

December 14, 2022

To: All City of Roswell Suppliers, Vendors, and Contractors

SUBJECT: PAYMENT SYSTEM UPGRADE – DUAL FACTOR AUTHENTICATION

Dear Partner,

We wanted to let everyone who currently does business with the City of Roswell know that the City is going through a required update to our online vendor tracking and payment system.

Summary:

For any supplier who uses the City's online Vendor Self Service function as a day to day tool (i.e. to track payment and invoice records, etc.), or if you frequently make changes to your vendor ID, etc..., this change will impact how you access the system, and you will be required to "link" your vendor profile in the old system to the updated (dual authentication security) vendor profile in the new system.

For suppliers who don't often use the Vendor Self Service feature, you will only need to access and link your new and old profiles if you need to make changes to your profile (i.e. update tax information or payment processing or identification information).

Detailed Change Process:

Attached is a detailed walk through that will show you how to create an individual account, link company accounts in the system, and upload current W-9.

You will need your Vendor number (available in the current system and on checks and POs) and your FID / SSN #.

Best,

Greg Anderson

Greg Anderson, Purchasing Manager

City of Roswell Vendor Self Service MUNIS UPGRADE

Task 1 – Establish Tyler Portico Account (Individual – Dual Authentication)

Task 2 – Link Old Munis (Munis 11.3) Vendor Account to New Munis Vendor Account (2021)

Task 3 – Upload W-9

Recorded Steps

Step 1: User left click on "Vendor Self Service"



Step 2: User left click on "Login / Register".



Step 3: User Left Click on "Sign up".

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ality HUDWeb 🛛 🚳 Log in or Register 🚯 N	IUNIS 👱 DocuSign 🞸 Contract/PO Chang 🕺 My	Forms JotForm 😵 Georgia Procureme	>>
	Sign in with Google		î
	Sign in with Apple		
	Sign in with Microsoft		
	Sign in with Facebook		
	OR		
	Email address		
	Password		
	Remember me		
	Sign in		
	Eorgot password? Unlock account? Help		
	Don't have an account? Signup		
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Step 4: User fill out Account Information and left click "Sign up".

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onality HUDWeb 🜼 Log in or Register	🚯 MUNIS 👱 DocuSign 🕺 Contract/PO Chang 🕺 M	vly Forms JotForm	🕑 Georgia Procu	reme
	Create an account rest@ffedprodocs.com At least 8 character(s) At least 1 number(s) At least 1 number(s)			
	John			
	Test			
	* indicates required field			

Step 5: System will send email to signup account email.



Step 6: User left click in email on "Activate Account"



Step 7: User left click on "Sign in" in Tyler Portico Citizen - Sign In. <u>At this point, at</u> <u>successful Sign In, Vendor will have completed Task 1 of establishing an individual</u> <u>account successfully.</u>

Sign in with Google
Sign in with Apple
Sign in with Microsoft
Sign in with Facebook
OR
Email address
Itest@feaprodocs.com
Password
••••••
Remember me
Sign
Forgot password? Unlock account? Help
Don't have an account? Sign up

Step 8: User left click "Yes" if they accept terms and conditions.



Step 9: User left click on "Link to Existing" **NOTE**: at this point, a supplier who does not have a previous account in Munis 11.3 can select "Create New Vendor" and follow prompts to create an unlinked new account – you will need to upload a W-9 in either case. The remainder of this document will include steps to link accounts, NOT to create a new account.



Step 10: User input previous account information – the previous (Munis 11.3) vendor number and FID / SSN information - Left click on Link to Existing"

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	Link to Existing Vendor	
vice	Q	
	Enter the information below to search for an existing vendor.	
	Vendor Number Vendor FID/SSN	
	7700 123456789	
	Link to Existing	
	#2022 Tyler Technologies, Inc.	

Step 11: User fill out required contact information and left click on "Continue". NOTE: suggest using Contact Type "GENERAL – General Contacts". This can be updated after linking accounts and uploading W-9.

Roswell) (8
	User Contact Information		
Home	Contact Person		
Vendor Self Service	* Contact Type		
	GENERAL - General Contacts		
	* Name		
	JOHN TEST		
	Description		
	CEO		
	* Phone		
	7705946197		
	Text		
	Opt in		
	Fax		
	* E-mail		
	JTEST@ROSWELLGOV.COM		
	Contin		

Step 12: User will be returned to "Vendor Self Service" page and the accounts will be linked as shown below. **This is the End of Task 2.**

Roswell	e e
Home	Welcome to Vendor Self Service
Vandas Eslé Esuitas	
Vendor Information	Profile information 🖋
1099	CEO Phone: 7705946197 JTEST@RKSWELLGOV.COM
Checks	Vendor information 🧳
Purchase Orders	KIMSPLACE 111 HAPPY STREET ROSWELL, GA 30075
	KLAWRENCE@ROSWELLGOV.COM
	Announcements
	Vendor Self Service gives existing and potential vendors access to their company information and records online. Vendors have the ability to view Purchase Orders, Invoices, AP Payments, and update their profile, address, contact information and commodities.
	Existing vendors will need their vendor number (located on the last received check stub or PO) and Federal ID. If you have not received a check recently or ID does not match when entered, please send an email to <u>Vendors@roswellgov.com</u> .
	\$2022 Tyler Technologies, Inc.

Step 13: User left click on "Vendor Information" in Left menu.

Roswell		
Home Vendor Self Service Vendor Information 1099 Checks Invoices Purchase Orders	Vendor Self Service gives existing and pote information and records online. Vendors he Invoices, AP Payments, and update their pi commod Existing vendors will need their vendor number (loc Federal ID. If you have not received a check recen send an email to <u>Vendor</u> A W9 MUST BE ATTACHED BEFORE ACCESS W FROM THE CITY Once logged in, click the document icon in the	ential vendors access to their company ave the ability to view Purchase Orders, rofile, address, contact information and lities. ated on the last received check stub or PO) and tly or ID does not match when entered, please ws@roswellgov.com. VILL BE GRANTED OR PAYMENTS RECEIVED OF ROSWELL upper right correr to download a W9 form.
	Invoices	Submit invoices Search invoices
	Checks Check information not found.	Search checks
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	Checks Check information not found. Purchase orders Purchase order information not found.	Search checks Search purchase orders

Step 14: User left click on "Attachments" in left menu.

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Vendor Information	KIMSPLACE Entity:		W-9
Commodities	GeoCode: 0001 - VENDOR BASED IN ROSWELL ROSWELL, GA 30075		
1099 Checks	KLAWRENCE@ROSWELLGOV.COM FID: 12-3456789		
Invoices	Foreign Entity MBE		
Purchase Orders	Discount Percentage: 0.000 Days to Discount: 0 Days to Net: 0		
	Address Information change		
	1 There are pending changes to the Remittance		
	Information. Click To View.		
	Name/DBA	Address	Is Default
	KIMSPLACE	111 HAPPY STREET ROSWELL GA 30075	Ŷ

Step 15: User left click on "Attach" Button.

Roswell					E
	Attachments				
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Attachments	default	Vendor Attachment		(0)	Attach
Commodities					
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nvoices					
Purchase Orders					

Step 16: User left click on "Choose File"

	Attachments				
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Step 17: Browse to where you have saved your W-9, then User left double click on W-9 Adobe file to upload.

C > Desktop > Vendor	Self Services Information -	Сору				~ (5		Vendor Se	elf Servic	es I
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Name		Date modified	Туре	Size							
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Step 19: Attachments are uploaded – the W-9 has been attached to your account in the new system. User Left click on "Vendor Self Service" on Left menu. End of Task 3.

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	Attachments					
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Step 20: Screen below indicates that Supplier has completed Tasks 1-3. Accounts are now linked and current W-9 is uploaded. User can now view system information and update account (including adding additional contacts, etc...). **END OF WALK THROUGH**

Roswell	B 0
	Welcome to Vendor Self Service
Home	
Vendor Self Service	
Vendor Information	Profile information 🖉 JOHN TEST
1099	CEO Phone: 7705946197 JTEST@ROSWELLGOV.COM
Checks	
Invoices	Vendor information 5
	KIMSPLACE
Purchase Orders	111 HAPPY STREET ROSWELL, GA 30075
	KLAWRENCE@ROSWELLGOV.COM
	Announcements
	Vendor Self Service gives existing and potential vendors access to their company information and records online. Vendors have the ability to view Purchase Orders.
	Invoices, AP Payments, and update their profile, address, contact information and commodities.
	Existing vendors will need their vendor number (located on the last received check stub or PO) and Federal ID. If you have not received a check recently or ID does not match when entered, please send an email to <u>Vendors@roswellgov.com</u> .