

Vendor Self Service Instructions – New Vendors

Registration Guidelines:

The City of Southlake is happy to announce our new Vendor Self Service portal. Vendor Self Service provides web-based access to information stored in the Purchasing and Accounts Payable database. Following approval of the vendor registration, VSS allows vendors to search for and view 1099 data, purchase orders, invoices, and checks. Existing Vendors will need their Vendor ID in order to register, review, update existing information and view transactions. A list of Vendor ID's is available on our website.

IMPORTANT: Enter all information in CAPS. Failure to do so will result in a delay in the registration process. ALL CAPS WILL ENSURE CONSISTENCY IN OUR DATABASE.

If you experience any difficulties with Vendor Self Service or have any questions please contact vendors@ci.southlake.tx.us.



Vendor Self Service Instructions – New Vendors

1. Click on the Registration link on the right side of the screen.

New Vendor Registration

Home > Vendor Self Service > Registration

Step 1 2 3 4 5

Step 1 of 5: Create user ID and password

*User ID (between 1 and 20 characters)


*Re-type user ID

*Password (between 0 and 15 characters)

*Re-type password

*Password hint

Please type these numbers into the box below them



EXISTING VENDORS ONLY
You must complete the following for initial registration.

Vendor ID

FID/SSN (Enter without dashes)


2. Enter a User ID. This is what will be used to login to Vendor Self Service.
3. Re-Type the User ID.
4. Enter a Password. This will also be used to login to Vendor Self Service and will need to be shared by anyone who will be accessing VSS.
5. Re-type the Password.
6. Enter a Password hint. In the event the password is forgotten, the password hint will be emailed to the email address entered later in the registration process.
7. Type the numbers that appear in the box.

Vendor Self Service Instructions – New Vendors

8. Click  to advance to Step 2.

New Vendor Registration

Registration

 Your User ID and password have been successfully set. Please continue with the registration process.

Step 2 of 5: General information Step 1 2 3 4 5

*Name
(line 2)

Doing business as
(if different from above)

Foreign Entity
 Minority/Woman Business Enterprise

*Address
(line 2)
(line 3)

*City

*State(abbreviation)
*Zip

Send remittances to the above name and address

Vendor Self Service Instructions – New Vendors

Please enter a Federal Tax ID Number or a Social Security Number.

FID SSN

*FID/SSN

*Re-type FID/SSN

*E-Mail

Web site

*Vendor Type

Terms

Discount Percentage

Days to Discount

Days to Net

9. In Step 2 of 5 update/enter all company information. Fields denoted with an * are required.

10. In the **Terms** section, fill in these boxes if a terms discount is offered for prompt payment.

City of Southlake standard terms of Net 30 will default.

If no terms discount is offered, enter "0" in Discount Percentage and all the other boxes blank.

11. Click to advance to Step 3.

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New Vendor Registration

Registration Step 1 2 **3** 4 5

Step 3 of 5: Remittance information

*Name	<input type="text" value="BEST COMPANY"/>
*Address	<input type="text" value="123 MAIN STREET"/>
(line 2)	<input type="text" value="ATTN: BILLING DEPT"/>
(line 3)	<input type="text"/>
*City	<input type="text" value="TULSA"/>
*State	<input type="text" value="OK - Oklahoma"/>
*Zip	<input type="text" value="74101"/>
Fax	<input type="text" value="918-555-6861"/>
*E-Mail	<input type="text" value="BILLING@COMPANY.COM"/>

12. In Step 3 of 5 update/enter all company remittance information.

13. Click to advance to Step 4.

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New Vendor Registration

Registration

Step 1 2 3 **4** 5

Step 4 of 5: Contacts and communication preferences

Please provide the details of at least one contact individual, and specify your preferred methods for receiving communications.

Contact person 1

*Name

*Phone

Fax

E-Mail

Contact person 2

Name

Phone

Fax

E-Mail

Your preferred method(s) for receiving purchasing advice.

Mail

Fax

E-Mail

14. In Step 4 of 5 update/enter up to two company contacts and corresponding contact information. *Verify the accuracy of your email address; this address will be used to electronically forward purchase orders. Due to changes in personnel, we recommend the use of a company email and avoiding email addresses of individuals.*

15. Choose only ONE preferred method for receiving purchasing advice. Selecting more than one will result in multiple transmissions of the same order and risk duplication.

16. Click to advance to Step 5.

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Step 5 of 5: Review Step 1 2 3 4 **5**

Please check that the information below is correct. Make changes if necessary, then click on "Register."

General Information [change](#)

Name/DBA	BEST COMPANY
Address	123 MAIN STREET TULSA, OK 74101
FID	89-8989898
E-Mail	BILLING@COMPANY.COM
Web Site	WWW.COMPANY.COM
Vendor Type	1 REGULAR VENDOR
Foreign Entity	No
Minority/Woman Business Enterprise	No

Terms [change](#)

Discount Percentage	2.5%
Days to Discount	10
Days to Net	30

Remittance Information [change](#)

Name	BEST COMPANY
Address	123 MAIN STREET ATTN: BILLING DEPT TULSA, OK 74101
Fax	918-555-6861
E-Mail	BILLING@COMPANY.COM
Correspondence Preferences (pay advice)	None selected

Contacts and Communication Preferences [change](#)

Contact Person 1	JANE SMITH Phone: 918-214-1395 E-Mail: JANE.SMITH@COMPANY.COM
Contact Person 2	DAVID JONES Phone: 918-214-1544 E-Mail: DAVID.JONES@COMPANY.COM
Correspondence Preferences (purchasing)	Email

17. In Step 5 review all registration information.
18. Click the [change](#) link to make any changes to company information.
19. Once the review is complete, click to complete the initial registration process. In the following section you can register the company for commodities and services.

Vendor Self Service Instructions – New Vendors

New Vendor Registration

Registration



Registration has been completed. You will be contacted when your information has been reviewed.

You can now:

- [Register for commodities/services and/or update your profile.](#)
- [Upload attachment documents to your profile.](#)

20. The message above will appear when registration is complete.
21. Click on Upload attachment and upload the completed W9 and the CIQ form (if applicable)
22. You will receive an automated email with the company's User ID and the link to Vendor Self Service.
23. The City of Southlake VSS Administrator will review your registration information within 10 business days and will contact you ONLY if there are questions.
24. Click on the "[Register for commodities/services and/or update your profile](#)" link and advance to next page for further instructions.

Vendor Self Service Instructions – New Vendors

My Profile

Home > Vendor Self Service > My Profile

General Information [change](#)

Name/DBA	BEST COMPANY
Address	123 MAIN STREET TULSA, OK 74101
FID	89-8989898
E-Mail	BILLING@COMPANY.COM
Web Site	WWW.COMPANY.COM
Vendor Type	REGULAR VENDOR
Foreign Entity	No
Minority/Woman Business Enterprise	No

Terms [change](#)

Discount Percentage	2.500%
Days to Discount	10
Days to Net	30

Remittance Information [change](#)

Name	BEST COMPANY
Address	123 MAIN STREET ATTN: BILLING DEPT TULSA, OK 74101
Fax	918-555-6861
E-Mail	BILLING@COMPANY.COM
Correspondence Preferences (pay advice)	Mail

Contacts and Communication Preferences [change](#)

Contact Person 1	JANE SMITH Phone: 918-214-1395 E-Mail: JANE.SMITH@COMPANY.COM
Contact Person 2	DAVID JONES Phone: 918-214-1544 E-Mail: DAVID.JONES@COMPANY.COM
Correspondence Preferences (purchasing)	Email

Current Vendor Commodities [add](#)

There are no Commodities to Display for this Vendor.

24. Scroll to the bottom of the page to the “Current Vendor Commodities” section and click [add](#) to add Commodity codes.

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Vendor Commodities

Vendor Commodities

Search for your commodities/services, then select and "Add". Search again and repeat as necessary. Click "Finished" when done.

Keyword(s) or commodity code (first 3 or more digits)

[List all commodities/services](#)

269 Found [1-10](#) | [11-20](#) | [21-30](#) | [31-40](#) | [41-50](#) | [51-60](#) | [Next](#)

Select All	Code	Description
<input type="checkbox"/>	005	ABRASIVES
<input type="checkbox"/>	010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES
<input type="checkbox"/>	015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES: CHEMICALS, INKS, PAPER, ETC.
<input type="checkbox"/>	019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES
<input type="checkbox"/>	020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
<input type="checkbox"/>	001	
<input type="checkbox"/>	993	TPS ASSIGNED TRAVEL (AIRFARE, HOTEL & REGISTRATION)
<input type="checkbox"/>	994	TPS ASSIGNED CONTRACTS FOR SERVICES
<input type="checkbox"/>	995	TPS ASSIGNED PETTY CASH AND SPECIAL CLAIMS
<input type="checkbox"/>	996	TPS ASSIGNED TPS PRINT SHOP AND CHILD NUTRITION CATERING

25. Search for Commodity/Service codes by using the Search field or by cycling through the list.

269 Found [Prev](#) | [61-70](#) | [71-80](#) | [81-90](#) | [91-100](#) | [101-110](#) | [Next](#)

Select All	Code	Description
<input checked="" type="checkbox"/>	271	DRUG AND FEEDING ADMINISTRATION, INFUSION, AND IRRIGATION EQUIPMENT AND SUPPLIES
<input type="checkbox"/>	279	EIGHTEENTH (18TH) CENTURY REPRODUCTION GOODS
<input type="checkbox"/>	280	ELECTRICAL CABLES AND WIRES (NOT ELECTRONIC)
<input checked="" type="checkbox"/>	285	ELECTRICAL EQUIPMENT AND SUPPLIES (EXCEPT CABLE AND WIRE)
<input type="checkbox"/>	287	ELECTRONIC EQUIPMENT, COMPONENTS, PARTS, AND ACCESSORIES (SEE CLASS 730 FOR TESTING OR ANALYZING TYPE)
<input type="checkbox"/>	290	ENERGY COLLECTING EQUIPMENT AND ACCESSORIES: SOLAR AND WIND
<input type="checkbox"/>	295	ELEVATORS, ESCALATORS, AND MOVING WALKS (BUILDING TYPE)
<input type="checkbox"/>	305	ENGINEERING AND ARCHITECTURAL EQUIPMENT, SURVEYING EQUIPMENT, DRAWING INSTRUMENTS, AND SUPPLIES
<input type="checkbox"/>	310	ENVELOPES, PLAIN (SEE CLASSES 525, 615, 640, 655, 665, AND 966 FOR OTHER TYPES)
<input type="checkbox"/>	312	ENVIRONMENTAL PROTECTIVE EQUIPMENT (INSIDE AND OUTSIDE)

Currently Added

175	CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES	Remove
192	CLEANING COMPOSITIONS, DETERGENTS, SOLVENTS, AND STRIPPERS - PREPACKAGED	Remove

26. Check the box next to the Commodity code that applies to your company.

27. Click the button to assign the commodity code. Repeat this process for all applicable commodity/service codes.

28. Click when all applicable commodity/service codes have been added.