



Munis Self Service Vendor Self Service 2018.1

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1 VENDOR SELF SERVICE OVERVIEW

Vendor Self Service (VSS) provides vendors with web-based access to information stored in your organization's Munis® database. The information is drawn from multiple Munis products, including Accounts Payable, Purchasing, Contract Management, and Bid Management.

Using VSS, vendors can enter and maintain their contact and remittance information, discount and payment terms, designated contact persons, and a list of commodity codes that represent the goods and services the vendor can provide.

A listing of the vendor's current and prior 1099 data, purchase orders, invoices, contracts, and checks is available in VSS. This information is entered by users in your organization using Munis programs, and the information is available to vendors for inquiry purposes only.

VSS 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 your Munis database that can be examined and evaluated by your organization's bid management personnel.

The fields and options available to vendors in VSS are determined by your VSS administrators. Refer to the MSS General Administration User Guide for details on modifying VSS permissions.
Style

1.1.1 Vendor Self Service Users

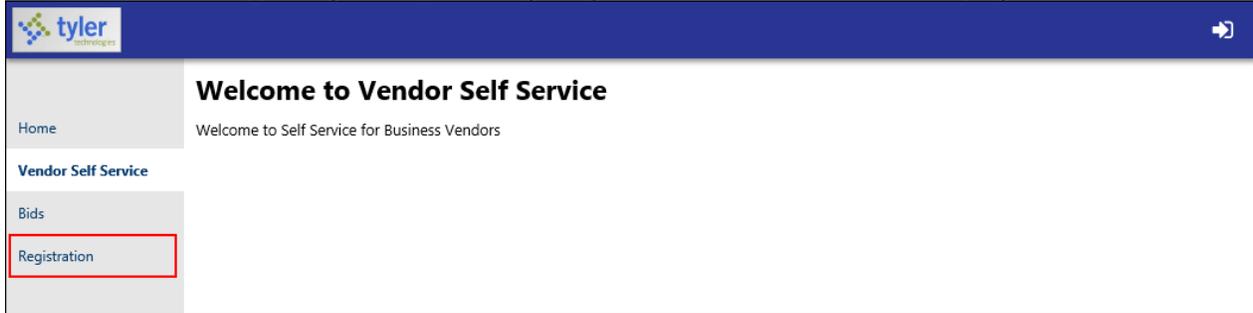
Vendor Self Service requires vendors who exist in your Munis database to register using the VSS website to gain access to their information. To successfully link a vendor's VSS registration with their Munis record, you must provide the vendor with the Munis vendor ID number assigned by your organization. The vendor enters the number in the Vendor ID box during registration.

Potential vendors who do not exist in your Munis database can complete the registration process, but they are granted limited access to VSS. When completed by a potential vendor, the registration process creates a new record in the Vendors program in Munis. A user from your organization with Munis vendor maintenance permissions must change the status of the newly created record to Active in Munis. A Vendor Self Service administrator must grant the vendor's user ID access to the appropriate pages in VSS before the vendor can fully utilize the site.

2 VENDOR REGISTRATION

Prospective vendors who do not exist in your Munis database, as well as existing vendors who have already been entered in the Vendors program in Munis, must register to gain access to Vendor Self Service.

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



Registration is a multistep process. Vendor Self Service displays the number of steps in the process, with the current step displayed in bold type. Vendor Self Service does not save any information entered in the fields on any page until the registration is complete. If a vendor leaves the registration process before completing each of the steps, all of the information entered is discarded and they must start again.

The first step in the process defines the vendor's user ID and password information.

Field	Description
User ID	Defines the vendor's VSS login name. Each user ID must be unique and cannot be greater than 20 characters in length.
Password	Indicates the vendor's login password. The vendor must enter and then retype a login password in the boxes. VSS requires entry of a minimum of two characters for the password and a maximum of 15 characters. VSS password formatting rules are defined by your organization's Self Service administrator on the General Administration page.
Password Hint	Contains a hint used to assist the vendor in remembering their password. The hint cannot be the same as the vendor's password. VSS sends this hint to the vendor in an email message when they click Forgot Password on the login page.
CAPTCHA	Displays a CAPTCHA code (Completely Automated Public Turing Test to Tell Computers and Humans Apart), which is used to protect the VSS database from attack. The vendor must enter the numbers shown in the box.

Vendors who already exist in your organization's Munis database must complete the fields in the Existing Vendors Only section. You must provide the vendor with the Munis vendor ID assigned by your organization, which is the vendor number in the Munis Vendors program. The value entered in the FID/SSN box must match the value from the Munis vendor record exactly.

When existing Munis vendors complete the Vendor ID and FID/SSN boxes and click **Continue**, VSS verifies the entered information with the vendor record in Munis. If all of the information matches, the vendor is automatically presented with the My Profile page. They do not have to complete the remaining steps of the registration process.

The second step in the new vendor registration process requires the vendor to provide their general business and contact information.

New Vendor Registration
 Your User ID and password have been successfully set. Please continue with the registration process. Step 2

General information

*Company Name: Chase Commodities
 (line 2):
 (line 3):
 (line 4):
 Doing business as (if different from above):
 Foreign Entity

*Address: One Tyler Drive

Your preferred payables delivery method(s):
 Mail Fax E-Mail

Your preferred purchasing delivery method(s):
 Mail Fax E-Mail

Bank Information

Joe Smith
 1234 Anystreet Court
 Anycity, AA 12345 1234
 Pay to the order of _____ Dollars
 Bank Anywhere
 123456789 123456789123 1234
 Routing Number Account Number Check Number

Bank Routing Number: 111000025 BANK OF AMERICA
 Bank Account Number: 365469
 Bank Account Type: Checking

Continue

Field	Description
Company Name	Contains the vendor's name or business name. The value entered here appears in the Alpha box in the Vendors program.
Doing Business As	Indicates the vendor's doing business as (DBA) name, if applicable.
Foreign Entity	When selected, indicates that the vendor is a foreign entity.
Address City State ZIP	Define the vendor's main address. The vendor must enter a two-letter state postal abbreviation code in the State box.
Fax Number	Displays the vendor's fax number, if applicable. This box can be hidden by a VSS administrator by clearing the Address Fax Number check box

Field	Description
	on the Field Settings tab of the Vendor Administration page.
Geographic	Indicates the vendor's geographic code. The codes available for selection are defined in Munis using the Accounts Payable Miscellaneous Codes program.
Send Remittances to the Above Name and Address	If the vendor selects this check box, Vendor Self Service enters the values from the main address as the default values in the boxes in step three of the registration process.
Email	Contains the vendor's primary email address. It is the address to which all notifications and alerts are sent, such as registration confirmation messages or password hints. Additional email addresses for contact persons are defined later in the registration process.
Web Site	Includes the vendor's website URL.
Vendor Type	Determines the vendor's type. Vendor type codes are defined by your organization using the Accounts Payable Miscellaneous Codes program in Munis. Your organization must define at least one vendor type code in order to allow vendors to successfully register in Vendor Self Service. If no vendor type codes exist, vendors cannot complete the registration process.

The New Vendor Registration page contains a Minority Business Entity (MBE) section that must be completed by minority business enterprise vendors. A minority business enterprise is typically defined as a business that is at least 51% owned and operated by an ethnic minority. These businesses are typically certified by a city, state, or federal agency.

Minority Business Entity (MBE)

Is Minority Business Enterprise

MBE Classifications
(select all that apply)

AFRICAN AMERICAN OWNED
 DISADVANTAGED BUSINESS
 General 0 certifications [manage](#)
 HISPANIC OWNED
 WOMAN OWNED

Gender

Ethnicity

Enter a Federal Tax ID Number or Social Security Number

FID SSN

*FID/SSN

*Re-type FID/SSN

Field	Description
Minority Business Entity (MBE)	
Is Minority Business Enterprise	Indicates that the vendor is a minority business enterprise
MBE Classification	Define which MBE classifications the vendor possesses. The

Field	Description
	<p>classifications displayed in the section are created and maintained by your organization using the Accounts Payable Miscellaneous Codes program in Munis. The vendor can select one or more of the check boxes, but the General check box is always selected and cannot be cleared.</p> <p>The MBE Classifications section displays the number of certifications of each type that the vendor possesses. If the VSS administrator has enabled certification management, vendors can click Manage for a classification to maintain certifications. See Appendix A—Managing Minority Business Enterprise Certificates for more information.</p>
<p>Gender Ethnicity</p>	<p>Contain the vendor gender and ethnicity codes your organization has defined in Munis using the Accounts Payable Miscellaneous Codes program. If no codes have been created, these lists cannot be used. The values selected from the lists determine the vendor's gender and ethnicity for vendor statistic and tracking purposes.</p> <p>A VSS administrator can hide the lists from view by clearing the check boxes on the Field Settings page in Vendor Administration.</p>
<p>Enter a Federal Tax ID Number or Social Security number</p>	
	<p>Requires the vendor to select whether to enter a federal tax identification number or a Social Security number, and then enter the value of the selected type.</p> <p>The FID or SSN must be a unique value that is not used by any other vendor profile, unless your organization has selected the Allow Duplicate FIDs/SSNs check box in the Accounts Payable program.</p> <p>Vendor Self Service automatically completes these fields for existing vendors who entered vendor ID and FID/SSN numbers during step one.</p>

The Payment Terms and Bank Information sections define the vendor's business terms and financial transaction information. However, the Bank Information section only appears when

your VSS administrator has enabled entry and viewing of bank information.

Payment Terms

Discount Percentage

Days to Discount

Days to Net

Your preferred payables delivery method(s).

Mail Fax E-Mail

Your preferred purchasing delivery method(s).

Mail Fax E-Mail

Bank Information

Joe Smith 1234 1234
 1234 Anystreet Court
 Anycity, AA 12345

Pay to the order of _____ Dollars

Bank Anywhere
 123456789 123456789123 1234

Routing Number
Account Number
Check Number

Bank Routing Number

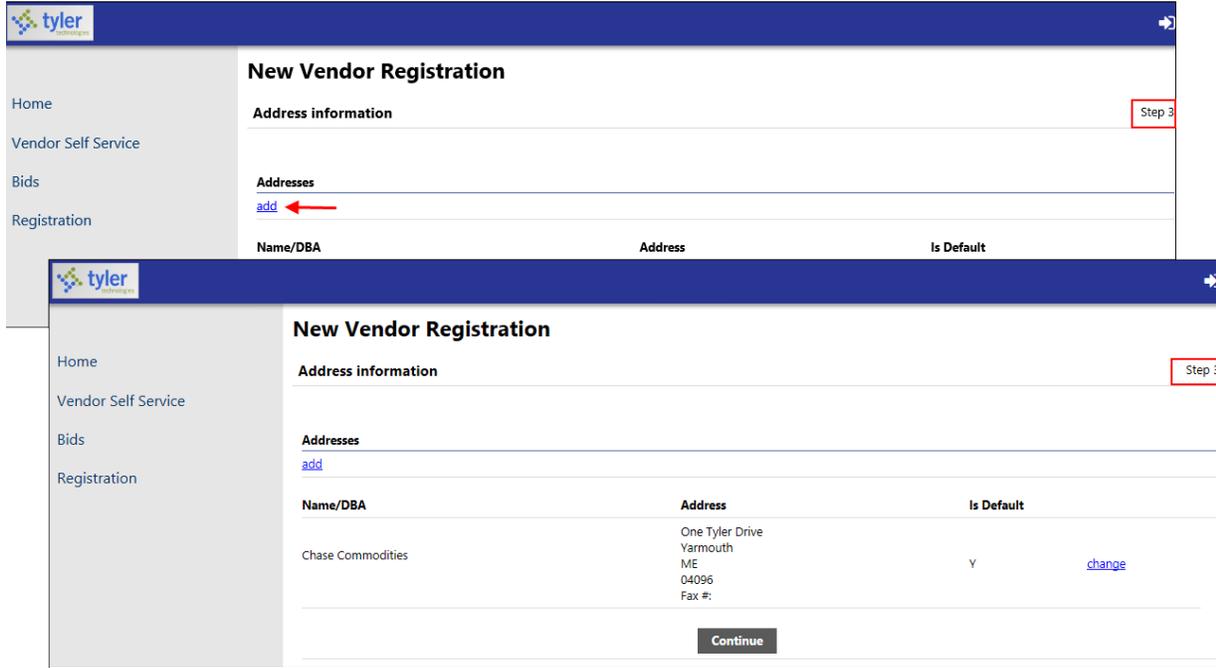
Bank Account Number

Bank Account Type

Field	Description
Payment Terms	
Discount Percentage	Defines the discount percentage the vendor extends to your organization.
Days to Discount	Contains the number of days within which payment must be received by the vendor in order for your organization to claim the discount percentage.
Days to Net	Indicates the number of days that the vendor allows before requiring net payment.
Your Preferred Payables Delivery Method	Determine the vendor's preferred delivery method for payables and purchasing documents.
Your Preferred Purchasing Delivery Method	A VSS administrator can hide the check boxes from view by clearing the equivalent check boxes on the Field Settings page in Vendor Administration. The administrator can also restrict the delivery method to only one selection.
Bank Information (This section does not display unless your VSS administrator has enabled entry of bank information on this page.)	
Bank Routing Number	Determines routing number of the bank account to which payments made to the vendor should be sent. The program automatically selects the correct bank code based on the entered routing number.

Field	Description
Bank Account Number	Contains the vendor's bank account number.
Bank Account Type	Indicates the type for the entered account: checking or savings.

Step three of the VSS registration process requires the vendor to enter address information. If the vendor selected the Send Remittances to the Above Name and Address check box during step two, Vendor Self Service automatically enters the first address record. If the check box was not selected, the Addresses table is blank.



The vendor must click **Add** to create a new address record, which displays the Remittance Information page.

Field	Description
Address Type	Determines the type code of the entered address. The list is not available unless your organization has cleared the Use General Vendor Address Records check box on the Vendor Settings tab of the Accounts Payable Settings program in Munis, and then defined address type codes in the Address Types program.
Company Name	Defines the name that appears on items sent to this remit address. The name can vary from the vendor name, if necessary.
Address City State ZIP	Provide the remit mailing address.
Fax	Contains the fax number for this remit address. A VSS administrator can hide the fax number from view by clearing the Address Fax Number check box on the Field Settings tab of the Vendor Administration page.
Email	Defines the email address used for the remit address.
Bank Information	

Field	Description
<i>(This section does not appear unless your VSS administrator has enabled entry of bank information on this page.)</i>	
Bank Routing Number	Determines routing number of the bank account to which payments made to the vendor should be sent. The program automatically selects the correct bank code based on the entered routing number.
Bank	Identifies the bank and routing number to which payments made to the vendor should be sent.
Bank Account Number	Contains the vendor's bank account number.
Bank Account Type	Indicates the type for the entered account: checking or savings.

Clicking **Save** after entry of an address record returns the Address Information page, where the new address record has been added to the table.

A vendor can add individual contacts for an address record by clicking **Change**, which displays the Remittance Information page. These contacts are only associated with the address record and are not displayed as part of the general vendor record.

Clicking **Add Contact** on the Remittance Information page displays the Contact Information page, where the vendor can create contact records for the address.

The top screenshot shows the 'New Vendor Registration' page. On the left is a navigation menu with 'Home', 'Vendor Self Service', 'Bids', and 'Registration'. The main content area has a header 'New Vendor Registration' and a sub-header 'General Vendor Contacts'. Below this is a table for 'Address Contacts' with columns 'Type', 'Name', 'Description', and 'Email'. At the bottom of the table are 'Continue' and 'New Contact' buttons. A red box labeled 'Step 4' is in the top right corner.

The bottom screenshot shows the 'Contact Person' form. It has the same navigation menu and header. The form fields are: '*Contact Type' (dropdown menu with 'GENERAL - General Contacts' selected), '*Name' (text field with 'Charles Chase'), 'Description' (text field), '*Phone' (text field with '207-555-1212'), 'Text' (text field with 'Opt In' checkbox), 'Fax' (text field), and 'E-Mail' (text field with 'melfring@tylertech.com'). At the bottom are 'Save' and 'Cancel' buttons. A red box labeled 'Step 4' is in the top right corner.

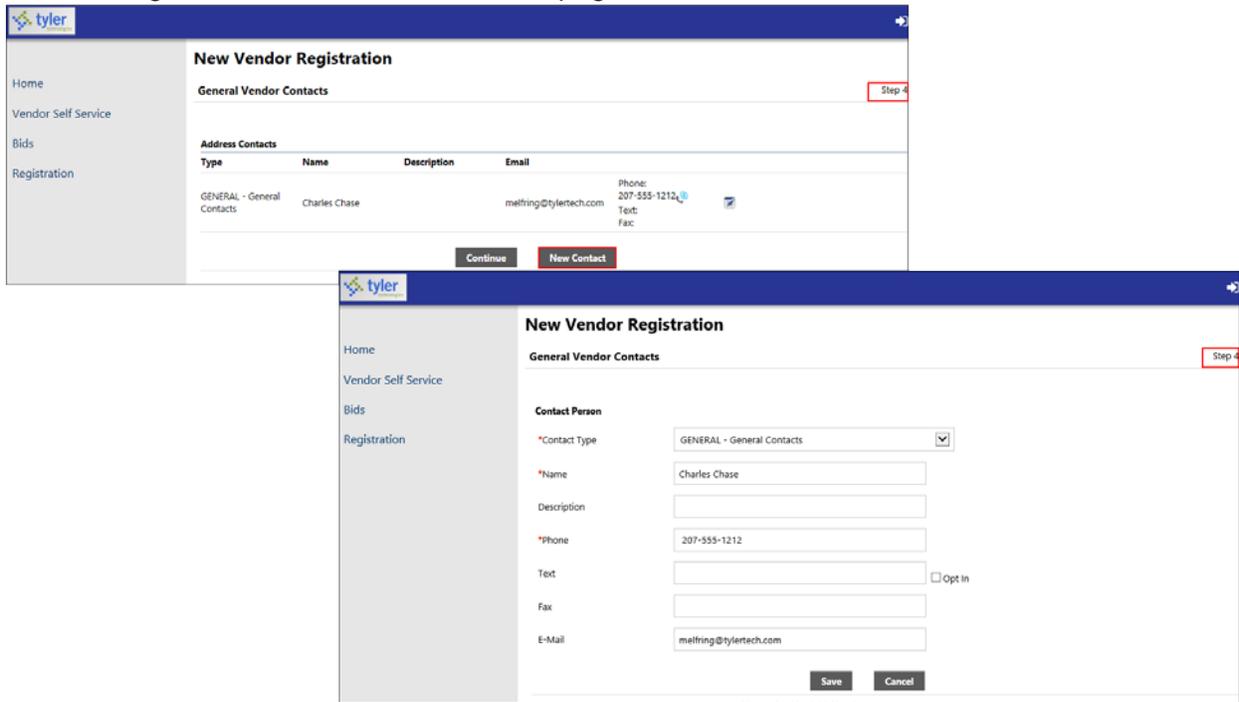
Field	Description
Contact Person	
Contact Type	Determines the contact type code. Contact type codes are defined in Munis using the Contact Types program.

Field	Description
Name	Contains the name of the contact person.
Phone Fax Email	Define the contact's phone and fax numbers, as well as the contact's email address. The fax and email information are optional. A VSS administrator can hide the fax number from view by clearing the Contact Fax Number check box on the Field Settings tab of the Vendor Administration page.

Clicking **Save** after completing the contact information returns the vendor to the address record, with the new contact record provided in the Addresses Contacts group.

The vendor must click **Save** on the Remittance Information page to return to the Address Information page, and then click **Continue** to advance to the next step in the registration process.

In step four, the vendor clicks **New Contact** to enter a contact person for the general vendor record using the General Vendor Contacts page.



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

The vendor must click **Continue** to advance to the last step of the VSS registration process, which is the verification step.

On the Review page, the vendor reviews and confirms the information they entered in previous steps. If changes are required for any detail group, the vendor uses the Change option for that group to make the appropriate changes.

When all the entered information is correct, the vendor must select the Terms and Conditions check box, acknowledging agreement with your organization’s terms and conditions, and then click **Register** to complete the process.

New Vendor Registration Step 6

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

General Information [change](#)

Name/DBA: Chase Commodities

Entity:

Bank Account Type: Checking

Terms [change](#)

Discount Percentage: 0

Days to Discount: 0

Days to Net: 0

Address Information [change](#)

Name/DBA	Address	Default
Chase Commodities	One Tyler Drive Yarmouth, ME 04096 Fax:	Y

Additional Fields [change](#)

SHIPPING CHOICE: UPS

Accounts Contacts [change](#)

Type	Name	Description	Email	Phone	Text	Fax
GENERAL - General Contacts	Charles Chase		melfring@tylertech.com	207-555-1212		

Commodities [change](#)

Attachments

Attachment Type	Description	Required	Attachments
General	Documents are not assigned to a type		(0) Attach
E-Verify	E-Verify		(0) Attach

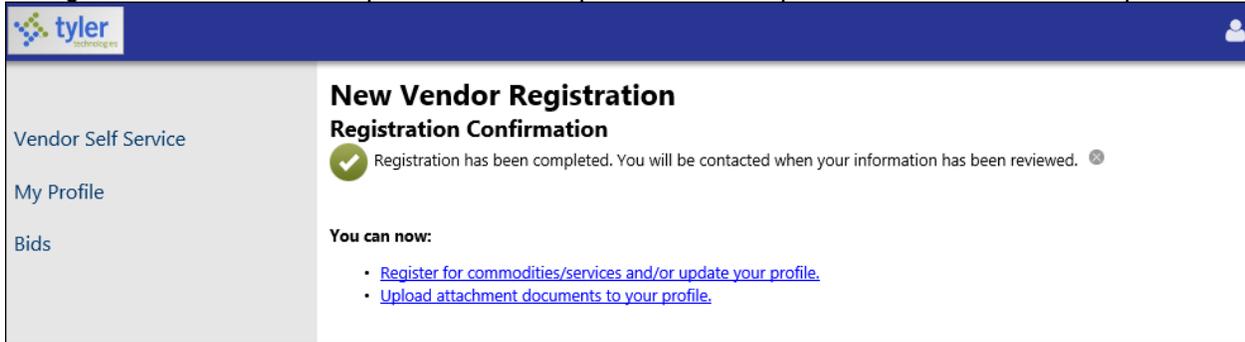
⚠ These are our terms and conditions. You must accept them before you can access VSS. Do you accept the terms and conditions?

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.)

Vendor Self Service displays a registration confirmation page that provides the vendor with links to register commodities or update their VSS profile, and to upload attachments to their profile.



Newly registered vendors only have access to the Home, Vendor Self Service, My Profile, and Bids options on the menu. Your organization's Vendor Self Service administrator must grant the vendor access to additional menu options.

3 VENDOR SELF SERVICE HOME PAGE

The Vendor Self Service home page contains a header and a series of summary information groups.

The screenshot shows the Vendor Self Service home page. At the top left is the Tyler Technologies logo. The main heading is "Welcome to Vendor Self Service". On the left is a navigation menu with options: My Profile, 1099, Bids, Checks, Invoices, Purchase Orders, and Contracts. The main content area is divided into sections: Profile information (LeTourneau Power Equipment, 123 Main Street, CARIBOU, ME 04736, US), Announcements (Welcome to Self Service for Business Vendors), and Invoices. The Invoices section includes a large box showing a recent invoice of \$452.99 dated 2/13/2017, and another box showing a year-to-date total of \$452.99. Below this is a table of recent invoices with columns for Date, Amount, and Status. The table shows one entry: 2/13/2017, \$452.99, Held. There are also links for "Submit invoices", "Search invoices", and "Search checks". The footer contains the copyright notice: ©2017 Tyler Technologies, Inc.

Clicking the login option in the header displays the following menu options:

- My Account – Opens the My Account page containing the vendor’s account information.
- Log Out – Logs the vendor out of Vendor Self Service.

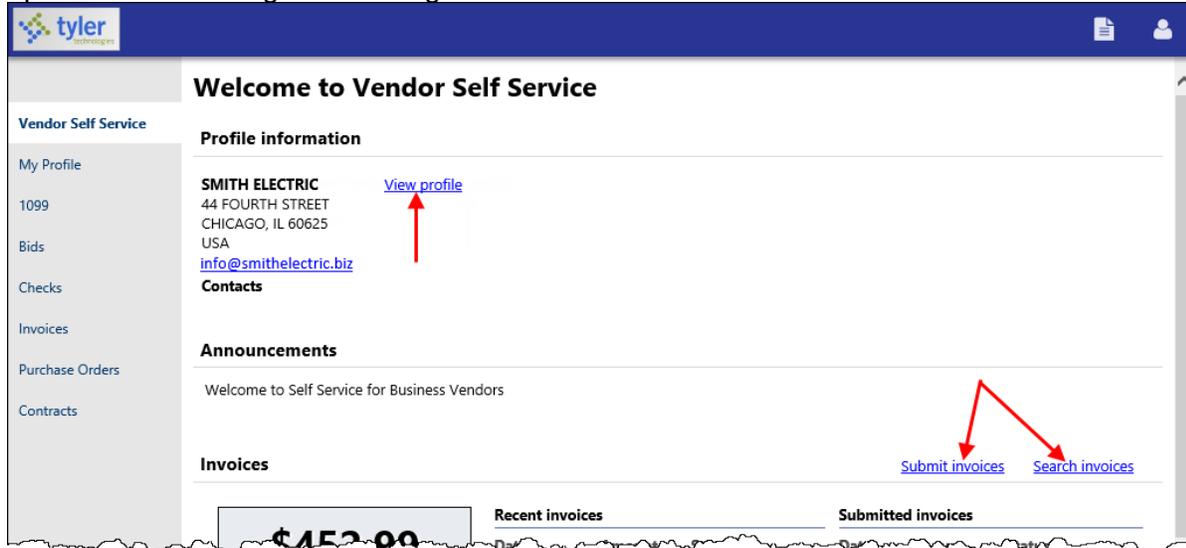
This screenshot is similar to the previous one but shows the login menu open. The user's name, "LETOURNEAU POWER EQUIPMENT", is displayed at the top right. The menu options are "My Account" and "Log Out". The rest of the page content remains the same as in the previous screenshot.

The Resources option in the header provides a menu of links or documents provided by your organization. These options are maintained in Vendor Administration.



4 VENDOR NAVIGATION

On the Vendor pages, the headers for the individual information groups that display include options for searching and viewing related information.



Clicking **View Profile** in the Profile Information group or the **My Profile** option in the navigation menu displays the My Profile page. The My Profile page groups profile information by category. By clicking **Change**, a vendor can update the information in that group.



The General Information group contains the vendor’s address and contact information, type and foreign entity status, minority business enterprise status and certifications, and discount terms. If your VSS administrator has enabled viewing of banking information on vendor profiles, the General Information group also displays the vendor’s banking information.

General Information change	
Name/DBA	SMITH ELECTRIC
Entity	
Address	44 FOURTH STREET CHICAGO, IL 60625
Fax Number	
FID	55-7777777
E-Mail	dan.olson@tylertech.com
Web Site	info@smithelectric.biz
Vendor Type	EQUI - EQUIPMENT VENDOR
Geographic	
Foreign Entity	No
Is minority business enterprise?	No
MBE Classification(s)	
General	
No certificates were found for this classification.	
Discount Percentage	0.000%
Days to Discount	0
Days to Net	0
Bank Name	
Bank Account Number	
Bank Account Type	
Gender	
Ethnicity	

The Address Information group displays the vendor’s remittance address and contact information, while the Address Contacts group lists the vendor’s contact persons and information.

Address Information					
change					
Name/DBA	Address			Is Default	
Address Contacts					
change					
Type	Name	Title	Email	Phone	Fax
ACCOUNTS PAYABLE	Susan Agouris	Accounting Office	info@mithelectric.biz	312-555-1212	

The Additional Fields group identifies the vendor’s shipping preferences. Clicking **Change** allows the vendor to update this information.

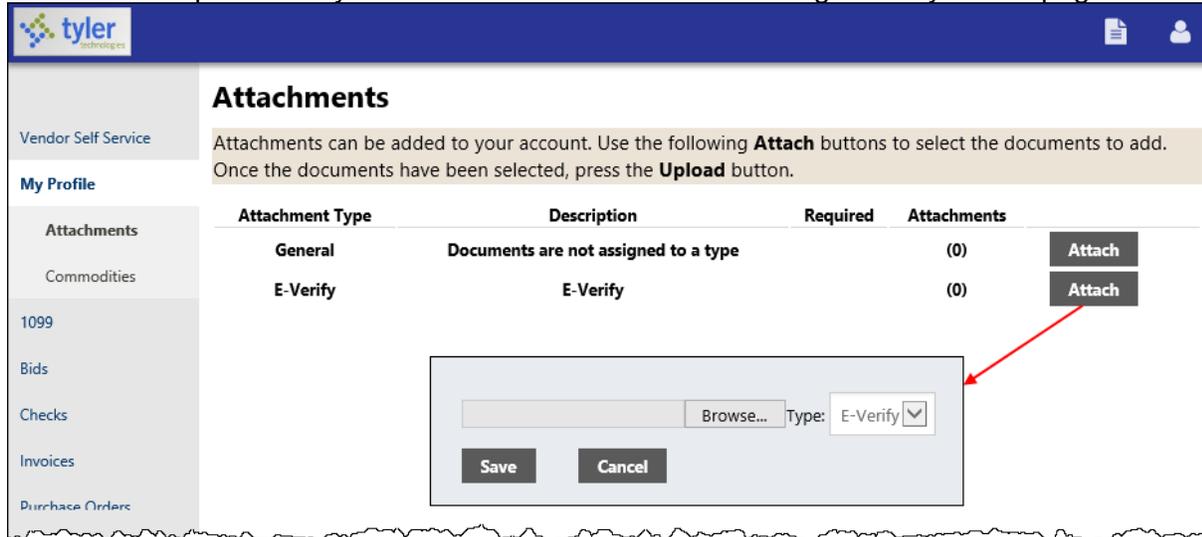
Additional Fields	
change	
SHIPPING CHOICE	USPS

The Current Vendor Commodities group contains a list of commodity codes associated with the vendor. Vendors remove commodities from the list by clicking the **Remove** link. The **Add** option allows vendor to add commodities to the list.

Commodities		
add		
Code	Description	
206	COMPUTER HARDWARE AND PERIPHERALS FOR MINI AND MAIN FRAME COMPUTERS	Remove
28525	Current Collection Equipment and Accessories, Electrical	Remove
28726	Circuit Cards	Remove
28782	Transmitters, Emergency Alarm Type (To incl. Equipment Operation Status Reporting)	Remove

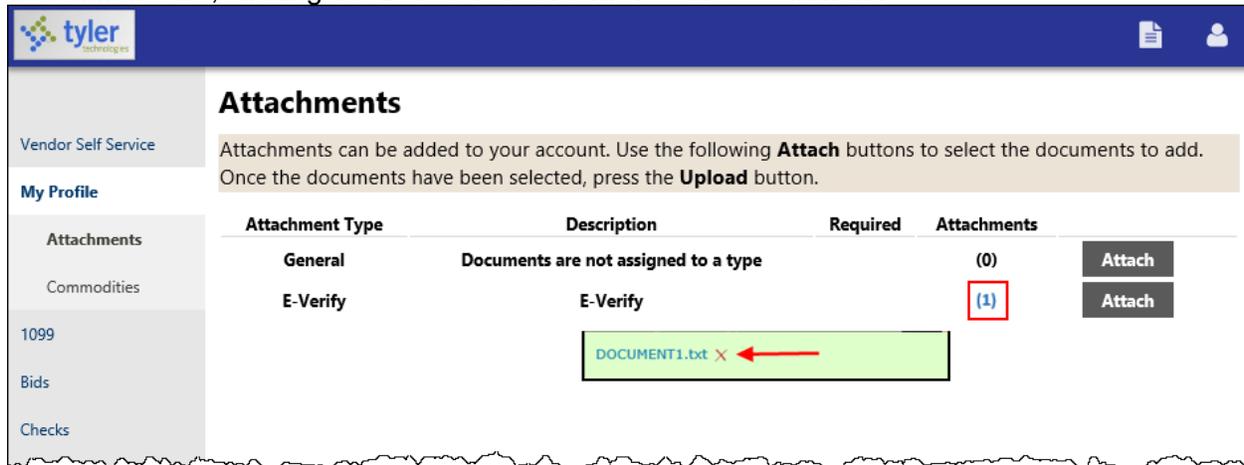
4.1.1 Attachments

A vendor adds attachments to their profile by clicking **Attachments** on the menu. The Attachments option is only available when the vendor is viewing their My Profile page.



Attachments are added by clicking the **Attach** button on the Attachments page, which allows the vendor to navigate to a file or document to upload. The Attachments column indicates the number of documents attached for the attachment types. Vendors can attach an unlimited number of files.

To remove an attachment, the vendor clicks the number of attachments indicator. On the attachments list, clicking the **Delete** button removes the attachment.

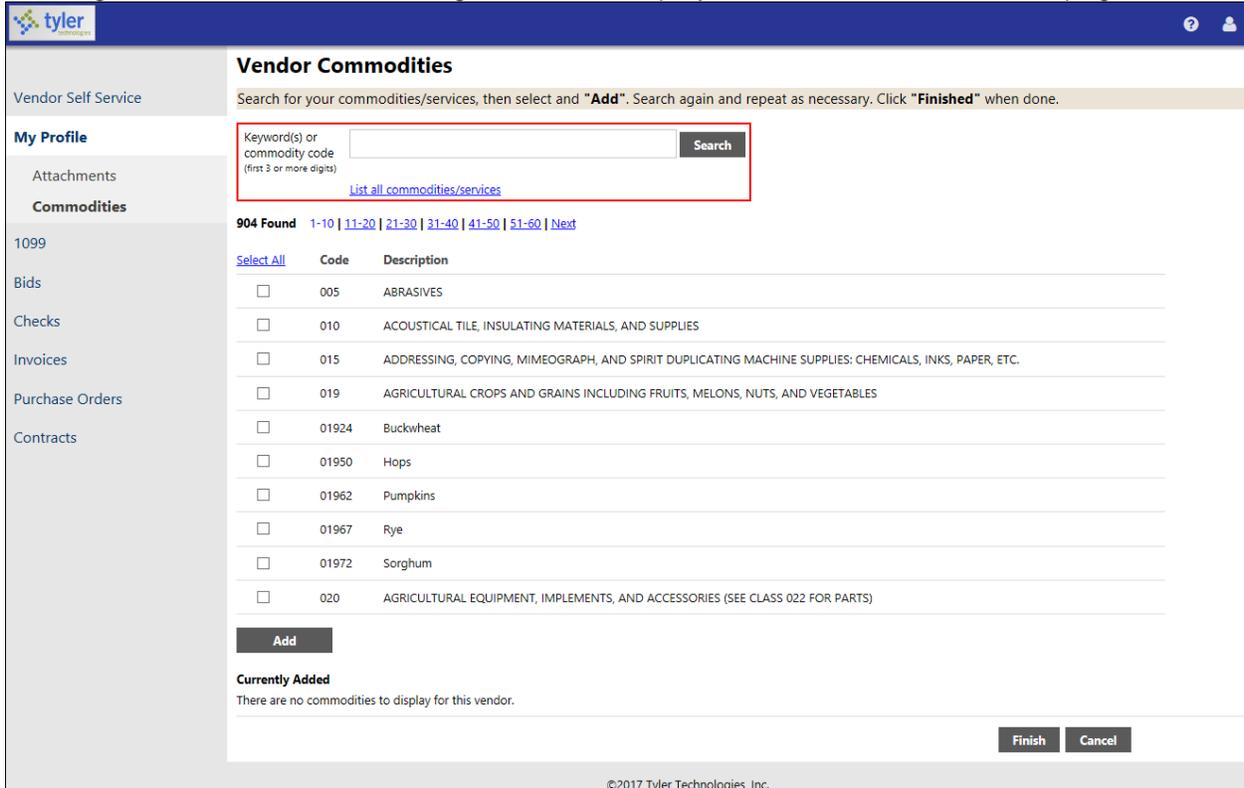


The uploaded files are also added to the vendor record in the Munis Vendors program and they can be viewed using the Vendor Attachments screen in that program.

The vendor cannot maintain their attachments in VSS once they have been uploaded. A Munis user from your organization must access the vendor record in the Vendors program and use the buttons on the Vendor Attachments screen to add, update, or delete the vendor's attached files.

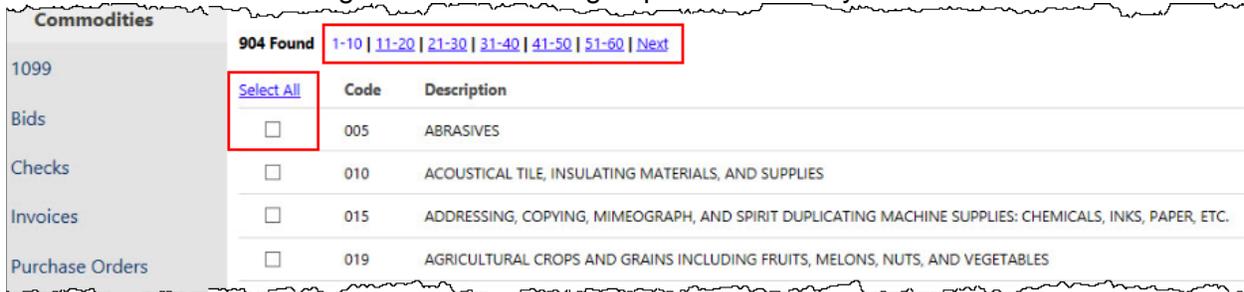
4.1.2 Commodities

Clicking **Commodities** on the navigation menu displays the Vendor Commodities page.



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

Vendors can view commodities by group using the numbered group selections, or they can identify specific commodities by selecting individual check boxes. If a vendor selects an individual check box within a numbered group selection, VSS saves the value of each check box when the vendor navigates between the groups of commodity codes.



After identifying the applicable commodity codes, clicking **Add** causes VSS to add all of the selected commodity codes to the vendor’s profile and updates the Currently Added list. Clicking **Remove** removes the commodity from the group. When vendors complete the commodity code update, they click **Finished** to save the changes and return to the My Profile page, where the Current Vendor Commodities group provides the full list of their associated commodity codes.

4.1.3 1099

The 1099 page displays a listing of the vendor’s 1099 data for a selected year. The data includes the 1099 box code, a description of the code type, and the 1099 amount.

The screenshot shows two screenshots of the Tyler Vendor Self Service interface. The top screenshot is the 'Vendor 1099 Information' page. It features a sidebar with navigation options: Vendor Self Service, My Profile, 1099, Bids, Checks, Invoices, Purchase Orders, and Contracts. The main content area is titled 'Vendor 1099 Information' and includes a 'Year' dropdown menu set to '2016'. Below this is a table titled 'Selected 1099 Data' with columns for Code, Description, and Amount. A single row is visible with Code 'F', Description 'FED INC TA', and Amount '\$3,555.00'. The 'F' in the Code column is highlighted with a red box. The bottom screenshot is the 'Vendor 1099 Invoice Detail' page, which also has the same sidebar. It is titled 'Vendor 1099 Invoice Detail' and includes a 'Return to 1099' button in the top right corner. The page displays general information for the selected code: Box 'F', Year '2016', Amount '\$3,555.00', and Description 'FED INC TA'. Below this is a section titled '1099 Invoice Detail' with a table listing individual invoices. The table has columns for AP Invoice, AP Check#, AP Check Date, and AP Amount.

AP Invoice	AP Check#	AP Check Date	AP Amount
5926	653327	09/14/2016	\$450.00
5928	6533287	10/17/2016	\$945.00
5930	6533288	11/08/2016	\$1,080.00
5931	6533288	11/18/2016	\$1,230.00

Clicking a code type provides the Vendor 1099 Invoice Detail page. This page displays the general 1099 information, as well as a listing of 1099 invoice details, if they exist for the selected box code. Clicking **Return to 1099** returns the vendor to the Vendor 1099 Information page.

4.1.4 Bids

Bids provides a list of bids available to the vendor from your organization. Bids opens to the Bid search page, which allows vendors to search for bids using the bid number, bid description, or bid status.

Note: The Bids page may be named differently depending on your organization’s VSS configuration. Your MSS Administrator can use the Vendor Administration settings in MSS to customize the name of the Bids page and the various Bid fields displayed in VSS.

Search results include all bids that match the entered criteria.

Type	Number	Description	Due By	Opening	Status
Open	100067	Light fixtures	02/02/18 12:00 AM	02/06/18 11:00 AM	Accepting Proposals
Open	100069	Steel shelving units	02/09/18 12:00 AM	02/12/18 02:00 PM	Accepting Proposals
Open	100052	LIGHTING FIXTURES	02/09/18 12:00 AM	02/13/18 11:00 AM	Accepting Proposals
Open	100042	Sandblasting supplies	02/16/18 12:00 AM	02/21/18 10:00 PM	Accepting Proposals
Open	100045	Office Equipment	02/23/18 12:00 AM	03/05/18 11:00 PM	Accepting Proposals

The RSS link allows vendors to subscribe to an RSS feed that is updated when your organization enters or updates bid records.

Clicking the Bid Number for a bid displays the Request for Bids page. The information provided varies according to the current status of the bid. Generally, the Information, Addenda, Items, and Evaluations tabs are available.

The screenshot displays the Tyler Vendor Self Service interface. On the left is a navigation menu with categories like Vendor Self Service, Vendor Information, 1099, Bids, Checks, Invoices, Purchase Orders, and Contracts. The main area shows 'Bids Search Results' with a table of bids. Bid 100069 is highlighted with a red box. A red arrow points from this bid to the 'Request for Bids' page for bid 100069. This page shows the bid status as 'Open' and includes tabs for Information, Events, Addenda, Items, and Evaluations. The bid details include:

Field	Value
Type	Open
Number	100069
Description	Steel shelving units
Due by	02/09/2018 12:00 AM
Opening date	02/12/2018 02:00 PM
Approximate award date	02/16/2018 02:00 PM

For open bids, the Create Proposal option allows the vendor to submit a proposal for the selected bid request.

The Create Proposal procedure is a four-step procedure that guides the vendor through bid response and submittal.

View Proposal Step 1 2 3 4

Vendor Bid ID to help you reference your bid (optional)

Supplies for cleanup of hazardous materials (All items require responses)

Commodity: 10067
STEEL BARRELS, DRUMS, AND KEGS

Attachment	Manufacturer/Part Number	Quantity	UOM	Unit Price
(0)	Spaxwell Products <input type="checkbox"/>	25.00	EACH	\$ 0.00
Propose Substitute				

Commodity: 10031
HAZARDOUS MATERIAL CONTAINMENT/STORAGE (PETROLEUM)

Attachment	Manufacturer/Part Number	Quantity	UOM	Unit Price
(0)	Spaxwell Products <input type="checkbox"/>	5.00	EACH	\$ 0.00
Propose Substitute				

Group Total: \$ 0.00

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Items listed on a bid display the manufacturer and/or part number if the bid invitation created in Munis Bid Central is configured to include this information.

If your organization uses the Allow Substitute option in Munis Bid Central, the vendor can propose a substitute item and enter a note justifying the proposed substitute item.

Attachment	Manufacturer/Part Number	Quantity	UOM	Unit Price
(0)	Spaxwell Products <input type="checkbox"/>	5.00	EACH	\$ 0.00
Propose Substitute				

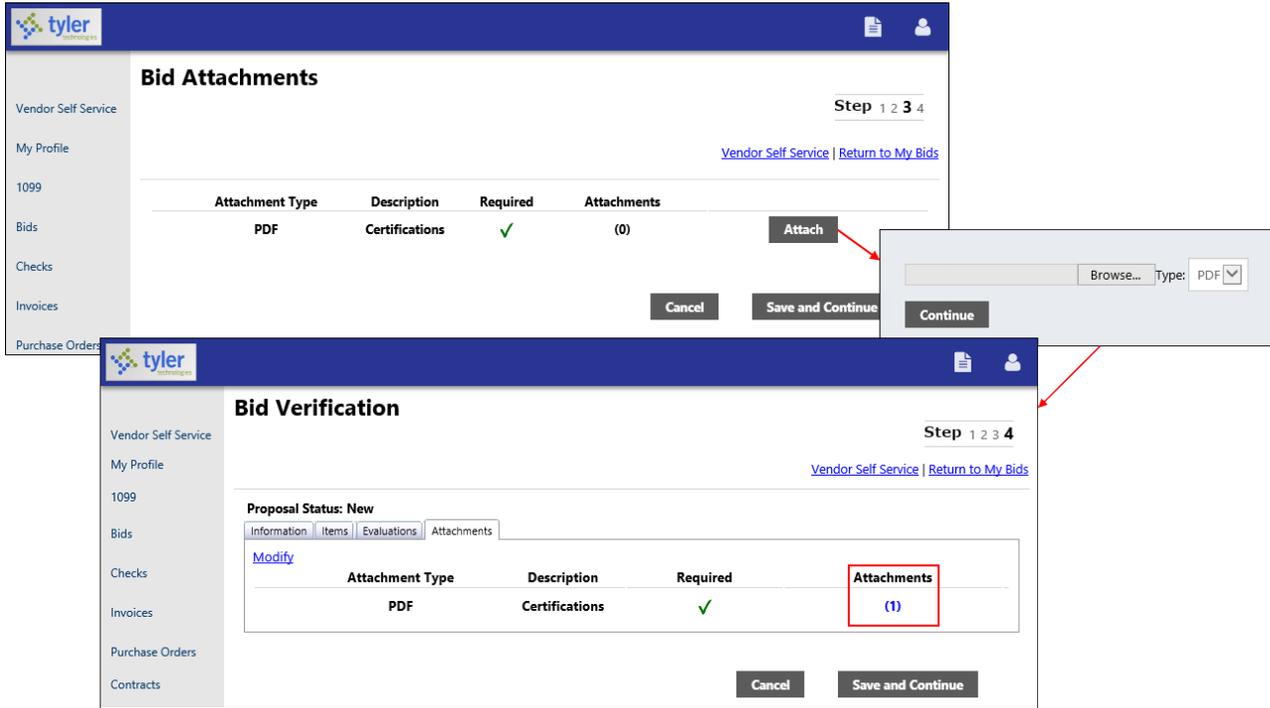
Select primary bid and/or propose multiple(s)
Propose additional items for consideration. Designate the 'primary' response which will be used when calculating total bid proposal amount.

Primary	Manufacturer	Part Number	Acceptable	Unit Price
Propose substitute If unable to propose pricing for above specifications, propose a substitute manufacturer and part number to be considered for awarding.				
Primary	Manufacturer	Part Number	Acceptable	Unit Price
<input type="checkbox"/>	<input type="text" value="Enter manufacturer"/>	<input type="text" value="Enter part number"/>	<input type="checkbox"/>	\$ <input type="text" value="0.00"/>

Reason for substitute

The Save and Continue option saves the information entered and moves the vendor through the steps required to complete the proposal.

Vendors add attachments to their bid quotes by selecting an attachment type and using the **Browse** button to select the file to attach.



Acceptable attachment types are defined in the Munis Bid Attachment Types program.

4.1.5 Checks

The Checks group provides a list of checks recently issued to the vendor by your organization.

\$2,460.00

Last check: 11/17/2017

Recent checks

Date	Number	Amount	
11/17/2017	#6533288	\$2,460.00	details
10/14/2017	#6533287	\$1,845.00	details

\$0.00

Year to date

Using the Search Checks option, vendors can find additional check details using the invoice number, date or amount ranges, and status search criteria.

Search Results for checks provides the check date, amount, check number, and status. Use the View option of an individual check to view additional details.

4.1.6 Invoices

The Invoices group provides vendor details for recent and submitted invoices. Vendors are only able to view invoices that are associated with their vendor ID.

Invoices		Submit invoices		Search invoices		
<div style="border: 1px solid gray; padding: 10px; margin-bottom: 10px;"> <h2 style="margin: 0;">\$452.99</h2> <p style="margin: 0;">Last invoice: 2/13/2017</p> </div> <div style="border: 1px solid gray; padding: 10px;"> <h2 style="margin: 0;">\$452.99</h2> <p style="margin: 0;">Year to date</p> </div>	Recent invoices			Submitted invoices		
	Date	Amount	Status	Date	Amount	Status
2/13/2017	\$452.99	Held			details	

The Search Invoices page allows searches by invoice number, date or amount ranges, and status.

The screenshot shows the 'Vendor AP Invoice Search' interface. On the left is a sidebar with navigation links: Vendor Self Service, My Profile, 1099, Bids, Checks, Invoices, Purchase Orders, and Contracts. The main area has a title 'Vendor AP Invoice Search' and the following search fields:

- Invoice number**: A text input field with a note '(other search criteria will be ignored)'.
- Date**:
 - Invoice date: A text input field.
 - or
 - Invoice date(s) from: A text input field followed by 'to' and another text input field.
- Amount**:
 - Invoice Amount: A text input field.
 - or
 - Amount(s) more than: A text input field followed by 'but less than' and another text input field.
- Status**: A dropdown menu currently showing 'Any Status'.

At the bottom of the search area are two buttons: 'Search' and 'Clear'.

The Search Results page provides the invoice date, amount, invoice number, and status. When the vendor clicks **Details**, VSS provides the Invoice Detail page, which includes additional

information sorted by Vendor, Invoice, and Invoice Totals groups.

The screenshot shows the Tyler Vendor Self Service interface. The top navigation bar includes the Tyler logo and user profile icons. The left sidebar contains menu items: Vendor Self Service, My Profile, 1099, Bids, and Checks. The main content area is titled 'Invoices' and shows 'Search Results' with links for 'Modify Search' and 'New Search'. It indicates '4 Found' and displays a table of invoices:

Invoice Date	Amount	Invoice Number	Status	View
3/9/2017	\$652.00	5998	In Review	View
3/9/2017	\$110.00	5999	Held	View

Below this is the 'Invoice Detail' page for invoice 5998. It includes a 'Return to previous view' link and sections for 'Vendor Information', 'Invoice Information', and 'Invoice Totals'.

Vendor Information

Vendor ID	1131
Vendor Name	SMITH ELECTRIC
Vendor Address	44 FOURTH STREET CHICAGO , IL 60625

Invoice Information

Status	Unpaid
Invoice Number	5998
PO Number	
Invoice Date	3/9/2017
Check Date	
Check Number	0
Voucher Number	226
Invoice Description	Service entry and mounting kit

Invoice Totals

Gross Amount	\$652.00
Non Taxable	\$652.00
Net Amount	\$652.00

With the applicable settings in Vendor Administration, Munis Accounts Payable Settings, and Purchase Order Settings enabled, the Submit Invoices option allows vendors to submit invoices to your organization directly from VSS.

The screenshot shows the 'Invoices' summary page. At the top right, there are buttons for 'Submit invoices' (highlighted with a red box) and 'Search invoices'. The page features a summary box on the left with the following information:

- \$652.00** Last invoice: 3/9/2017
- \$1,045.69** Year to date

On the right, there are two tables: 'Recent invoices' and 'Submitted invoices'.

Recent invoices

Date	Amount	Status	details
3/9/2017	\$652.00	Held	details
3/9/2017	\$110.00	Held	details
3/9/2017	\$87.59	Held	details
3/9/2017	\$196.10	Held	details

Submitted invoices

Date	Amount	Status
------	--------	--------

Depending on settings configured for the vendor in Vendor Administration, the Submit Invoices option may require the vendor to indicate a valid purchase order or contract number when they submit an invoice.

4.1.7 Purchase Orders

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

The initial **Search Purchase Orders** page allows vendors to search by purchase order number, date, or a purchase order total range.

Vendor Purchase Order Search

PO number (other search criteria will be ignored)

Contract number

Status Any Status

Date

Date ordered

or

PO(s) ordered from to

PO total Equal to \$

Search results include the purchase order number, contract number (if applicable), status, date orders, and total. The View option provides additional details for a specific purchase order.

The screenshot displays two pages from the Tyler Technologies Vendor Self Service interface. The top page, 'Purchase Order Search Results', shows a table with 5 results. A red box highlights the 'View' link for the first result. The bottom page, 'Purchase Order Detail', provides comprehensive information for PO # 20100015, including vendor details, bill and ship to addresses, phone numbers, and a line item table.

Purchase Order Search Results

Vendor Self Service
My Profile
1099
Bids
Checks

Search Results
[Modify Search](#) | [New Search](#)

5 Found

PO Number	Contract Number	Status	Date Ordered	PO Total	
20100015		Open	3/9/2017	\$288.00	View

Purchase Order Detail
[Return to previous view](#)

Purchase Order Detail
PO #: 20100015 FY2017

Vendor
SMITH ELECTRIC
44 FOURTH STREET
CHICAGO, IL 60625

Bill To
3202 EAST 42ND STREET
FALMOUTH, ME 04105

Ship To
3202 EAST 42ND STREET
FALMOUTH, ME 04105

Phone Numbers
Tel# 312-555-1212
Fax#

Reference
Contract:
Requisition: 20100050

Date Ordered	Vendor Number	Date Required	Shipping/Terms	Department/Location
3/9/2017	1131			CENTRAL OFFICE

Line	Description	Unit	Qty	Unit Price	Net Price
1	Fluorescent tubes, 48"	EACH	60.00	\$4.80	\$288.00
Open Amount					\$288.00
Purchase Order Total					\$288.00

4.1.8 Contracts

Contracts provides contracts the vendor currently holds with your organization. The initial **Search Contracts** page allows vendors to search by a range of contract numbers or years.

The screenshot shows the 'Contracts Search' page in the Tyler Technologies Vendor Self Service interface. It features a search form with input fields for 'Contract Number' and 'Contract Year', and 'Search' and 'Clear' buttons.

Contracts Search

Contracts Search

Contract Number

Contract Year

Search **Clear**

Search results include the contract start date, number, and amount. The Details option displays the Contract Detail page for the selected contract.

Search Results [New Search](#) [Modify Search](#)

1 Found 1-1

Start Date	Number	Description	Revised Amount	details
	200800079	Wiring street lights	\$22,575.00	

Contract Detail [Return to previous view](#) Attachments: (0)

Contract number 200800079

Description Wiring street lights, Brubaker Street

Year 2017

Estimated start date

Original amount \$22,575.00

Revised amount \$22,575.00

Paid amount \$0.00

Available amount \$22,575.00

Retained to date \$0.00

Liquidated damages \$0.00

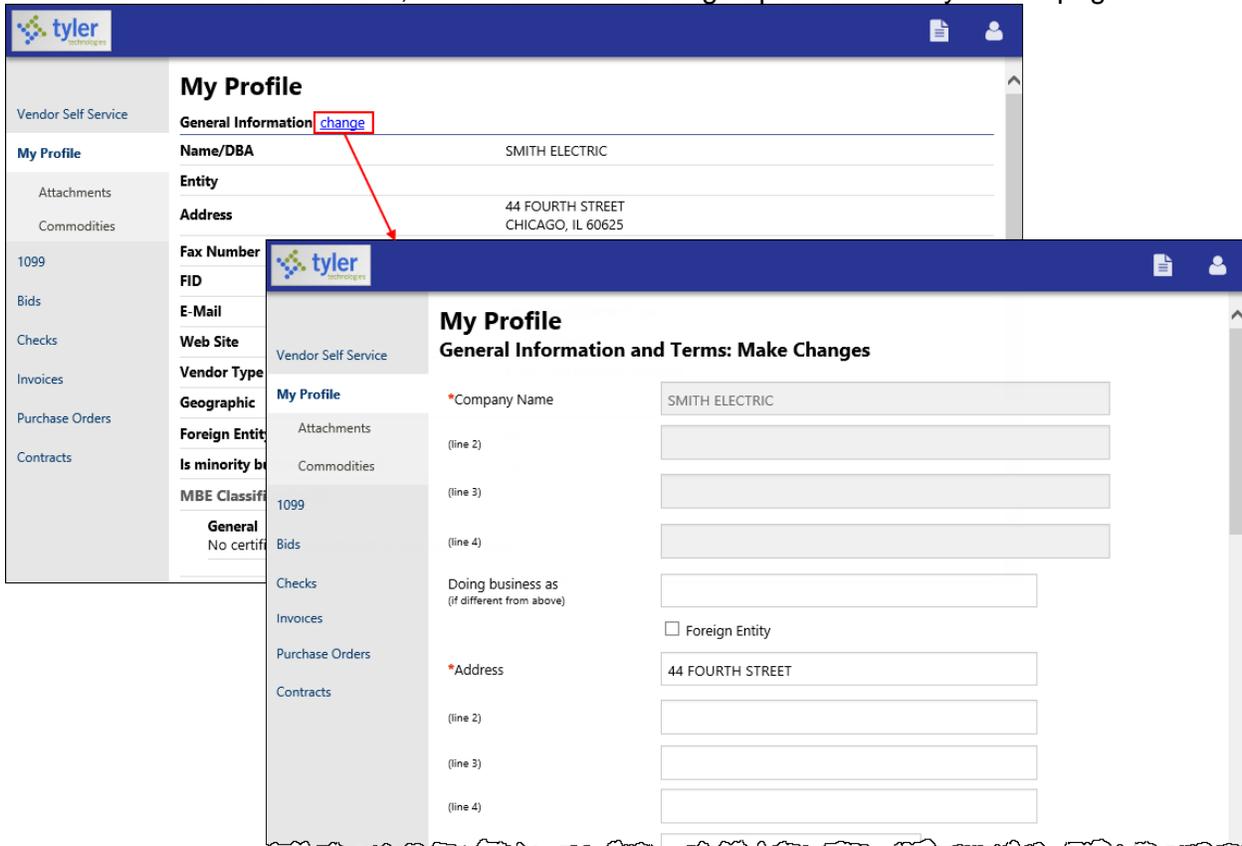
Released retainage \$0.00

Description	Contracted Quantity	Ordered Quantity	Unit of Measure	Unit Price
Street lamps	15.00	15.00	EACH	\$1,500.00
Conduit (1.5")	75.00	75.00	FEET	\$1.00

Appendix A—Managing Minority Business Enterprise Certificates

If your organization’s Vendor Self Service administrator has cleared the Disable MBE Certification Management check box on the Vendor Administration page, vendors can manage their minority business enterprise (MBE) certifications in Vendor Self Service.

To maintain MBE certifications, vendors use the Change option on the My Profile page.



The Minority Business Entity (MBE) section contains the check boxes that indicate if the vendor is a minority business enterprise, and if so, which classifications the vendor possesses. The available classifications are defined by your organization using the Accounts Payable Miscellaneous Codes program in Munis.

Minority Business Entity (MBE)

Is Minority Business Enterprise

MBE Classifications
(select all that apply)

123 MBE CODE

AFRICAN AMERICAN OWNED

DISADVANTAGED BUSINESS

General 0 certifications [manage](#)

HISPANIC OWNED

WOMAN OWNED

Gender

Ethnicity

The Manage option for each classification allows a vendor to maintain the classification using the Manage MBE Classification Certificates page.

Vendor Self Service

My Profile

Attachments

Commodities

1099

Bids

Checks

Invoices

Purchase Orders

Contracts

My Profile

Manage MBE Classification Certificates

[Return to General Profile](#)

Selected MBE Classification

Serial ID	0
Description	General

[Add new certificate](#)

Existing Certificates

Agency	Issue Date	Expire Date	Status	
Agency 001	5/6/2014	12/31/2018	New	edit remove

Changes Complete
Cancel All

Clicking **Add New Certificate** refreshes the page to include the Certificate Details section. For new certificates, the vendor must complete the Agency, Issue Date, and Expiration Date fields.

The screenshot shows the 'My Profile' page in the Tyler Technologies Vendor Self Service system. The page title is 'My Profile' with a subtitle 'General Information and Terms: Make Changes'. The left sidebar contains navigation links: Vendor Self Service, My Profile, Attachments, Commodities, 1099, Bids, Checks, Invoices, Purchase Orders, and Contracts. The main content area displays 'Selected MBE Classification' with 'Serial ID' 0 and 'Description' 'General'. Below this is a table of 'Existing Certificates' with one entry: Agency 001, Issue Date 5/6/2014, Expire Date 12/31/2018, and Status New. A red box highlights the 'Add new certificate' link, with an arrow pointing to the 'Certificate Details' form. The form includes fields for Agency (300 character limit), Issue Date, Expiration Date, and Notes (300 character limit), along with 'Done' and 'Cancel' buttons.

My Profile
General Information and Terms: Make Changes

Selected MBE Classification
Serial ID 0
Description General

Existing Certificates

Agency	Issue Date	Expire Date	Status	
Agency 001	5/6/2014	12/31/2018	New	edit remove

Certificate Details

Agency *
(300 character limit)
300 remaining

Issue Date *

Expiration Date *

Notes
(300 character limit)
300 remaining

Done **Cancel**

When the vendor has finished entering data in the boxes, clicking **Done** saves the entry and displays the Make Changes page.

My Profile
General Information and Terms: Make Changes

! This new Certificate is now set for adding to your MBE Classification.
NOTE: This change will NOT be saved until your entire Profile is saved.
 When finished modifying your certificate(s), click "Changes Complete" to hold these changes and return to the Profile editing page, or click "Cancel All" to cancel the certificates changes.
Also note that if you undo pending changes on an existing certificate before you save your new certificates, the new certificates will be lost. ☒

Selected MBE Classification

Serial ID	0
Description	General

[Add new certificate](#)

Existing Certificates

Agency	Issue Date	Expire Date	Status
Agency 001	5/6/2014	12/31/2018	New edit remove
Agency 002	10/26/2016	12/31/2017	New edit remove

Changes Complete **Cancel All**

The Make Changes page includes message indicating that the new certificate is ready to be added to the vendor’s profile, but that the information will not be saved until the vendor’s entire profile is saved.

After entering, editing, or removing certificates for a classification, the vendor clicks **Changes Complete** to save the certificate entries or **Cancel All** to discard all of the certificate information. Clicking **Changes Complete** returns the vendor to the Make Changes page, where the Minority Business Entity section displays the updated certification count.

On the My Profile–Make Changes page, the vendor must click **Update** to permanently update their profile with the certificate information.

The screenshot displays the 'My Profile' page in the Tyler Vendor Self Service system. The page title is 'My Profile' and the subtitle is 'General Information and Terms: Make Changes'. The left sidebar contains navigation links: Vendor Self Service, My Profile, Attachments, Commodities, 1099, Bids, Checks, Invoices, Purchase Orders, and Contracts. The main content area contains the following form fields:

- *Company Name:** SMITH ELECTRIC
- (line 2):** [Empty text box]
- (line 3):** [Empty text box]
- (line 4):** [Empty text box]
- Doing business as (if different from above):** [Empty text box]
- Foreign Entity
- *Address:** 44 FOURTH STREET
- Bank Account Number:** [Empty text box]
- Bank Account Type:** Checking (selected)

At the bottom of the form, there are two buttons: **Update** (highlighted with a red box) and **Cancel**. The footer of the page reads '©2017 Tyler Technologies, Inc.'