IPS VENDOR SELF SERVICE (VSS)

FOR NEW & EXISTING VENDORS

Contents

1 VENDOR SELF SERVICE OVERVIEW

Vendor Self Service (VSS) provides vendors with web-based access to information stored in IPS's Munis® database.

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

A listing starting from 7-1-2020, of your 1099 data, purchase orders, invoices, contracts and checks is available in VSS to vendors for inquiry purposes only.

Vendor Self Service Users

IPS requires vendors who exist in IPS's Munis database as well as new vendors to register using the VSS portal to gain access to their information.

To successfully link your company's VSS registration with IPS's Munis database records, VSS requires your IPS Vendor ID# and your company's Federal ID#. You will need to enter these numbers in the Vendor ID box and FID# box during registration.
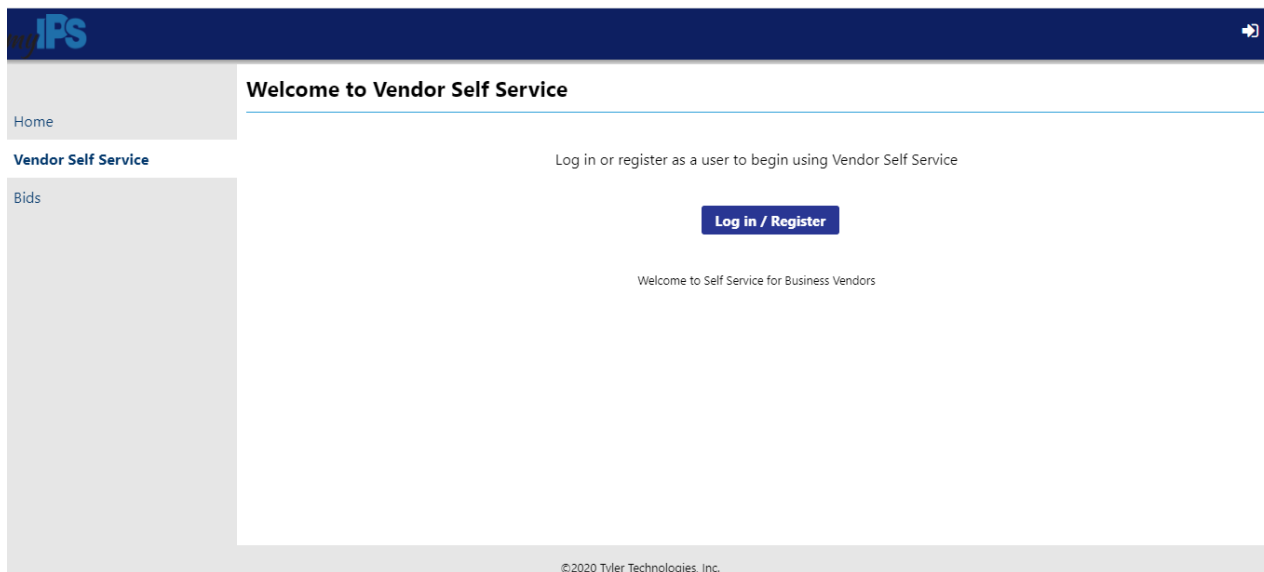
2 VENDOR REGISTRATION

New Vendors who do not exist in Munis database, as well as an **Existing Vendor** who have already been entered in the Vendor program in Munis but who have not previously accessed VSS, must register to access Vendor Self Service.

To begin registration, click on **Vendor Self Service** on the VSS home page.
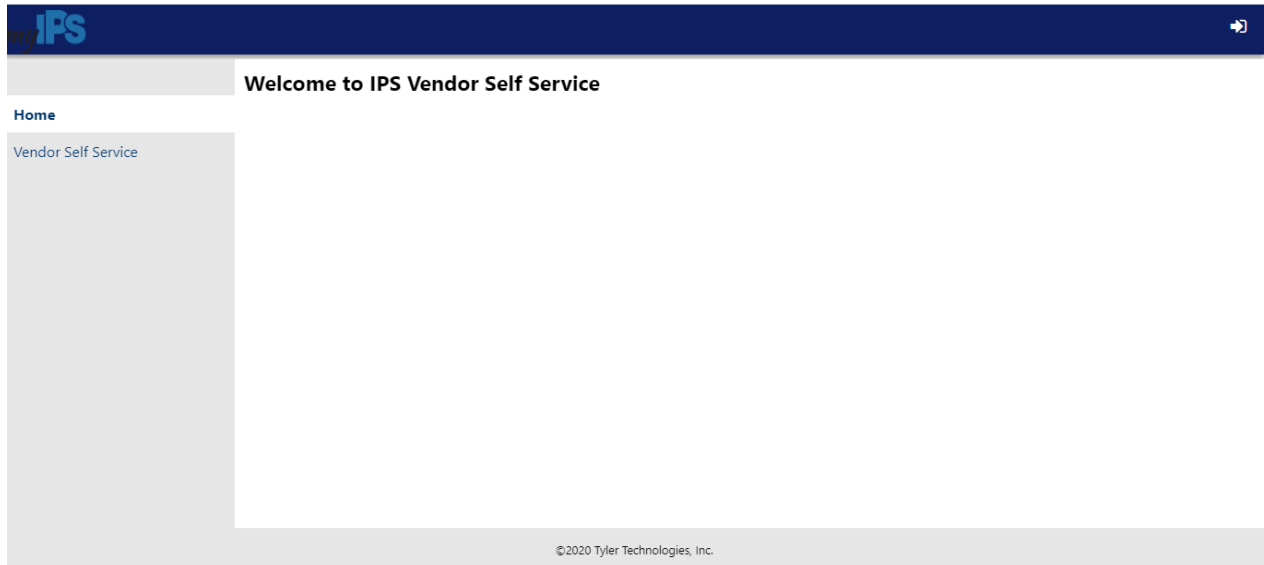
Vendors of either type, click on **Log in / Register**.

The sign in to community access services for Indianapolis Public Schools response will pop up.
For New Vendors: You will scroll to the very bottom of that page and click on Create an Account.
For Existing Vendors: You will log in with your VSS email address.

Create an account

Email

First name

Last name

Mobile phone   Optional

Password   👁

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Password can't be the same as your last 10 passwords

Sign up

Already have an account?

For New Vendors: You must enter a valid email address, along with name and phone number and create a password. After you click on **Sign up**, you will receive the following message "Registration Complete Congratulations! You're registered."

NOTE: *Email address entered on this screen will receive EFT advice and PO notifications. If you wish to have EFT/PO notifications sent to a different email, you will make that change under Vendor information. Your login email will not change.*

Registration complete

Congratulations! You're registered.

One last step. Click the confirmation link sent to **ipsvendor1@gmail.com**.

One last step: Click the confirmation link sent to your email address entered in VSS User Self Service. You cannot log in to VSS until you have received an email confirmation message and completed the confirmation process.

User Self-Service   SIGN IN

Email Confirmation

Enter your password *

••••••••

CANCEL   CONFIRM ACCOUNT

User Self-Service   SIGN IN

Email Confirmation

Your account has been confirmed. You may now sign in

If you have any questions, please email Purchasing@myips.org.

Once the email confirmation process is completed, return to VSS log in screen by clicking on link to VSS, there you can log into VSS to complete the registration process.

myIPS

Welcome to Vendor Self Service

Home

Vendor Self Service

Bids

Log in or register as a user to begin using Vendor Self Service

Log in / Register

Welcome to Self Service for Business Vendors

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Sign in to community access services for Indianapolis Public Schools.

G	Sign in with Google
	Sign in with Apple
	Sign in with Microsoft
f	Sign in with Facebook

OR

Email address

dickersonm@myips.org

☐ Keep me signed in

Next

Unlock account?   Help

Create an account

For Existing Vendors (Vendors already setup in IPS vendor database)**:** Click on **Link to Existing**. See page 11

For New Vendors: Click on **Create New Vendor**.

For New Vendors:

Click **Continue,** VSS provides the User Contact Information page

After you entered contact information, click **Continue**, the next New Vendor Registration page gathers the specific vendor details. Banking information is no longer added. You will be required to upload either a voided check or a bank letter providing your banking information in the Attachments section.

NOTE: Contact email address is only for information purposes.
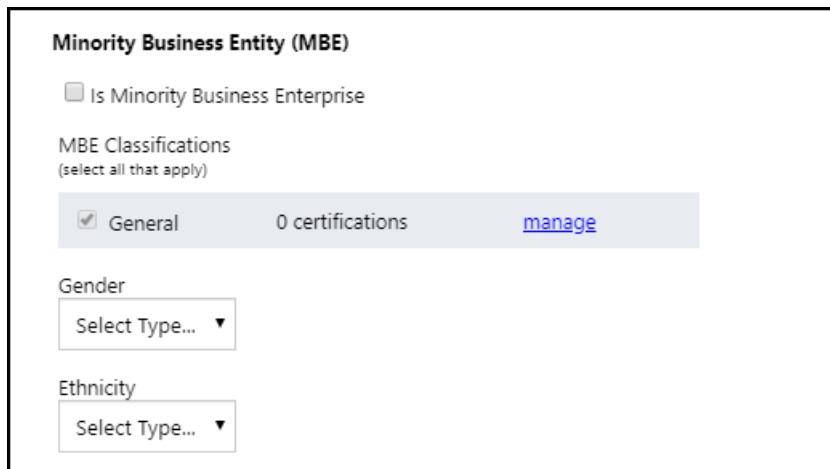
For New Vendors:

The New Vendor Registration page contains a Minority Business Entity (XBE) section that must be completed by minority business enterprise vendors. A minority business enterprise is typically defined as a business that is at least 51% owned and operated by an ethnic or gender minority.

For New Vendors:

These businesses are typically certified by a city, state, or federal agency.

When you click **Continue** and the registration is successful, VSS provides the Welcome to Vendor Self Service page. **See Page 15**

For Existing Vendors:

On Link to Existing Vendor page, enter your IPS vendor ID# and the FID# or SSN number associated with your IPS vendor record. Click on **Link to Existing** button.

The value entered in the FID/SSN box must match the value in your IPS Munis vendor record exactly.

This should also be used if you would like to add an employee to view your VSS profile. Please keep in mind that this access is unrestricted. They can view all information.

When you click **Link to Existing** button , VSS provides the User Contact Information page. Enter your information for each of the required fields. The description, text, and fax are optional fields. Click **Continue.**

NOTE: Contact email address is only for information purposes.
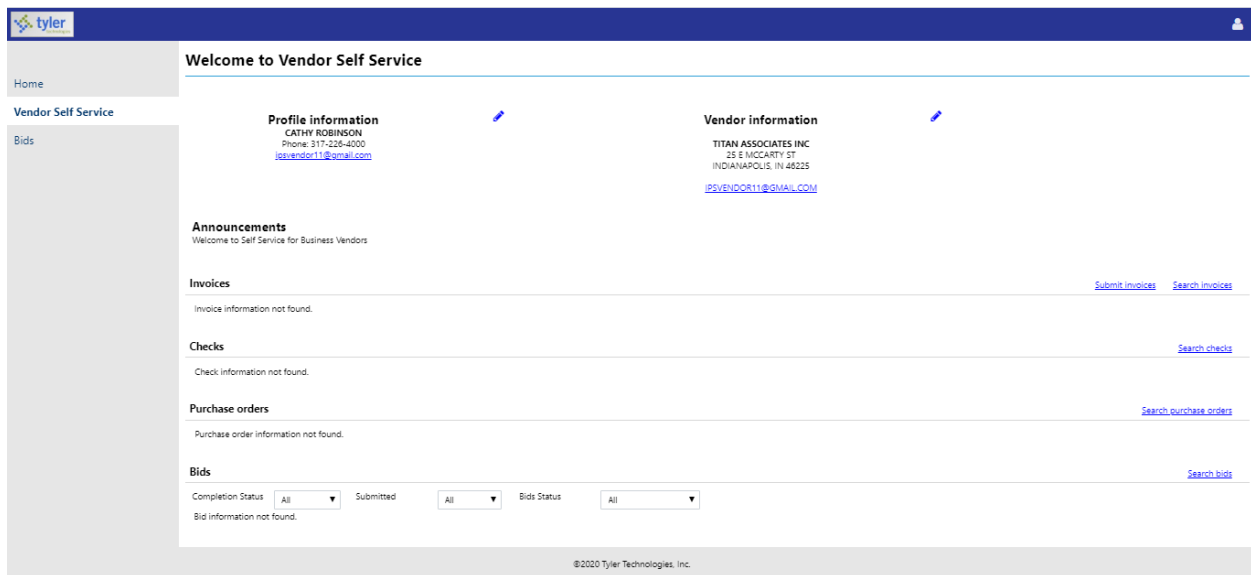
For Existing Vendors & New Vendor:

VSS provides the Welcome to Vendor Self Service page. You now have access to your Vendor Profile, Vendor Information,1099, Checks, Invoices, Purchase Orders, and Contracts options on the menu.

NOTE: New vendors only have access to the Home, Vendor Self Service, and Vendor Information options on the menu.

To view a summary of Vendor information, click on **Vendor Information** on menu or click on the **Pencil icon** to view Vendor Information.

3   VENDOR INFORMATION PAGE

A summary of your company's information shows general information, vendor address, bank information, contacts, and commodity information. IPS requires all vendor information fields are maintained and up to date. *This is where you can update your EFT/PO email.*

You can use the Change button for each category to add or update the information.

In the Commodities group, clicking **Add** allows you to identify the commodity groups for which your company provide items or services.

On the menu, clicking **Attachments** allows you to upload documents.
***A signed copy of your company's W9 is **required** to be attached at time of registration to avoid delay in approving vendor registration.*
**If you have entered banking information, A copy of a voided check or your bank letter must be attached to avoid delay in approving vendor registration.
 **A copy of your company's Certificate of Insurance (COI) must be attached, IF required.
See page 19 for instructions on attaching documents.

4 VENDOR SELF SERVICE HOME PAGE

The Vendor Self Service home page provides your vendor profile information and access to your company's 1099, checks, invoices, purchase orders, and contracts.

Clicking the login option in the header displays the following menu options:

- **My Account** – Opens the My Account page containing your vendor account information.
- **Log Out** – Logs the user out of Vendor Self Service.
- **Resources-** An old version of this document is also downloadable.

5 VENDOR NAVIGATION

On the Vendor pages, the headers for the individual information groups that display include options for searching and viewing related information.

Clicking **View Profile** in the Profile Information group or the My Profile option in the navigation menu displays the My Profile page. The My Profile page groups profile information by category. By clicking **Change**, you can update the information in that group.

The General Information group contains your vendor address and contact information, type and foreign entity status, minority business enterprise status and certifications.

General Information change	
Name/DBA	SMITH ELECTRIC
Entity	
Address	44 FOURTH STREET CHICAGO, IL 60625
Fax Number	
FID	55-7777777
E-Mail	dan.olson@tylertech.com
Web Site	info@smithelectric.biz
Vendor Type	EQUI - EQUIPMENT VENDOR
Geographic	
Foreign Entity	No
Is minority business enterprise?	No
MBE Classification(s)	
General	
No certificates were found for this classification.	
Discount Percentage	0.000%
Days to Discount	0
Days to Net	0
Bank Name	
Bank Account Number	
Bank Account Type	
Gender	
Ethnicity	

The Address Information group displays your vendor remittance address and contact information, while the Address Contacts group lists your contact people and information.

Address Information

change

Name/DBA	Address	Is Default

Address Contacts

change

Type	Name	Title	Email	Phone	Fax
ACCOUNTS PAYABLE	Susan Agouris	Accounting Office	info@mithelectric.biz	312-555-1212	

The Current Vendor Commodities group contains a list of commodity codes associated with your vendor account. You can remove commodities from the list by clicking the **Remove** link. The **Add** option allows you to add commodities to the list.

Commodities		
add		
Code	**Description**	
206	COMPUTER HARDWARE AND PERIPHERALS FOR MINI AND MAIN FRAME COMPUTERS	Remove
28525	Current Collection Equipment and Accessories, Electrical	Remove
28726	Circuit Cards	Remove
28782	Transmitters, Emergency Alarm Type (To incl. Equipment Operation Status Reporting)	Remove

5.1.1 Attachments

You can add attachments to your company's profile by clicking **Attachments** on the menu. The Attachments option is only available when viewing My Profile page.

Attachments are added by clicking the Attach button on the Attachments page, which allows you to navigate to a file or document to upload. The Attachments column indicates the number of documents attached for the attachment types. You can attach an unlimited number of files.

**It does appear that there is a current glitch with the upload process, you will want to click on the left continue button once you have selected your item for upload.

To remove an attachment, click on the number in the Attachment's indicator box. On the Attachments list, clicking the **Delete** button removes the attachment.

The uploaded files are also added to the vendor record in the IPS Vendor's program.

You cannot maintain your attachments in VSS once they have been uploaded.

5.1.2 Commodities

Clicking **Commodities** on the navigation menu displays the Vendor Commodities page.

Use the Search box to search for commodities by code or keyword. Alternatively, clicking List All Commodities/Services displays all commodity codes in the IPS Munis database. VSS displays the number of codes found during a search and updates the commodity table.

You can view commodities by group using the numbered group selections, or you can identify specific commodities by selecting individual check boxes. If you select an individual check box within a numbered group selection, VSS saves the value of each check box when you navigate between the groups of commodity codes.

Commodities	904 Found	1-10	11-20	21-30	31-40	41-50	51-60	Next		
1099										
	Select All	Code	Description							
Bids	☐	005	ABRASIVES							
Checks	☐	010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES							
Invoices	☐	015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES: CHEMICALS, INKS, PAPER, ETC.							
Purchase Orders	☐	019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES							

After identifying the applicable commodity codes, clicking Add causes VSS to add the selected commodity codes to your vendor profile and updates the Currently Added list. Clicking **Remove** removes the commodity from the group. When you complete the commodity code update, click Finished to save the changes and return to the My Profile page, where the Current Vendor Commodities group provides the full list of your company's associated commodity codes.

5.1.3 1099

The 1099 page displays a listing of your company'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 you to the Vendor 1099 Information page.

5.1.4 Bids

VSS is not meant to manage our potential vendors. Our current bids are managed by [Indigo Bonfire](#). This is where all bids and formal solicitations are released.

5.1.4 Checks

The Checks group provides a list of checks recently issued to your company by IPS.

Using the **Search Checks** option, you 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.

5.1.5 Invoices

The Invoices group provides vendor details for recent and submitted invoices.

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

The Search Results page provides the invoice date, amount, invoice number, and status. When you click **Details**, VSS provides the Invoice Detail page, which includes additional information sorted by Vendor, Invoice, and Invoice Totals groups.

The **Submit Invoices** option allows you to submit invoices to IPS directly from VSS. Our vendors are required to indicate a valid purchase order or contract number when submitting an invoice.

5.1.6 Purchase Orders

Purchase Orders provides a list of recent purchase orders issued to your company from IPS.

The initial Search **Purchase Orders** page allows you to search by purchase order number, date, or a purchase order total range.

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.

5.1.7 Contracts

Contracts provides contracts your company currently hold with IPS. The initial **Contracts Search** page allows you to search by a range of contract numbers or years.

Search results include the contract start date, number, and amount. The Details option displays the Contract Detail page for the selected contract.

Appendix A—Managing Minority Business Enterprise Certificates

To maintain XBE certifications, you can use the **Change** option on the My Profile page.

The Minority Business Entity (XBE) section contains the check boxes that indicate whether you are a Minority Business Enterprise, and if so, which classifications your company possesses.

The **Manage** option for each classification allows you to maintain the classification using the Manage MBE Classification Certificates page.

Clicking **Add New Certificate** refreshes the page to include the Certificate Details section. For new certificates, you must complete the Agency, Issue Date, and Expiration Date fields.

When you have finished entering data in the boxes, clicking **Done** saves the entry and displays the Make Changes page.

The Make Changes page includes message indicating that the new certificate is ready to be added to your vendor profile, but that the information will not be saved until your entire vendor profile is saved.

After entering, editing, or removing certificates for a classification, you can click **Changes Complete** to save the certificate entries or **Cancel All** to discard all the certificate information. Clicking **Changes Complete** returns you to the Make Changes page, where the Minority Business Entity section displays the updated certification count.

On the My Profile–Make Changes page, <u>you must click **Update** to permanently update your profile</u> with the certificate information.