



Vendor Access

User Guide

May 2024

Contents

Overview	3
User Accounts	4
New Users	5
Existing Users	6
Password Resets	6
Locked Accounts	6
The Welcome Screen	7
Linking to an Existing Vendor	8
Registering/Creating a New Vendor	11
Home Page	19
Using the Navigation Menu	21
Vendor Profile	22
Maintaining Profile Information	22
Purchase Orders	29
Checks	31
Form 1099	33
Contracts	34

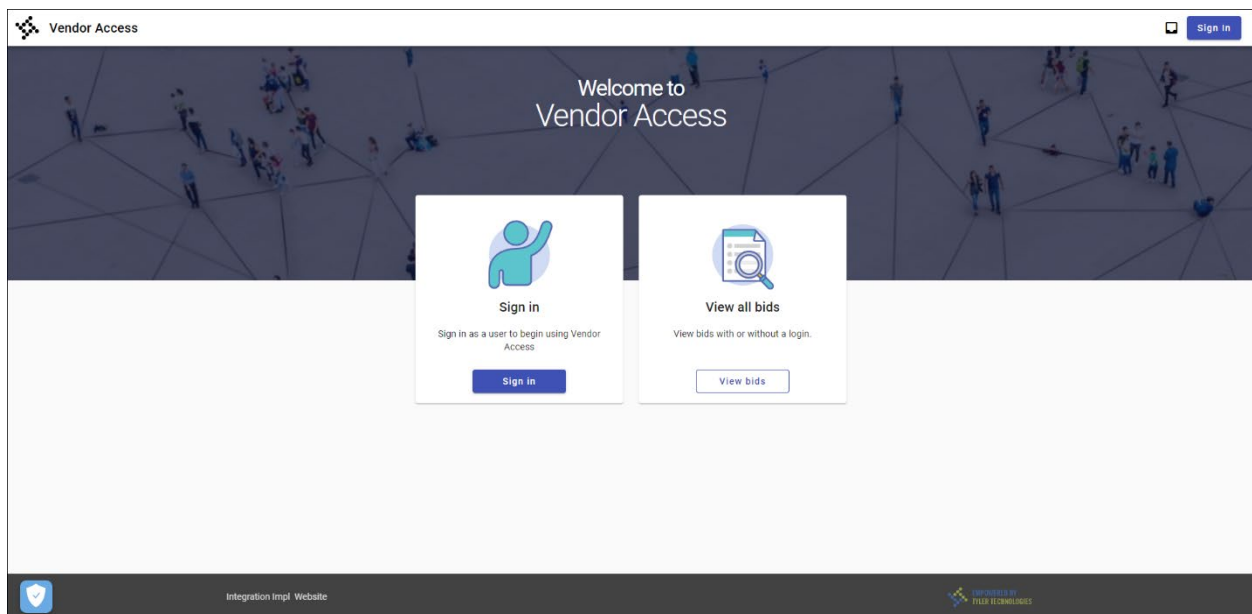
Overview

Vendor Access provides vendors with cloud-based access to information stored in the City's Tyler ERP solution. The information may be drawn from various ERP modules, such as accounts payable, purchasing, contracts, bids, and enterprise assets.

By using Vendor Access, vendors can enter and maintain their contact and remittance information, discount and payment terms, required documentation, and the commodity codes that represent the goods and services the vendor can provide.

A listing of the vendor's current and prior 1099 data, bids, purchase orders, invoices, contracts, checks, and work orders is available in Vendor Access. Typically, City staff enters this information using the ERP solution, such as Enterprise ERP, and the information is available to vendors for inquiry purposes.

Vendor Access allows vendors to search for and view bid request information, and then use that information to submit a bid offer or quote. The submission process creates bid records in the ERP solution database that can be examined and evaluated by the City's bid management staff. Vendors can either sign in to review any company information already stored or simply view available bids posted by the City, which does not require a Vendor to have an existing account. See welcome page below.



User Accounts

Vendors who access the City's Vendor Access application must create a Tyler Identity log-in account. The log-in account requires an active email address and a password.

When accessing Vendor Access, the application presents the Community Access sign-in screen with options to associate an existing log-in from Google®, Apple®, Microsoft®, or Facebook® with the Tyler Identity account. Otherwise, users can create a new account by clicking the Sign Up link at the bottom of the screen. The Help link on this screen also provides detailed steps for password management, including setting up multi-factor authentication.

Sign in to community access services.

Sign in with Google

Sign in with Apple

Sign in with Microsoft

Sign in with Facebook

OR

Email address

Password

Remember me

Sign in

[Forgot password?](#) [Unlock account?](#) [Help](#)

Don't have an account? [Sign up](#)

New Users

For first-time users, clicking the Sign Up link at the bottom of the sign-in screen presents the Create an Account dialog box.

The image shows two overlapping windows. The background window is the sign-in screen, featuring a 'Remember me' checkbox, a blue 'Sign in' button, and links for 'Forgot password?' and 'Unlock account?'. At the bottom, it says 'Don't have an account?' with a 'Sign up' link highlighted by a red box and an arrow. The foreground window is the 'Create an account' dialog box, which has a globe icon and the title 'Create an account'. It contains four input fields: 'Email *', 'Password *', 'First name *', and 'Last name *'. Below these fields is a note '* indicates required field' and a blue 'Sign up' button. At the bottom of the dialog box is a link 'Back to sign in'.

Enter a valid email address, create a password, enter the first and last name, and click Sign Up to create the Tyler Identity account. The application sends a confirmation email to the email address entered.

The image shows an email interface. At the top, it says 'Welcome to your Community Access account'. Below this is a circular profile picture with 'CA' and the text 'Community Access Identity <noreply@identity.tcpqa.com>'. The recipient is listed as 'To [redacted]'. An information icon and text state: 'If there are problems with how this message is displayed, click here to view it in a web browser.' The main body of the email says: 'Hi WAYNE, Welcome to your Community Access account! To verify your email address, please click the following link:'. Below this text is a green button labeled 'Verify email'. At the bottom of the email, it says: 'This is an automatically generated message from Community Access. Replies are not monitored or answered.'

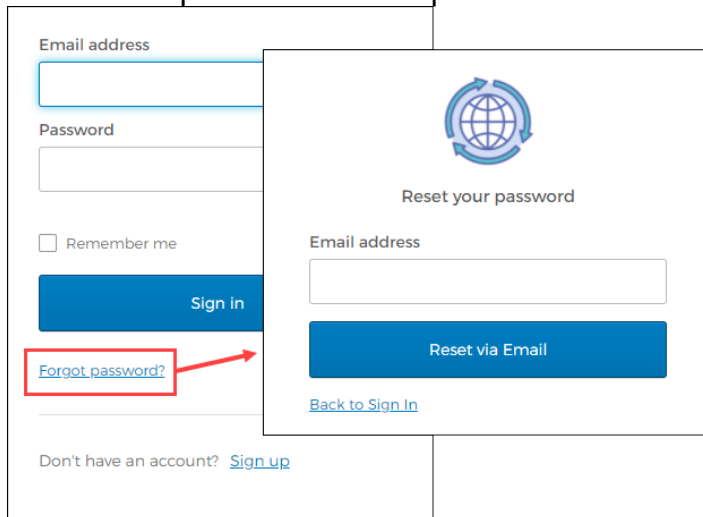
Once the user receives the email and clicks the Verify Email link, Vendor Access presents the User Profile page. Using this page, users can complete their profile information, connect accounts, establish payment methods, and set notification preferences.

Existing Users

For existing users, enter the registered email address and password and click the Sign In button to access the home page.

Password Resets

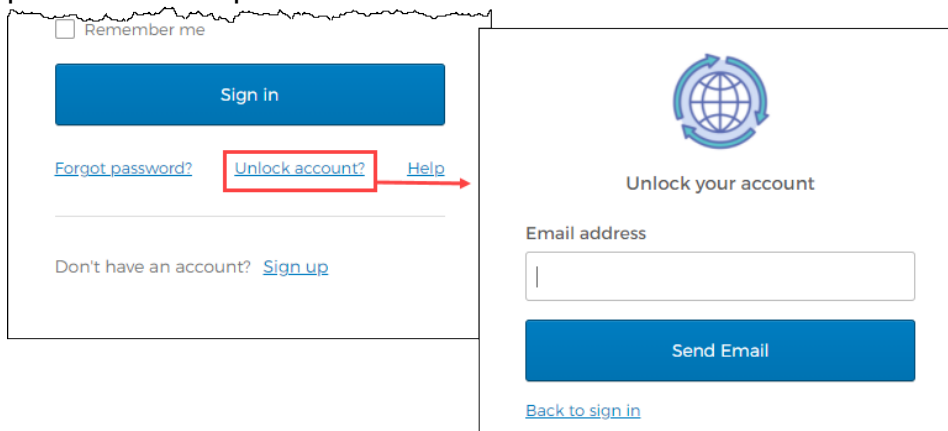
If a user forgets their assigned password, clicking the Forgot Password? link on the Sign-in screen provides the steps to reset the password. The Help link on the Sign-In screen also provides detailed password retrieval instructions.



The image shows a sign-in form on the left and a modal window on the right. The sign-in form includes fields for "Email address" and "Password", a "Remember me" checkbox, a "Sign in" button, a "Forgot password?" link (highlighted with a red box and an arrow), and a "Don't have an account? Sign up" link. The modal window, titled "Reset your password", features a globe icon with circular arrows, an "Email address" input field, a "Reset via Email" button, and a "Back to Sign In" link.

Locked Accounts

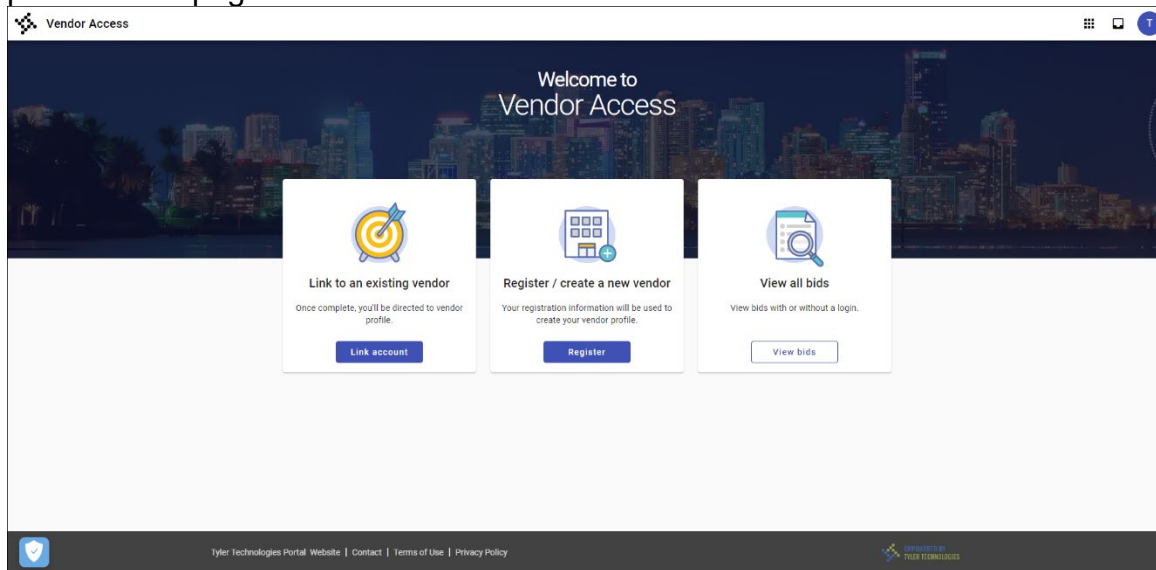
If a user's account is locked, clicking the Unlock Account? link on the Sign-in screen provides the steps to unlock the account.



The image shows a sign-in form on the left and a modal window on the right. The sign-in form includes a "Remember me" checkbox, a "Sign in" button, "Forgot password?", "Unlock account?" (highlighted with a red box and an arrow), and "Help" links, and a "Don't have an account? Sign up" link. The modal window, titled "Unlock your account", features a globe icon with circular arrows, an "Email address" input field, a "Send Email" button, and a "Back to sign in" link.

The Welcome Screen

When you log in to Vendor Access for the first time, the “Welcome to Vendor Access” screen provides options to “Link account” to an existing vendor record from the City's ERP solution, or “Register” to create a new vendor record. Once a vendor profile is established, this screen is bypassed and users are taken directly to their company’s profile home page within Vendor Access.



The options available on this screen are as follows:

- Link to an existing vendor—This option associates the currently logged in user with an existing vendor account that has been established with the integrated Tyler product, such as Enterprise ERP. **The vendor number and the Taxpayer Identification Number found in the vendor’s W-9 form are required to verify the account.** See [Linking to an Existing Vendor](#) for more information.
- Register/create a new vendor—This option creates a new vendor profile. It is used when the vendor does not have an existing vendor account in the integrated Tyler product. The user must complete the steps to establish the vendor profile, such as providing the business name, location, contacts, and payment information. City staff will then review and approve the vendor's account information before the vendor can use Vendor Access to submit invoices, bid proposals, and so on. For more details, see [Registering/Creating a New Vendor](#).
- View all bids – currently not available.

Linking to an Existing Vendor

If the logged-in vendor has an existing record in the Tyler ERP solution database, Vendor Access provides the Link Account option to establish the connection.

1. Click Link Account to associate the user who is currently logged in with an existing vendor record.

Welcome to Vendor Access

Michael, welcome to Vendor Access.
Let's find your vendor account.

* Vendor Number

Request your vendor number

FID SSN

* Retype FID

* FID

Cancel Find vendor

Link to an existing vendor

Once complete, you'll be directed to vendor profile.

Link account

View all bids

ids with or without a login.

View bids

- Enter the vendor number (as established in the ERP solution) and the vendor's federal identifier (FID) to search for the existing vendor record. The Request Your Vendor Number link provides the contact details for the City's Accounts Payable staff who handles these requests.

IF HAVING TROUBLE:

PLEASE DO NOT CREATE A NEW RECORD BUT CONTACT ACCOUNTS PAYABLE FOR HELP: accountspayable@cityofmerced.org

2. Click Find Vendor.

The application searches and retrieves the vendor information stored on the vendor record in the integrating Tyler product.

We found a vendor, is this you?

Name
MARIA PEREZ, LLC

Address
123 INDUSTRIAL WAY
PORTLAND, ME 04101

Doing Business As
PEREZ PAVING

Email
PPAVING@GMAIL.COM

Cancel That's not me Next

3. If this is the correct vendor, click Next. If not, click That's Not Me to return to the previous screen to re-enter the vendor information and correct any errors.

The application provides the name and email address of the logged-in user.

We have your contact information.

If it looks good, click Finish.

Name
Antonia Raoul-Smith

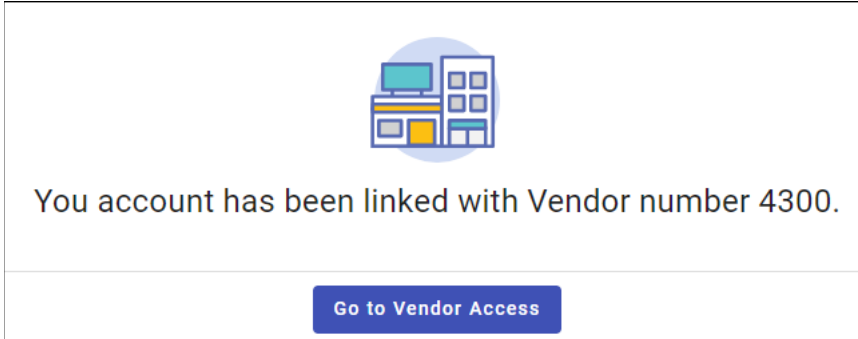
Email
ANTONIA.RAOULSMITH@GMAIL.COM

* Phone number
(---)---- ----

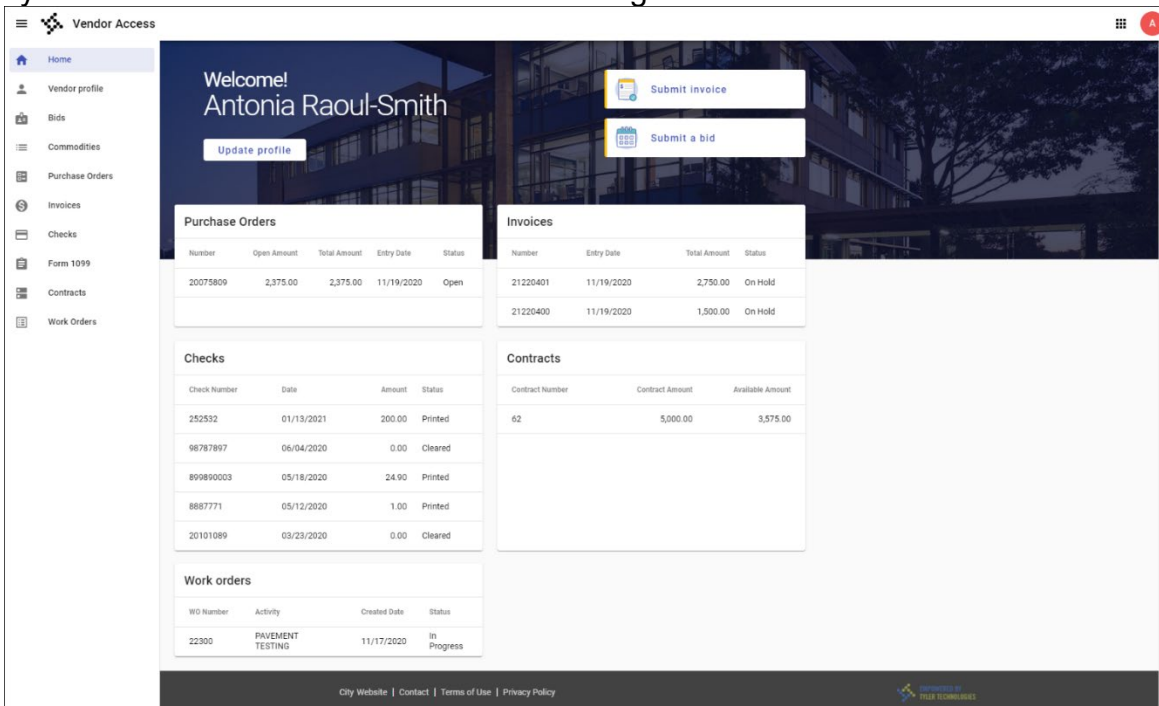
Mobile number

Cancel Finish

4. Enter at least one phone number to use for this email address and then click Finish. The Finish button is not available until the required fields are completed. The application saves the information and links the vendor account to the logged-in user.



5. Click Go to Vendor Access to open the home page. Invoices, purchase orders, and other such data that are associated with the existing vendor from the integrating system are now linked and searchable through Vendor Access.

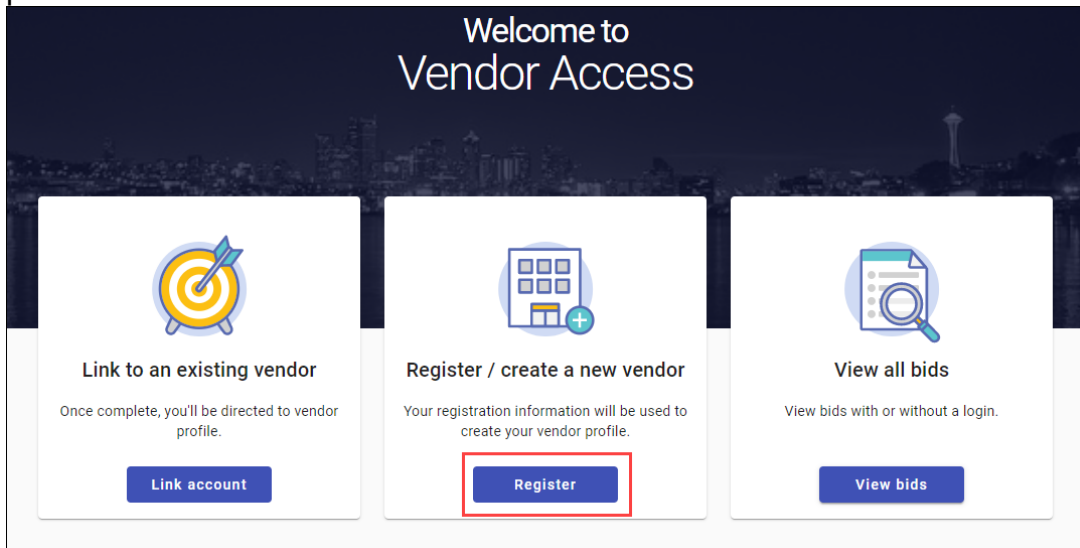


Registering/Creating a New Vendor

It is important to note that the fields and options that are available on these screens vary depending on your organization's settings. Some options that are shown in these examples may not apply to your specific setup.

To register a new vendor:

1. On the Welcome screen after you log in to Vendor Access, click Register to create a profile for a new vendor.



The program provides step 1 of the Vendor Registration with fields to define the vendor's name and federal identification number (FID) or Social Security number (SSN). **Select the FID option.** All fields marked with a red asterisk (*) are required.

Vendor registration

1 Profile 2 Location 3 Information 4 Contacts 5 Documentation 6 Review

Hi there!

Let's create your vendor profile. First, share some information about yourself.

* Business name

FID SSN

* FID

* Retype FID

Cancel Next

Note: Clicking Cancel at any point during the registration process exits the registration screens and removes all of the entered information.

2. Complete the fields and click Next to continue to step 2 of the registration process to define the location details, referring to the following table for information.


Field	Description
Vendor Information	
Vendor Type	Indicates the type of vendor, such as a payroll vendor, employee, or equipment vendor.
Doing Business As	Specifies the vendor's Doing Business As (DBA) name.
Vendor Email	Identifies the vendor's email address.
Website	Indicates the vendor's website address.
Address Information	
Address City	Indicates the vendor's mailing address, including the city, state, and ZIP Code™.

Field	Description
State ZIP Code	
<p>Bank Information <i>Click Update My Bank Account to add vendor banking information, if applicable. The bank code and account information must exist in the ERP system. Vendor Access verifies the entered information matches the existing bank account information in the ERP system.</i></p>	

- After completing the fields, click Next to proceed to step 3 to specify payment terms. **Please note that no minority business categories have not been set for the City yet so please skip this section.**

Vendor registration ×


✓ Profile —
 ✓ Location —
 3 Information —
 4 Contacts —
 5 Documentation —
 6 Review



Minority business enterprise

Do any of the following MBE classifications apply to your business?

Applies	Description	Certifications	Actions
<input type="checkbox"/>	African-American Owned	0	▼
<input type="checkbox"/>	Asian-American Owned	0	▼
<input type="checkbox"/>	Woman Owned	0	▼
<input type="checkbox"/>	Native American Owned	0	▼



Payment terms

Do you have any payment discounts?

Which delivery methods do you accept?

Accounts payable *	Purchasing *
<input type="checkbox"/> Printed	<input type="checkbox"/> Printed
<input type="checkbox"/> Fax	<input type="checkbox"/> Fax
<input type="checkbox"/> Email	<input type="checkbox"/> Email

Cancel
Previous
Next

- If the payment terms are known, complete the fields, referring to the following table for specific field details.
- If the payment terms are not known at this time, click Next to skip this step and proceed to step 4.

Field	Description
Payment Terms	
Do you have any payment discounts?	
Discount Percent	Sets the discount percentage offered by the vendor if the invoice is paid within the Days to Discount timeframe.
Days to Discount	Contains the number of days within which the invoice must be paid to qualify for the vendor discount.
Days to Net	Holds the number of days allowed from the invoice date to pay the full invoice.
Which delivery methods do you accept?	
Accounts Payable	Provides options to select one or more accepted delivery methods for accounts payable: <ul style="list-style-type: none"> • Printed—The vendor accepts printed delivery. • Email—The vendor accepts delivery by email.
Purchasing	Provides options to select one or more accepted delivery methods for purchasing: <ul style="list-style-type: none"> • Printed—The vendor accepts printed purchase orders. • Email—The vendor accepts purchase orders by email.

4. Click Next to proceed to step 4 to define the contacts.


Field	Description
Full Name	Indicates the full name of the person registering as a vendor. The app automatically completes this information based on the email address you provided when logging in. For example, if you logged in through Google, the full name associated with your Google account is provided in this field.
Type	Specifies the type of contact: <ul style="list-style-type: none"> • General Contacts • Accounts Payable Contacts • Purchasing Contacts
Phone	Establishes the phone number of the contact. A phone number is required.
Mobile Phone	Indicates the mobile phone number of the contact, if different from the phone number entered in the Phone field.
Email	Identifies the email address of the contact.

Field	Description
	The app automatically completes this information based on the email address you provided when logging in.
Comments	Provides a text box to enter any comments associated with the contact information. For example, the contact's job role or preferred contact method.

5. Click Next to proceed to step 5 to provide any relevant documents, if applicable.

Vendor registration ×

✓ Profile —
 ✓ Location —
 ✓ Information —
 ✓ Contacts —
 5 Documentation —
 6 Review

 **Upload attachments relevant to your vendor activity**

Required documentation

Type	Document name
<hr/>	<hr/>

General documentation (optional)


Type	Document name
<hr/>	<hr/>


Cancel
Previous
Next

6. Click Next to proceed to the final step to review the entered information.

Vendor registration ✕


Profile Location Information Contacts Documentation **6** Review

 Review and submit


Profile 

Business name	FID	Vendor email
Antonia's Consulting	98-7456123	antonia.raoulsmith@gmail.com

Are you a minority business enterprise?
No


Location 

Doing business as	Vendor type	Address
Antonia's Consulting	Supply Vendor	135 Meadow Lane
City	State	Zipcode
Portland	ME	04101

Payment methods 


Discount percent	Days to discount	Days to net
------------------	------------------	-------------

Accounts Payable	Purchasing
Printed	Printed
Yes	Yes
Fax	Fax
No	Yes
Email	Email
Yes	Yes

Contact 

Full Name	Type	Phone
Antonia Raoul-Smith	1	9995551212

Email
antonia.raoulsmith@gmail.com

Attachments 

Vendor attachments

Type	Document name
<hr/>	<hr/>

7. Review the information and click Submit to complete the registration. To make changes, either click the step or click the Edit option beside the step heading to return to that step to update the information. Click Review to return to the final step.

Vendor registration

Profile Location Information Contacts Documentation 6 Review

Review and submit

Profile

Business name
Fritz Fencing

Location

Doing business as

Vendor registration

Profile Location Payment Contacts Documentation 6 Review

Hi there!

Let's create your vendor profile. First, share some information about yourself.

* Business name
Fritz Fencing

FID SSN

* FID
55-4261800

* Retype FID
55-4261800

Cancel Review

8. Once the vendor registration is submitted, the program provides a confirmation message. Click I'm Done to continue to the Vendor Access home page.

Nice work!

Your registration has been submitted and your vendor profile is being created.

I'm done

Home Page

Once a vendor profile is established, the Vendor Access home page serves as the primary landing page when users log in to Vendor Access. It provides the vendor's profile information and access to other options, such as Bids, Purchase Orders, Invoices, Checks, 1099 Forms, Contracts, and Work Orders.

Welcome!
Antonia Raoul-Smith

[Update profile](#)

[Submit invoice](#)

[Submit a bid](#)

Purchase Orders				
Number	Open Amount	Total Amount	Entry Date	Status
20075809	2,375.00	2,375.00	11/19/2020	Open

Invoices			
Number	Entry Date	Total Amount	Status
21220401	11/19/2020	2,750.00	On Hold
21220400	11/19/2020	1,500.00	On Hold

Checks			
Check Number	Date	Amount	Status
252552	01/13/2021	200.00	Printed
98767897	06/04/2020	0.00	Cleared
899890003	05/18/2020	24.90	Printed
8887771	05/12/2020	1.00	Printed
20101089	03/23/2020	0.00	Cleared

Contracts		
Contract Number	Contract Amount	Available Amount
62	5,000.00	3,575.00

Work orders			
WO Number	Activity	Created Date	Status
22300	PAVEMENT TESTING	11/17/2020	In Progress

City Website | Contact | Terms of Use | Privacy Policy

POWERED BY
VALER TECHNOLOGIES

This screen also provides any announcements, if applicable.

The screenshot shows the Vendor Access home page for a user. The navigation menu on the left includes: Home, Vendor profile, Bids, Commodities, Purchase Orders, Invoices, Checks, Form 1099, Contracts, and Work Orders. The main content area features a 'Submit a bid' button and an 'Update profile' button. Below these, there are two sections: 'Announcements' with a speaker icon and the text 'You're all caught up on announcements', and 'Purchase Orders' with a table of records.

Number	Open Amount	Total Amount	Entry Date	Status
20230016	0.00	2,190.00	12/01/2022	Closed
20220022	449.99	449.99	01/10/2022	Open
20220021	0.00	1,490.54	12/16/2021	Closed
20220020	0.00	1,490.54	12/16/2021	Closed
20220019	0.00	1,490.54	12/16/2021	Closed

The bottom of the home page provides overview information about the records that are associated with the vendor. These are informational only. To access the records, use the navigation menu.

The screenshot shows the Vendor Access home page for a user named Antonia Raoul-Smith. The navigation menu on the left is the same as in the previous screenshot. The main content area features a 'Welcome! Antonia Raoul-Smith' message, an 'Update profile' button, and 'Submit invoice' and 'Submit a bid' buttons. Below these, there are four sections: 'Purchase Orders', 'Invoices', 'Checks', and 'Contracts', each with a table of records. A red box highlights the 'Purchase Orders', 'Checks', and 'Work orders' sections.

Number	Open Amount	Total Amount	Entry Date	Status
20075809	2,375.00	2,375.00	11/19/2020	Open

Number	Entry Date	Total Amount	Status
21220401	11/19/2020	2,750.00	On Hold
21220400	11/19/2020	1,500.00	On Hold

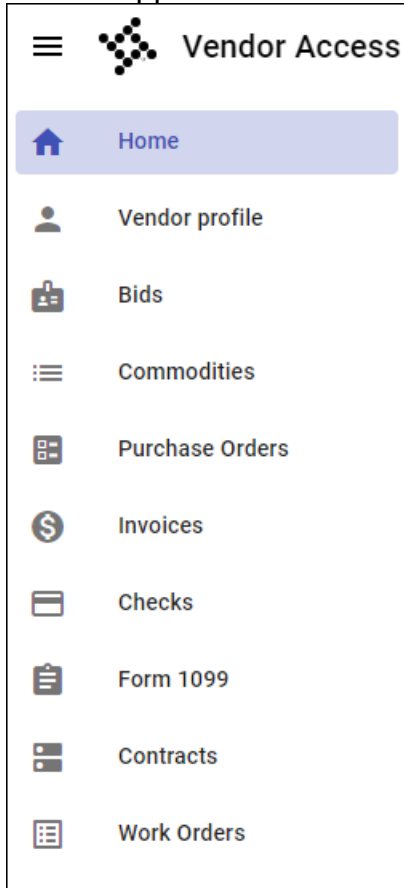
Check Number	Date	Amount	Status
252532	01/13/2021	200.00	Printed
98787897	06/04/2020	0.00	Cleared
899890003	05/18/2020	24.90	Printed
8887771	05/12/2020	1.00	Printed
20101089	03/23/2020	0.00	Cleared

Contract Number	Contract Amount	Available Amount
62	5,000.00	3,575.00

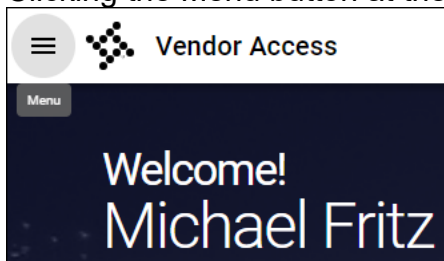
WO Number	Activity	Created Date	Status
22300	PAVEMENT TESTING	11/17/2020	In Progress

Using the Navigation Menu

The navigation menu serves as the primary means of navigating through the Vendor Access application. Available options vary depending on City policies.



Clicking the Menu button at the top of the page hides or displays the navigation menu.



Submitting an Invoice

This feature is currently not available.

Submitting a Bid

This feature is not available at the moment.

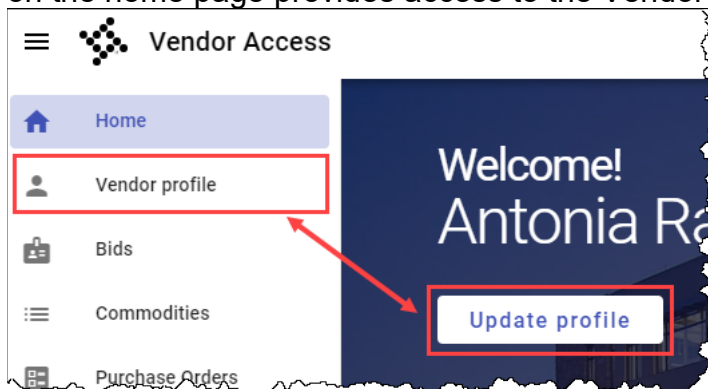
Vendor Profile

The Vendor Profile provides essential information about the vendor, including associated locations, contacts, payment terms, and attachments.

The screenshot shows the Vendor Access interface for a Vendor Profile. The left sidebar contains navigation options: Home, Vendor profile (selected), Bids, Commodities, Purchase Orders, Invoices, Checks, Form 1099, Contracts, and Work Orders. The main content area is titled 'Vendor profile' and has two tabs: 'Locations' and 'Attachments'. The 'Locations' tab is active, showing a dropdown menu with 'Nexus' selected. Below this, there are fields for Name (Nexus), Remit Address (89 Sustainable Drive, Portland, ME 04101), and Address Type (Accounts Payable). There are also sections for 'Contacts' (No contacts found), 'Payment Terms' (with input fields for discount percent, days to discount, and days to net), and 'Which delivery methods do you accept?' (with checkboxes for Email, Fax, and Mail under Accounts payable and Purchasing). On the right side, there are sections for 'Business owner' (with vendor email, website, and a URL) and 'Bank information' (with an 'Update my bank account' button).

Maintaining Profile Information

In addition to selecting Vendor Profile in the navigation menu, the Update Profile option on the home page provides access to the Vendor Profile page.



Locations

The Locations tab provides information for a selected location associated with the vendor, including the remit address, contact names and phone numbers, and accepted delivery and payment methods.

The Add and Edit options in each group allow vendors to maintain the information.

The screenshot shows a 'Vendor profile' page with a 'Locations' tab selected. A dropdown menu shows 'MARIA PEREZ, LLC' with a '+' icon and an edit icon (pencil) next to it. A red arrow points from the edit icon to an 'Edit Location' modal form. The modal form contains the following fields:

- Location Name*: MARIA PEREZ, LLC
- Doing Business As: PEREZ PAVING
- Email address: MARIA.PEREZ@PEREZPAVING.NET
- Type*: General
- Address*: 123 INDUSTRIAL WAY
- Address line 2: SUITE 103
- City: PORTLAND
- State: ME
- Zip Code: 04101

At the bottom of the modal are 'Save' and 'Cancel' buttons.

To view or maintain a different location, click the Location list and select the location. The screen refreshes to show the information for the selected location.

The screenshot shows the 'Vendor profile' page with the 'Locations' tab active. A dropdown menu is open for the 'Location' field, which currently displays 'MARIA PEREZ, LLC'. The dropdown list contains three items: 'MARIA PEREZ, LLC', 'MARIA PEREZ, LLC', and 'Perez Plowing'. A red arrow points to 'Perez Plowing'. To the right of the dropdown are a plus sign and an edit icon. Below the dropdown, the details for the selected location are visible: Name: MARIA PEREZ, LLC; Remit Address: 123 INDUSTRIAL WAY, SUITE 103, ATTN: MARIA PEREZ, PORTLAND, ME 04101.

To add a new location, click Add, complete the fields to define the location, and click Save.

The screenshot shows the 'Vendor profile' page with the 'Locations' tab active. The 'Location' dropdown is set to 'Perez Plowing'. A red box highlights the plus sign icon, with a red arrow pointing to the 'Add Location' modal form. The modal form contains the following fields: Location Name* (MARIA PEREZ, LLC), Doing Business As (PEREZ PAVING), Email address (MARIA.PEREZ@PEREZPAVING.NET), Type* (General), Address* (123 INDUSTRIAL WAY), Address line 2 (SUITE 103), City (PORTLAND), State (ME), and Zip Code (04101). There are 'Save' and 'Cancel' buttons at the bottom of the modal.

Click Update My Bank Account to add or change bank account information. **Please note that this feature is not yet available.**

Contacts

The Contacts group provides a list of contacts associated with the selected location. If no contacts exist, use the Add option to enter a new contact.

The screenshot shows a modal window titled "Add Contact" with a close button (X) in the top right. The form contains the following fields: "Full Name*" (text input), "Type*" (dropdown menu), "Phone*" (text input), "Mobile Phone" (text input), "Email*" (text input), and "Comments" (text area). At the bottom are "Cancel" and "Save" buttons. A red box highlights a "+" icon in the top right corner of the modal, with a red arrow pointing to it.

Clicking the More button displays a list of available actions for each contact record.

The screenshot shows a contact record for "Antonia" with "General Contacts" as the category, phone number "(207)-861-9181", and email "ANTONIA.RAOULSMITH@GMAIL.COM". Below the record is a "Payment Terms" section with questions like "Do you have any payment discounts?" and "Which delivery methods do you accept?". A red box highlights a vertical ellipsis menu icon (More button) to the right of the contact record, which has opened a dropdown menu with options: "Edit contact", "View details", and "Opt-in text messaging".

The Edit Contact and View Details options provide information about the selected contact. The Edit Contact window provides access to the fields to update the information whereas the View Contact window is informational only.

Edit Contact ×

* First Name

* Last Name

Type*

* Phone

Mobile Phone

* Email

Comments

View Contact ×

First name
Antonia

Last name
Raoul-Smith

Type
General Contacts

Phone number
(207)-861-9181

Email
ANTONIA.RAOULSMITH@GMAIL.COM

Comments

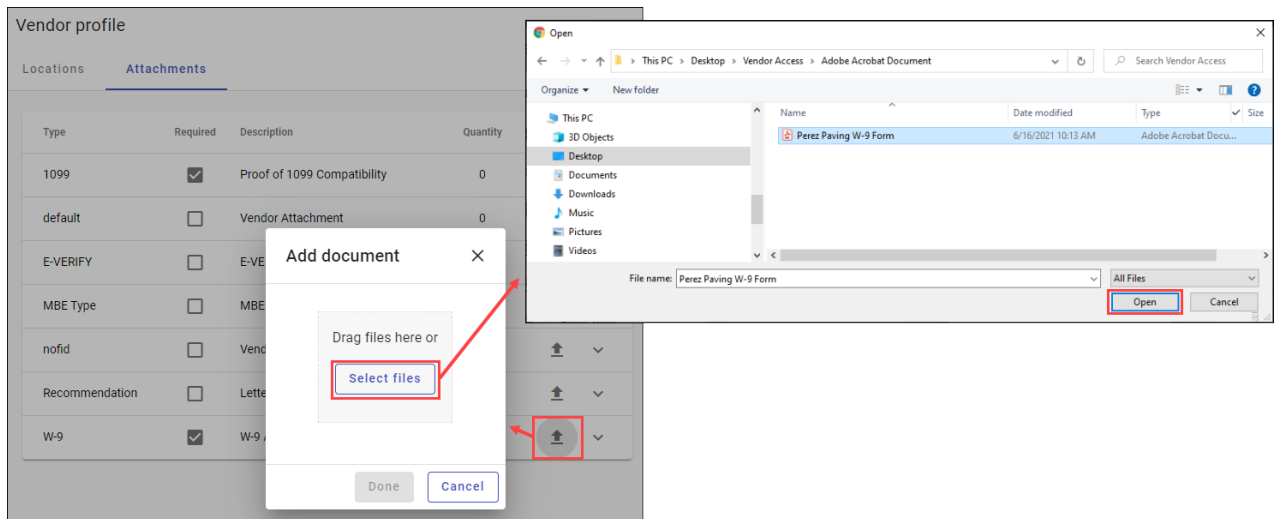
The Opt-In Text Messaging option allows users to receive text messages.

Attachments

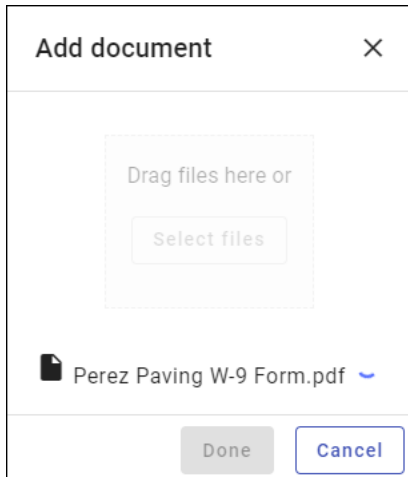
The Attachments tab displays a list of attachment types your organization has established for vendors in your Tyler ERP solution. Attachments may be required or optional.

Type	Required	Description	Quantity	Actions
default	<input checked="" type="checkbox"/>	Vendor Attachment	0	
Insurance Document	<input checked="" type="checkbox"/>	Vendor Insurance	1	
Test Attachment Type VA	<input checked="" type="checkbox"/>	TEST Vendor Attachment	0	
W-9	<input checked="" type="checkbox"/>	Vendor W-9	1	

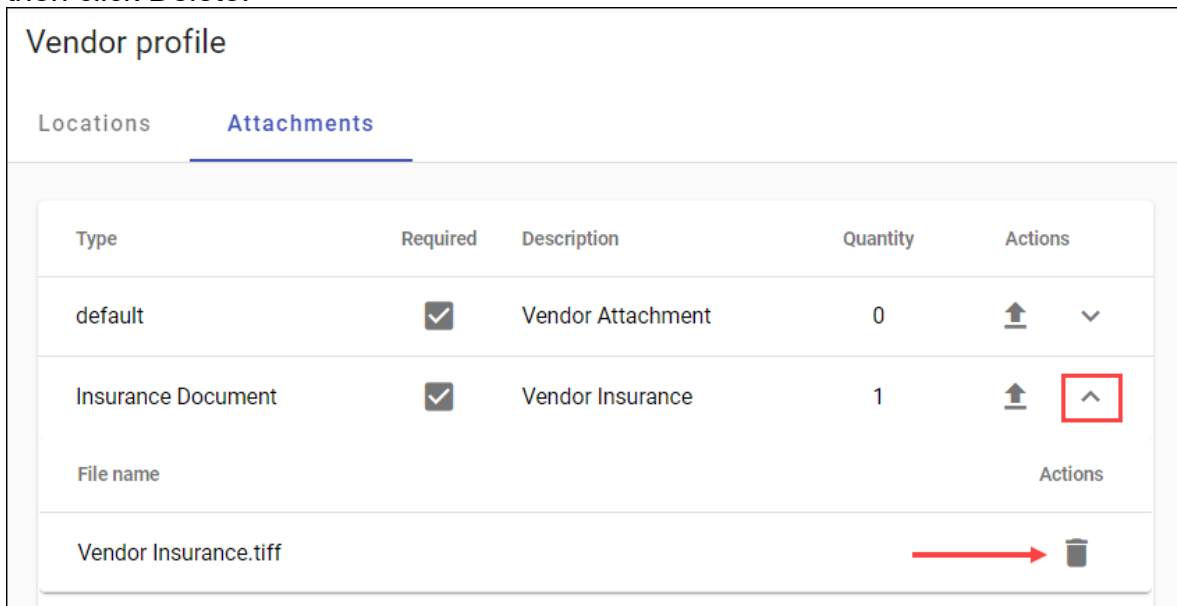
Clicking the Upload button provides the Add Document dialog box for selecting the file to attach from the workstation.



The selected attachment is added to the vendor profile.



To delete an attachment, click the arrow in the Actions column to expand the group, and then click Delete.



Bids

This feature is not available now.

Commodities

This feature is not currently set up.

Purchase Orders

Purchase Orders provides a list of purchase orders issued to the vendor from your organization.

Purchase Orders

My purchase orders

Last 7 Days Last 30 Days

Number ↑	Description	Open Amount	Total Amount	Status
20075809	Plow Post Office Parking Lot	2,375.00	2,375.00	Open

Rows per page: 25 1-1 of 1

Overview

You have 1 open PO's

Open amount \$2,375.00
Total amount \$2,375.00

Amounts as of Jun 16, 2021

The Last 7 Days and Last 30 Days filters allow vendors to quickly view the purchase orders that have been issued in the past week and past month. Filters can also be applied by purchase order number, description, open amount, total amount, or status.

My purchase orders

Last 7 Days **Last 30 Days**

Number ↑	Description	Open Amount	Total Amount	Status
----------	-------------	-------------	--------------	--------

No matching records found

Clicking the arrow for a purchase order provides additional details.

The screenshot shows the 'Purchase Orders' section of the Vendor Access system. On the left, there is a navigation menu with options like Home, Vendor profile, Commodities, Purchase Orders, Invoices, Checks, Form 1099, and Contracts. The main area displays a table of purchase orders. One order is highlighted with a red box around its status column, which contains a right-pointing arrow. To the right of the table is an 'Overview' panel showing 'You have 1 open PO's' with an open amount and total amount of \$2,375.00. Below the table, a detailed view for purchase order #20075809 is shown, including a summary of addresses, a table of line items, and an 'Available amount' of \$2,375.00 with a 'Submit invoice' button.

Clicking Submit Invoice provides a screen with fields to enter the invoice number to submit in reference to the selected purchase order, as well as line-item liquidation options. The Liquidate All option completely liquidates the purchase order.

The screenshot shows the 'Submit invoice' screen. At the top, it says 'Submit invoice: 20075809'. There is a text input field for the 'Invoice number'. To the right, the 'Bill To' information is displayed: Central Location Building, 370 US Route 1, Falmouth, ME. Below this is a table for 'Adjust quantities on line items' with columns for Line#, Description, UOM, Unit Price, Quantity, Available, and Amount. The first line item is 'Plow Post Office Parking Lot' with a unit price of 125.00000 and a quantity of 0. A red box highlights the quantity field, which has a red error message below it: 'Must be a number greater than zero'. To the right of the table is a 'Purchase order totals' box showing Total amount (\$2,375.00), Amount paid (\$0.00), Invoice amount (\$0.00), and Open amount (\$2,375.00). Below the table is a 'Total amount' box showing \$2,375.00. At the bottom, there are 'Cancel', 'Back', and 'Submit' buttons.

Click Submit to finish submitting the invoice to the organization. Click Back to return to the previous screen of purchase order details. Click Cancel to return to the home page.

Invoices

This feature is not set up yet.

Checks

Clicking Checks displays a list of the checks that have been issued to the vendor, including EFTs, manual checks, printed checks, voided checks, and stale checks.

The screenshot shows the 'Vendor Access' interface with a sidebar on the left containing navigation options: Home, Vendor profile, Bids, Commodities, Purchase Orders, Invoices, Checks (highlighted), Form 1099, Contracts, and Work Orders. The main content area is titled 'Checks' and features a 'My Checks' section with two filter buttons: 'Last 7 Days' and 'Last 30 Days'. A 'Filter' button is also present. Below the filters is a table with the following data:

Check Number ↑	Date	Type	Status	Comment	Amount	Actions
252532	01/13/2021	EFT	Printed	test	200.00	▼
8887771	05/12/2020	Print	Printed	quantity	1.00	▼
20101089	03/23/2020	Void	Cleared	VOID AFTER UPDATE 09/03/2020	0.00	▼
98787897	06/04/2020	Stale	Cleared	STALE AFTER UPDATE 08/04/2020	0.00	▼
899890003	05/18/2020	Manual	Printed	Flashlight	24.90	▼

At the bottom of the table, there is a 'Rows per page' dropdown set to '25' and a pagination indicator '1-5 of 5' with navigation arrows.

The checks can be filtered by the last 7 days or the last 30 days. Clicking the Filter option provides additional fields to apply specific filter criteria to the results, such as a check number, date, or amount.

My Checks

Last 7 Days Last 30 Days Filter

Check Number ↑	Date	Type	Status	Comment	Amount	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	amount	
252532	01/13/2021	EFT	Printed	test	200.00	▼
8887771	05/12/2020	Print	Printed	quantity	1.00	▼
20101089	03/23/2020	Void	Cleared	VOID AFTER UPDATE 09/03/2020	0.00	▼
98787897	06/04/2020	Stale	Cleared	STALE AFTER UPDATE 08/04/2020	0.00	▼
899890003	05/18/2020	Manual	Printed	Flashlight	24.90	▼

Rows per page: 25 1-5 of 5 < >

Clicking the arrow for an individual check provides additional information, such as the invoice associated with the check. Select the invoice to view the full invoice details.

My Checks

Last 7 Days Last 30 Days Filter

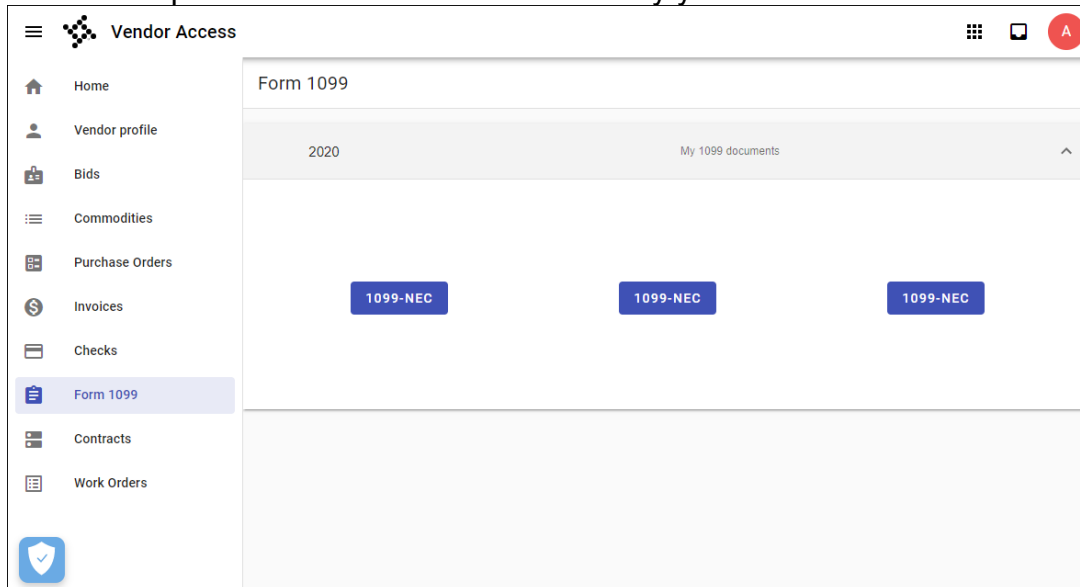
Check Number ↑	Date	Type	Status	Comment	Amount	Actions
<input type="text"/>	<input type="text"/>	manual	<input type="text"/>	<input type="text"/>	amount	
899890003	05/18/2020	Manual	Printed	Flashlight	24.90	▲

Invoice Number: 21220098
 Description: Supplies for line operations
 Amount: \$30.00

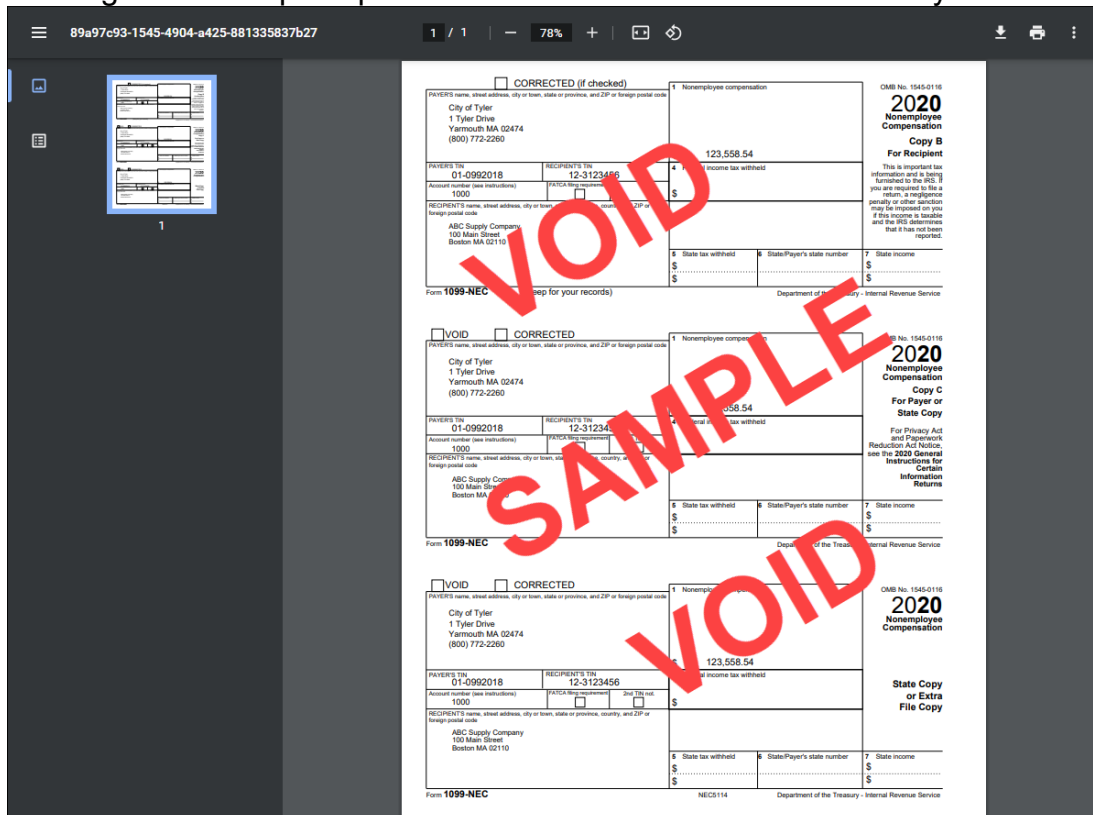
Rows per page: 25 1-1 of 1 < >

Form 1099

Form 1099 provides the vendor's 1099 data by year.

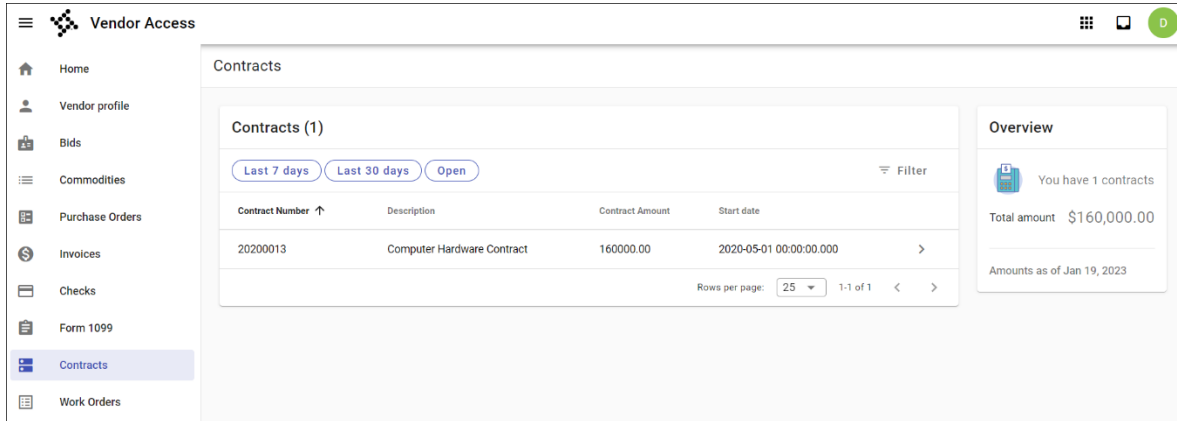


Clicking the 1099 option provides the vendor's 1099 form for that year.



Contracts

The vendor's associated contracts are provided in the Contracts section.



Click the arrow for a contract to view the contract details, including a summary, general information, the contract balance, available amount, and any associated items.

