



Vendor Access

User Guide

City of Victoria, TX

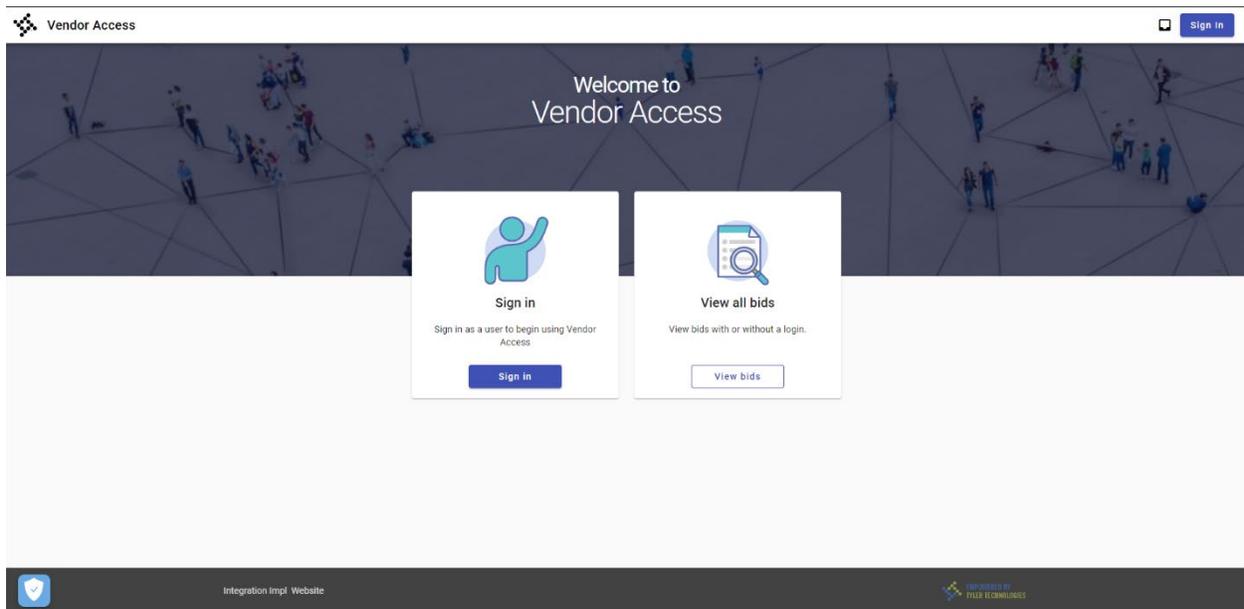
Overview

Vendor Access provides vendors and employees with a portal to view vendor and payment information. Vendors can enter and maintain their contact and remittance information, discount and payment terms, and required documentation that represent the goods and services the vendor can provide.

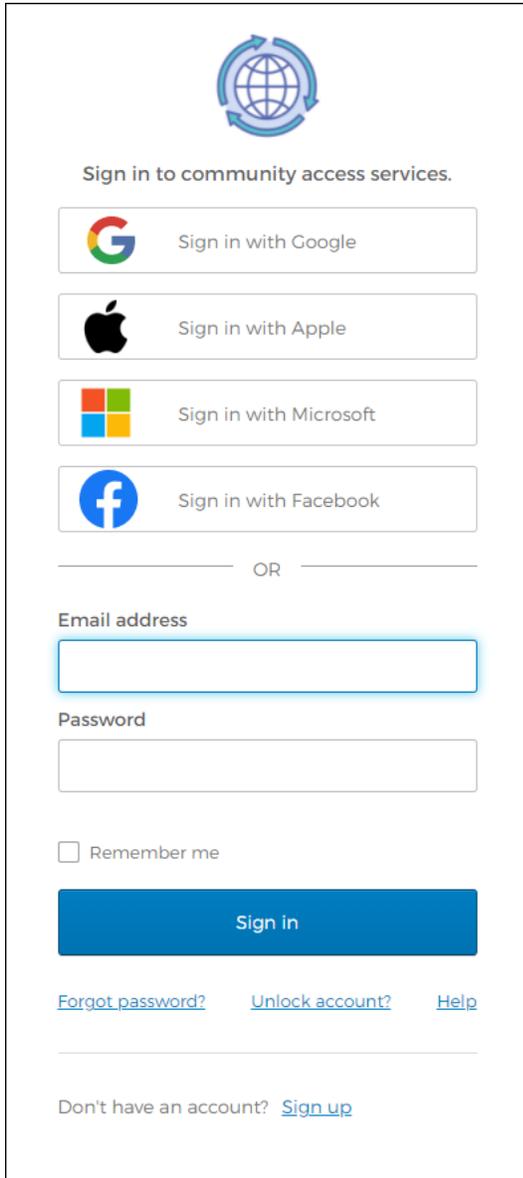
Vendors can register to become a vendor for City of Victoria on this portal, also once they are a vendor they can login and see their information.

The Vendor Access portal can be accessed at <https://cityofvictoriatx.tylerportico.com/va/vendor-access/registration>

Start with Sign In and it will get you started.



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



The screenshot shows a sign-in interface for community access services. At the top is a logo of a globe with circular arrows. Below it, the text reads "Sign in to community access services." There are four social login buttons: "Sign in with Google" (with the Google 'G' logo), "Sign in with Apple" (with the Apple logo), "Sign in with Microsoft" (with the Microsoft logo), and "Sign in with Facebook" (with the Facebook 'f' logo). Below these is a horizontal line with "OR" in the center. Underneath are two input fields: "Email address" and "Password". Below the password field is a checkbox labeled "Remember me". A large blue "Sign in" button is positioned below the checkbox. At the bottom, there are three links: "Forgot password?", "Unlock account?", and "Help". A horizontal line separates these from the text "Don't have an account? [Sign up](#)".



New Users

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

The image shows two overlapping UI components. On the left is a sign-in form with a 'Remember me' checkbox, a blue 'Sign in' button, and links for 'Forgot password?' and 'Unlock account?'. Below these is the text 'Don't have an account?' followed by a 'Sign up' link highlighted with a red box and a red arrow pointing to the right. On the right is the 'Create an account' dialog box, which features a globe icon with circular arrows, the title 'Create an account', and four input fields: 'Email *', 'Password *', 'First name *', and 'Last name *'. Below the fields is a note '* indicates required field' and a blue 'Sign up' button. At the bottom of the dialog is a link 'Back to sign in'.

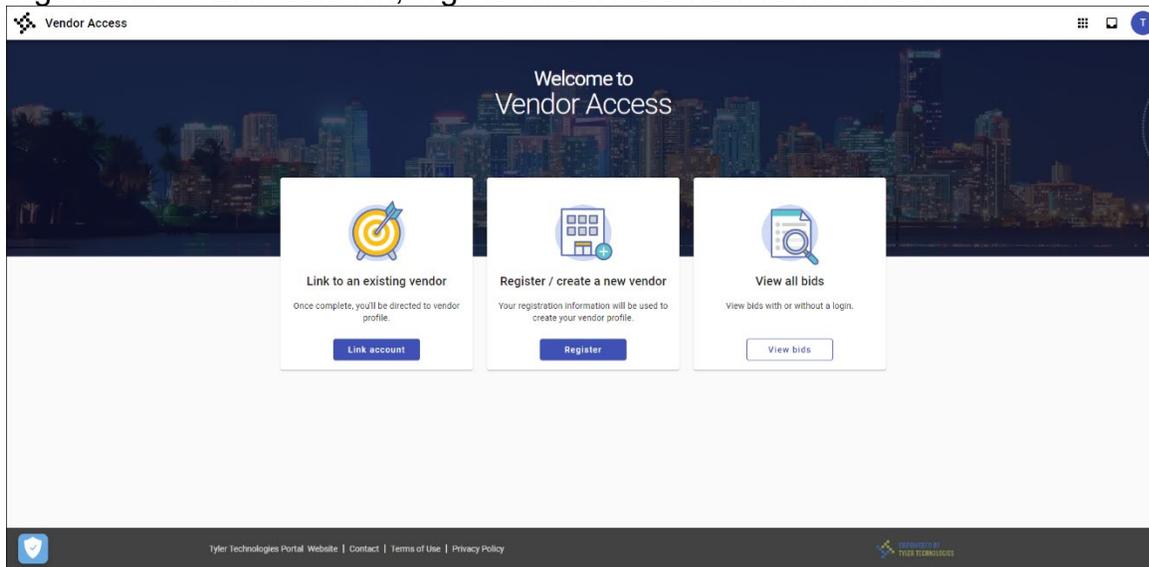
Enter a valid email address, create a password, Sign Up and the application sends a confirmation email to the email address entered.

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



The Welcome Screen

When you log in to Vendor Access for the first time, the Welcome to Vendor Access screen provides options to establish a link to an existing vendor record from your organization's ERP solution, register or create a new vendor record.



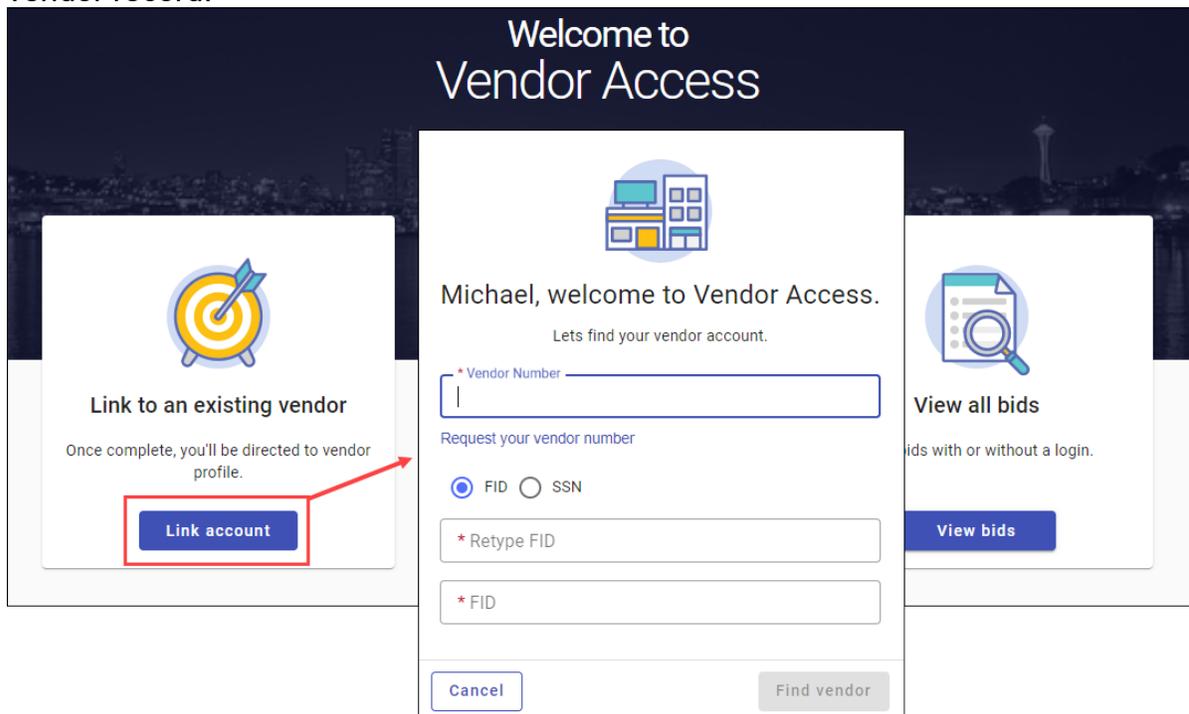
Additionally, this screen includes the App Launcher, Resources, and User Information/Sign In buttons in the banner. These options are found on all Vendor Access screens.

Linking to an Existing Vendor

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



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

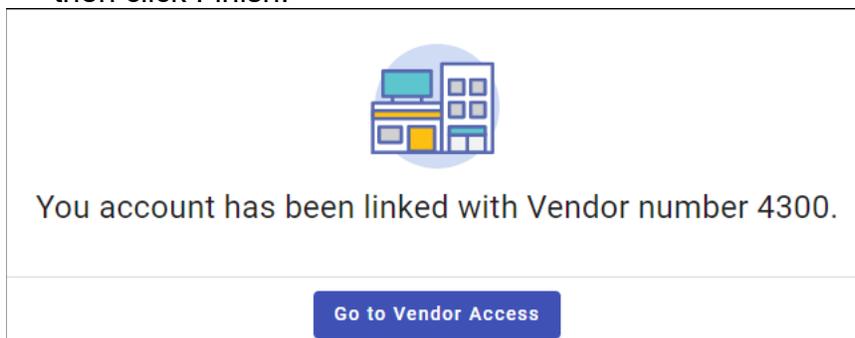


Enter the vendor number (as established in the ERP) and the vendor's federal identifier (FID) or Social Security number (SSN) to search for the existing vendor record. *The Request Your Vendor Number link provides the contact details for the person at your organization who handles these requests.

Click Find Vendor.

The application searches and retrieves the vendor information stored on the vendor record in the integrating Tyler product. Click **Next** if it finds the correct vendor.

You may need to enter at least one phone number to use for this email address and then click Finish.



Click Go to Vendor Access to open the home page. Invoices, purchase orders, and other such data that are associated with the existing vendor.

Vendor Access

Welcome!
Antonia Raoul-Smith

[Update profile](#)

[Submit invoice](#)

[Submit a bid](#)

Purchase Orders

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

Invoices

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

Checks

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

Contracts

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

Work orders

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

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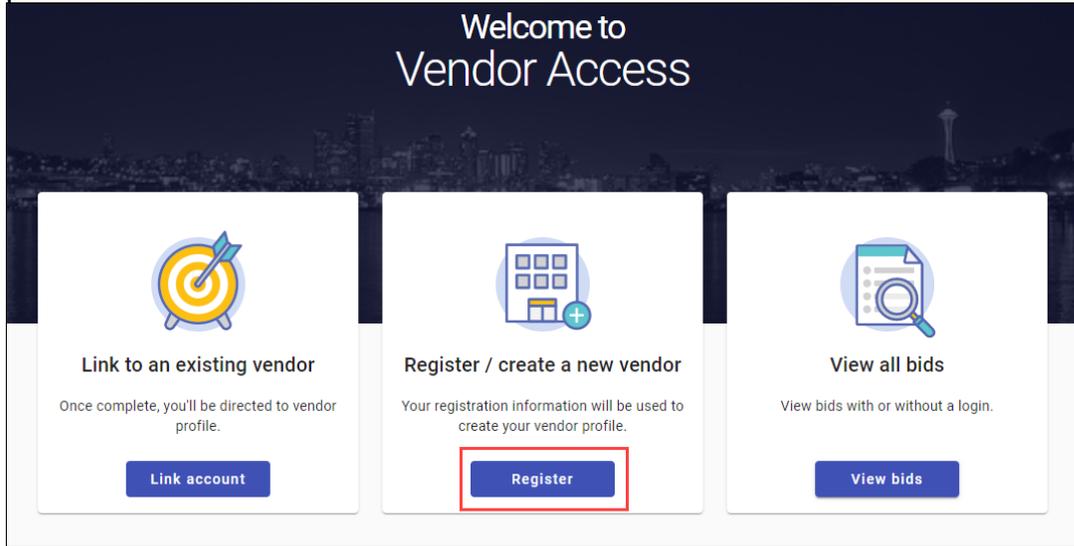
UNIVERSITY OF TEXAS TECHNOLOGIES



Registering/Creating a New Vendor

To register a new vendor:

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



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

Vendor registration

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

Hi there!

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

* Business name

FID SSN

* FID

* Retype FID

Cancel Next

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



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

Vendor registration ×

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

 **Great! Next, share a few details about your business**

Vendor information	Address information
<input type="text" value="Vendor type"/>	<input type="text" value="Address*"/>
<input type="text" value="Doing business as"/>	<input type="text" value="City*"/>
<input type="text" value="Vendor email*"/>	<input type="text" value="State*"/>
<input type="text" value="Website"/>	<input type="text" value="Zipcode*"/>

Bank information

After completing the fields, click Next to ADD ANY classifications and payment



terms.

Vendor registration ✕

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

Minority business enterprise

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

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

Payment terms

Do you have any payment discounts?

Discount percent

Days to discount

Days to net

Which delivery methods do you accept?

Accounts payable * Purchasing *

Printed Printed

Fax Fax

Email Email

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



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

The screenshot shows a 'Vendor registration' window with a progress bar at the top. The steps are: Profile (checked), Location (checked), Information (checked), **4 Contacts** (highlighted), 5 Documentation, and 6 Review. The main content area features a 'Nice work!' message with a pencil icon and the text 'We have your email, but how else can you be contacted?'. Below this are several input fields: 'Full Name*' with the value 'Antonia Raoul-Smith', 'Type*' (a dropdown menu), 'Phone*', 'Mobile Phone', 'Email*' with the value 'antonia.raoulsmith@gmail.com', and 'Comments'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'.

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

The screenshot shows the 'Vendor registration' window at step 5: Documentation. The progress bar now shows: Profile (checked), Location (checked), Information (checked), Contacts (checked), **5 Documentation** (highlighted), and 6 Review. The main content area features an 'Upload attachments relevant to your vendor activity' message with a pencil icon. Below this is a section for 'Required documentation' and 'General documentation (optional)'. Each section has a table with columns for 'Type' and 'Document name'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'.



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

Vendor registration ✕

Profile Location Information Contacts Documentation **6** Review

Review and submit

Profile

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

Are you a minority business enterprise?
No

Location

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

Payment methods

Discount percent	Days to discount	Days to net
Accounts Payable	Purchasing	
Printed	Printed	
Yes	Yes	
Fax	Fax	
No	Yes	
Email	Email	
Yes	Yes	

Contact

Full Name	Type	Phone
Antonia Raoul-Smith	1	9995551212

Email
antonia.raoulsmith@gmail.com

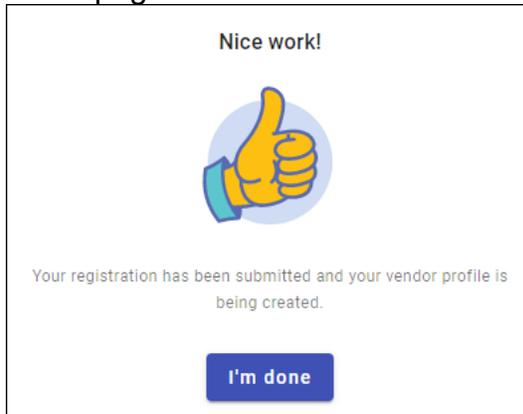
Attachments

Vendor attachments

Type	Document name
<input type="text"/>	<input type="text"/>



7. Review the information and click Submit to complete the registration. The program provides a confirmation message. Click I'm Done to continue to the Vendor Access home page.



Home Page

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

The screenshot shows the Vendor Access home page for Antonia Raoul-Smith. The page features a navigation sidebar on the left with options: Home, Vendor profile, Bids, Commodities, Purchase Orders, Invoices, Checks, Form 1099, Contracts, and Work Orders. The main content area includes a welcome message, an 'Update profile' button, and two buttons: 'Submit invoice' and 'Submit a bid'. Below these are four data tables: Purchase Orders, Invoices, Checks, and Work orders. At the bottom, there are links for City Website, Contact, Terms of Use, and Privacy Policy, along with the Tyler Technologies logo.

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

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

Check Number	Date	Amount	Status
252532	01/13/2021	200.00	Printed
98767897	06/04/2020	0.00	Cleared
899890003	05/18/2020	24.90	Printed
8887771	05/12/2020	1.00	Printed
20101089	03/23/2020	0.00	Cleared

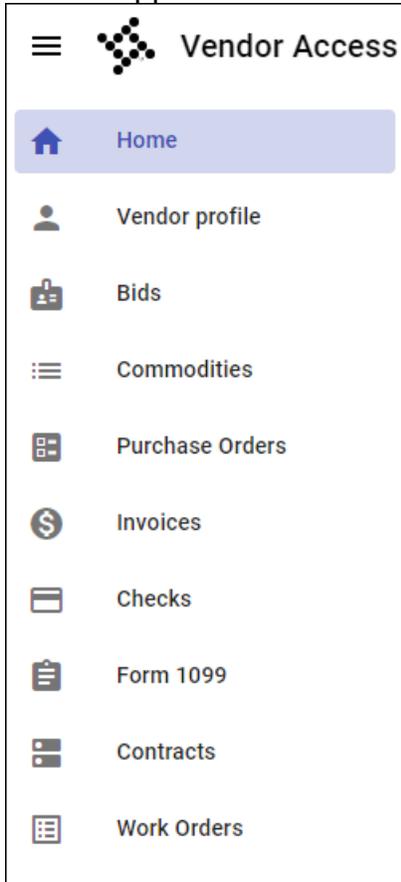
Contract Number	Contract Amount	Available Amount
62	5,000.00	3,575.00

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



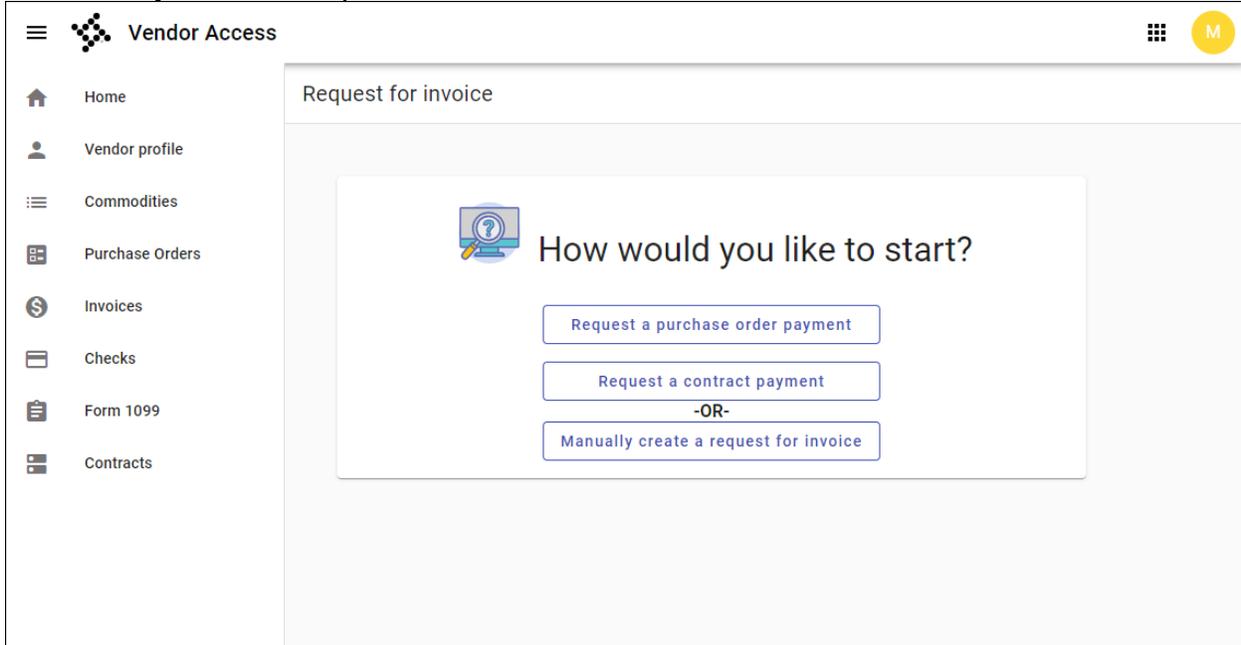
Using the Navigation Menu

The navigation menu serves as the primary means of navigating through the Vendor Access application. Available options vary depending on your organization's settings.



Submitting an Invoice

Click Submit Invoice to request a purchase order payment, request a contract payment, or manually create a request for invoice.



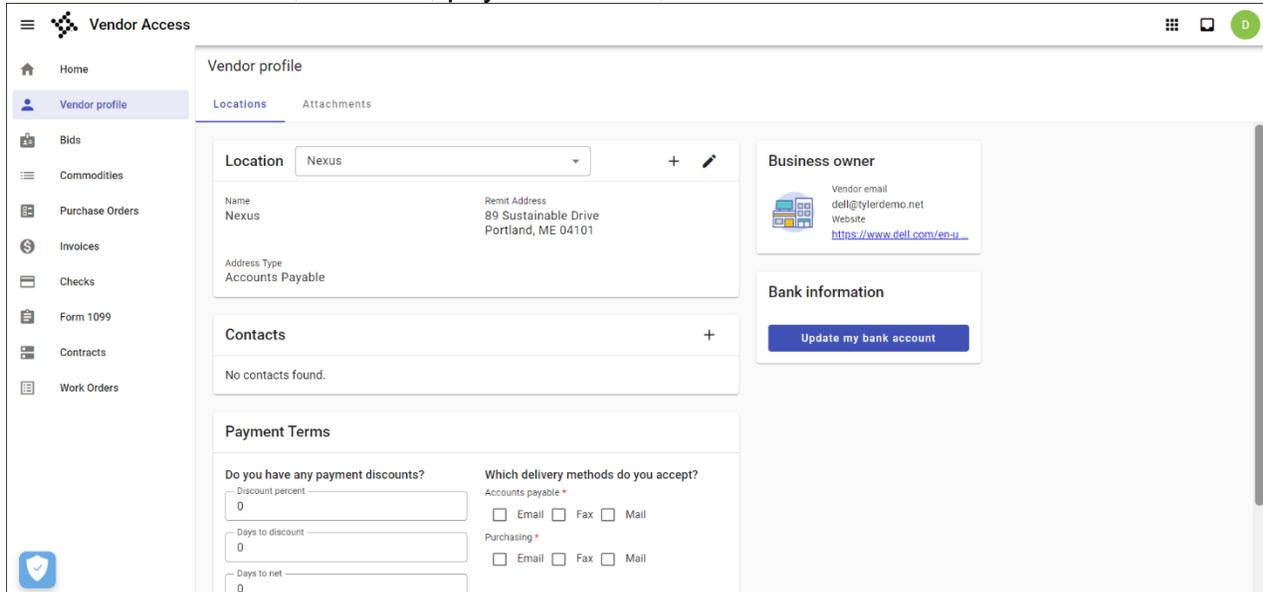
To request a PO or contract payment, purchase orders and contracts must exist in the system.

The invoice does not appear in the vendor's list of submitted invoices in Vendor Access until it is formally accepted and processed according to Victoria's procedures.



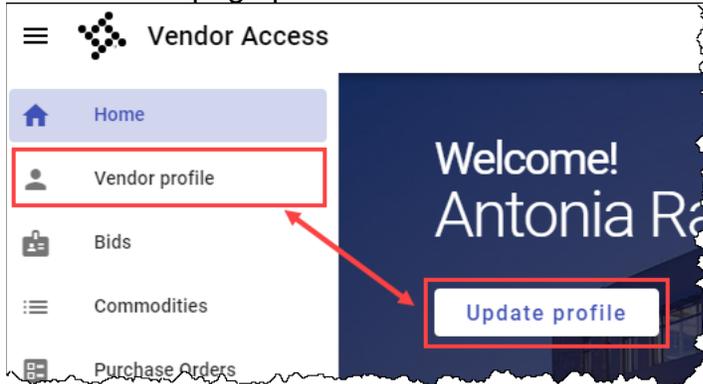
Vendor Profile

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



Maintaining Profile Information

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



Click Update My Bank Account to add or change bank account information.

The screenshot shows a 'Vendor profile' page with a modal dialog titled 'Update Bank Account'. The modal has the following fields and options:

- Routing number* (text input)
- Account number* (text input)
- Account type: Checking, Savings
- Buttons: Save, Cancel

In the background, the 'Bank information' section has a blue button labeled 'Update my bank account' which is highlighted with a red rectangle. Other sections visible include 'Locations' (Nexus), 'Business owner' (dell@tylerdemo.net), and 'Contacts' (No contacts found).

The View option allows you to show or hide bank account information for privacy and security.

This close-up shows the 'Bank information' section with a red box around an eye icon, indicating a visibility toggle. The section contains the following fields:

- Routing number
- Account number
- Account type
- Update my bank account button

Contacts

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



information in the system.

The screenshot shows a web interface with a 'Contacts' tab on the left and an 'Add Contact' dialog box on the right. The 'Contacts' tab displays 'No contacts found.' The 'Add Contact' dialog box has a title bar with a close button (X) and a plus sign (+) button. A red arrow points to the plus sign button. The dialog box contains the following fields:

- Full Name* (text input)
- Type* (dropdown menu)
- Phone* (text input)
- Mobile Phone (text input)
- Email* (text input)
- Comments (text area)

At the bottom of the dialog box are 'Cancel' and 'Save' buttons.

Attachments

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

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



Purchase Orders

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

Purchase Orders

My purchase orders

Last 7 Days Last 30 Days

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

Filter number Filter description Filter open amt Filter total amt Filter status

Rows per page: 25 1-1 of 1

Overview

You have 1 open PO's

Open amount \$2,375.00

Total amount \$2,375.00

Amounts as of Jun 16, 2021

Clicking the arrow for a purchase order provides additional details.

Purchase Orders

My purchase orders

Last 7 Days Last 30 Days

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

Filter number Filter description Filter open amt Filter total amt Filter status

Vendor Access

Purchase Order #20075809

Summary

Addresses

Bill To: Central Location Building, 370 US Route 1, Falmouth, ME

Ship To: Building 370 Location, 370 US Route 1, Falmouth, ME

Purchase order balance

Subtotal	\$2,375.00
Tax	\$0.00
Amount paid	(\$0.00)
Open amount	\$2,375.00

Available amount

\$2,375.00

Submit Invoice

Details

Issue date: 06/16/2021

Line items (1)

Number	Description	Quantity	Open Amount	Total Amount
1	Plow Post Office Parking Lot	20.00	2375.00	2375.00

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



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

Invoices

Clicking Invoices provides the vendor's submitted invoices.

Number	Description	Total Amount
21220400	Fix Pot Holes Along Main Stree	1500.00
21220401	Repair Potholes	2750.00

Number	Amount	Actions
989	125.00	
8967	125.00	
1245	125.00	
123456	.00	
123456	.00	
123	2375.00	
123	2375.00	



Checks

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

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

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

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



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

My Checks

Last 7 Days Last 30 Days Filter

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

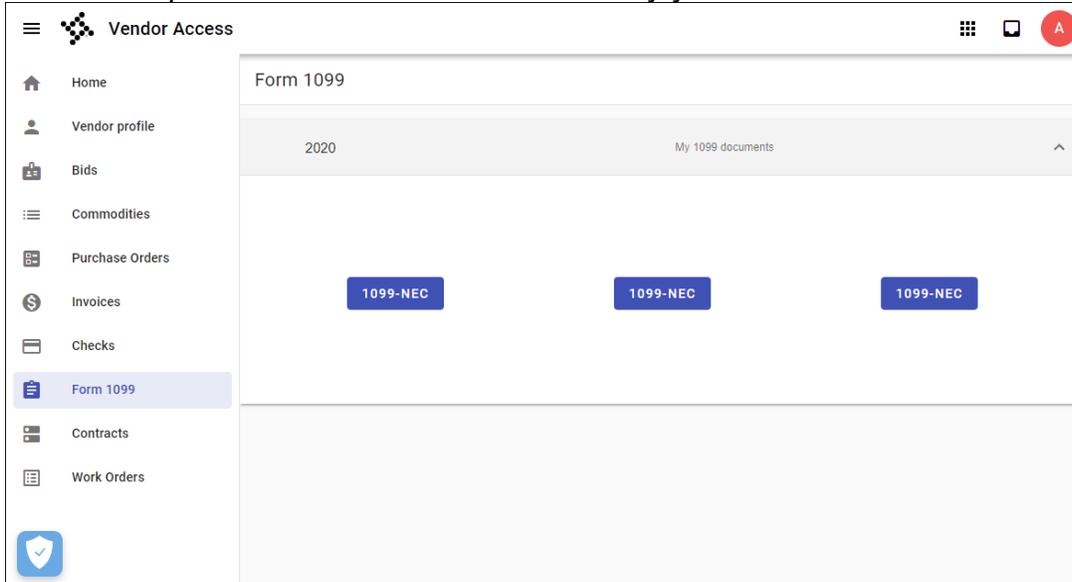
 Invoice Number: 21220098
Description: Supplies for line operations
Amount: \$30.00

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

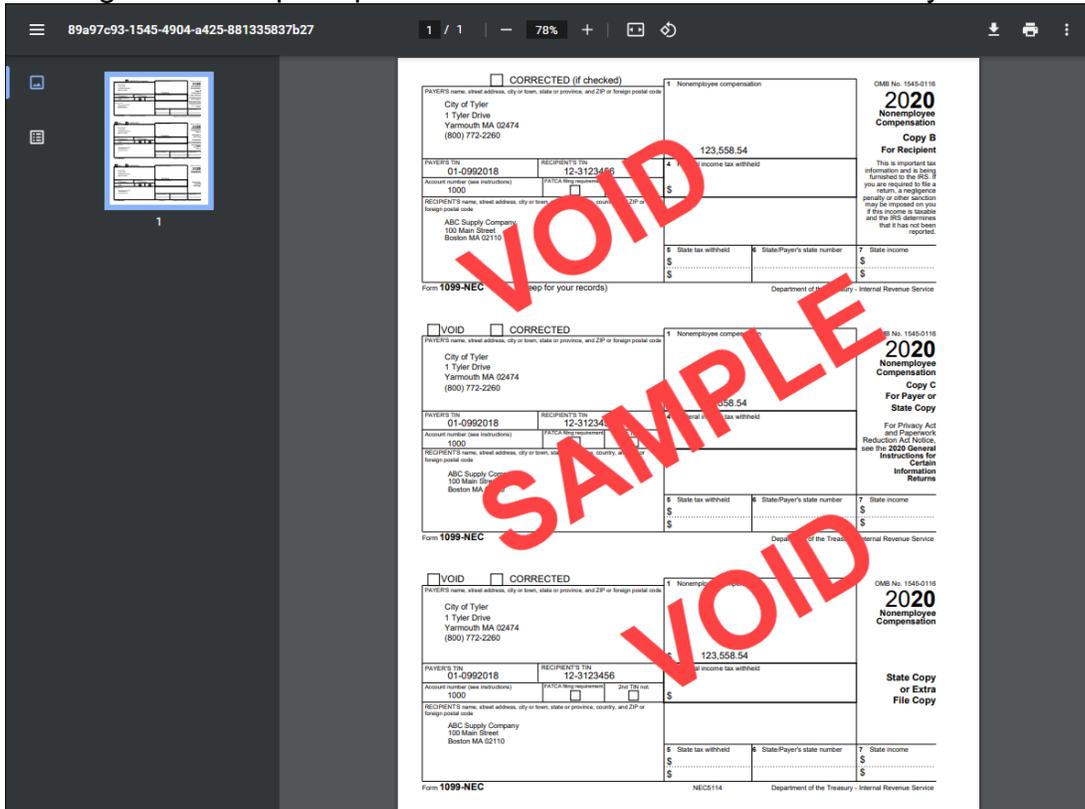


Form 1099

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

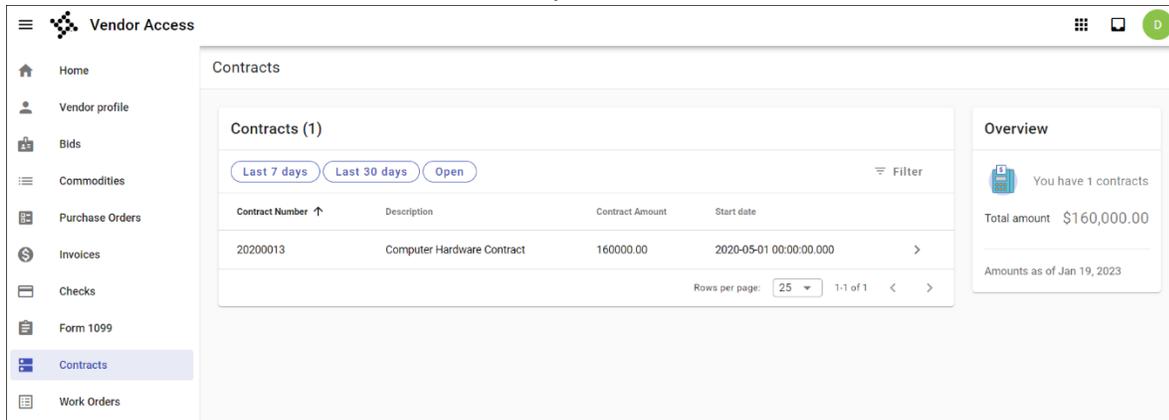


Clicking the 1099 option provides the vendor's 1099 form for that year.



Contracts

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



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

