

## Vendor Self-Service instructions – New Vendors

The City of Allen is happy to announce our new Vendor Self Service portal. Vendor Self Service provides web-based access to your company’s vendor record with the City of Allen. VSS allows vendors to view 1099 information, purchase orders, invoices, contracts, and checks.

Existing vendors will need their Vendor ID number to register. If you are an existing vendor, please follow a separate set of instructions on the City of Allen’s Website under Business> Purchasing.

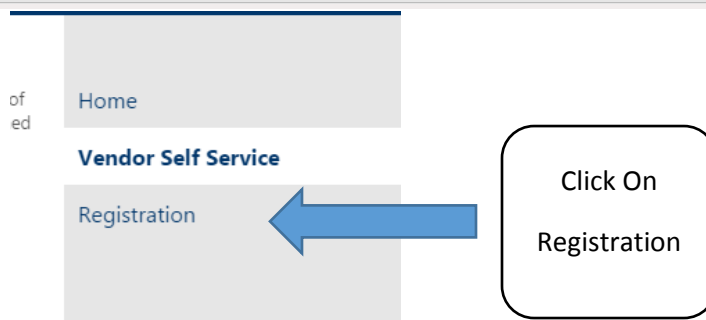
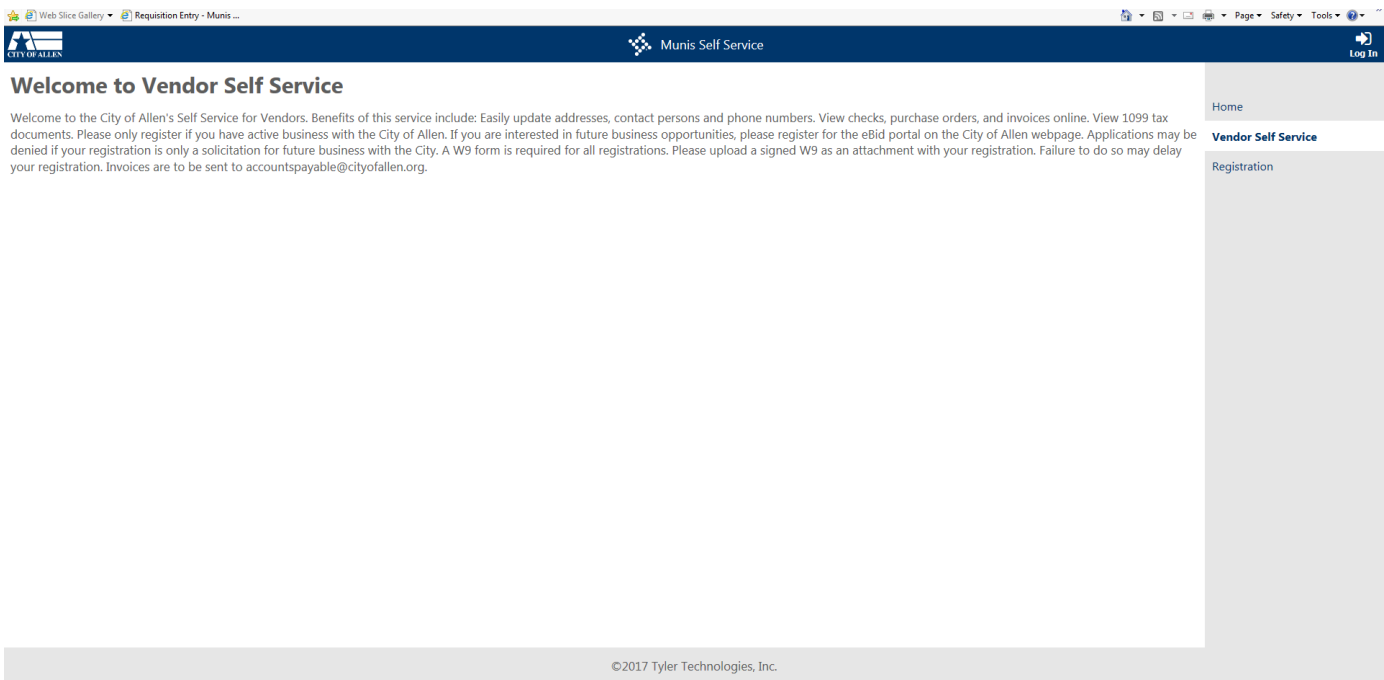
IMPORTANT: Enter all information in CAPS.

If you experience any difficulties with Vendor Self Service or have any questions please contact [purchasing@cityofallen.org](mailto:purchasing@cityofallen.org).

To register, you must have a copy of your current W9 form ready to upload. Obtain a copy of a W9 to fill out at : <https://www.irs.gov/pub/irs-pdf/fw9.pdf?portlet=103>

### STEP 1: Create a log-in and password

1. Click on “Registration” on the right side of the screen.



## Vendor Self-Service instructions – New Vendors

2. Create a user ID and password. This will be needed later by anyone within your organization who will be accessing VSS.
3. If you have never done business with the City before, ignore the “EXISTING VENDORS ONLY” boxes.
4. Type the validation numbers that appear in the box and then click “Continue”.



### New Vendor Registration

#### Create user ID and password

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User ID (between 1 and 100 characters) \*

Re-type user ID \*

Password (between 7 and 15 characters) \*

Re-type password \*

Password hint \*

Enter these validation numbers into the box below them

7584

#### EXISTING VENDORS ONLY

You must complete the following for initial registration.

Vendor ID

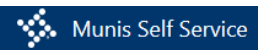
FID/SSN (Enter without dashes)

**Continue**

## Vendor Self-Service instructions – New Vendors

### STEP 2: Company Information

1. Fill in your company's information as it appears on the W9. For individuals, this must be the full name on your income tax returns.
2. Enter a DBA (Doing Business As name) if applicable. The DBA is the name you want printed on payment checks if different from the Company Name.
3. Enter the address that appears on the W9. Additional remittance addresses can be added in the next steps. If you do not have additional addresses, check the 'Send remittances to the above name and address' box.



### New Vendor Registration

✔ Your User ID and password have been successfully set. Please continue with the registration process. ⓧ

#### General information

[Help](#)

\*Company Name

(line 2)

(line 3)

(line 4)

Doing business as  
(if different from above)

Foreign Entity

\*Address

(line 2)

(line 3)

(line 4)

\*City

\*State (abbreviation)

\*Zip

## Vendor Self-Service instructions – New Vendors

<p>Form <b>W-9</b> (Rev. August 2013) Department of the Treasury Internal Revenue Service</p>	<h3>Request for Taxpayer Identification Number and Certification</h3>	
<p>Print or type See Specific Instructions on page 2.</p>	<p>Name (as shown on your income tax return)</p>	
	<p>Business name/disregarded entity name, if different from above</p>	
	<p>Check appropriate box for federal tax classification:</p> <p> <input type="checkbox"/> Individual/sole proprietor              <input type="checkbox"/> C Corporation              <input type="checkbox"/> S Corporation              <input type="checkbox"/> Partnership              <input type="checkbox"/> Trust/estate         </p> <p> <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ►         </p> <p> <input type="checkbox"/> Other (see instructions) ►         </p>	
	<p>Address (number, street, and apt. or suite no.)</p>	<p>Requester's name a</p>
	<p>City, state, and ZIP code</p>	
	<p>List account number(s) here (optional)</p>	

**Business name and address as it appears for IRS tax returns.**

- Please enter a general e-mail address for your company. If the password is forgotten or if an associate leaves your company, this will ensure password re-sets will be sent to a general company e-mail. (e.g. [accountspayable@mycompany.com](mailto:accountspayable@mycompany.com) or [sales@mycompany.com](mailto:sales@mycompany.com)). Additional contacts can be added later.

\*E-Mail

## Vendor Self-Service instructions – New Vendors

- Select your Vendor type.

\*E-Mail

Web site

\*Vendor Type

**Minority Business Entity (MBE)**

Select Type...  
 Individual  
 Corporation  
 Employee  
 Other than Corporation  
 Local, State, & Federal  
 Exempt

Enterprise

**Individual** = using your social security number on your W9 for tax filing purposes with the IRS. If you are an instructor teaching classes, please select this option.

**Corporation** = Corporation as indicated on the W9

**Employee** = do not select this option

**Other Than Corporation** = LLC, partnership, LP, Disregarded entity

**Local, State & Federal** = Cities, Counties

**Exempt** = non-profit, trust, 501(C)(3), Association/membership

- If you have Minority Business Enterprise classifications and certifications, please add them here. Click 'manage' to add certifications. Then 'add new certificate'. Click 'changes complete' when finished.

### New Vendor Registration Manage MBE Classification Certificates

#### General information

[Help](#)

#### Selected MBE Classification

**Serial ID** 0  
**Description** General

[Add new certificate](#)

#### Existing Certificates

There are no certificates associated with this MBE Classification

**Changes Complete** **Cancel All**

### New Vendor Registration

#### General information

[Help](#)

#### Selected MBE Classification

**Serial ID** 0  
**Description** General

[Add new certificate](#)

#### Existing Certificates

There are no certificates associated with this MBE Classification

#### Certificate Details

**Agency \*** (300 character limit)  300 remaining

**Issue Date \***


**Expiration Date \***

**Notes** (300 character limit)  300 remaining

**Done** **Cancel**

## Vendor Self-Service instructions – New Vendors

- The FIN/SSN number must match the W9. For individual instructors who are not associated with a company, this is your Social Security Number.



Geographic Select Type... ▼

Send remittances to the above name and address

\*E-Mail

Web site

\*Vendor Type Select Type... ▼

**Minority Business Entity (MBE)**

Is Minority Business Enterprise

MBE Classifications (select all that apply) 
 General    0 certifications    [manage](#)

**Enter a Federal Tax ID Number or Social Security Number**

\* ▼

\*FID/SSN

\*Re-type FID/SSN

Your preferred payables delivery method(s).  Mail

Your preferred purchasing delivery method(s).  Mail

**Continue**



A TIN is a Taxpayer Identification Number, also known as the FIN, Federal Identification number from the W9 form:

Part I Taxpayer Identification Number (TIN)																																																														
<p>Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3.</p> <p><b>Note.</b> If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="10" style="text-align: left; padding: 2px;">Social security number</th> </tr> <tr> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> </tr> <tr> <td colspan="4"></td> <td style="text-align: center;">-</td> <td colspan="2"></td> <td style="text-align: center;">-</td> <td colspan="2"></td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="10" style="text-align: left; padding: 2px;">Employer identification number</th> </tr> <tr> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> </tr> <tr> <td colspan="4"></td> <td style="text-align: center;">-</td> <td colspan="6"></td> </tr> </table>	Social security number																								-			-			Employer identification number																								-						
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- The default delivery method is 'Mail' and must be selected.

## Vendor Self-Service instructions – New Vendors

### STEP 3: Addresses

1. Add any additional company addresses. The Primary address from the W9 must be entered again in addition to other addresses you will use for remit purposes.
2. Click on “add” to add a new address.
3. If you have a DBA name for a remittance address, you may use that DBA name as the company name. This will ensure payment checks to that address reflect the name needed on the printed check.

### New Vendor Registration

Address information

Step 3

Addresses

add

Name/DBA

Address

Is Default

Continue

### General Vendor Contacts

<b>*Address Type</b>	<input type="text" value="General"/>
<b>*Company Name</b>	<input type="text" value="PCAT"/>
(line 2)	<input type="text"/>
(line 3)	<input type="text"/>
(line 4)	<input type="text"/>
Doing business as (if different from above)	<input type="text"/>
<b>*Address</b>	<input type="text" value="PO BOX 100"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
<b>*City</b>	<input type="text" value="ALLEN"/>
<b>*State</b>	<input type="text" value="TN"/>
<b>*Zip</b>	<input type="text" value="75013"/>
County	<input type="text" value=""/>
Country	<input type="text"/>

## Vendor Self-Service instructions – New Vendors

After you have added multiple addresses, the screen should appear as follows:

### Address information

#### Addresses

[add](#)

Name/DBA	Address	Is Default	
PURCHASING COMPANY OF ALLEN TX PCAT	123 ALLEN WAY APT 500 ALLEN TN 75013 Fax #:214-000-0000	Y	<a href="#">change</a>
PCAT	PO BOX 100 ALLEN TN 75013 Fax #:214-000-0000	N	<a href="#">change</a>

**Continue**

Leave the primary address from the W9 as the default address. Continue to the next step.

## STEP 4: Contacts

1. Add company contacts. Examples include sales agents, accounts payable departments, customer service hotlines, etc. To add a contact, click “NEW CONTACT”.

### General Vendor Contacts

Step 4

#### Address Contacts

Type	Name	Description	Email
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**Continue**

**New Contact**



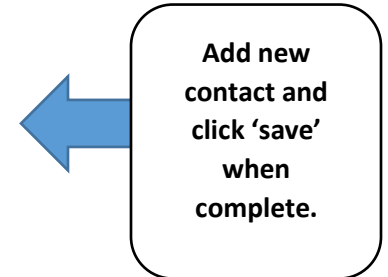


## Vendor Self-Service instructions – New Vendors

### General Vendor Contacts

#### Contact Person

*Contact Type	GENERAL - General Contacts	<input type="checkbox"/>
*Name	JOHN SMITH	
Description	SALES	
*Phone	214-100-1000	
Text	<input type="text"/>	<input type="checkbox"/> Opt In
Fax	214-100-1111	
E-Mail	PURCHASING@CITYOFALLEN.ORG	<input type="text"/>



**Save** **Cancel**

Review the contacts you have added:

## New Vendor Registration

### General Vendor Contacts

#### Address Contacts

Type	Name	Description	Email	Phone	Text	Fax
GENERAL - General Contacts	JOHN SMITH	SALES	PURCHASING@CITYOFALLEN.ORG	214-100-1000	<input type="checkbox"/>	214-100-1111
ACCOUNTS PAYABLE - Accounts Payable Contacts	AP DEPARTMENT HOTLIN		AP@CITY.ORG	214-111-1111	<input type="checkbox"/>	

**Continue** **New Contact**

Save and Continue to the next step.

## Vendor Self-Service instructions – New Vendors

### STEP 5: Commodity or Service

1. If you would like to add categories of business, select all that appl. Then click 'Add' and then continue to the next step.

Search for your commodities/services, then select and "**Add**". Search again and repeat as necessary. Click "**Finished**" when done.

Keyword(s) or commodity code  
(first 3 or more digits)



[List all commodities/services](#)

**40 Found**

[1-10](#) | [11-20](#) | [21-30](#) | [31-40](#)

Select All	Code	Description
<input type="checkbox"/>	100	ADVERTISING
<input type="checkbox"/>	110	ATHLETIC EQUIPMENT
<input type="checkbox"/>	120	AUDIO VISUAL EQUIPMENT AND ACCESSORIES
<input type="checkbox"/>	130	BOOKS & PUBLICATIONS
<input type="checkbox"/>	140	BUILDING MATERIALS
<input type="checkbox"/>	150	CHEMICALS, FERTILIZERS & PESTICIDES
<input type="checkbox"/>	160	CLOTHING & UNIFORMS
<input type="checkbox"/>	170	COMPUTER HARDWARE, SOFTWARE & ACCESSORIES
<input type="checkbox"/>	180	CONSTRUCTION SERVICES
<input type="checkbox"/>	190	ELECTRICAL EQUIPMENT

**Add**

## Vendor Self-Service instructions – New Vendors

### STEP 6: Review

1. Review all the detail of your registration. If you need to make a change, click 'change' in blue above the fields.

**Review Screens, check all your information.**

#### Address Information

[change](#)

Name/DBA	Address	Default
PURCHASING COMPANY OF ALLEN TX PCAT	123 ALLEN WAY APT 500 ALLEN, TN 75013 Fax:214-000- 0000	Y
PCAT	PO BOX 100 ALLEN, TN 75013 Fax:214-000- 0000	N

#### Accounts Contacts

[change](#)

Type	Name	Description	Email	Phone	Text	Fax
GENERAL - General Contacts	JOHN SMITH	SALES	PURCHASING@CITYOFALLEN.ORG	214-100-1000		214-100-1111
ACCOUNTS PAYABLE - Accounts Payable Contacts	AP DEPARTMENT HOTLIN		AP@CITY.ORG	214-111-1111		

## Vendor Self-Service instructions – New Vendors

- At this step you may add attachments at the bottom of the screen. The only required attachment is a W9. If you need a copy of a blank W9 form, contact [purchasing@cityofallen.org](mailto:purchasing@cityofallen.org) or visit the IRS website at:

<https://www.irs.gov/pub/irs-pdf/fw9.pdf?portlet=103>

**Commodities**

[change](#)

160 CLOTHING & UNIFORMS

**Attachments**

Attachment Type	Description	Required	Attachments	
General	Documents are not assigned to a type		(0)	<b>Attach</b>

**Register** **Cancel**

(Only click Register once and refrain from using your browser's Back or Refresh button.)

**Click "attach" to add documents to your registration**

To add Attachments, click 'Browse' and select a file from your computer. The default is general. After you have attached your document, click 'Continue'.

Additional types of attachments that can be added include documents like a Certificate of Insurance or professional licenses and certifications.

PURCHASING COMPANY OF ALLEN TX  
PCAT

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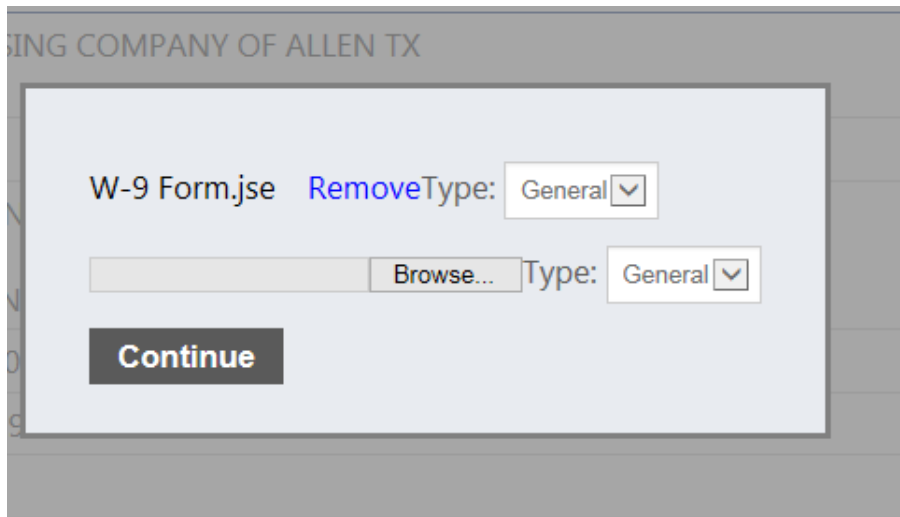
123 ALLEN  
APT 500  
ALLEN, TN  
214-000-0  
12-3456799

purchasing@cityofallen.org

**Browse...** Type: General

**Continue**

## Vendor Self-Service instructions – New Vendors



Attachments can now be seen at the bottom of the 'Review' step.

### Attachments

Attachment Type	Description	Required	Attachments
General	Documents are not assigned to a type		W-9 Form.jse (Not yet saved) <span style="float: right;"><a href="#">Attach</a></span>

[Register](#) [Cancel](#)



**When finished, click “Register”.**

## Registration Complete

Registration has been submitted to the City of Allen for review and acceptance. Any missing documents or inaccurate information may delay your registration. If you do not have future planned business or active business with a City department, your registration may be rejected or put on hold until further notice. Registration does not guarantee business with the City.

### New Vendor Registration

#### Registration Confirmation

 Registration has been completed. You will be contacted when your information has been reviewed. 

#### You can now:

- [Register for commodities/services and/or update your profile.](#)
- [Upload attachment documents to your profile.](#)

## Vendor Self-Service instructions – New Vendors

The yellow triangles next to a field indicate that the information is being reviewed for acceptance by the Purchasing Department. It is not an error.

### My Profile

#### General Information and Terms: Make Changes

*Company Name	PURCHASING COMPANY OF ALLEN TX
(line 2)	
(line 3)	
(line 4)	
Doing business as (if different from above)	PCAT
	<input type="checkbox"/> Foreign Entity
*Address	123 ALLEN WAY
(line 2)	APT 500
(line 3)	
(line 4)	
*City	ALLEN
*State (abbreviation)	TN
*Zip	75013
County	<input type="checkbox"/>
Country	
Fax Number	214-000-0000

## Vendor Self-Service instructions – New Vendors

### Self Service Account Information

Your online account will provide access to several documents. Profile information can be updated in the “My Profile” area. Updates will have to be approved by the Purchasing department after they are submitted before they become effective. Those fields may have a yellow triangle next to them during that period.

Contact [purchasing@cityofallen.org](mailto:purchasing@cityofallen.org) for any assistance with the Vendor Self Service portal.

