Vendor Registration and Account Maintenance Job Aid

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.

Table of Contents

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	**W-9** forms are required for all new vendors. • Submit the W-9 forms by mail, fax, or email (the County has established a secure email address).

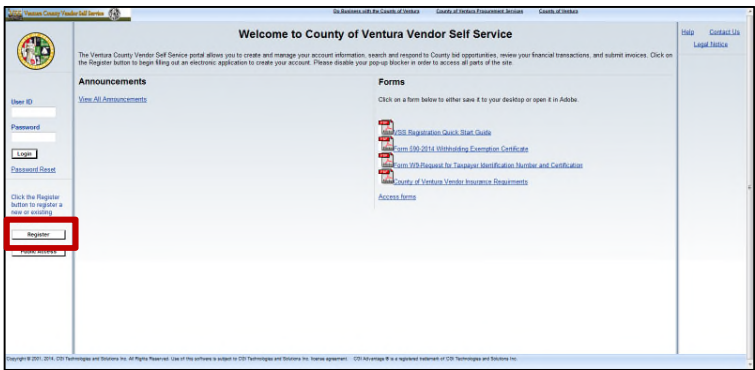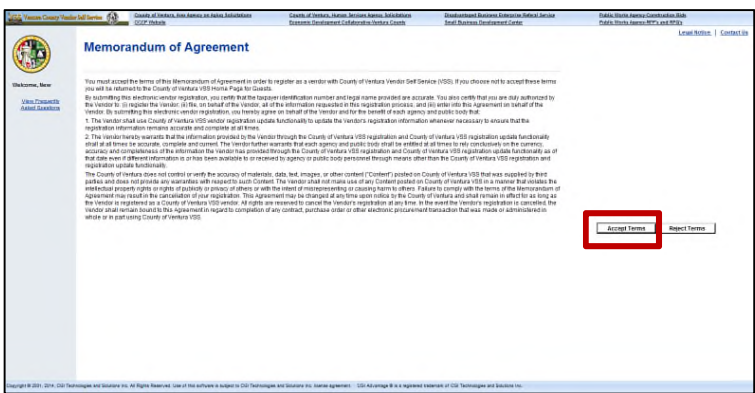## Step 1

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

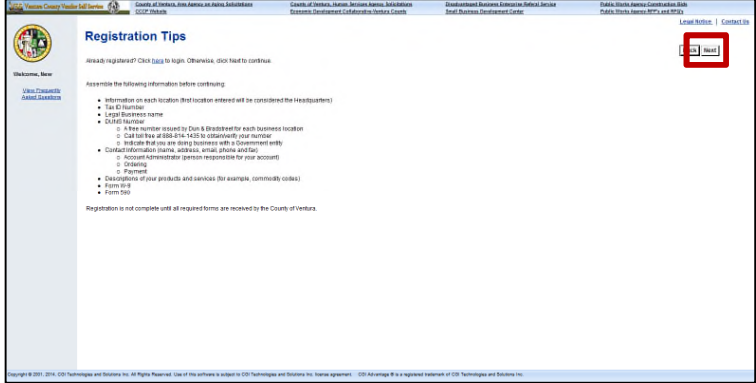| Step	Image
Start on the **County of Ventura Vendor Self Service Home** page: 1. Click on the **Register** button.	
2. Carefully read the **Memorandum of Agreement**. 3. Click **Accept Terms**.	

Vendor Registration

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

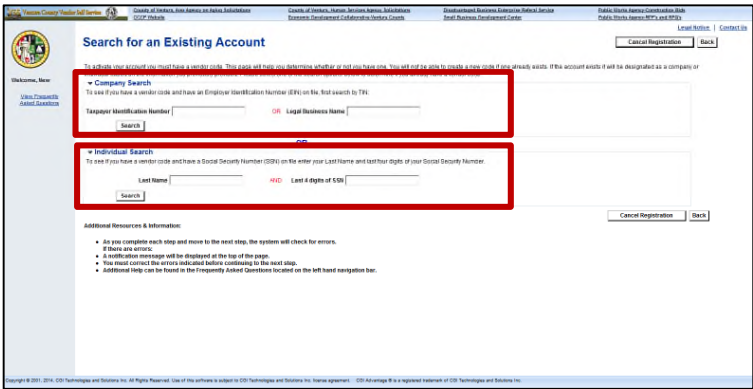## Search for an Existing Account

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

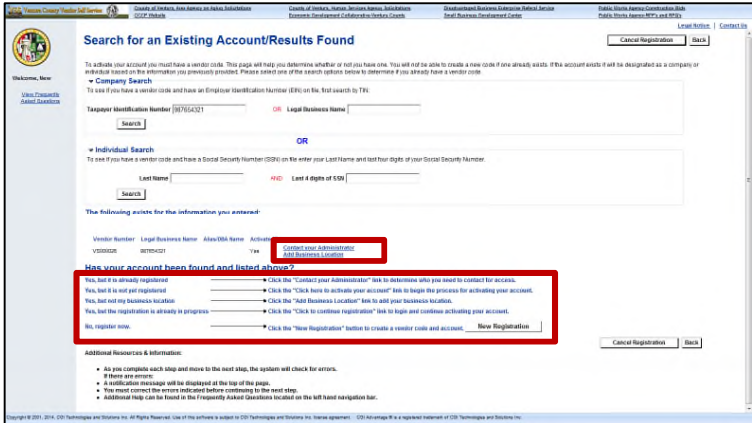| Step	Image
If the organization type is *Company*: 1. Enter the **Taxpayer Identification Number** or **Legal Business Name**. 2. Click **Search.** If the organization type is *Individual*: 3. Enter **Last Name** and **Last 4 digits of SSN.** 4. Click **Search.**	

Search for an Existing Account

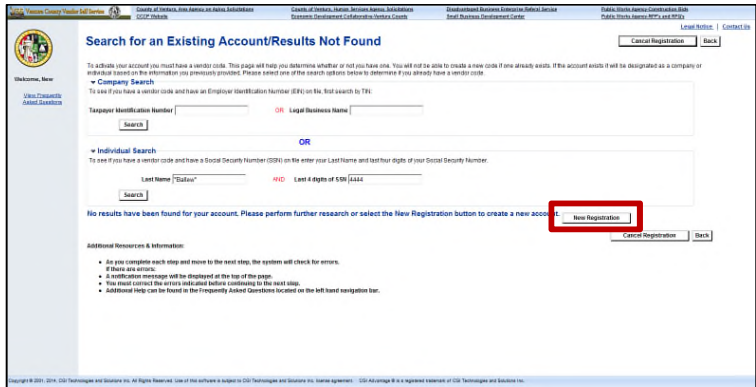| Step	Image
Search for an Existing Account/Results Found: 5. Click on the link that best addresses your needs from the '**Has your account been found and listed above?**' section. • **Yes, but is it already registered. -** The **Contact your Administrator** link is used to display the vendor administrator 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. **Note**: If no match is found move to **New Vendor Registration** section.	

New Vendor Registration

New Vendor Registration

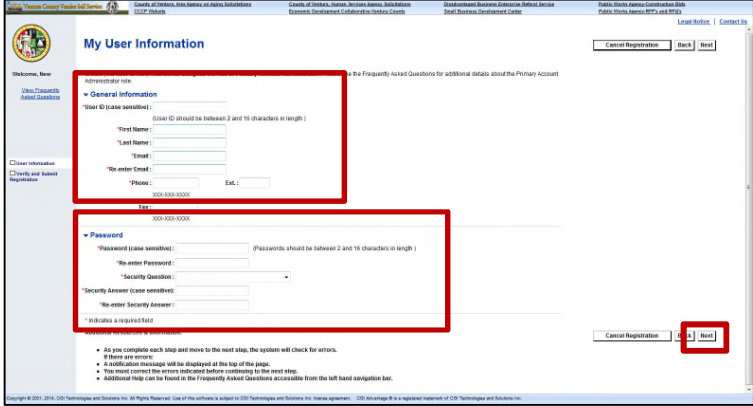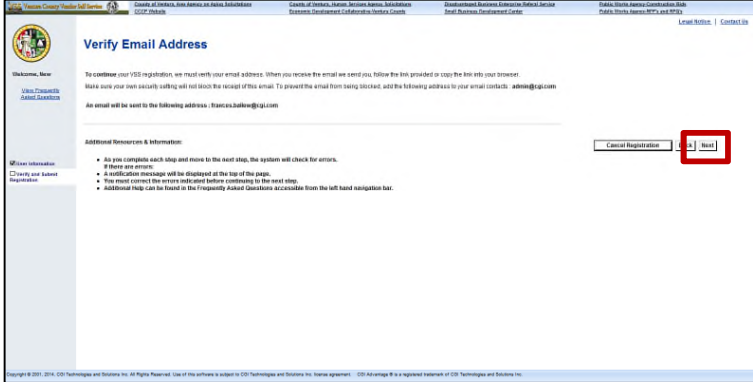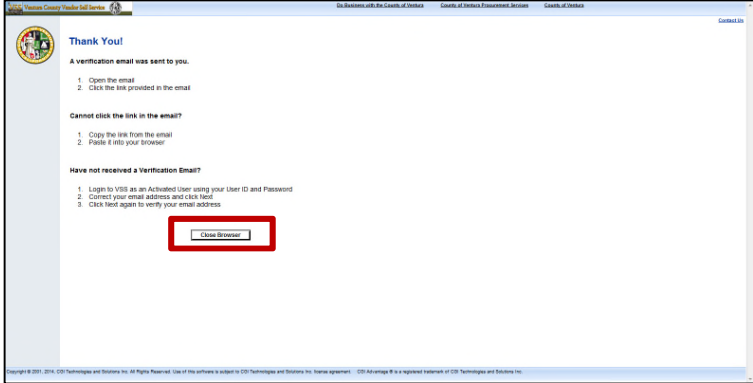| Step	Image
Search for an Existing Account/Results Not Found: If Search Results are Not Found: 5. Click on **New Registration**.	

My User Information

My User Information

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

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Open VSS Email Verification

Navigate to your email application and open the automated message.

Open VSS Email Verification	
Step	**Image**
1. Open the VSS verification email. 2. Click on the link provided or copy paste the link into your browser window to continue registration.	
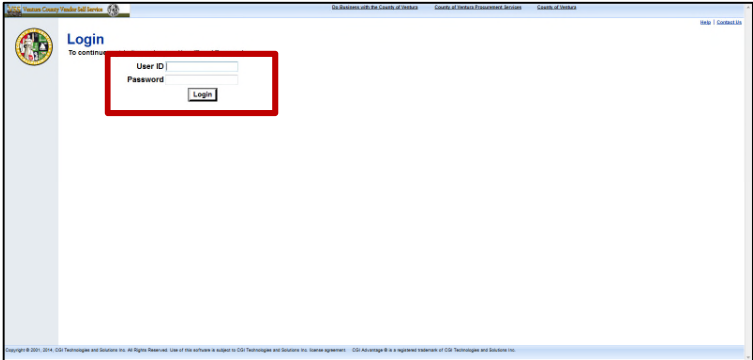
Login to VSS Vendor Registration

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: 1. Enter your User ID in the **User ID** field. 2. Enter your Password in the **Password** field. 3. Click **Login**.	
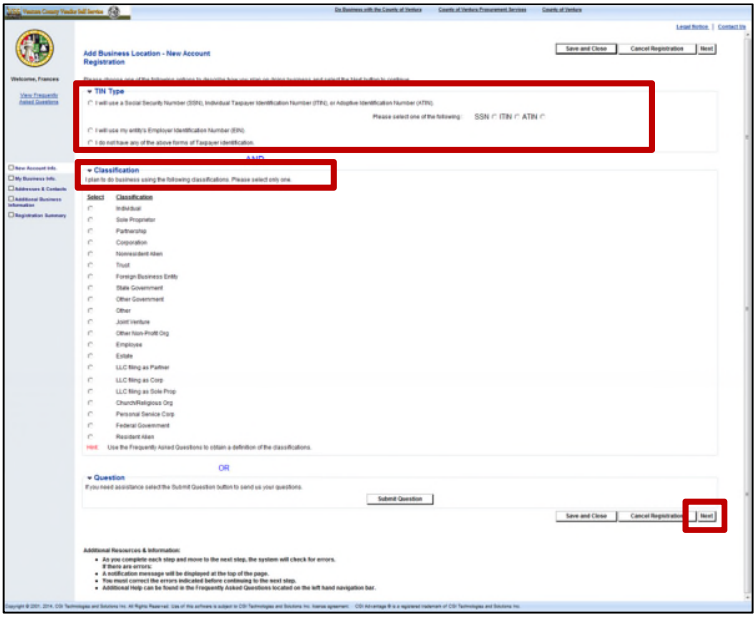
Add Business Location – New Account Registration

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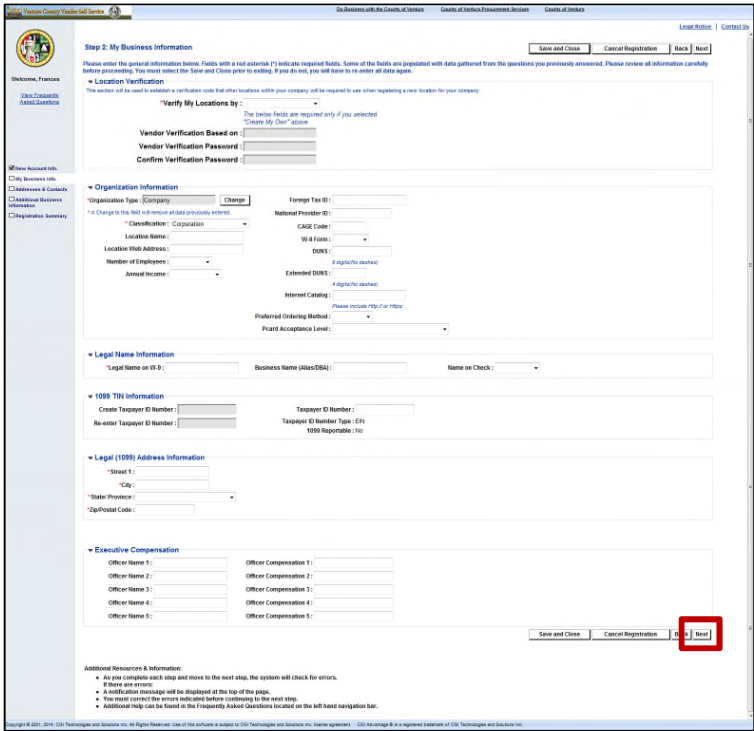
Step 2

My Business Information

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

Add Business Location – Address Information	
Step	**Image**
Step 2: My Business Information: 1. Enter the information for your account. 2. Click **Next.** **Note:** The following buttons display on each page: • 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.	

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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
1. Verify the address in the **Legal Address Information** section. 2. Select the applicable radio buttons in the **Address Questions** section. 3. Click **Next.**	
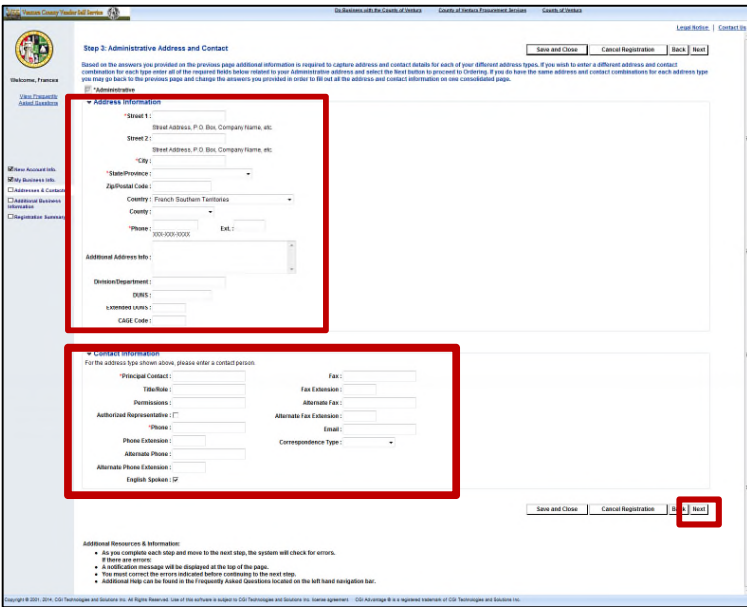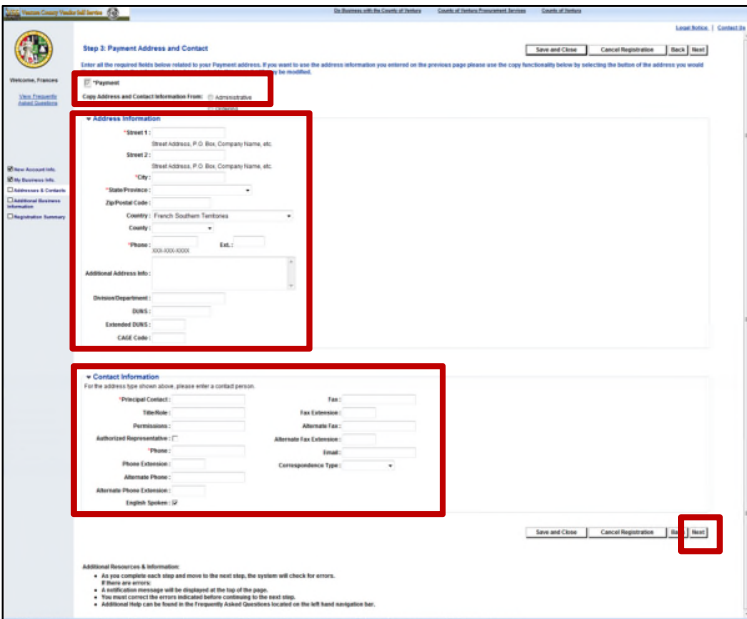
Add Business Location – Address Information Questionnaire

Step	Image
Step 3: Administrative Address and Contact: **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. 4. Complete the **Address Information** section. 5. Complete the **Contact Information** section. 6. Click **Next**.	
Step 3: Addresses and Contacts: 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**. **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.	

Add Business Location – Address Information Questionnaire

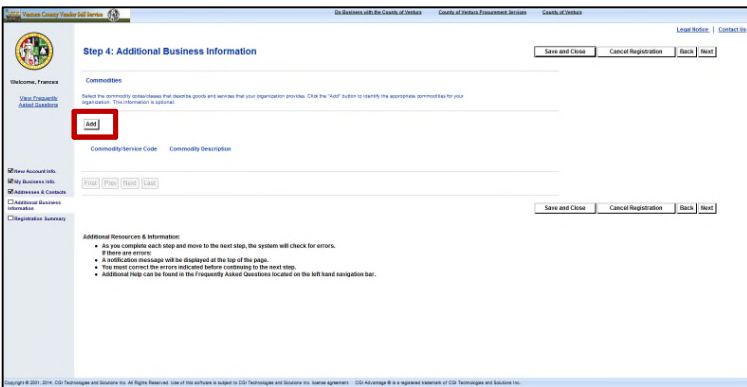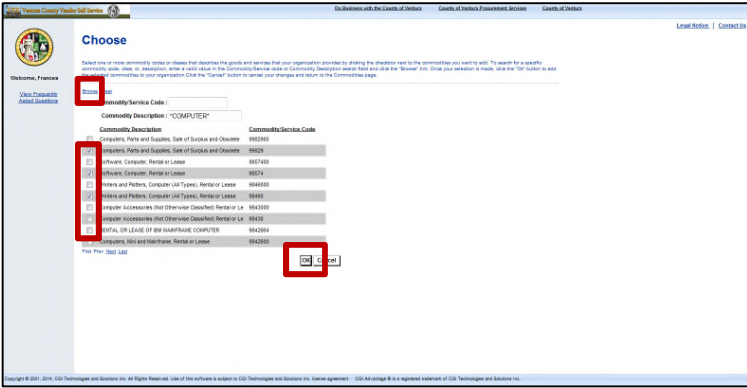| Step	Image
Step 3: Billing Address and Contact: 9. Select a radio button to copy a previously entered address or enter the **Address Information** and **Contact Information**. 10. Click **Next**.	

Step 4

Additional Business Information

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

Additional Business Information	
Step	**Image**
Step 4: Additional Business Information: 1. Click on the **Add** button in order to add commodities to your business information**.**	
Choose: 2. Enter the **Commodity / Service Code** or **Commodity Description**. **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. 3. Click **Browse**. **Note:** Click **Next** to view additional commodities and select from the list . 4. Select the check box for each commodity. 5. Click **Ok** to add the commodities.	

Additional Business Information

Step	Image
Step 4: Additional Business Information: 6. Selected commodities display. **Note**: You can remove a commodity by clicking on **Delete**. 7. Click **Next**.	

Registration Summary

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

Registration Summary

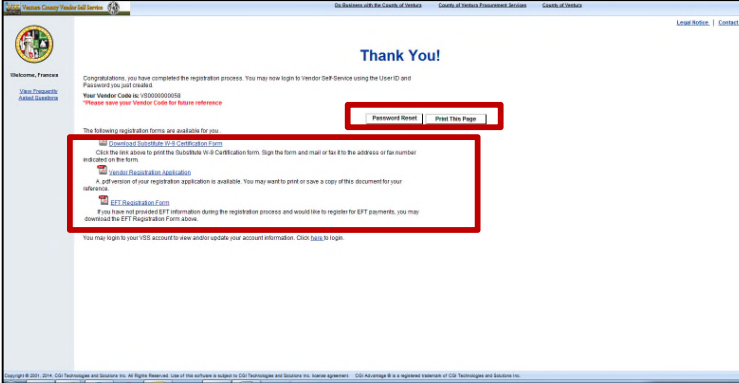| Step 4	Image
1. Click **Update Information** in each section to make changes. 2. Click the **Submit Registration** button after the information is complete. **Note**: Click: • **Save and Close** if you are not ready to submit the registration yet. • **Cancel Registration** to cancel. • **Back** to return to the previous page. • **Print This Page** to print the current page.	

![County seal logo]

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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.

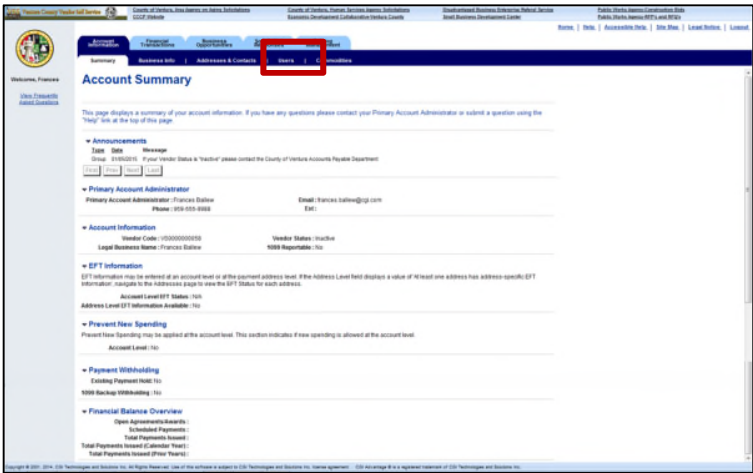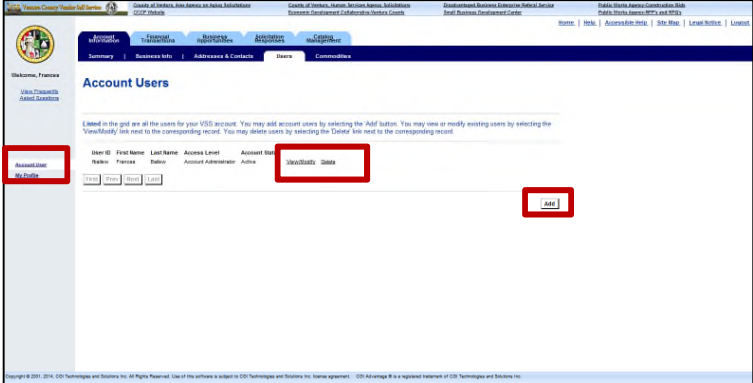| Thank You!	
Step 4	**Image**
1. Download PDF documents as needed by clicking on the link for **Substitute W-9 Certification Form, Vendor Registration Application** or **EFT Registration Form**. 2. Click the **Password Reset** button to have your password reset. After validating your account, the new password will be emailed to the email address on record. 3. Click the **Print This Page** button if you want to print the page.	

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

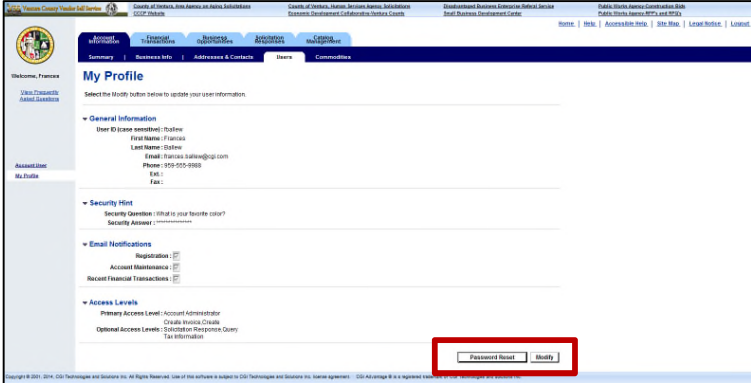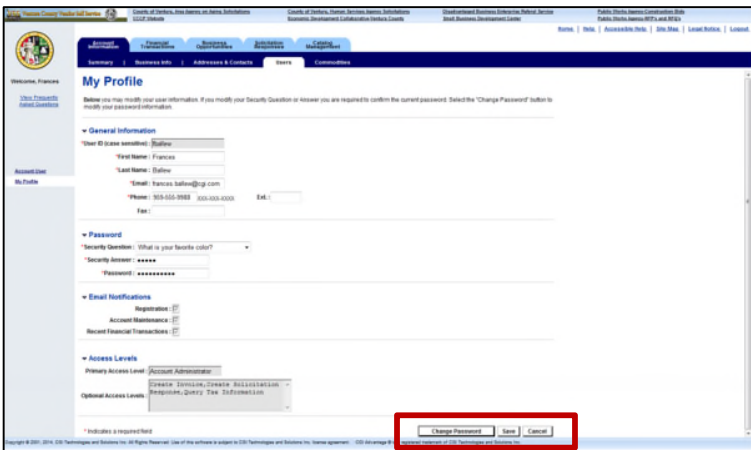| Step	Image
1. Complete the Log on to VSS step action table. **Note:** Complete the Account Verification questions. 2. The **Account Summary** page displays. 3. Click on the **Users** tab.	
Account Users: 4. Click the **View/Modify** link to update a user. 5. Click the **Delete** link to delete a user. 6. Click the **Add** button to add a new user to the account. 7. Click on **My Profile** in the left menu to modify profile.	

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Maintain My Profile

Step	Image
My Profile: 8. Click the **Password Reset** button to have your VSS password reset. 9. Click the **Modify** button to update your profile.	
My Profile – Modify view: 10. Update profile as needed. 11. Click the **Save** button. 12. Click the **Change Password** button to change your VSS password. 13. Click the **Cancel** button to return to the previous page.	
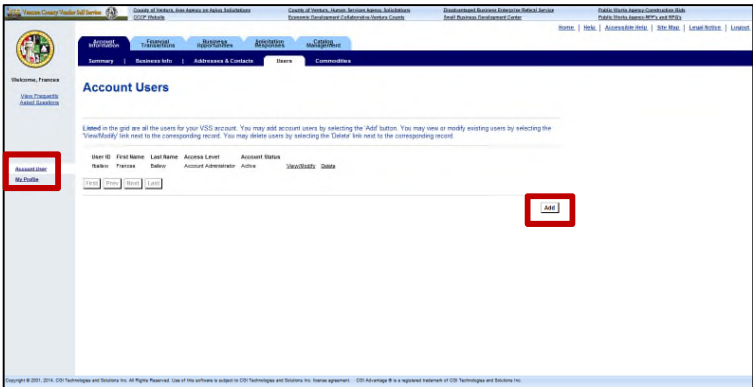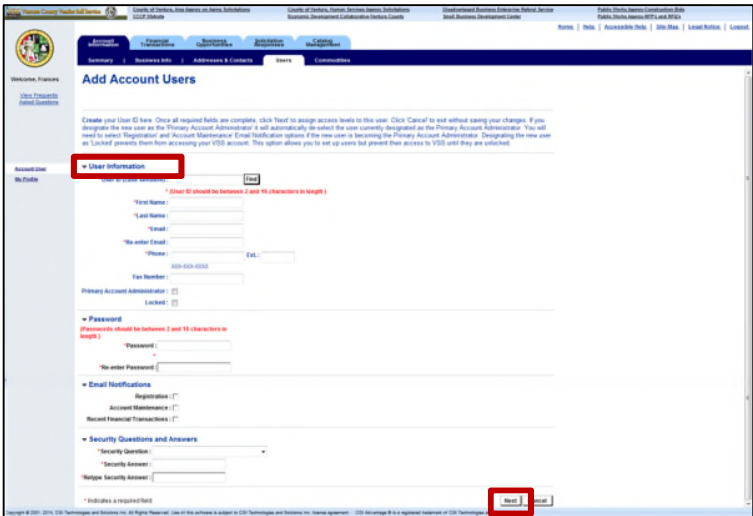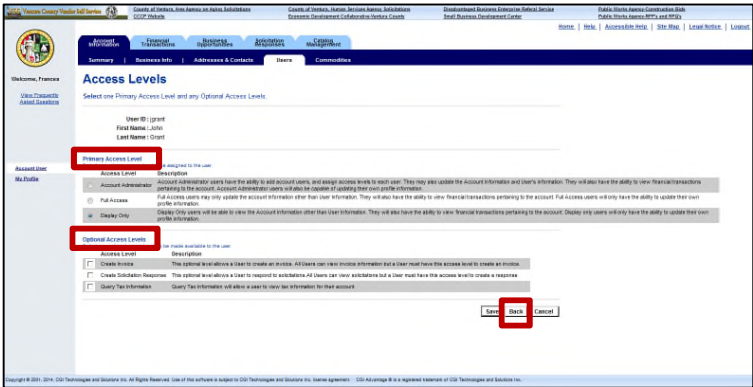
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Add Account Users

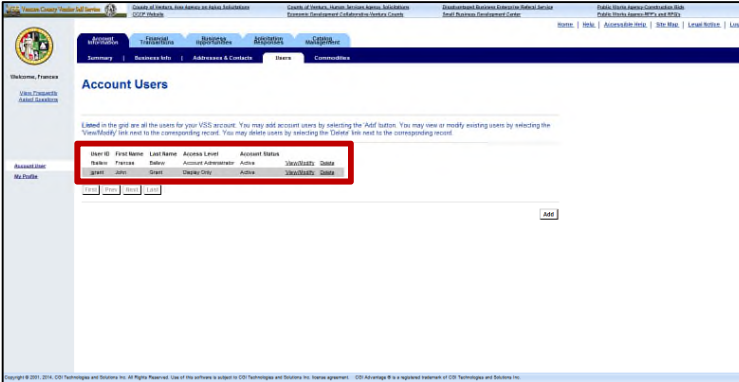| Step	Image
Account Users: 1. Select **Account Users** link from the left menu. 2. Click the **Add** button **to** add users to the account.	
Add Account Users: 3. Enter the new user details**.** 4. Click **Next.** 5. Click the **Cancel** button to cancel the entry and return to the previous page.	
Access Levels: 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
Account Users: The added user will display. 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".	

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Reset Your Password

Step	Image
1. Select **My Profile** from the left menu. 2. Click the **Reset Password** button.	
3. Enter the **User ID**. 4. Click **Next**.	
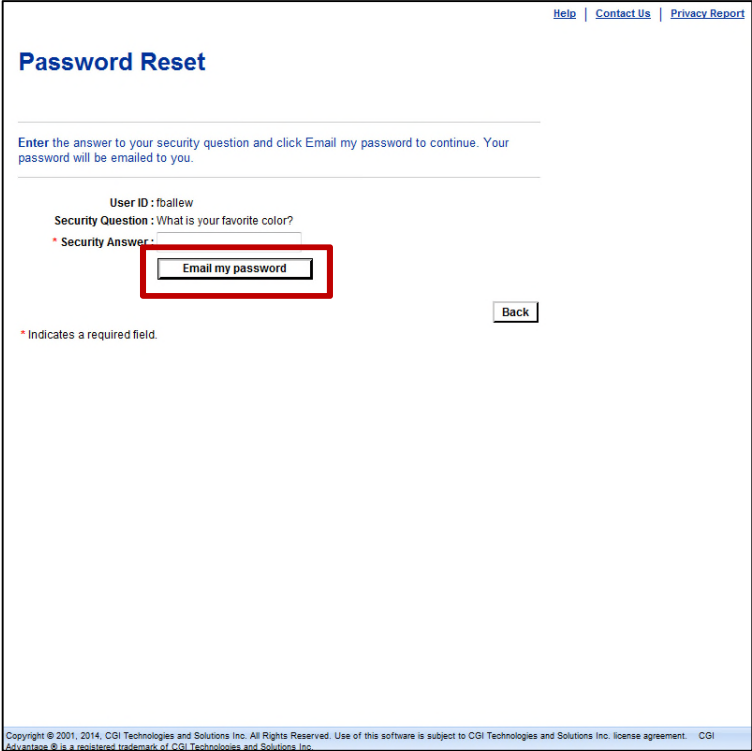
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Reset Your Password

Step	Image
5. Enter the **Security Answer**. 6. Click the **Email my password** button.	Help | Contact Us | Privacy Report **Password Reset** Enter the answer to your security question and click Email my password to continue. Your password will be emailed to you. User ID : fballew Security Question : What is your favorite color? * Security Answer : [Email my password] [Back] * Indicates a required field. 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.
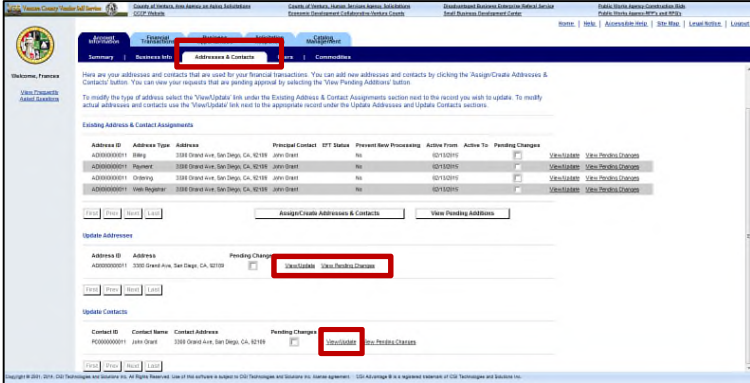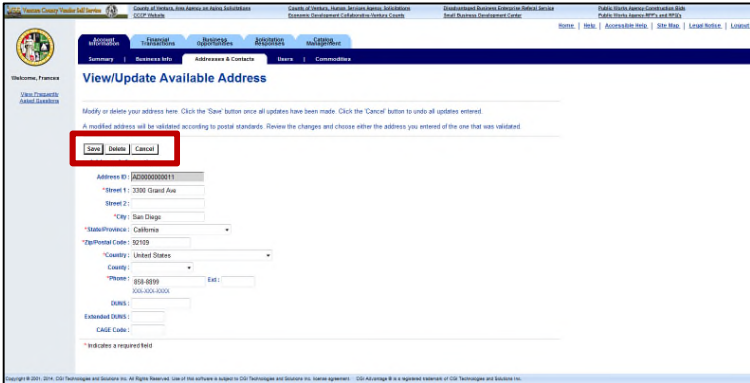
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Reset Your Password

Step	Image
7. A confirmation message will display. 8. Click **Exit**. 9. Check your email for the message received which provides a temporary password. 10. Complete the Log on to VSS step action table using your temporary password and enter a new password.	

Vendor Registration and Account Maintenance Job Aid

Maintain Addresses & Contacts

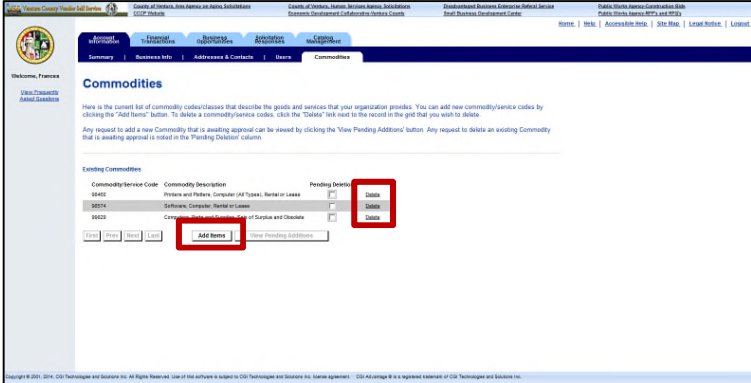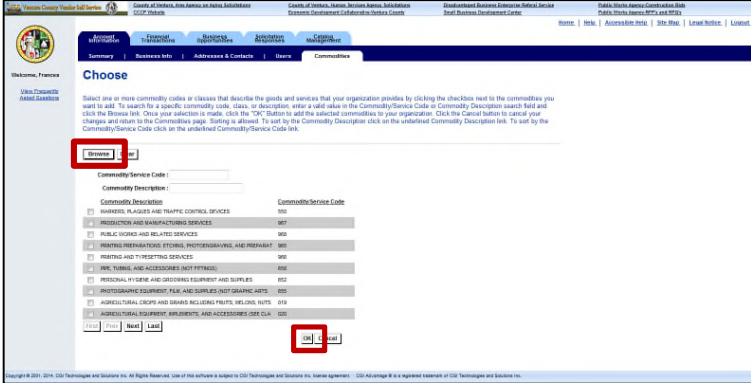| Step	Image
Addresses & Contacts: 1. Click on the **Addresses** and **Contacts** tab. 2. Click on the **View/Update** link next to the address to edit an existing address. 3. Click on the **Assign/Create Addresses & Contacts button** to add new information**.** 4. If there are pending changes, the **Pending 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.	
View/Update Available Address: 6. Update details as needed. 7. Click **Save**. 8. Click **Delete** to remove the address. 9. Click **Cancel** to return to the previous page.	

Maintain Commodities

Step	Image
Commodities: 1. Click on the **Commodities** tab. 2. Click **Delete** to remove commodities. 3. Click the **Add Items** button to navigate to the **Choose** page.	
Choose: 4. Enter the **Commodity / Service Code** or **Commodity Description**. **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. 5. Click **Browse**. 6. Click **Next** to view additional commodities and select from the list. 7. Select the check box for each commodity. 8. Click **Ok** to add the commodities.	