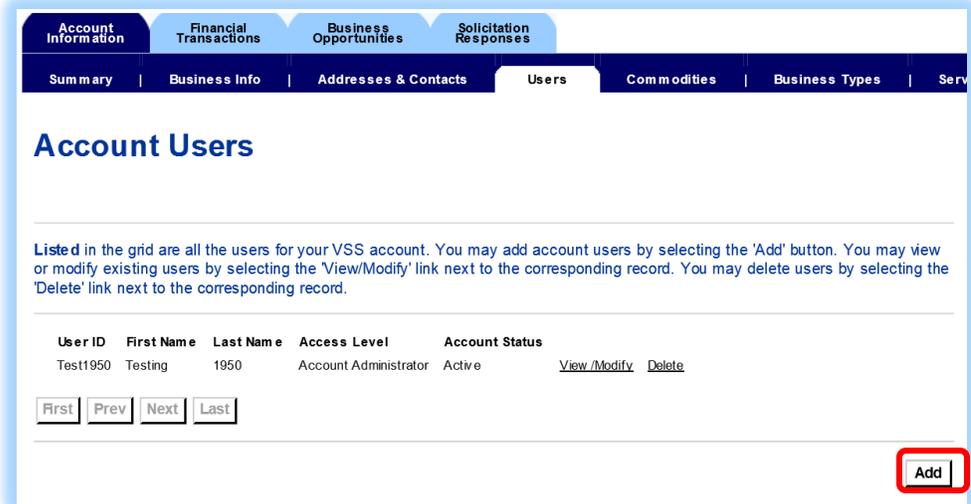
*Re-enter New Password : (Note: Passwords should be case sensitive, between 8 and 16 characters in length and contain at least 1 numeric value)

* Indicates a required field

Account Information – Users Account Users

Add Account Users

- Select the **Add** button



Account Users

Listed in the grid are all the users for your VSS account. You may add account users by selecting the 'Add' button. You may view or modify existing users by selecting the 'View/Modify' link next to the corresponding record. You may delete users by selecting the 'Delete' link next to the corresponding record.

User ID	First Name	Last Name	Access Level	Account Status	
Test1950	Testing	1950	Account Administrator	Active	View/Modify Delete

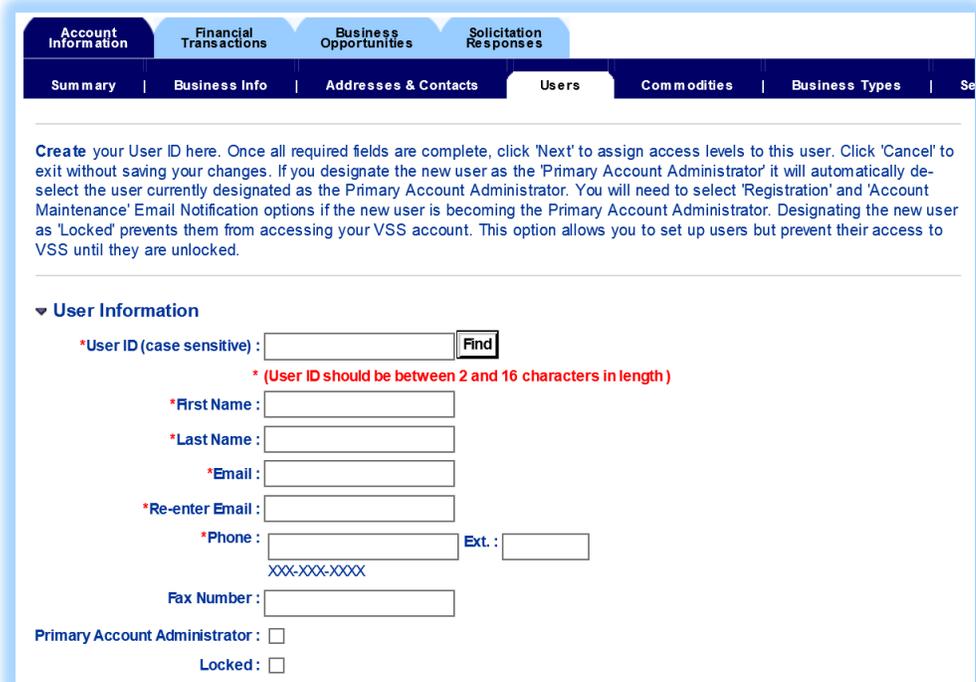
First Prev Next Last

Add

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



Create your User ID here. Once all required fields are complete, click 'Next' to assign access levels to this user. Click 'Cancel' to exit without saving your changes. If you designate the new user as the 'Primary Account Administrator' it will automatically de-select the user currently designated as the Primary Account Administrator. You will need to select 'Registration' and 'Account Maintenance' Email Notification options if the new user is becoming the Primary Account Administrator. Designating the new user as 'Locked' prevents them from accessing your VSS account. This option allows you to set up users but prevent their access to VSS until they are unlocked.

▼ **User Information**

*User ID (case sensitive):
 *(User ID should be between 2 and 16 characters in length)

*First Name:

*Last Name:

*Email:

*Re-enter Email:

*Phone: Ext.:
 XXX-XXX-XXXX

Fax Number:

Primary Account Administrator:

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

▼ Password
(Passwords should be between 2 and 16 characters in length)

*Password :

*

*Re-enter Password :

▼ Email Notifications

Registration :

Account Maintenance :

Recent Financial Transactions :

▼ Security Questions and Answers

*Security Question :

*Security Answer :

*Retype Security Answer :

* Indicates a required field

Next

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
Financial Transactions
Business Opportunities
Solicitation Responses

Summary
Business Info
Addresses & Contacts
Users
Commodities
Business Types
Service Areas

Access Levels

Select one Primary Access Level and any Optional Access Levels.

User ID : 123
First Name : 123
Last Name : 123

Primary Access Level
Select one primary access level to be assigned to the user.

Access Level	Description
<input type="radio"/> Account Administrator	Account Administrator users have the ability to add account users, and assign access levels to each user. They may also update the Account Information and User's information. They will also have the ability to view financial transactions pertaining to the account. Account Administrator users will also be capable of updating their own profile information.
<input type="radio"/> Full Access	Full Access users may only update the account Information other than User Information. They will also have the ability to view financial transactions pertaining to the account. Full Access users will only have the ability to update their own profile information.
<input checked="" type="radio"/> Display Only	Display Only users will be able to view the Account Information other than User Information. They will also have the ability to view financial transactions pertaining to the account. Display only users will only have the ability to update their own profile information.

Optional Access Levels
Select any optional access levels to be made available to the user.

Access Level	Description
<input type="checkbox"/> Create Invoice	This optional level allows a User to create an invoice. All Users can view invoice information but a User must have this access level to create an invoice.
<input type="checkbox"/> Create Solicitation Response	This optional level allows a User to respond to solicitations. All Users can view solicitations but a User must have this access level to create a response
<input type="checkbox"/> Query Tax Information	Query Tax Information will allow a user to view tax information for their account

Account Information – Users Account Users

- New User ID will display on the Account Users Page

Account Information
Financial Transactions
Business Opportunities
Solicitation Responses

Summary
Business Info
Addresses & Contacts
Users
Commodities
Business Types
Service Areas

Account Users

Listed in the grid are all the users for your VSS account. You may add account users by selecting the 'Add' button. You may view or modify existing users by selecting the 'View/Modify' link next to the corresponding record. You may delete users by selecting the 'Delete' link next to the corresponding record.

User ID	First Name	Last Name	Access Level	Account Status		
New User	New	User	Display Only	Active	View/Modify	Delete
Test1950	Testing	1950	Account Administrator	Active	View/Modify	Delete

First
Prev
Next
Last

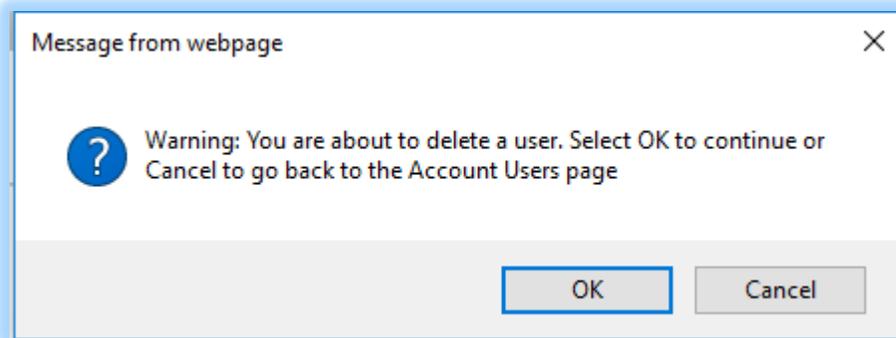
Add

Account Information – Users Remove Account Users

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

User ID	First Name	Last Name	Access Level	Account Status	
New User	New	User	Display Only	Active	View /Modify Delete
Test1950	Testing	1950	Account Administrator	Active	View /Modify Delete

- 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

You have 1 messages

1: Warning : New User user is deleted as the corresponding vendor record is deleted.

[View All Details](#) [Submit Question](#)

Account Users

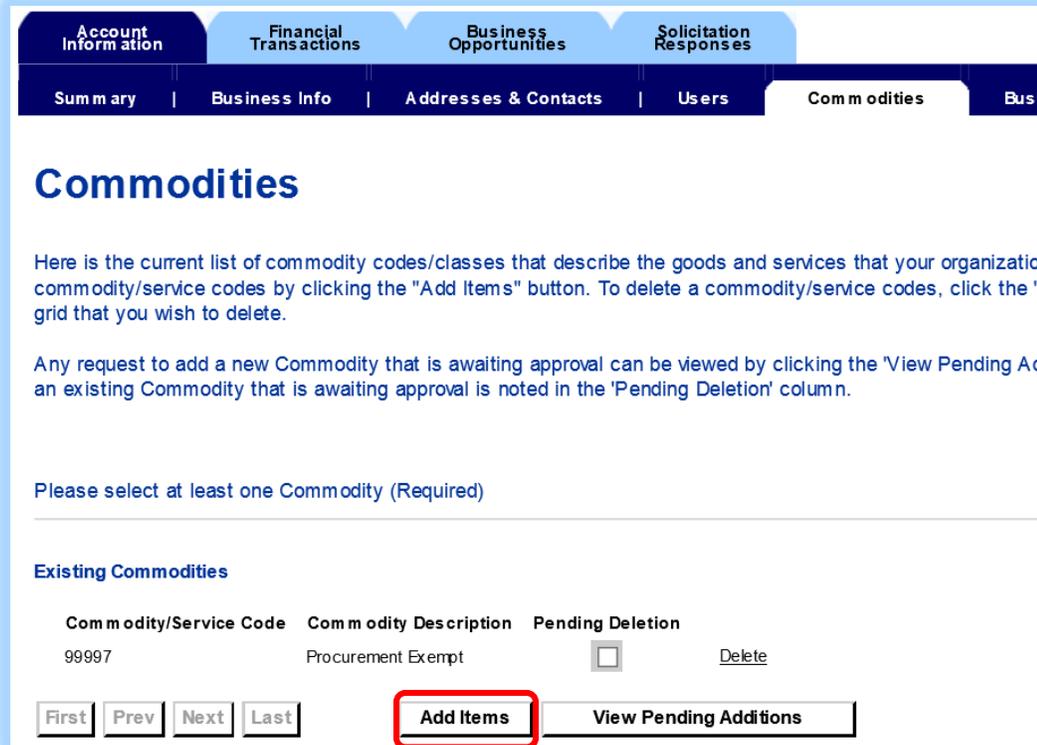
Listed in the grid are all the users for your VSS account. You may add account users by selecting the 'Add' button. You may view or modify existing use the 'View/Modify' link next to the corresponding record. You may delete users by selecting the 'Delete' link next to the corresponding record.

User ID	First Name	Last Name	Access Level	Account Status	
Test1950	Testing	1950	Account Administrator	Active	View /Modify Delete

Account Information – Commodities Add Items

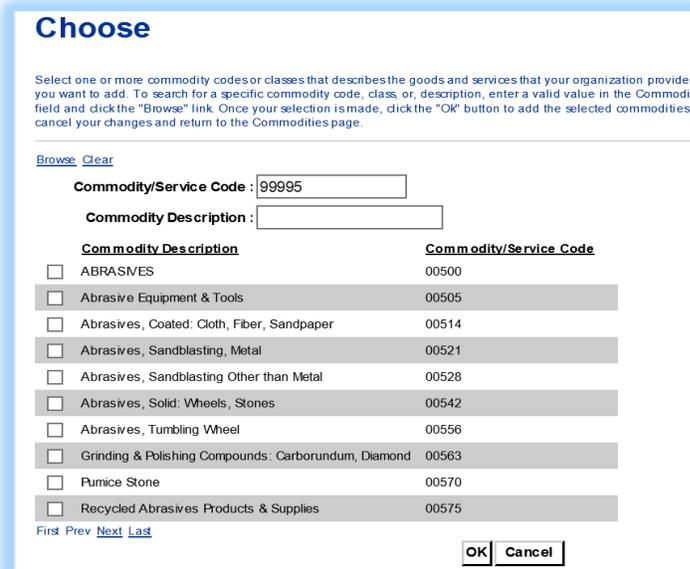
This section allows you to maintain a list of the commodity codes associated with your organization.

- 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



The screenshot shows the 'Commodities' section of the Vendor Self Service interface. At the top, there are navigation tabs: Account Information, Financial Transactions, Business Opportunities, Solicitation Responses, Summary, Business Info, Addresses & Contacts, Users, Commodities, and Business. The 'Commodities' tab is active. Below the tabs, the title 'Commodities' is displayed. A paragraph explains that the current list of commodity codes/classes describes the goods and services that the organization provides, and that users can add or delete items. Another paragraph mentions that pending additions and deletions can be viewed. Below this, a message states 'Please select at least one Commodity (Required)'. Under the heading 'Existing Commodities', there is a table with columns for 'Commodity/Service Code', 'Commodity Description', and 'Pending Deletion'. The table contains one entry: '99997 Procurement Exempt' with a checkbox in the 'Pending Deletion' column and a 'Delete' link. At the bottom of the table, there are navigation buttons: 'First', 'Prev', 'Next', 'Last', 'Add Items' (highlighted with a red box), and 'View Pending Additions'.

- 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



The screenshot shows the 'Choose' dialog box. It has a title 'Choose' and a paragraph explaining that users should select one or more commodity codes or classes that describe the goods and services they want to add. Below the paragraph, there are search fields for 'Commodity/Service Code' (containing '99995') and 'Commodity Description'. There is a 'Browse' link and a 'Clear' link. Below the search fields, there is a table with columns for 'Commodity Description' and 'Commodity/Service Code'. The table contains several rows of commodity codes, each with a checkbox in the 'Commodity Description' column. The 'Add Items' button from the previous screenshot is highlighted with a red box. At the bottom right, there are 'OK' and 'Cancel' buttons.

Account Information – Commodities Add Items

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

Existing Commodities

Commodity/Service Code	Commodity Description	Pending Deletion	
99997	Procurement Exempt	<input type="checkbox"/>	Delete

[First](#)
[Prev](#)
[Next](#)
[Last](#)
[Add Items](#)
[View Pending Additions](#)

View Pending Additions – Commodities

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

Account Information | Financial Transactions | Business Opportunities | Solicitation Responses

Summary | Business Info | Addresses & Contacts | Users | Commodities

View Pending Additions - Commodities

Here are your new commodities awaiting approval.

Please select at least one Commodity (Required).

Commodity/Service Code	Commodity Description	Status
00570	Pumice Stone	Pending Approval
99995	Pima County Employee	New Change

[First](#)
[Prev](#)
[Next](#)
[Last](#)
[Back](#)

Account Information – Commodities Remove Commodity Code

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

Commodities

Here is the current list of commodity codes/classes that describe the goods and services that your organization provides. You can add new commodity codes by clicking the "Add Items" button. To delete a commodity/service codes, click the "Delete" link next to the record in the grid that you want to remove.

Any request to add a new Commodity that is awaiting approval can be viewed by clicking the 'View Pending Additions' button. Any request to delete a Commodity that is awaiting approval is noted in the 'Pending Deletion' column.

Please select at least one Commodity (Required)

Existing Commodities

Commodity/Service Code	Commodity Description	Pending Deletion	
99997	Procurement Exempt	<input type="checkbox"/>	Delete

[First](#) [Prev](#) [Next](#) [Last](#) [Add Items](#) [View Pending Additions](#)

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

Message from webpage

 Warning: You are about to delete a commodity. Select OK to continue or Cancel to go back to the Commodities page

[OK](#) [Cancel](#)

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

Existing Commodities

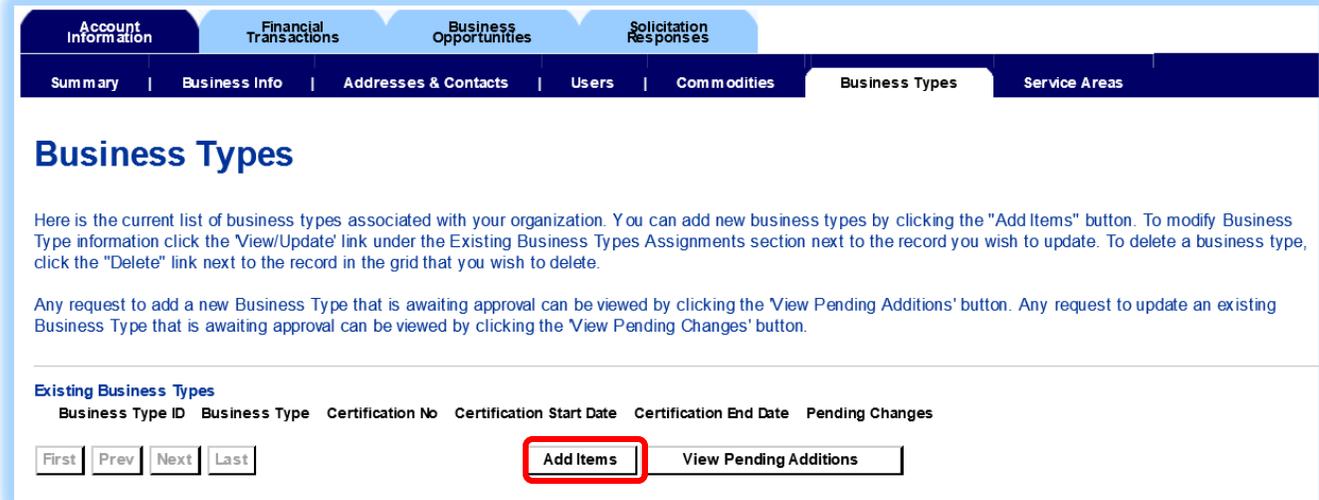
Commodity/Service Code	Commodity Description	Pending Deletion	
99997	Procurement Exempt	<input checked="" type="checkbox"/>	Delete

[First](#) [Prev](#) [Next](#) [Last](#) [Add Items](#) [View Pending Additions](#)

Account Information – Business Types Add Items

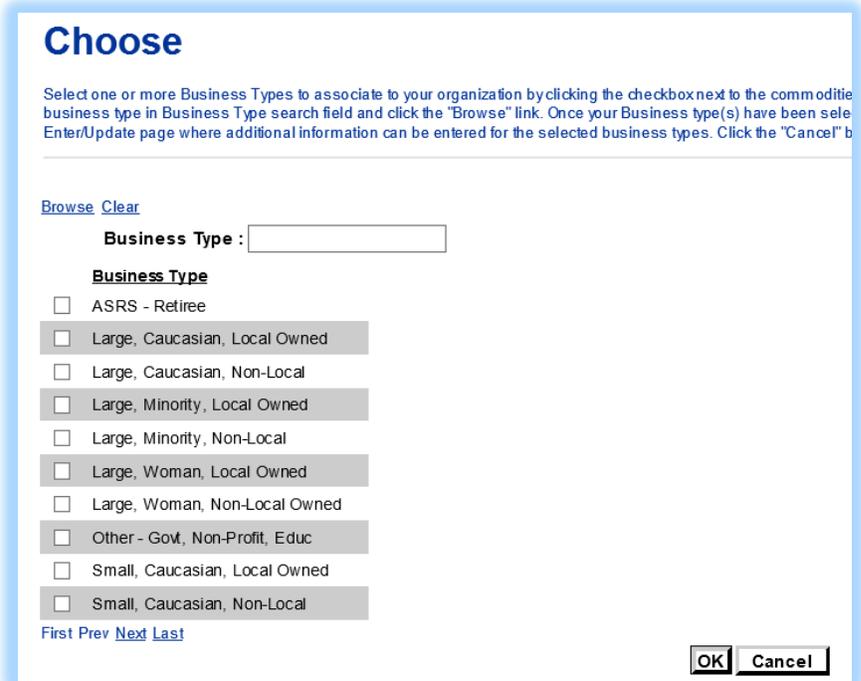
This section allows you to maintain a list of the business types associated with your organization.

- Click the **Add Items** button



The screenshot shows a navigation menu with tabs for Account Information, Financial Transactions, Business Opportunities, and Solicitation Responses. Under Account Information, there are sub-tabs for Summary, Business Info, Addresses & Contacts, Users, Commodities, **Business Types**, and Service Areas. The Business Types section is active, displaying a title, explanatory text, and a table of existing business types. Below the table are navigation buttons: First, Prev, Next, Last, **Add Items** (highlighted with a red box), and View Pending Additions.

- 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

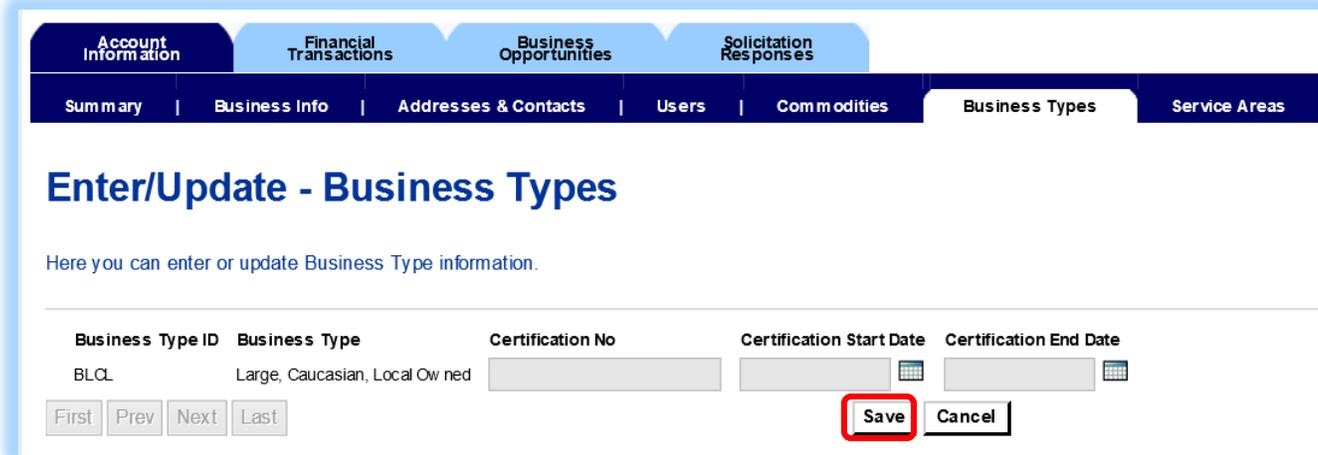


The 'Choose' dialog box contains the following elements:

- Choose** (Section Header)
- Instructions: "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, Enter/Update page where additional information can be entered for the selected business types. Click the 'Cancel' button." (Text partially obscured)
- [Browse](#) [Clear](#)
- Business Type :** [Search Field]
- Business Type**
- List of business types with checkboxes:
 - ASRS - Retiree
 - Large, Caucasian, Local Owned
 - Large, Caucasian, Non-Local
 - Large, Minority, Local Owned
 - Large, Minority, Non-Local
 - Large, Woman, Local Owned
 - Large, Woman, Non-Local Owned
 - Other - Govt, Non-Profit, Educ
 - Small, Caucasian, Local Owned
 - Small, Caucasian, Non-Local
- [First](#) [Prev](#) [Next](#) [Last](#)
- OK** **Cancel**

Account Information – Business Types Enter/Update – Business Types

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



Account Information | Financial Transactions | Business Opportunities | Solicitation Responses

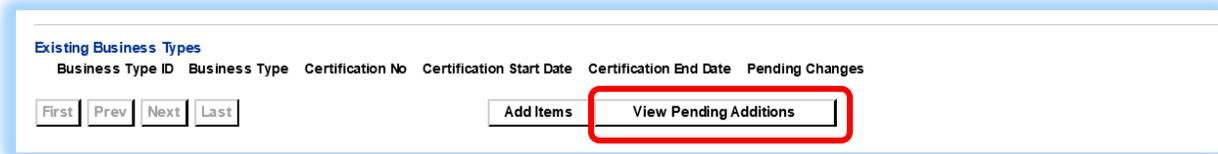
Summary | Business Info | Addresses & Contacts | Users | Commodities | **Business Types** | Service Areas

Enter/Update - Business Types

Here you can enter or update Business Type information.

Business Type ID	Business Type	Certification No	Certification Start Date	Certification End Date
BLC	Large, Caucasian, Local Owned	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

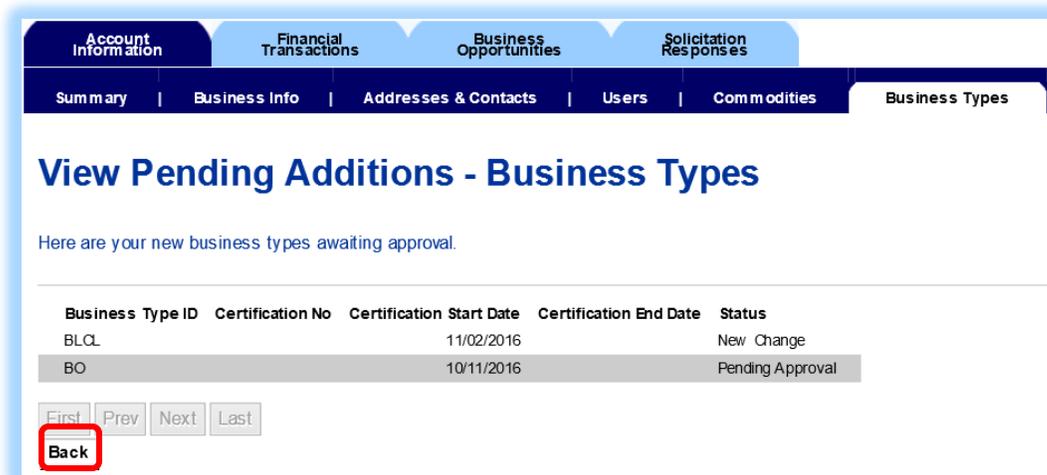


Existing Business Types

Business Type ID	Business Type	Certification No	Certification Start Date	Certification End Date	Pending Changes
<input type="button" value="First"/>	<input type="button" value="Prev"/>	<input type="button" value="Next"/>	<input type="button" value="Last"/>	<input type="button" value="Add Items"/>	<input type="button" value="View Pending Additions"/>

View Pending Additions – Business Types

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



Account Information | Financial Transactions | Business Opportunities | Solicitation Responses

Summary | Business Info | Addresses & Contacts | Users | Commodities | **Business Types**

View Pending Additions - Business Types

Here are your new business types awaiting approval.

Business Type ID	Certification No	Certification Start Date	Certification End Date	Status
BLC		11/02/2016		New Change
BO		10/11/2016		Pending Approval

Account Information – Business Types

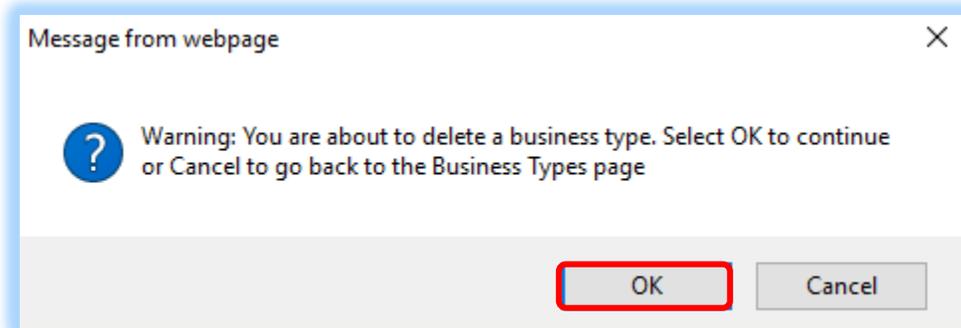
Remove Business Types

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

Existing Business Types

Business Type ID	Business Type	Certification No	Certification Start Date	Certification End Date	Pending Changes			
BSWL	Small, Woman, Local Owned		12/31/9999		<input type="checkbox"/>	View /Update	View Pending Changes	Delete
CCOT	Certified by City of Tucson		12/31/9999		<input type="checkbox"/>	View /Update	View Pending Changes	Delete

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



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

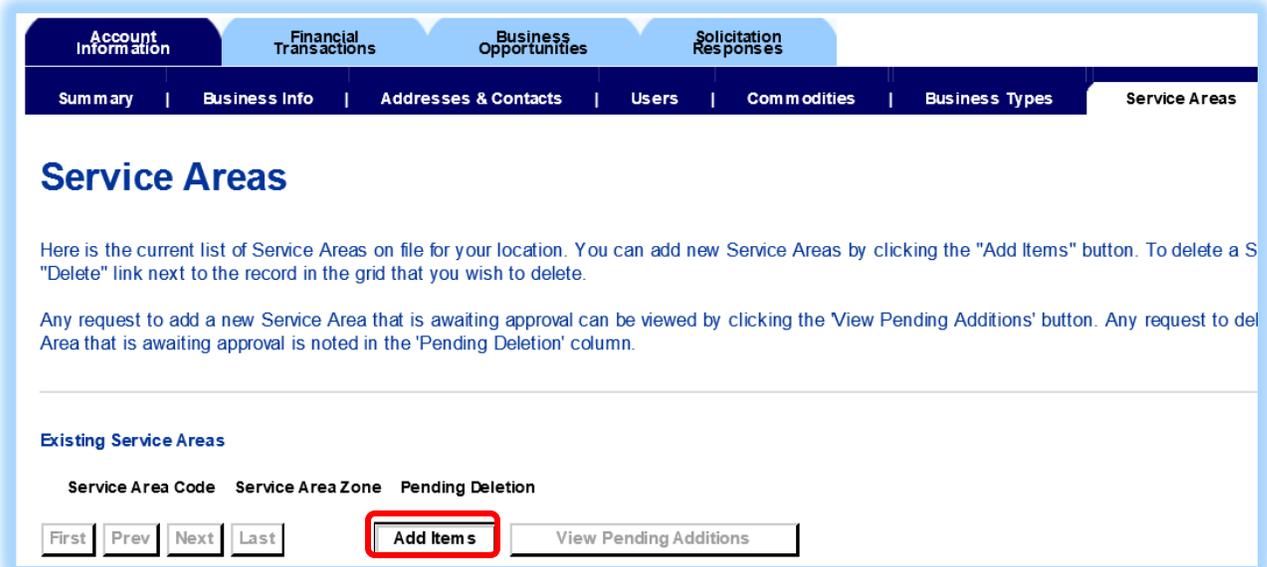
Existing Business Types

Business Type ID	Business Type	Certification No	Certification Start Date	Certification End Date	Pending Changes			
BSWL	Small, Woman, Local Owned		12/31/9999		<input checked="" type="checkbox"/>	View /Update	View Pending Changes	Delete
CCOT	Certified by City of Tucson		12/31/9999		<input type="checkbox"/>	View /Update	View Pending Changes	Delete

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



Service Areas

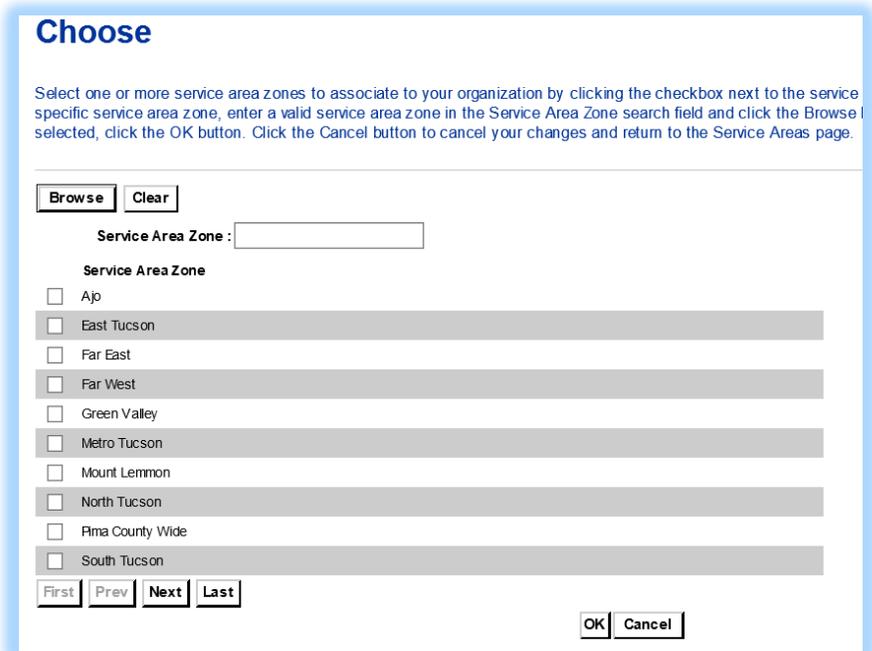
Here is the current list of Service Areas on file for your location. You can add new Service Areas by clicking the "Add Items" button. To delete a Service Area, click the "Delete" link next to the record in the grid that you wish to delete.

Any request to add a new Service Area that is awaiting approval can be viewed by clicking the 'View Pending Additions' button. Any request to delete a Service Area that is awaiting approval is noted in the 'Pending Deletion' column.

Existing Service Areas

Service Area Code	Service Area Zone	Pending Deletion
<input type="button" value="First"/> <input type="button" value="Prev"/> <input type="button" value="Next"/> <input type="button" value="Last"/> <input type="button" value="Add Items"/> <input type="button" value="View Pending Additions"/>		

- 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



Choose

Select one or more service area zones to associate to your organization by clicking the checkbox next to the service area zone, enter a valid service area zone in the Service Area Zone search field and click the Browse button. To cancel your changes and return to the Service Areas page, click the Cancel button.

Service Area Zone:

Service Area Zone

- Ajo
- East Tucson
- Far East
- Far West
- Green Valley
- Metro Tucson
- Mount Lemmon
- North Tucson
- Pima County Wide
- South Tucson

Account Information – Service Areas

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

Service Areas

Here is the current list of Service Areas on file for your location. You can add new Service Areas by clicking the "Add Items" button. To delete a Service Area, click the "Delete" link next to the record in the grid that you wish to delete.

Any request to add a new Service Area that is awaiting approval can be viewed by clicking the 'View Pending Additions' button. Any request to delete an existing Service Area that is awaiting approval is noted in the 'Pending Deletion' column.

Existing Service Areas

Service Area Code	Service Area Zone	Pending Deletion
First Prev Next Last Add Items View Pending Additions		

View Pending Additions – Service Areas

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

View Pending Additions - Service Areas

Here are your new service areas awaiting approval.

Service Area Code	Service Area Zone	Status
3	Metro Tucson	New Change
6	Mount Lemmon	New Change

First Prev Next Last
Back