



New Hanover  
County Schools

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# Vendor Self Service User Guide

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## 1. Before you begin the registration process

Please have the following items ready in order to complete the registration process:

- Vendors with existing accounts: your New Hanover County Schools MUNIS Vendor number – this will be located on your vendor letter or email notification that you have received from NHCS prior to registration.
- Your Federal Tax ID number or Social Security Number.
- Your Bank Routing Number and Bank Account Number if payment will be electronic.
- Your updated W-9 form to attach as an electronic document.

**Important Note: Leaving a web page idle for too long before completing registration will force your session to time out. To avoid your session timing out, do not allow more than 10 minutes of idle time between each web page.**

## 2. Overview

This documentation covers the Vendor Registration process and Site Navigation for new and existing New Hanover County Schools vendors.

Vendor Self Service (VSS) provides vendors with web-based access to information stored in New Hanover County School’s database. The information is drawn from multiple areas, including Accounts Payable and Purchasing.

Using VSS, vendors can enter and maintain their contact and remittance information, payment terms, designated contact persons, and the commodity codes that represent the goods and services the vendor can provide.

A listing of the vendor’s current and prior 1099 data, purchase orders, invoices, and checks are available in VSS. This information is entered by NHCS and is available to vendors for inquiry purposes only.



## Vendor Self Service Users – New and Existing Vendors

Vendor Self Service requires vendors who exist in the NHCS database to register using the VSS website to gain access to their information. To successfully link your vendor VSS registration with the vendor record within the NHCS database, you must have access to your **Munis Vendor ID Number** assigned by NHCS. You will need this number to enter in the Vendor ID box during registration.

**NOTE:** this number was provided via email or mailed letter. If you feel you did not receive or misplaced this communication, contact our Purchasing or Accounts Payable department to receive a reminder.

New vendors who do not exist in the NHCS database can complete the registration process, but are granted limited access to VSS. When completed by a potential vendor, the registration process creates a new record in the NHCS database, which is pending approval. NHCS Purchasing will review the submission and then activate the record for use.

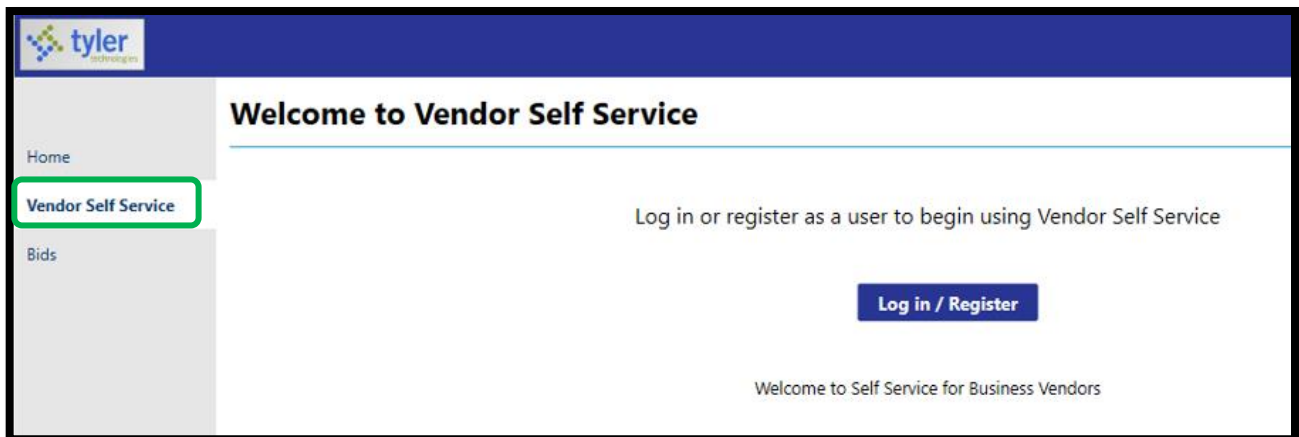
Prospective vendors who do not exist in the NHCS database, as well as existing vendors who have already been entered in the NHCS program in Munis but who have not previously accessed VSS, must register to gain access to Vendor Self Service.

### 3. Vendor Self Service – Welcome Screen/Logging In

To access the VSS website, go to:

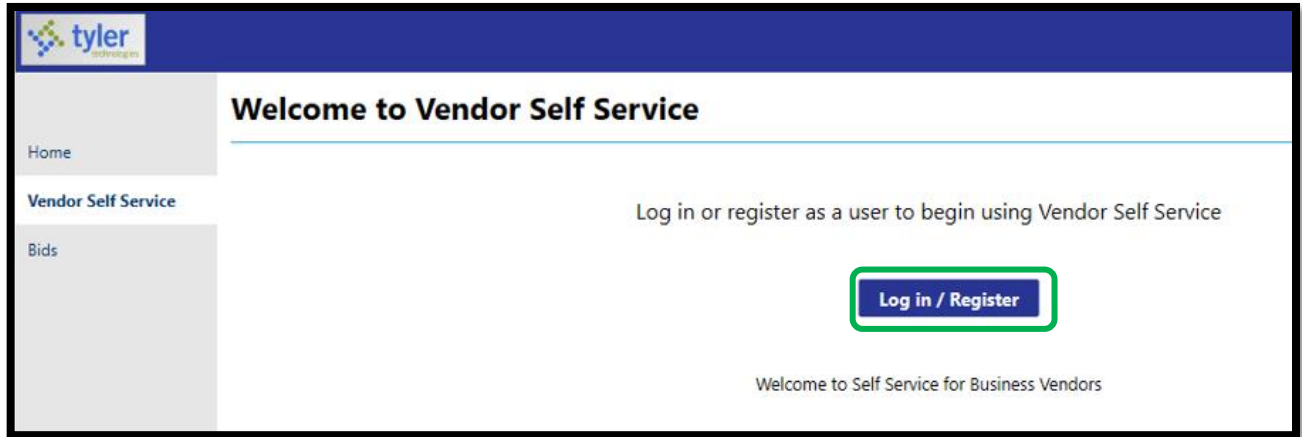
<https://nhcsk12ncvendors.munisselfservice.com/default.aspx>

Click on “**Vendor Self Service**” in the left menu, to access the **Welcome to Vendor Self Service page** to start the Registration process.



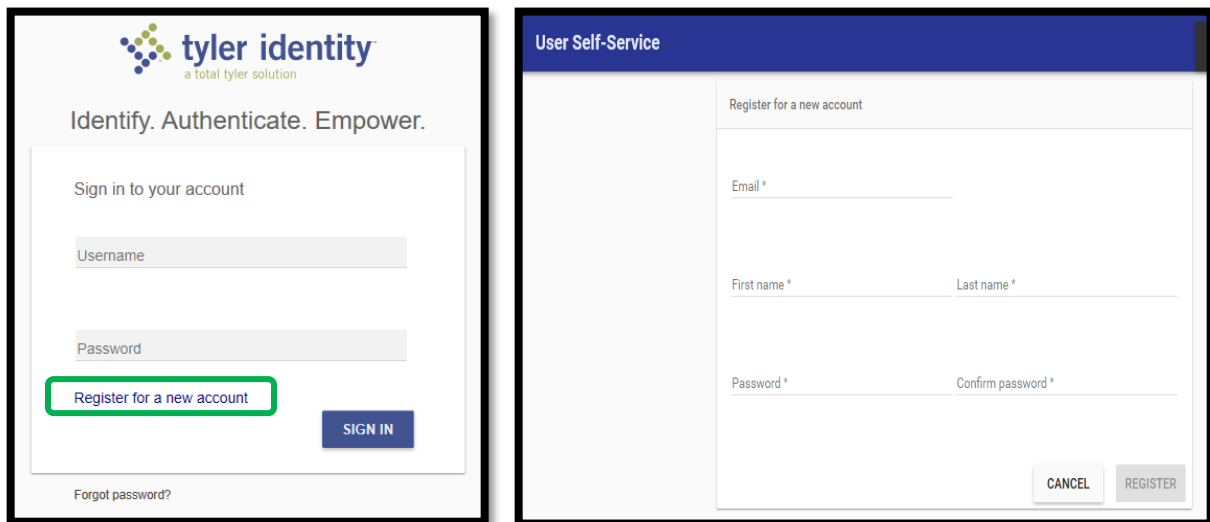


Click on the “**Log In/Register**” button to begin Registration process.



#### 4. Create User ID and Password

Use Tyler Identity Username/Password to login. If you are a vendor visiting the VSS site for the first time, you will need to register for a new account by clicking on the “Register for a new account” link.



The text boxes with a red asterisk\* are required.

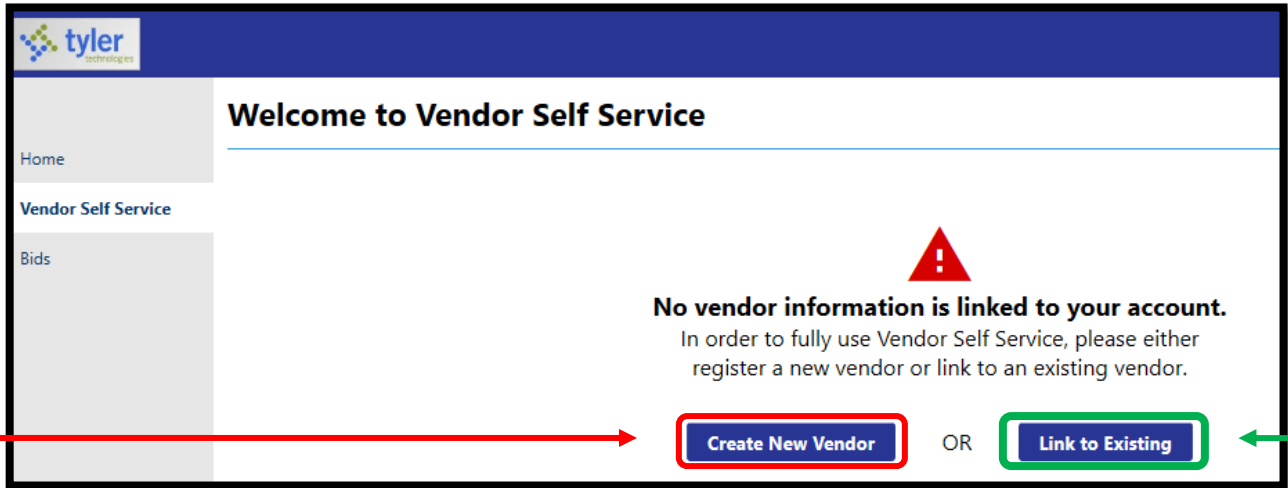
**NOTE:** A message will generate asking you to use a message sent to your email to complete registration. Your username will be the email address you used during registration.

You will then see the “Welcome to Vendor Self Service” screen.



**For Vendors with an existing NHCS account** - Choose the “Link to Existing” button to modify your existing vendor information, and then **proceed to step 5**.

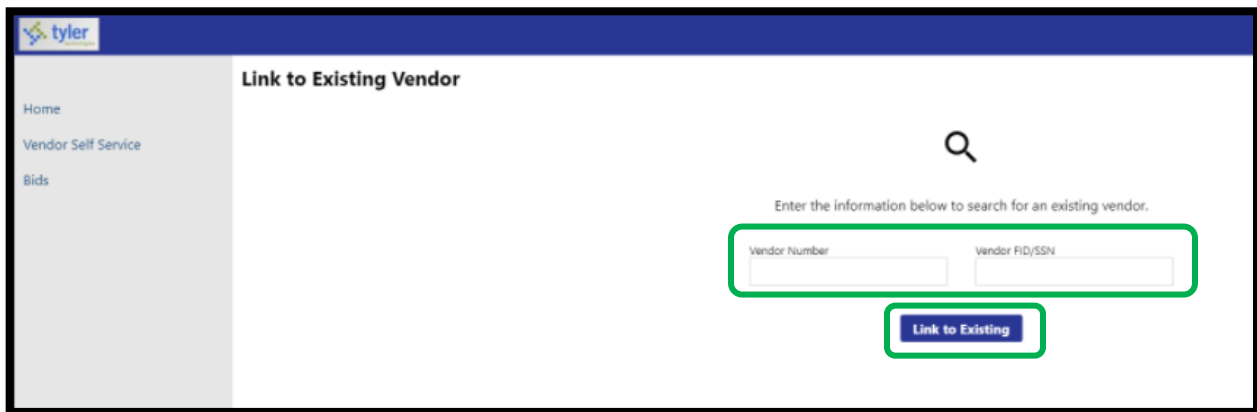
**For New Vendors** – Choose the “Create New Vendor” button then skip down to the **section 7 - “New Vendor Account Setup”**.



## 5. Vendors with an Existing Account

Fill in your **Munis Vendor Number** and your **FID/SSN (without dashes)**. Your vendor ID is your NHCS MUNIS vendor number which appears on your vendor letter or email you have received prior to registering.

Click on the “Link to Existing” button.





Fill out your contact information and click “Continue” to edit your existing profile and vendor information on file

**tyler**

Home  
Vendor Self Service  
Bids

**User Contact Information**

Contact Person

\* Contact Type  
Select Type...

\* Name

Description

\* Phone

Text  Opt in

Fax

\* E-mail

Continue


### 6. Editing Profile and Vendor information


You may now review your profile information and add any missing data using the pencil icons next to your profile name and vendor information. Please review this information for accuracy and update any outdated data, such as address, phone number, and email.

**tyler**

Home  
Vendor Self Service  
Vendor Information  
1099  
Bids  
Checks  
Invoices  
Purchase Orders  
Contracts

**Welcome to Vendor Self Service**

**Profile information**   
MARTHA M  
Phone

**Vendor information**   
MARTHA A M  
WILMINGTON, NC 28403  
NEW HANOVER COUNTY

**Announcements**  
Welcome to Self Service for Business Vendors

**Invoices** [Submit Invoices](#) [Search Invoices](#)  
Invoice information not found.

**Checks** [Search checks](#)  
Check information not found.

**Purchase orders** [Search purchase orders](#)  
Purchase order information not found.

**Contracts** [Search contracts](#)  
Contract information not found.

**Bids** [Search bids](#)  
Completion Status: All Submitted All Bids Status: All  
Bid information not found.



## 7. New Vendor Account Setup

If you are a new vendor requesting a new account with NHCS, and have clicked on the “Create New Vendor” button in Step 4 above, you will now have to set up your account information, beginning with the New Vendor Registration section.

**New Vendor Registration**

✔ Your User ID and password have been successfully set. Please continue with the registration process. <sup>Ⓜ</sup>

**Enter Vendor Registration Information**

**Company Information**

Company Name\*

Line 2 (OPTIONAL)

Line 3 (OPTIONAL)

Line 4 (OPTIONAL)

Doing business as (if different from above)

\*Vendor Type  
Select Type...

Foreign Entity

Send Accounts Payable checks to the above address

Send Purchase Orders to the above address

E-mail\*

Website

DUNS

California Permit Number

**Vendor Address**

Address\*

Line 2 (OPTIONAL)

Line 3 (OPTIONAL)

Line 4 (OPTIONAL)

City\*  State\*

Zip Code\*  County

Country  Geographic

Fax Number

**Minority Business Enterprise**

Minority Business Enterprise  
Minority Business Enterprise Classifications  
(select all that apply)

- American Indian
- Asian America
- Black
- Disabled Bus Enterprise
- Disabled Owned Bus Enterprise
- Disadvantaged
- General
- Hispanic
- NonProfit Work Center

Gender  Ethnicity

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

\*FID or SSN  
 FID  SSN

\*FID/SSN  \*Re-type FID/SSN

**Payment Terms**

Discount Percentage  Days to Discount  Days to Net

Your preferred payables delivery method(s).  
 Mail  Fax  E-Mail

Your preferred purchasing delivery method(s).  
 Mail  Fax  E-Mail

**Bank Information**

Bank Routing Number  Bank Account Number  Bank Account Type

Joe Smith 1234  
1234 Anystreet Court  
Anycity, AA 12345

Pay to the order of \_\_\_\_\_ Dollars

Bank Anywhere  
[ 123456789 ] 123456789123 | 1234

Routing Number      Account Number      Check Number

UPDATE
CANCEL



Complete this information. Anything with a red asterisk \* is required to complete your setup.

- Vendor type – choose “Standard”.
- Email and mailing address is required.
- A valid Federal ID# is required (FID)
- If electronic payment by ACH is preferred, fill out the Bank Information section.

Click “Continue” when finished.

If you have another address to add, you may do so here by clicking ‘Add’. If not, click “Continue”.

The screenshot shows the 'New Vendor Registration' page at Step 2, 'Address information'. On the left is a navigation menu with 'Home', 'Vendor Self Service', and 'Bids'. The main content area has a header 'New Vendor Registration' and a sub-header 'Address information' with 'Step 2' on the right. Below this is a section titled 'Addresses' with a table. The table has three columns: 'Name/DBA', 'Address', and 'Is Default'. Above the table is a link labeled 'add' which is highlighted with a green box. Below the table is a 'Continue' button.

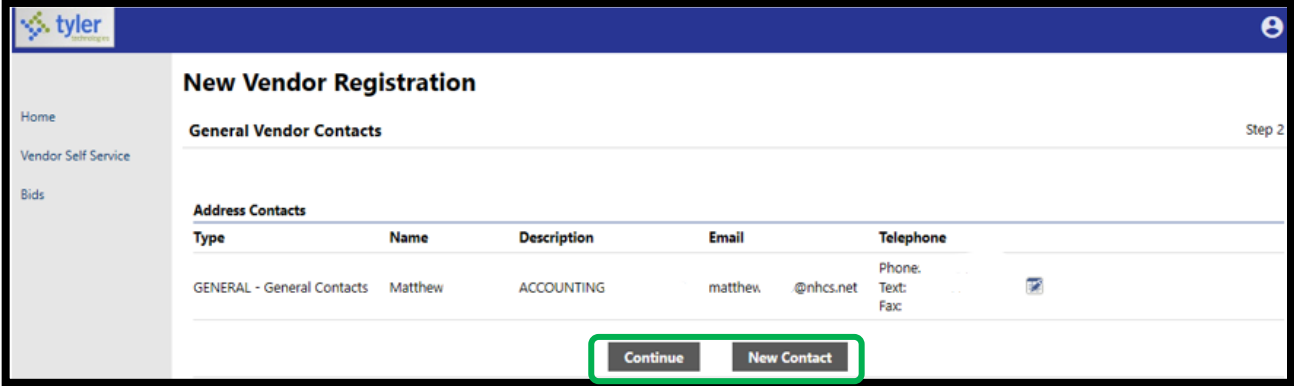
Fill out your User Contact information and then click “Continue”.

The screenshot shows the 'User Contact Information' page. On the left is a navigation menu with 'Home', 'Vendor Self Service', and 'Bids'. The main content area has a header 'User Contact Information'. Below this is a section titled 'Contact Person' with several fields: '\* Contact Type' (a dropdown menu with 'Select Type...' and a downward arrow), '\* Name' (a text input field), 'Description' (a text input field), '\* Phone' (a text input field), 'Text' (a text input field with an 'Opt In' checkbox), 'Fax' (a text input field), and '\* E-mail' (a text input field). At the bottom right of the form is a 'Continue' button highlighted with a green box.

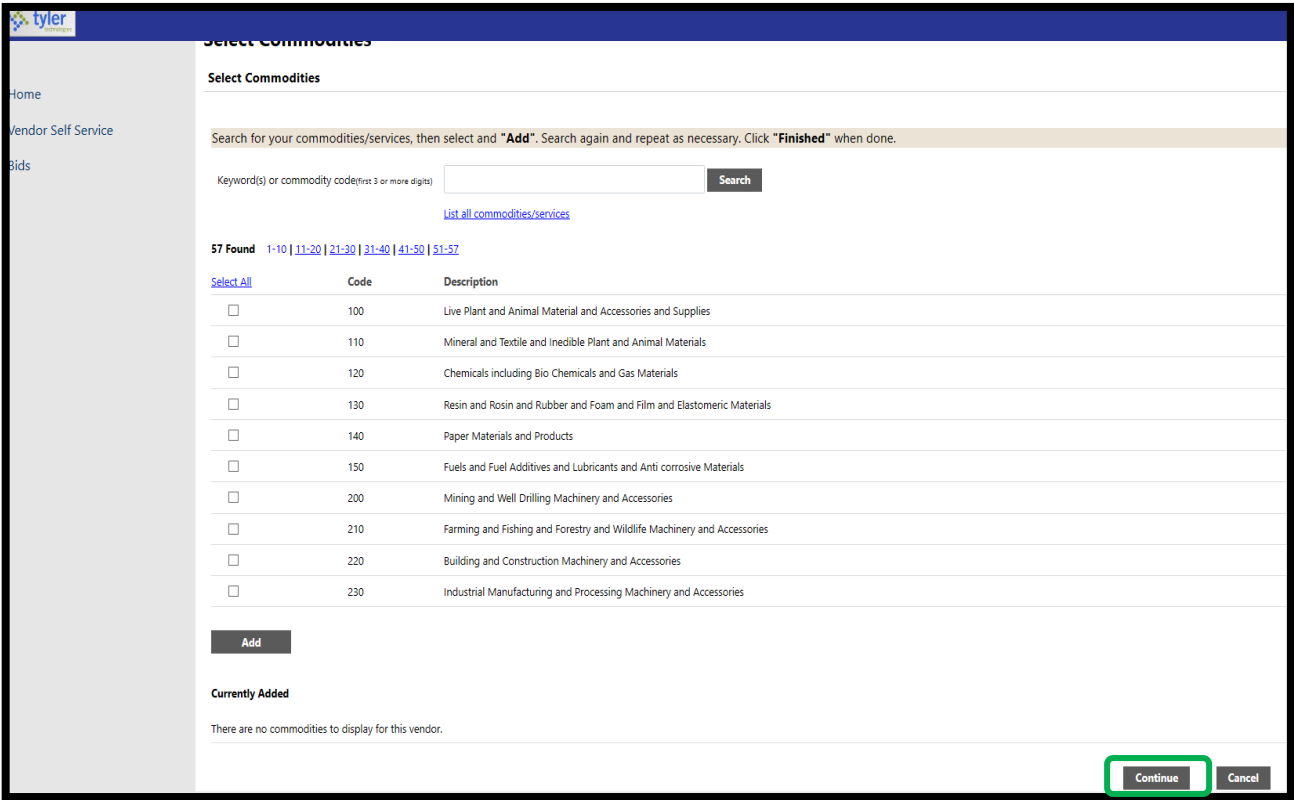




An additional contact can be added to the vendor record by clicking on the “New Contact” button, or click “Continue” to proceed.



On the next screen, commodity codes may be entered if desired, or this may be filled out at a later time. Click “Continue” to proceed.



Next, you will be asked to review your information for accuracy. Here you may edit any of your information, and also attach any documents to your account, such as your completed W-9 form. This is a required document, but can also be attached after registration under “Vendor Information” and “Attachments”.



Attachment Type	Description	Required	Attachments	
General	Documents are not assigned to a type		(0)	Attach
default	Vendor Attachment		(0)	Attach
W-9	Vendor W-9	✓	(0)	Attach

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

If you choose to attach your W-9 documentation later, you may receive a message when you click on “Register” that looks like this

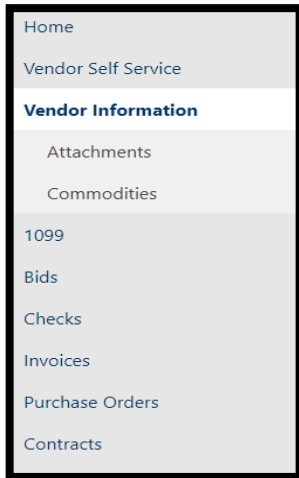
You may click on the “Submit” button to proceed with your registration and then attach your W-9 form at a later time. Be aware that the W-9 document is required to for account approvals. Delaying in attaching your W-9 document in VSS may result in a delay the approval process.

Once NHCS receives your vendor registration request, we will review your information. Once approved you will then become an active vendor in VSS and can conduct business with NHCS.

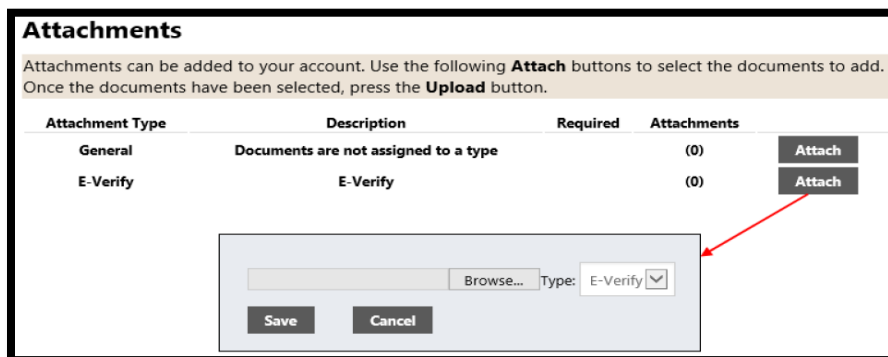


## 8. Vendor Navigation

For active vendor accounts, you may update and view your information in VSS at any time. Use the menu options on the left hand side of the screen in VSS to modify and view your information. Within any of the sections, you may update information by clicking on the “Change” link. Then click on the “Update” button to complete the update process.



- **Vendor Self Service** – this screen displays a dashboard of your vendor data, including your profile information and vendor information. See section 6. Above (Editing Profile and Vendor Information).
- **Vendor Information** – can also be updated and viewed here. This includes your email address, DBA name, main vendor address, MBE status, payment terms, bank information, and communication preferences.
- **Attachments and Commodities** – these sections can be reached once you are on the Vendor Information page. The links for Attachments and Commodities will then appear on the menu to the left. You may click on either link to update your Attachments, such as your W-9, and Commodity codes (if applicable). Attachments are added by clicking the “Attach” button on the Attachments page, which allows the vendor to navigate to a file or document to upload. The Attachments column indicates the number of documents attached for the attachment types. Vendors can attach an unlimited number of files.





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To remove an attachment, the vendor clicks the number of attachments indicator. On the attachments list, clicking the Delete (“x”) button removes the attachment.

**Attachments**

Attachments can be added to your account. Use the following **Attach** buttons to select the documents to add. Once the documents have been selected, press the **Upload** button.

Attachment Type	Description	Required	Attachments
General	Documents are not assigned to a type		(0) <span style="float: right;">Attach</span>
E-Verify	E-Verify		(1) <span style="float: right;">Attach</span>

DOCUMENT1.txt X ←

- 1099** - The 1099 page displays a listing of the vendor’s 1099 data for a selected year. The data includes the 1099 box code, a description of the code type, and the 1099 amount. Clicking a code type provides the Vendor 1099 Invoice Detail page. This page displays the general 1099 information, as well as a listing of 1099 invoice details, if they exist for the selected box code. Clicking Return to 1099 returns the vendor to the Vendor 1099 Information page.

**Vendor 1099 Information**

Year: 2016 ▼

**Selected 1099 Data**

Code	Description	Amount
F	FED INC TA	\$3,555.00

**Vendor 1099 Invoice Detail**

Box: F

Year: 2016

Amount: \$3,555.00

Description: FED INC TA

[1099 Invoice Detail](#)

AP Invoice	AP Check#	AP Check Date	AP Amount
5926	653327	09/14/2016	\$450.00
5928	6533287	10/17/2016	\$945.00

- Checks** - The Checks group provides a list of checks recently issued to the vendor by NHCS.

**\$2,460.00**

Last check: 11/17/2017

Recent checks

Date	Number	Amount	
11/17/2017	#6533288	\$2,460.00	<a href="#">details</a>
10/14/2017	#6533287	\$1,845.00	<a href="#">details</a>

**\$0.00**

Year to date

Using the Search Checks option, vendors can find additional check details using the invoice number, date or amount ranges, and status search criteria. Search Results for checks provides the check date, amount, check number, and status. Use the “View” option of an individual check to view additional details.



### Vendor Check Search

**Date (mm/dd/yyyy)**  
 Check date   
 or  
 Check date(s) from  to

**Amount**  
 Check amount   
 or  
 Amount(s) more than  but less than

**Number**  
 Check number   
 or  
 Check number(s) from  to

**Status**

- **Invoices** - The Invoices group provides vendor details for recent and submitted invoices. Vendors are only able to view invoices that are associated with their vendor ID.

**Invoices** [Submit invoices](#) [Search invoices](#)

\$452.99

Last invoice: 2/13/2017

Recent invoices			Submitted invoices		
Date	Amount	Status	Date	Amount	Status
2/13/2017	\$452.99	Held <a href="#">details</a>			

\$452.99

Year to date

The Search Invoices page allows searches by invoice number, date or amount ranges, and status.

### Vendor AP Invoice Search

**Invoice number**  (other search criteria will be ignored)

**Date**  
 Invoice date   
 or  
 Invoice date(s) from  to

**Amount**  
 Invoice Amount   
 or  
 Amount(s) more than  but less than

**Status**



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The Search Results page provides the invoice date, amount, invoice number, and status. When the vendor clicks “View”, VSS provides the Invoice Detail page, which includes additional information sorted by Vendor, Invoice, and Invoice Totals groups.

Invoices				
Search Results				
<a href="#">Modify Search</a>   <a href="#">New Search</a>				
4 Found				
Invoice Date	Amount	Invoice Number	Status	
3/9/2017	\$652.00	5998	In Review	<a href="#">View</a>

Invoice Detail	
Invoice Detail for Invoice: 5998	
<b>Vendor Information</b>	
Vendor ID	1131
Vendor Name	SMITH ELECTRIC
Vendor Address	44 FOURTH STREET CHICAGO , IL 60625
<b>Invoice Information</b>	
Status	Unpaid
Invoice Number	5998
PO Number	
Invoice Date	3/9/2017
Check Date	
Check Number	0
Voucher Number	226
Invoice Description	Service entry and mounting kit
<b>Invoice Totals</b>	
Gross Amount	\$652.00
Non Taxable	\$652.00
<b>Net Amount</b>	<b>\$652.00</b>

- **Purchase Orders** - Purchase Orders provides a list of recent purchase orders issued to the vendor from NHCS. The initial Search Purchase Orders page allows vendors to search by PO number, date, or PO total range.

Vendor Purchase Order Search	
PO number	<input type="text"/> (other search criteria will be ignored)
Contract number	<input type="text"/>
Status	Any Status <input type="button" value="v"/>
Date	
Date ordered	<input type="text"/>
or	
PO(s) ordered from	<input type="text"/> to <input type="text"/>
PO total	Equal to <input type="button" value="v"/> \$ <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>	



Search results include the purchase order number, contract number (if applicable), status, date orders, and total. The “View” option provides additional details for a specific purchase order.

**Purchase Order Search Results**

Search Results  
[Modify Search](#) | [New Search](#)

5 Found

<a href="#">PO Number</a>	<a href="#">Contract Number</a>	<a href="#">Status</a>	<a href="#">Date Ordered</a>	<a href="#">PO Total</a>	<a href="#">View</a>
20100015		Open	3/9/2017	\$288.00	<a href="#">View</a>

**Purchase Order Detail** [Return to previous view](#)

**Purchase Order Detail**

**PO #:** 20100015 **FY2017**

**Vendor**  
 SMITH ELECTRIC  
 44 FOURTH STREET  
 CHICAGO, IL 60625

<b>Bill To</b>	<b>Ship To</b>
3202 EAST 42ND STREET FALMOUTH, ME 04105	3202 EAST 42ND STREET FALMOUTH, ME 04105

<b>Phone Numbers</b>	<b>Reference</b>
Tel# 312-555-1212 Fax#	Contract: Requisition: 20100050

<b>Date Ordered</b>	<b>Vendor Number</b>	<b>Date Required</b>	<b>Shipping/Terms</b>	<b>Department/Location</b>
3/9/2017	1131			CENTRAL OFFICE

<b>Line</b>	<b>Description</b>	<b>Unit</b>	<b>Qty</b>	<b>Unit Price</b>	<b>Net Price</b>
1	Fluorescent tubes, 48"	EACH	60.00	\$4.80	\$288.00
<b>Open Amount</b>					<b>\$288.00</b>
<b>Purchase Order Total</b>					<b>\$288.00</b>

### 9. User Menu

You may access your user menu in the top right side of the screen. This gives you your:

- Account Settings – displays your login name, email address, and last successful login date
- Log Out option – use this to log out of the system
- Home screen – will return you to the main home screen