



Vendor Registration and Account Maintenance Job Aid



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Introduction

The County of Ventura Vendor Self Service (VSS) portal provides vendors with a single entry point to register and maintain an account. You can search to see if a record already exists before creating a new record, as well as search and locate your new record after submitting the record.

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Concepts

The concepts for the Vendor Self Service Portal (VSS) are:

Concept	Description
Vendor Self Service Portal Registration	The County of Ventura Vendor Self Service (VSS) portal provides vendors with a single entry point to register and maintain an account. You can search to see if a registration already exists before starting a new registration.
Maintain Vendor Information	Vendors will be able to maintain information previously entered by logging into VSS.
Required Forms	<p>W-9 forms are required for all new vendors.</p> <ul style="list-style-type: none">• Submit the W-9 forms by mail, fax, or email (the County has established a secure email address).



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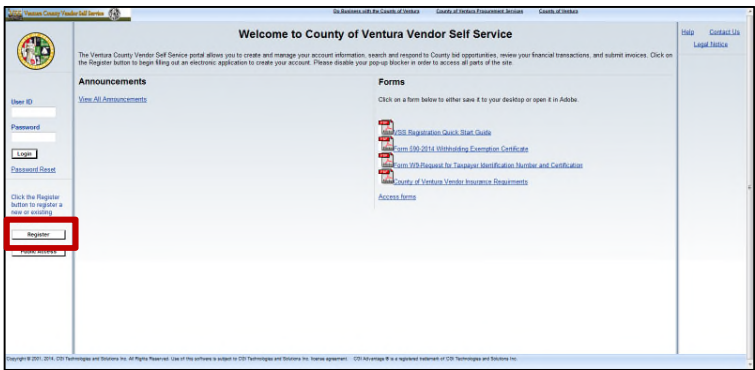
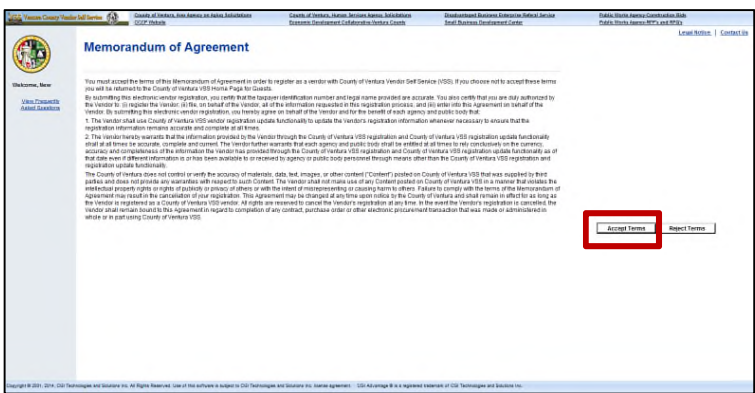


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Step 1

Vendor Registration

Note: If a record was previously initiated or the user has received the confirmation email with the password, the user will log in by entering the User ID and Password then clicking the Login button. The user will then be able to continue their registration process.

Vendor Registration	
Step	Image
<p>Start on the County of Ventura Vendor Self Service Home page:</p> <ol style="list-style-type: none"> 1. Click on the Register button. 	
<ol style="list-style-type: none"> 2. Carefully read the Memorandum of Agreement. 3. Click Accept Terms. 	

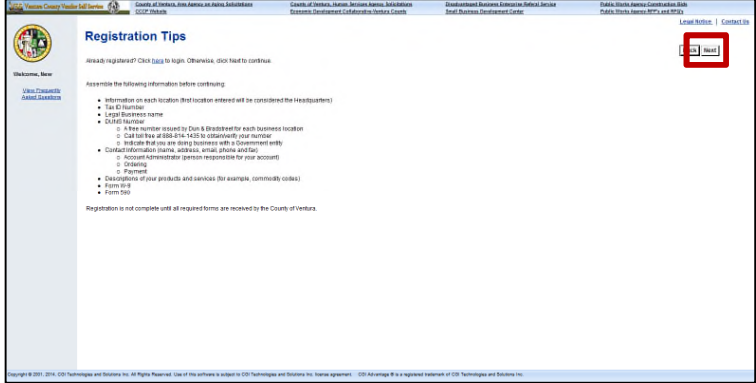


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Vendor Registration

Step	Image
4. Review the Registration Tips . 5. Click on Next .	



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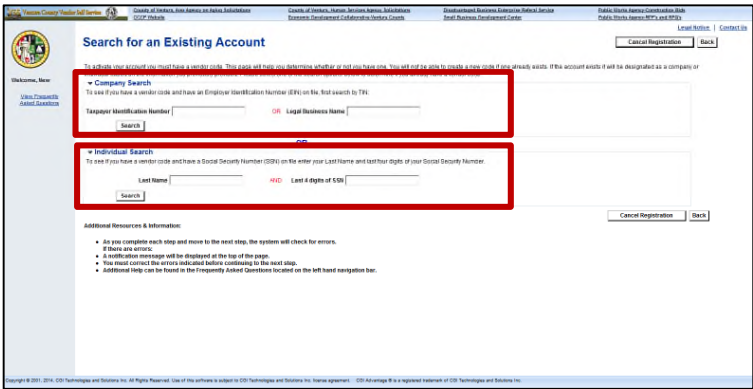


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Search for an Existing Account

This search page helps determine if there is an existing vendor account. To initiate the search process, you can choose to search by Company or by Individual depending on your type of business. The distinction between these two is that an Individual's Taxpayer Identification Number is his/her Social Security Number (SSN) or alternative identifier whereas a Company's Taxpayer Identification is generally their Federal Employer Identification Number (EIN).

Search for an Existing Account

Step	Image
<p>If the organization type is <i>Company</i>:</p> <ol style="list-style-type: none">1. Enter the Taxpayer Identification Number or Legal Business Name.2. Click Search. <p>If the organization type is <i>Individual</i>:</p> <ol style="list-style-type: none">3. Enter Last Name and Last 4 digits of SSN.4. Click Search.	

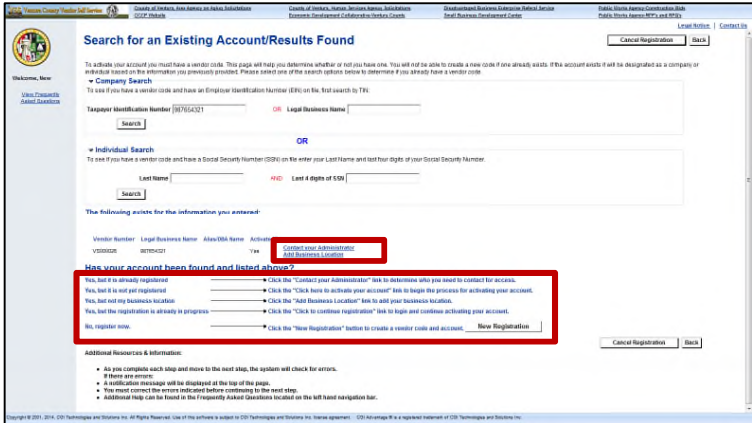


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Search for an Existing Account

Step	Image
<p data-bbox="277 548 571 613">Search for an Existing Account/Results Found:</p> <p data-bbox="277 633 609 801">5. Click on the link that best addresses your needs from the 'Has your account been found and listed above?' section.</p> <ul data-bbox="277 824 633 1798" style="list-style-type: none">• Yes, but is it already registered. - The Contact your Administrator link is used to display the vendor administrator contact information for assistance in accessing account.• Yes, but it is not registered. - The Click here to activate your account link is used if a user is in process of creating an account but has not completed the registration.• Yes, but not my business location. - Click Add Business Location to add a location.• Yes, but the registration is already in progress. - Use Click to continue registration to log in and continue account activation.• Click New Registration to create a new account. <p data-bbox="277 1818 588 1917">Note: If no match is found move to New Vendor Registration section.</p>	



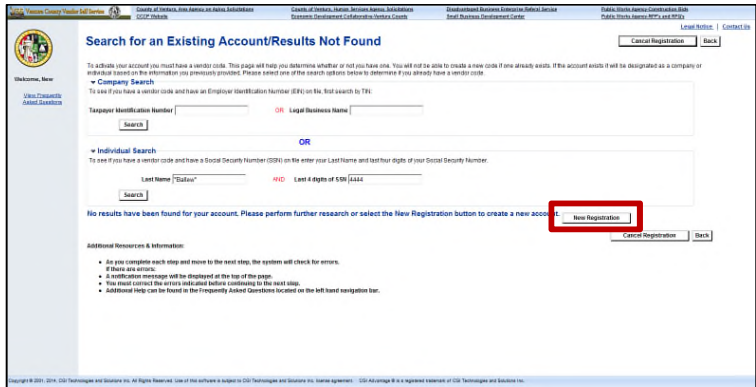
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New Vendor Registration

New Vendor Registration

Step	Image
<p>Search for an Existing Account/Results Not Found:</p> <p>If Search Results are Not Found:</p> <p>5. Click on New Registration.</p>	



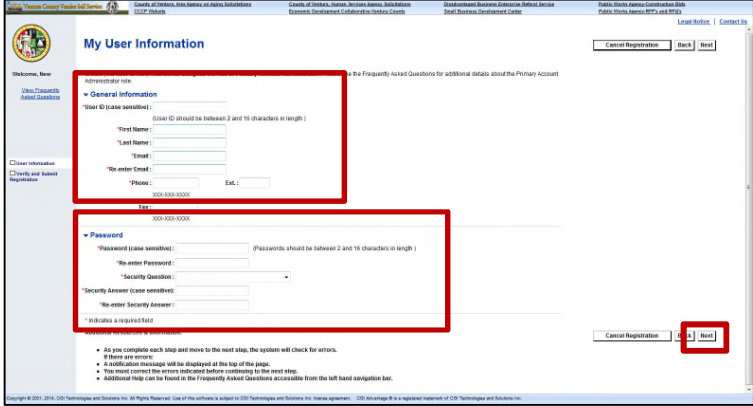
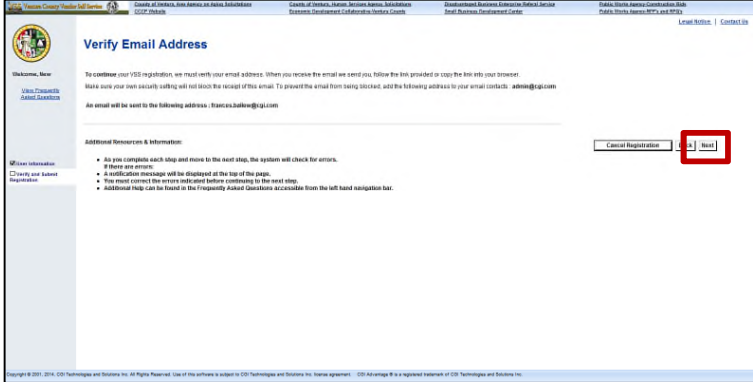
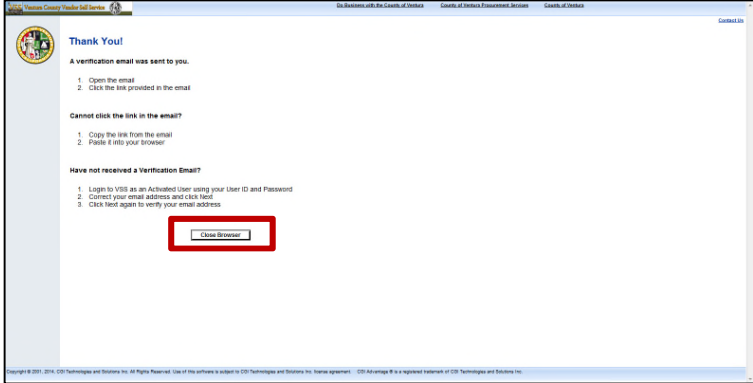
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My User Information

My User Information

Step	Image
<p>My User Information:</p> <p><i>General Information</i> section:</p> <p>6. Enter the information for the user.</p> <p><i>Password</i> section:</p> <p>7. Complete the required fields to set up the password and security.</p> <p>8. Click Next.</p>	
<p>Verify Email Address:</p> <p>9. Review the information.</p> <p>10. Click Next.</p>	
<p>Thank You!:</p> <p>11. Review all the email instructions.</p> <p>12. Click Close Browser.</p>	



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Open VSS Email Verification

Navigate to your email application and open the automated message.

Open VSS Email Verification	
Step	Image
<ol style="list-style-type: none">1. Open the VSS verification email.2. Click on the link provided or copy paste the link into your browser window to continue registration.	



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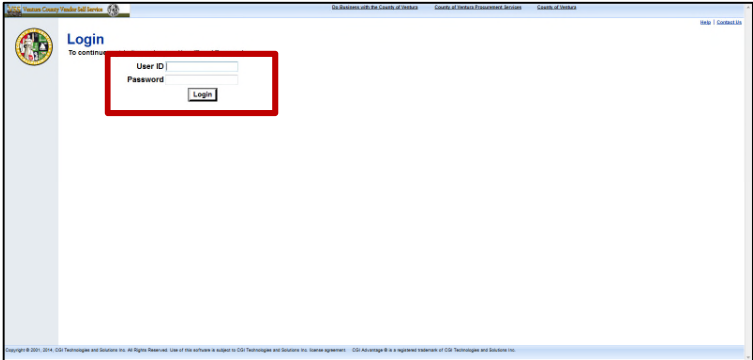


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Login to VSS Vendor Registration

After you click the link in your email, you will be transitioned to a VSS login page. You will enter the User ID and password you created. Remember that the User ID and password are case sensitive.

Note: Do not bookmark this page. You will be logging in from the VSS home page once your registration is complete.

Login	
Step	Image
Login: <ol style="list-style-type: none">1. Enter your User ID in the User ID field.2. Enter your Password in the Password field.3. Click Login.	



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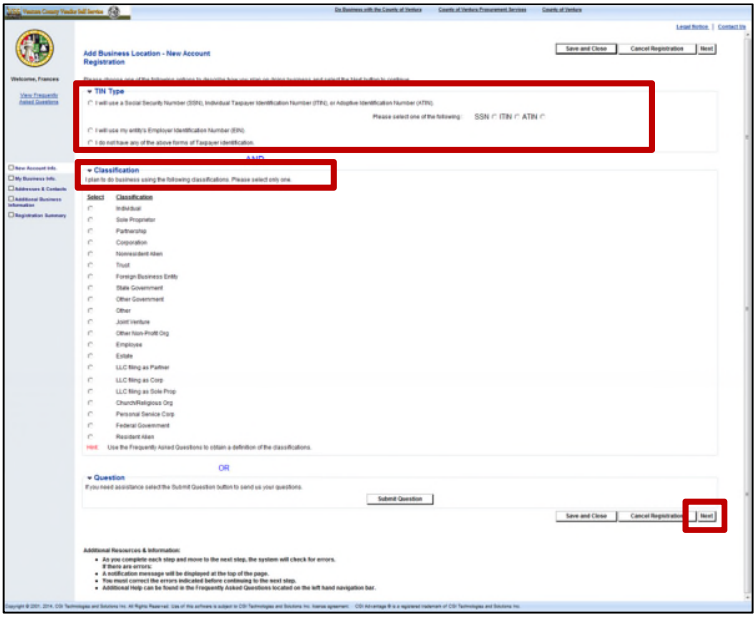


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Add Business Location – New Account Registration

Note: If you have any issues with how you should answer any of these questions, click the “Submit Question” button at the bottom of the page. After you submit your question, click “Save and Close” to exit the application. VSS will save the information you have already entered and will remember your progress. Once you receive an answer to your question you can log back in and VSS will return you to the place where you left off.

Add Business Location – New Account Registration

Step	Image
<p>1. Select the TIN Type for your account.</p> <p>Note: If you select the first TIN Type option be sure to select SSN, ITIN or ATIN.</p> <p>2. Select the Classification that applies to your business or individual account.</p> <p>3. Click Next.</p>	



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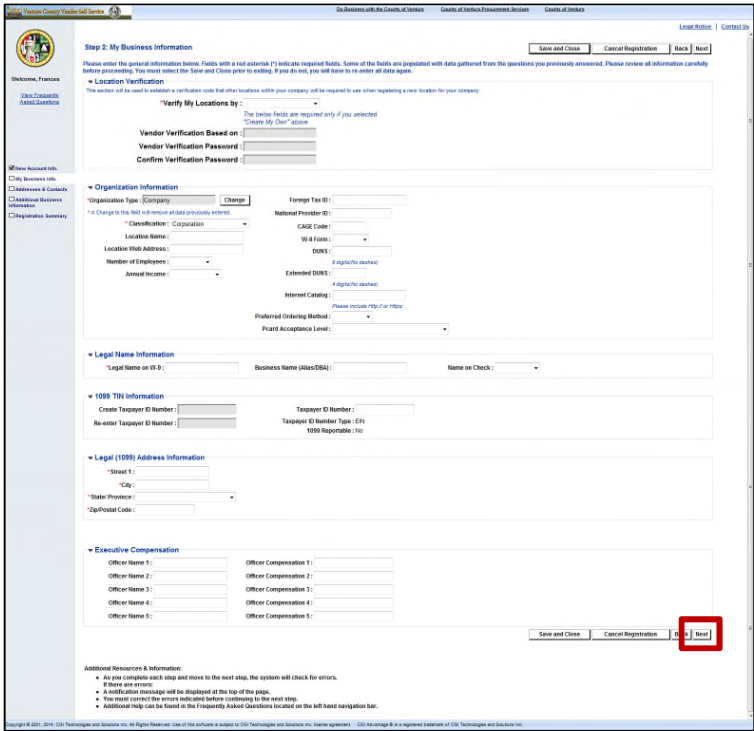
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Step 2

My Business Information

Some fields will be populated based on information entered on previous pages.

Add Business Location – Address Information

Step	Image
<p>Step 2: My Business Information:</p> <ol style="list-style-type: none">1. Enter the information for your account.2. Click Next. <p>Note: The following buttons display on each page:</p> <ul style="list-style-type: none">• The Save and Close button will allow you to exit the registration process and save the information entered so you can return to complete the registration.• The Cancel Registration button will delete the information entered and cancel the registration.• The Back button will return you to the previous page.	 <p>The screenshot shows a web form titled "Step 2: My Business Information". It contains several sections with input fields and dropdown menus. At the bottom right, there are three buttons: "Save and Close", "Cancel Registration", and "Next". The "Next" button is highlighted with a red box.</p>



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Step 3

Add Business Location – Address Information Questionnaire

VSS collects an address for Administrative correspondence, an address for Ordering from you, an address for sending Payments to you, and an optional address for billing if you owe fees or other payments.

Note: You can choose to specify the same address or different addresses for each by selecting the ‘Yes or No’ radio buttons in the **Address Questions** section. If you select not to use the same address the pages will display for you to enter an address for each address type.

- If you want a single contact person for all four address types, choose “**Yes**” for the 3rd question, otherwise, choose “**No**”.

Add Business Location – Address Information Questionnaire	
Step	Image
<ol style="list-style-type: none"> 1. Verify the address in the Legal Address Information section. 2. Select the applicable radio buttons in the Address Questions section. 3. Click Next. 	

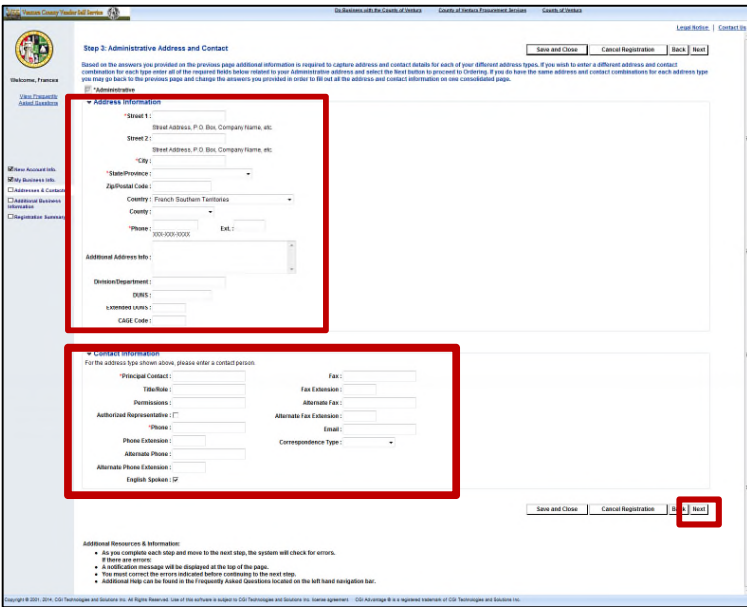
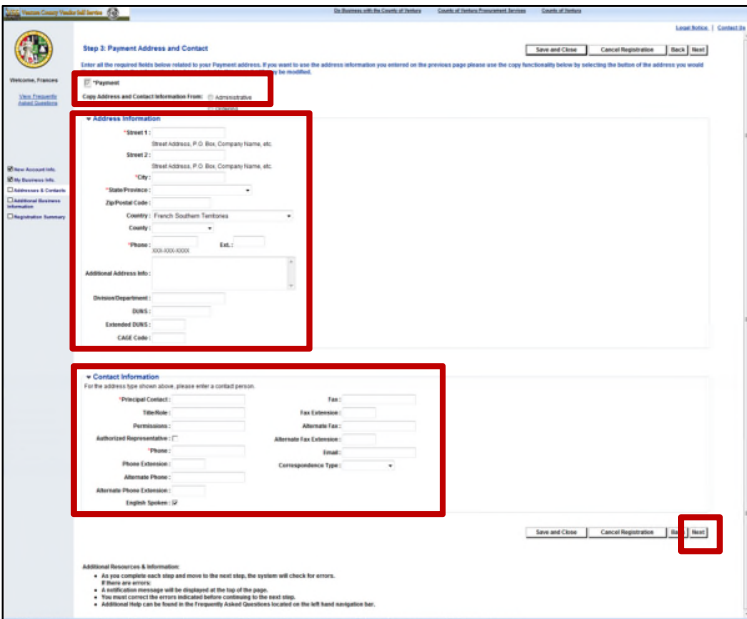


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Add Business Location – Address Information Questionnaire

Step	Image
<p>Step 3: Administrative Address and Contact:</p> <p>Note: The vendor will be directed to the Administrative Address and Contact page if they respond "No" to all three questions on the previous step.</p> <ol style="list-style-type: none"> 4. Complete the Address Information section. 5. Complete the Contact Information section. 6. Click Next. 	
<p>Step 3: Addresses and Contacts:</p> <ol style="list-style-type: none"> 7. Select a radio button to copy a previously entered address or enter the Address Information and Contact Information for each type of address as needed. 8. Click Next. <p>Note: The Billing check box is selected by default. Uncheck the check box if you want to add the billing address later or the billing address page will display to enter the address.</p>	



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Add Business Location – Address Information Questionnaire

Step	Image
<p>Step 3: Billing Address and Contact:</p> <p>9. Select a radio button to copy a previously entered address or enter the Address Information and Contact Information.</p> <p>10. Click Next.</p>	<p>The screenshot shows a web-based form titled 'Step 3: Billing Address and Contact'. At the top, there are instructions and a note: 'Billing: Copying a Billing Address from a previously entered address is optional and not required in order to proceed. If you want to use the address information you entered on the previous page please use the copy functionality below by selecting the button of the address you would like to copy. Once the information has been copied to this page it will be available.' Below this, there are two radio buttons: 'Address Information' (selected) and 'Contact Information'. The 'Address Information' section includes fields for Street 1, Street 2, City, State/Province, Zip/Postal Code, Country (French Southern Territories), and Phone. The 'Contact Information' section includes fields for Principal Contact, Title/Role, Phone, Alternate Phone, Fax, Alternate Fax, Email, and Correspondence Type. At the bottom right, there is a 'Next' button highlighted with a red box. The form also includes a 'Save and Close' button and a 'Cancel Registration' button.</p>



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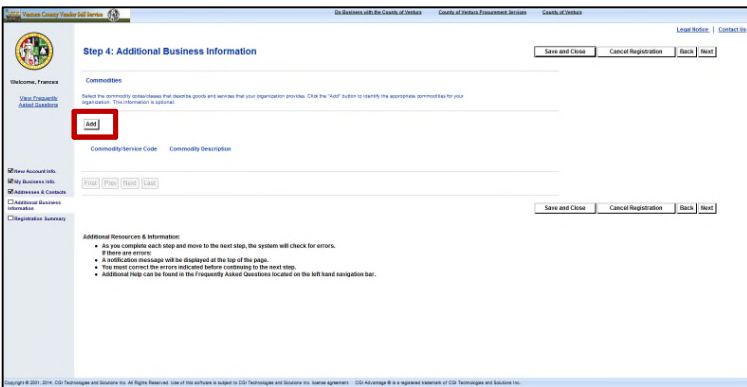
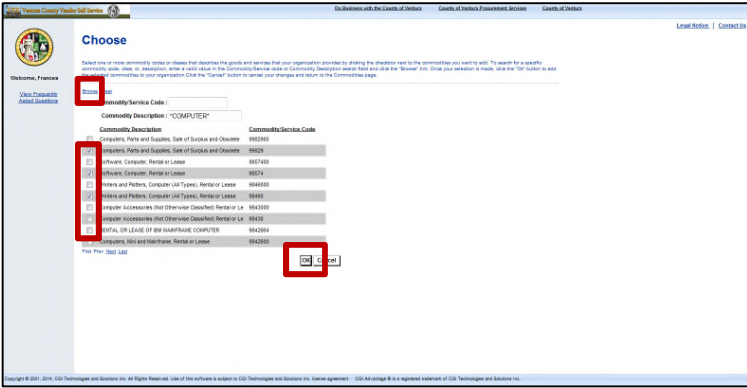


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Step 4

Additional Business Information

Additional Business Information allows you to enter additional optional information about your company.

Step	Image
<p>Step 4: Additional Business Information:</p> <ol style="list-style-type: none"> Click on the Add button in order to add commodities to your business information. 	
<p>Choose:</p> <ol style="list-style-type: none"> Enter the Commodity / Service Code or Commodity Description. <p>Note: If you are using the Commodity Description field in order to search for a commodity, make sure to add asterisk before and after the text entered in the Commodity Description search box. <ol style="list-style-type: none"> Click Browse. <p>Note: Click Next to view additional commodities and select from the list .</p> <ol style="list-style-type: none"> Select the check box for each commodity. Click Ok to add the commodities. </p>	



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Additional Business Information

Step	Image									
<p>Step 4: Additional Business Information:</p> <p>6. Selected commodities display.</p> <p>Note: You can remove a commodity by clicking on Delete.</p> <p>7. Click Next.</p>	<p>Step 4: Additional Business Information</p> <table border="1"><thead><tr><th>Commodity Service Code</th><th>Commodity Description</th><th></th></tr></thead><tbody><tr><td>50275</td><td>Computer, Parts and Supplies, Sale of Surplus and Obsolete</td><td>Delete</td></tr><tr><td>50402</td><td>Software, Computer, Rental or Lease</td><td>Delete</td></tr></tbody></table> <p>Next</p>	Commodity Service Code	Commodity Description		50275	Computer, Parts and Supplies, Sale of Surplus and Obsolete	Delete	50402	Software, Computer, Rental or Lease	Delete
Commodity Service Code	Commodity Description									
50275	Computer, Parts and Supplies, Sale of Surplus and Obsolete	Delete								
50402	Software, Computer, Rental or Lease	Delete								



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Registration Summary

The Registration Summary page displays the information you have entered. Review the information and make changes if necessary.

Registration Summary

Step 4

1. Click **Update Information** in each section to make changes.
2. Click the **Submit Registration** button after the information is complete.

Note: Click:

- **Save and Close** if you are not ready to submit the registration yet.
- **Cancel Registration** to cancel.
- **Back** to return to the previous page.
- **Print This Page** to print the current page.

Image

The screenshot displays the 'Registration Summary' page. At the top right, there are buttons for 'Save and Close', 'Cancel Registration', 'Submit Registration', and 'Print This Page'. The 'Submit Registration' button is highlighted with a red box. Below the buttons, there are several sections, each with an 'Update Information' link. The 'Organization Information' section is highlighted with a red box. The sections include:

- Location Verification:** Includes fields for 'Verify My Location by: (If Password Required)', 'NO VENDOR VERIFICATION', 'PASSWORD REQUIRED?', and 'VERIFICATIONS: Please verify that this is the headquarters which you are part of and to be the submit info.'
- Organization Information:** Includes fields for 'Organization Type', 'Foreign Tax ID', '1099 Classification', 'National Number ID', 'Location Name', 'CAZ Code', 'Location Street Address', 'City', 'State', 'ZIP Code', 'Number of Employees', 'Annual Revenue', 'Extended DUNS', 'Informed Calling', 'Preferred Calling Method', and 'Plant Acceptance Level'.
- Legal Name Information:** Includes fields for 'Legal Name', 'First Name', 'Last Name', 'Business Name (aka DBA)', 'Middle Name', and 'Name as Check / Legal Name'.
- 1099 TIN Information:** Includes fields for 'Taxpayer ID (SSAN/EIN)', 'Default TIN Type', 'Taxpayer ID Number (EIN)', and 'VAT Registration: No'.
- Legal (1099) Address Information:** Includes fields for 'Street', 'City', 'State/Province', and 'Zip/Postal Code'.
- Discount Information:** Includes fields for 'Number of Days 1', 'Discount Percent 1', 'Number of Days 2', 'Discount Percent 2', 'Number of Days 3', 'Discount Percent 3', and 'Number of Days 4', 'Discount Percent 4'.
- Executive Compensation:** Includes fields for 'Officer Name 1', 'Officer Compensation 1', 'Officer Name 2', 'Officer Compensation 2', 'Officer Name 3', 'Officer Compensation 3', 'Officer Name 4', 'Officer Compensation 4', and 'Officer Name 5', 'Officer Compensation 5'.
- Administrative Address:** Includes fields for 'Country', 'City', 'State/Province', 'Phone', 'Phone Extension', 'Street', 'Zip/Postal Code', 'Additional Address', 'Diverse/Department', 'DUNS', 'Extended DUNS', and 'CAZ Code'.



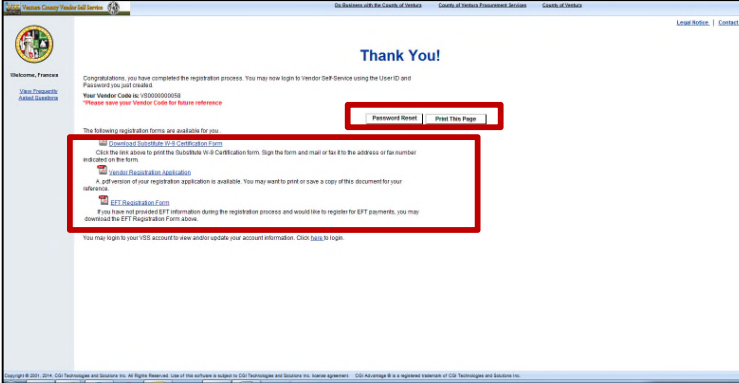
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Thank You!

The 'Thank You!' page displays after submitting the registration. You have now completed the registration process, and going forward, you can login to VSS using your User ID and Password.

Thank You!	Image
<p>Step 4</p> <ol style="list-style-type: none">1. Download PDF documents as needed by clicking on the link for Substitute W-9 Certification Form, Vendor Registration Application or EFT Registration Form.2. Click the Password Reset button to have your password reset. After validating your account, the new password will be emailed to the email address on record.3. Click the Print This Page button if you want to print the page.	



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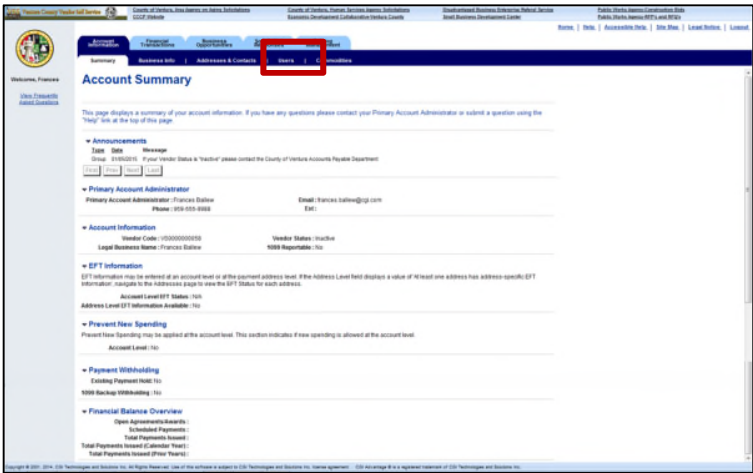
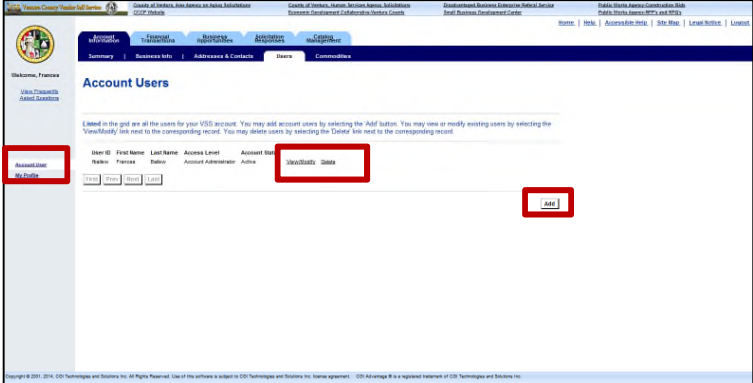
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Maintain Vendor Account

The Account Summary page is displayed after logging into VSS. Each tab will display the details previously entered and provide links and buttons to view, update, delete or add information. Review the information and instructions in the top section of each page, for details on the maintenance options available.

Note: The **Account Users** page allows the user to view all users for the account. *Only users with an access level of "Account Administrator" can view this page.* Here, the Account Administrator may add new users, or modify or delete existing users.

Maintain My Profile

Step	Image
<ol style="list-style-type: none">Complete the Log on to VSS step action table. <p>Note: Complete the Account Verification questions.</p> <ol style="list-style-type: none">The Account Summary page displays.Click on the Users tab.	
<p>Account Users:</p> <ol style="list-style-type: none">Click the View/Modify link to update a user.Click the Delete link to delete a user.Click the Add button to add a new user to the account.Click on My Profile in the left menu to modify profile.	

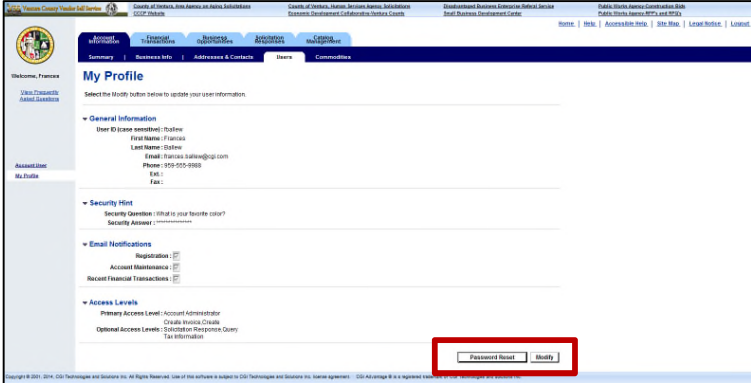
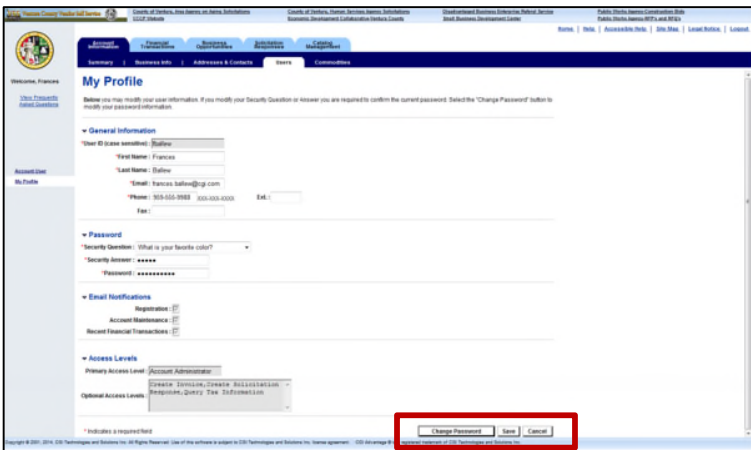


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Maintain My Profile

Step	Image
<p>My Profile:</p> <ol style="list-style-type: none">Click the Password Reset button to have your VSS password reset.Click the Modify button to update your profile.	 <p>The screenshot shows the 'My Profile' page with the following sections: General Information (User ID, First/Last Name, Email, Phone, Fax), Security Question (What is your favorite color?), Email Notifications (Registration, Account Maintenance, Recent Financial Transactions), and Access Levels (Primary: Account Administrator, Optional: Create Profile Credits, Create/Modify Receipts Query, Tax Information). A red box highlights the 'Password Reset' and 'Modify' buttons at the bottom right.</p>
<p>My Profile – Modify view:</p> <ol style="list-style-type: none">Update profile as needed.Click the Save button.Click the Change Password button to change your VSS password.Click the Cancel button to return to the previous page.	 <p>The screenshot shows the 'My Profile' page in 'Modify' view. It includes input fields for 'First Name', 'Last Name', 'Email', and 'Phone'. There is a 'Password' field with a 'Security Question' dropdown. A red box highlights the 'Change Password', 'Save', and 'Cancel' buttons at the bottom right.</p>

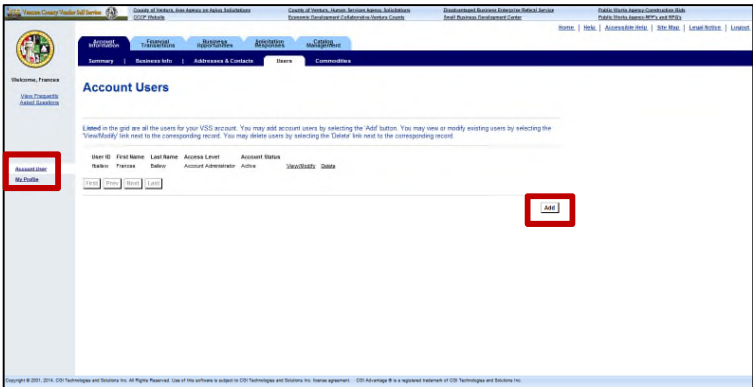
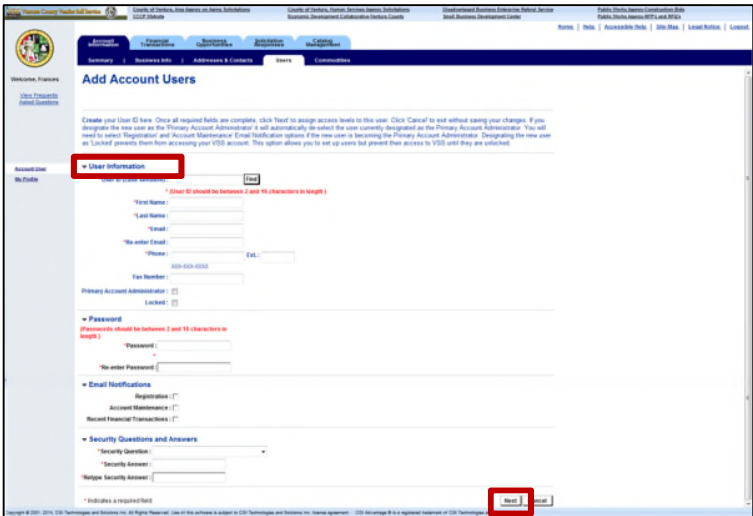
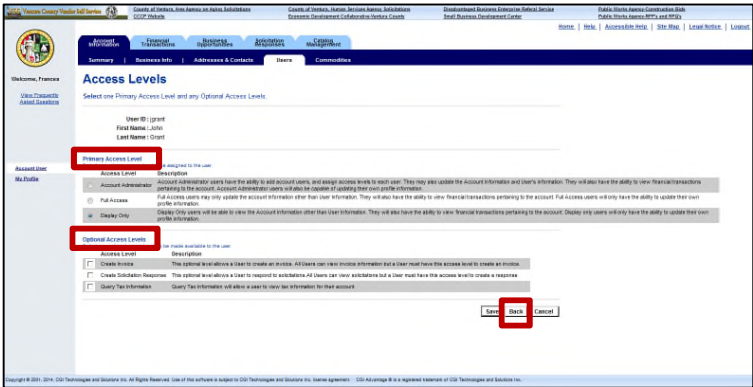


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Add Account Users

Step	Image
<p>Account Users:</p> <ol style="list-style-type: none">1. Select Account Users link from the left menu.2. Click the Add button to add users to the account.	
<p>Add Account Users:</p> <ol style="list-style-type: none">3. Enter the new user details.4. Click Next.5. Click the Cancel button to cancel the entry and return to the previous page.	
<p>Access Levels:</p> <ol style="list-style-type: none">6. Select one Primary Access Level.7. Select one or more Optional Access Levels.8. Click Save.9. Click Cancel to cancel the entry and return to the previous page.10. Click Back to return to the previous page.	

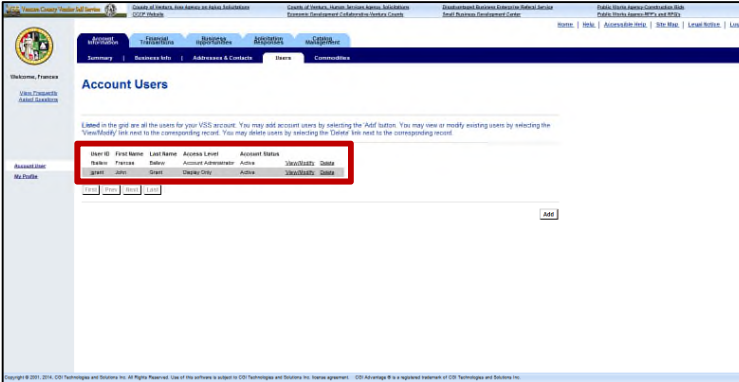


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Add Account Users

Step	Image														
<p>Account Users:</p> <p>The added user will display.</p> <ol style="list-style-type: none">11. Click View/Modify to edit a user profile.12. Click Delete to remove the user. Note: A warning will display saying: "Warning: You are about to delete a user. Select OK to continue or Cancel to go back to the Account Users page".	 <p>The screenshot shows the 'Account Users' page. At the top, there are navigation tabs: Account, Financials, Business, Resources, and Settings. Below the navigation, there is a 'Welcome, France' message and a 'View Properties' link. The main content area is titled 'Account Users' and contains a table of users. The table has columns for 'User ID', 'First Name', 'Last Name', 'Account Level', and 'Account Status'. A red box highlights the 'View/Modify' and 'Delete' buttons for a user named 'grant'.</p> <table border="1"><thead><tr><th>User ID</th><th>First Name</th><th>Last Name</th><th>Account Level</th><th>Account Status</th><th>View/Modify</th><th>Delete</th></tr></thead><tbody><tr><td>grant</td><td>grant</td><td>grant</td><td>Account Administrator</td><td>Active</td><td>View/Modify</td><td>Delete</td></tr></tbody></table>	User ID	First Name	Last Name	Account Level	Account Status	View/Modify	Delete	grant	grant	grant	Account Administrator	Active	View/Modify	Delete
User ID	First Name	Last Name	Account Level	Account Status	View/Modify	Delete									
grant	grant	grant	Account Administrator	Active	View/Modify	Delete									

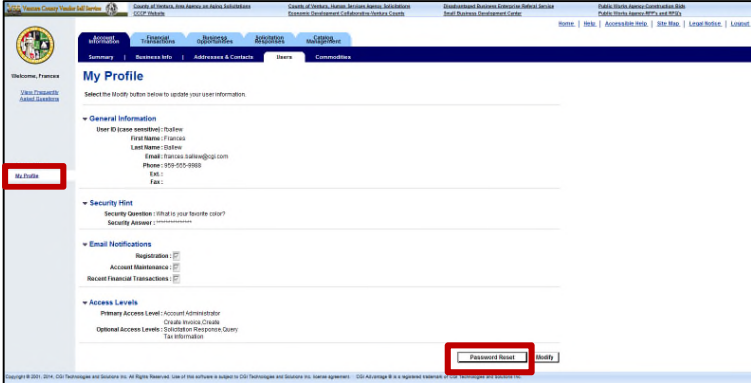
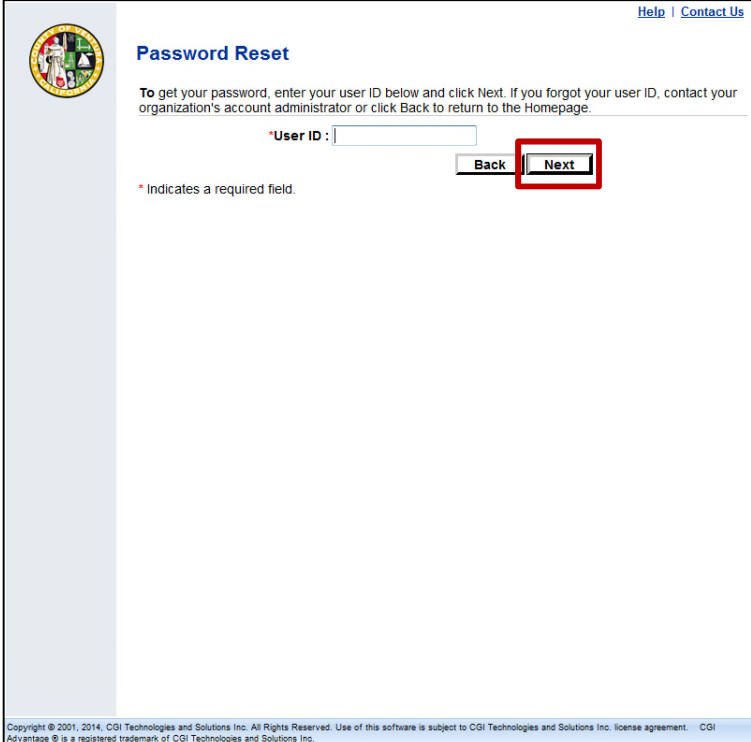


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Reset Your Password

Step	Image
<ol style="list-style-type: none">1. Select My Profile from the left menu.2. Click the Reset Password button.	
<ol style="list-style-type: none">3. Enter the User ID.4. Click Next.	

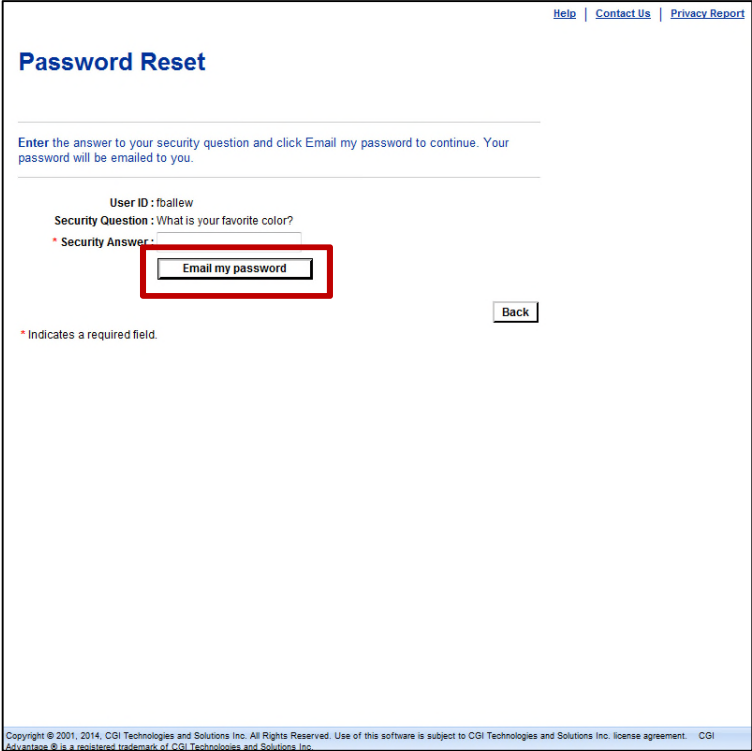


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Reset Your Password

Step	Image
<p>5. Enter the Security Answer.</p> <p>6. Click the Email my password button.</p>	



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Reset Your Password

Step	Image
<ol style="list-style-type: none">A confirmation message will display.Click Exit.Check your email for the message received which provides a temporary password.Complete the Log on to VSS step action table using your temporary password and enter a new password.	<p>View All 1 of 1 · Your new password has been emailed to the email address on record</p> <h3>Password Reset</h3> <p>Enter the answer to your security question and click Email my password to continue. Your password will be emailed to you.</p> <p>User ID : fballew</p> <p>Security Question : What is your favorite color?</p> <p>* Security Answer : <input type="text"/></p> <p><input type="button" value="Email my password"/></p> <p><input type="button" value="Exit"/></p> <p>* Indicates a required field.</p> <p><small>Copyright © 2001, 2014, CGI Technologies and Solutions Inc. All Rights Reserved. Use of this software is subject to CGI Technologies and Solutions Inc. license agreement. CGI Advantage is a registered trademark of CGI Technologies and Solutions Inc.</small></p>

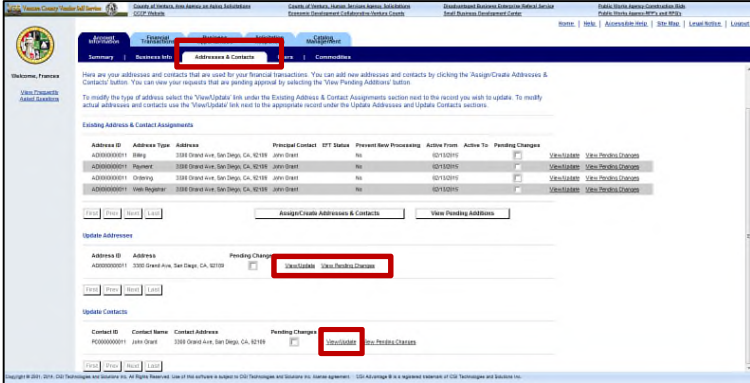
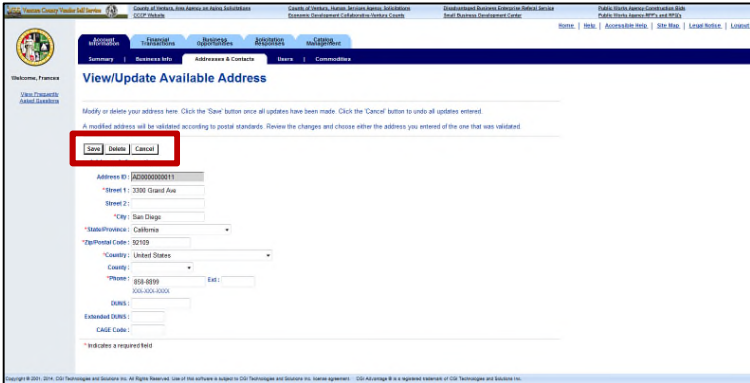


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Maintain Addresses & Contacts

Step	Image
<p data-bbox="277 568 550 600">Addresses & Contacts:</p> <ol data-bbox="277 618 630 1451" style="list-style-type: none">1. Click on the Addresses and Contacts tab.2. Click on the View/Update link next to the address to edit an existing address.3. Click on the Assign/Create Addresses & Contacts button to add new information.4. If there are pending changes, the Pending Changes check box for the applicable section, will be checked. Click on the View Pending Changes link or the View Pending Additions button to view pending information.5. Click on the View/Update link next to Contact to update the contact person.	
<p data-bbox="277 1489 561 1556">View/Update Available Address:</p> <ol data-bbox="277 1579 614 1818" style="list-style-type: none">6. Update details as needed.7. Click Save.8. Click Delete to remove the address.9. Click Cancel to return to the previous page.	

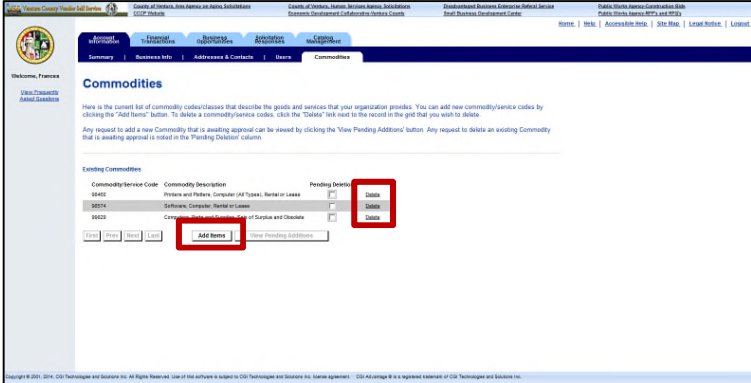
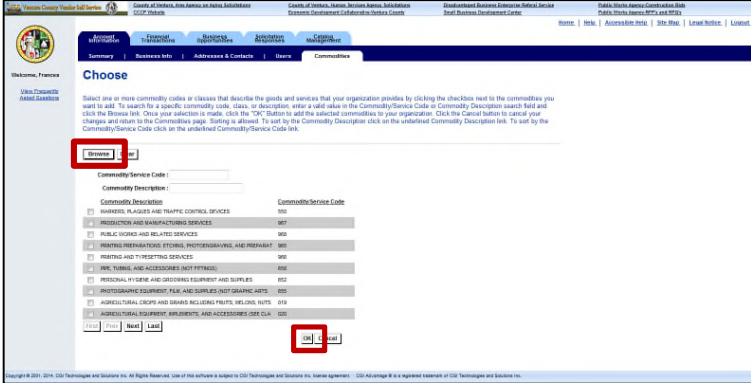


Vendor Registration and Account Maintenance Job Aid



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Maintain Commodities

Step	Image
<p>Commodities:</p> <ol style="list-style-type: none"> Click on the Commodities tab. Click Delete to remove commodities. Click the Add Items button to navigate to the Choose page. 	 <p>The screenshot shows the 'Commodities' page with a table of existing commodities. The 'Add Items' button at the bottom is highlighted with a red box. Other buttons like 'Delete' are also visible.</p>
<p>Choose:</p> <ol style="list-style-type: none"> Enter the Commodity / Service Code or Commodity Description. <p>Note: If you are using the Commodity Description field in order to search for a commodity, make sure to add asterisk before and after the text entered in the Commodity Description search box.</p> <ol style="list-style-type: none"> Click Browse. Click Next to view additional commodities and select from the list. Select the check box for each commodity. Click Ok to add the commodities. 	 <p>The screenshot shows the 'Choose' page with a search box and a list of commodity categories. The 'Browse' button is highlighted with a red box.</p>