

# city of santa fe vendor self service userguide



## OVERVIEW

Welcome to the City of Santa Fe's Vendor Self Service (VSS). VSS gives you web-based access to your personal information and records, You have the ability to update your profile including Address, contact information, W-9, 1099, Insurance Certificates, and commodities information.

### FOR EXISTING VENDORS:

If you are an existing vendor, you can register and gain access to the information stated in the overview. You must have your VSS vendor number in order to register and access your profile. You must obtain this number by e-mailing [npsalazar@santafenm.gov](mailto:npsalazar@santafenm.gov) or calling the Department in which you serve.

Before you can successfully use this feature:

- Access Vendor Self Service by going to (<https://santafenm.munisselfservice.com/Vendors/default.aspx>)
- Your Vendor Number, obtained from the Department you currently serve or Purchasing Department
- Turn your CAPS LOCK on. Enter everything in CAPS
- Have your completed and signed W-9 Form ready to submit or upload

### FOR PROSPECTIVE VENDORS:

If you are a prospective vendor, you must complete the registration process through VSS. We must receive your W-9 prior to reviewing and validating your registration. Upon review and validation of the information you have provided, the City's Finance Department will set your record status to Active in VSS.

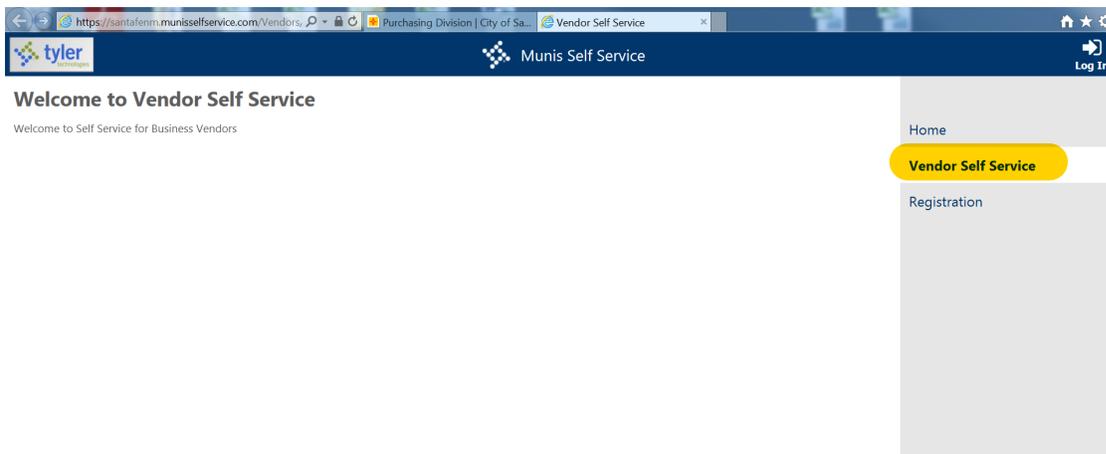
Before you can successfully use this feature:

- Turn your CAPS LOCK on. Enter everything in CAPS
- Have your completed and signed W-9 Form ready to submit or upload

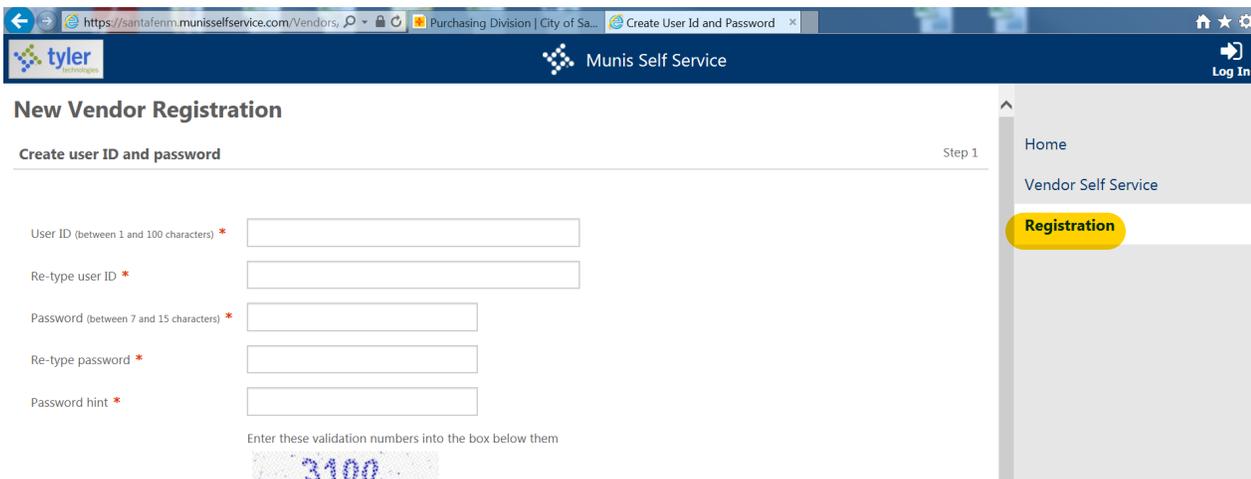


## VENDOR REGISTRATION

Prospective vendors who do not exist in our database, as well as existing vendors, must register to gain access to Vendor Self Service. Enter the link to VSS <https://santafenm.munisselfservice.com/Vendors/default.aspx> in your web browser and click on **Vendor Self Service**.



Vendor of either type register by clicking **Registration** on the VSS home page.



**Registration-** Vendor Self Service displays the number of steps in the process, with the current step displayed in on the top right of the screen. Vendor Self Service does not save any information entered in the fields on any page until the registration is complete. If you leave the registration process before completing all of the steps, all of the information entered is discarded and you must start again.



**Step 1** - This process defines your user ID and password information.

You can use the following table as a reference in completing this screen.

Field	Description
User ID	This box contains your VSS login name. ID must be unique and cannot be more than 20 characters in length.
Password	You must enter and then retype a login password in the boxes. <ul style="list-style-type: none"> <li>• Password must be at least 8 characters long.</li> <li>• Password can be a maximum of 15 characters.</li> <li>• Password must contain at least 1 numeric character.</li> <li>• Password must consist of upper and lower case letters.</li> </ul>
Password Hint	Enter a hint used to assist you in remembering your password. The hint cannot be the same as your password. VSS sends this hint to you in an email if you click <b>Forgot Password</b> on the login page.
CAPTCHA	This box is used as part of a verification process to protect the database (Completely Automated Public Turning Test to Tell Computers and Humans Apart). <b>You must enter the number shown in the box.</b>

ONLY vendors who already exist in our database must complete the boxes in the Existing Vendors Only section. Existing vendors must also enter their Vendor ID and Federal Identification Number or Social Security number.

Select **Continue** to complete Step 1.



The following information must be completed on the Contact Information screen in order to create a contact.

Field	Description
<b>Contact Person</b>	
Contact Type	Select the contact type from the drop down.
Name	Enter the name of the contact person.
Phone	Enter the contact's phone and fax numbers, as well as the contact's e-mail address.
Fax	

EMAIL



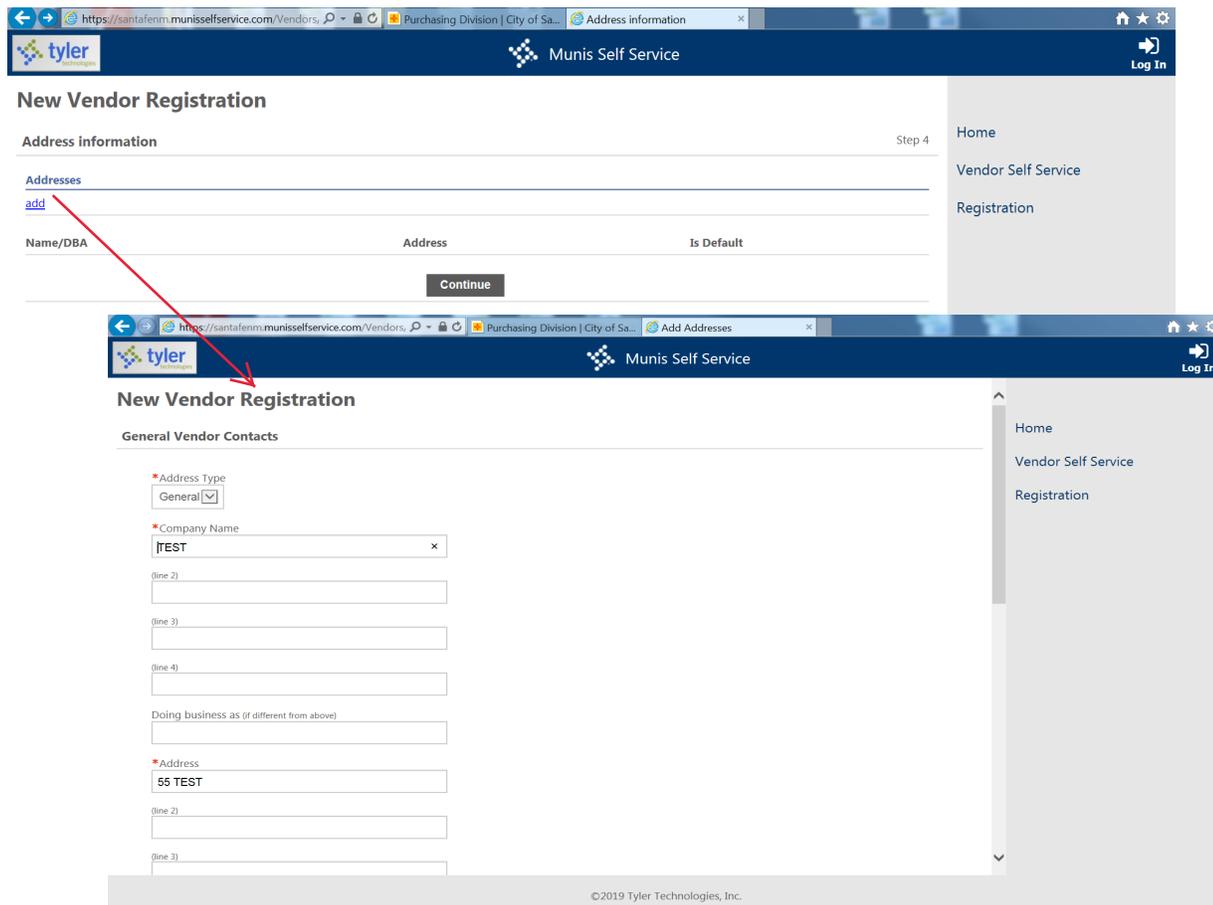
**Step 2** – You must enter the following information in the fields.

Field	Description
Name	Enter your name or business name. Sole Proprietors shall enter their last name, first name.
Doing Business As	Enter your Doing Business As (DBA) name, if applicable.
Foreign Entity	When selected, this check box indicates that you are a foreign entity.
Address	Enter your main address. You must use a two-letter State postal abbreviation code in this box.
City	
State	
Zip	
County	Skip this box.
Country	Enter your Country.
Fax Number	Enter your fax number, if applicable.
Geographic Code	Skip this box.
Send Remittance to the Above Name and Address	If you check this box VSS will enter the values from the mailing address as the default values in the boxes in Step 3 of the registration process.
E-Mail	address. Additional e-mail addresses for contact persons are defined later in the registration process.
Web Site	Enter your company's web site URL.
Vendor Type	

\*After Vendor Type you will have fields to enter your Banking Information - Account & Routing Number Click **"Continue"** ONLY after the information has been added.



**Step 3** – Requires you to enter address information. If you selected the **Send Remittance to the Above Name and Address** check box during step two, VSS automatically enters the first address record. If the check box was not selected, the Addresses table is blank. You must click **Add** to create a new address record, which displays the Remittance information page.



You must complete the following fields.

Field	Description
Address Type	This list determines the type code of the entered address.
Name	This box defines the name that appears on items sent to this remit address.
Address	These boxes define the remit mailing address.
City	
State	
Zip	
Fax	This box contains the fax number for the remit address.
E-Mail	This box defines the e-mail address used for the remit address.



**Step 4** – Click **New Contact** to enter a contact person for the general record. Doing so opens the General Vendor Contacts page.

©2019 Tyler Technologies, Inc.

This page contains fields that are identical in function to those for step three, but they apply to the vendor record as a whole and not to a single remit address. Clicking **Save** after entering the contact information returns you to the General Vendor Contacts page with the new contact record displayed in the table.

Type	Name	Description	Email	Telephone
GENERAL - General Contacts	TEST		test@santafenm.gov	Phone: 5555555555 Text: Fax:

©2019 Tyler Technologies, Inc.

You must click **Continue** to advance to step five of the VSS registration process.

**Step 5** – Requires you to verify the information you entered in previous steps. You can update incorrect information by clicking the **Change** link for the appropriate section. When the link is clicked, VSS returns to the page for that step.



Once you continue to **Step 5**, you will be prompted to provide a CRS Number. This will save to your profile should you need to request a Tax Exempt Certificate from the City of Santa Fe.

**New Vendor Registration** Step 5

**Additional Values**

Field	Value
CRS NUMBER	<input type="text"/>

[Continue](#)

©2019 Tyler Technologies, Inc.



## COMMODITY CODES

**Step 6-** Brings you into **Commodities** , Select the Commodities that are associated to your Business.

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](#)

**281 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 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"/>	022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
<input type="checkbox"/>	025	AIR COMPRESSORS AND ACCESSORIES

©2019 Tyler Technologies, Inc.

Vendors use the **Search** box to search for commodities by code or keyword. Alternatively, clicking the **List All Commodities/Services** link displays all commodity codes in the City's database. VSS displays the number of codes found during a search and updates the commodity table.

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](#)

**281 Found**



The numbered links above the commodities table allow you to view additional groups of codes. Selecting the check box for a code indicates that it should be added to your profile. Clicking **Select All** selects all of the check boxes currently displayed on the page. VSS saves the value of each check box when you navigate between groups of commodity codes.

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 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"/>	022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
<input type="checkbox"/>	025	AIR COMPRESSORS AND ACCESSORIES

©2019 Tyler Technologies, Inc.

When you click **Add Step 7**, VSS adds all of the selected commodity codes to your profile and updates the Currently Added table. Clicking the **Remove** link removes the commodity from the table. After you have finished adding commodity codes to your profile, you must click the **Continue** button. This completes the commodity addition process .

<input type="checkbox"/>	037	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS, ETC.
--------------------------	-----	--

Add

<input type="checkbox"/>	035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES
<input type="checkbox"/>	037	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS, ETC.

Add

Currently Added

005	ABRASIVES	Remove
-----	-----------	--------

<input type="checkbox"/>	037	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS, ETC.
--------------------------	-----	--

Add

Currently Added

005	ABRASIVES	Remove
-----	-----------	--------

Continue Cancel

©2019 Tyler Technologies, Inc.



**Step 8**– Requires you to review and verify your information before you click on register at the bottom of the screen. **Warning:** You **MUST** attach a W-9 to your account when Registering. If a W-9 is not attached the account will be rejected for approval to do work with the City until one is added to your profile.

**New Vendor Registration** Step 8

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

[General Information change](#)

Name/DBA	TEST
Entity	
Address	53 TEST SANTA FE, NM 87505
Fax Number	
SSN	555-55-5555
Geographic	
E-Mail	test@santafenm.gov
Web Site	
Vendor Type	01 VENDORS
Gender	
Ethnicity	
Foreign Entity	No
Bank	

©2019 Tyler Technologies, Inc.

**Accounts Contacts** [change](#)

Type	Name	Description	Email	Phone	Text	Fax
GENERAL - General Contacts	TEST		test@santafenm.gov	5555555555		

**Commodities** [change](#)

**Attachments**

Attachment Type	Description	Required	Attachments
General	Documents are not assigned to a type		(0) <a href="#">Attach</a>

**!** If you are a prospective vendor, you must complete the registration process through VSS. We must receive your W-9 prior to reviewing and validating your registration. Upon review and validation of the information you have provided, the City's Finance Department will set your record status to Active in VSS.

I have read and accept the terms & conditions.

[Register](#) [Cancel](#)

(Only click Register once and refrain from using your browser's Back or Refresh button.)

©2019 Tyler Technologies, Inc.



**Complete-** Congratulations! you have Registered/Created your Vendor Self Service Profile with the City of Santa Fe. At any time you may update your profile as needed.

The screenshot shows a web browser window with the URL <https://santafenm.munisselfservice.com/Vendors>. The page title is 'Confirmation'. The header includes the Tyler Technologies logo and 'Munis Self Service'. The main content area displays 'New Vendor Registration' and 'Registration Confirmation'. A green checkmark icon is followed by the text: 'Registration has been completed. You will be contacted when your information has been reviewed.' Below this, a section titled 'You can now:' lists two actions: 'Register for commodities/services and/or update your profile.' and 'Upload attachment documents to your profile.' A right-hand sidebar contains the links 'Vendor Self Service' and 'My Profile'. The footer of the page reads '©2019 Tyler Technologies, Inc.'