Contents

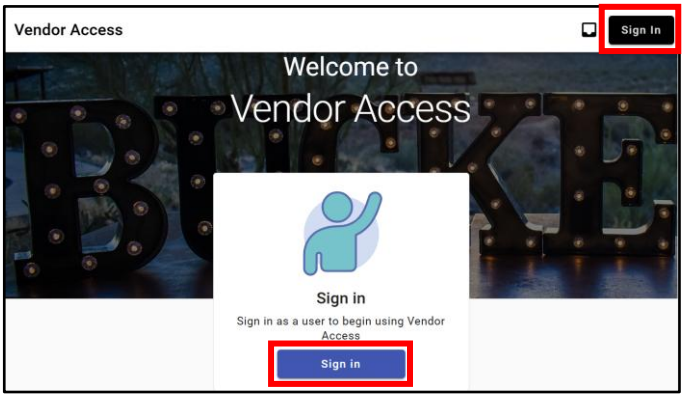
Purpose:

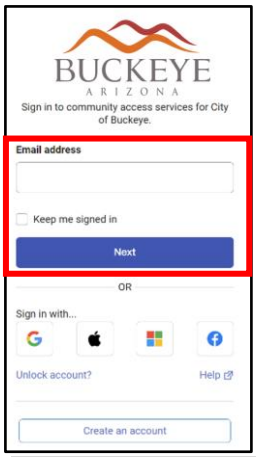
Provide vendors with instructions on how to perform updates to their accounts in Vendor Access (VA), the City of Buckeye's portal for vendor management. Updates highlighted in this guide include updating a vendor W-9 form, adding a remit to address for payment, adding or updating an authorized account contact, and enrolling in an EFT payment option (for vendors who currently receive a physical check). **Note: These instructions pertain to vendor accounts that have already been established in VA.** To establish a vendor account in VA, complete the steps contained in the Vendor Access – New Registration and Vendor Access – Create a New Account guides.

Sign In

Sign in to the vendor's VA account and call up the Vendor profile screen.

1. Sign in to the VA portal using URL: https://cityofbuckeyeaz.tylerportico.com/va/vendor-access/registration.

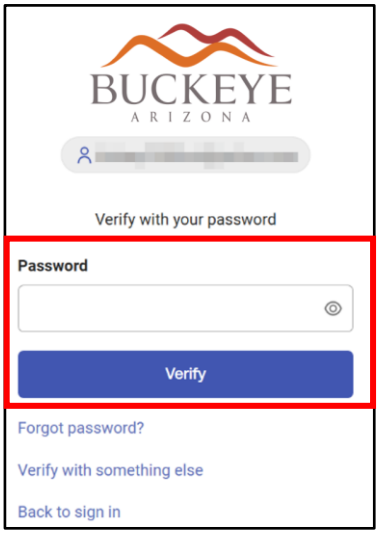




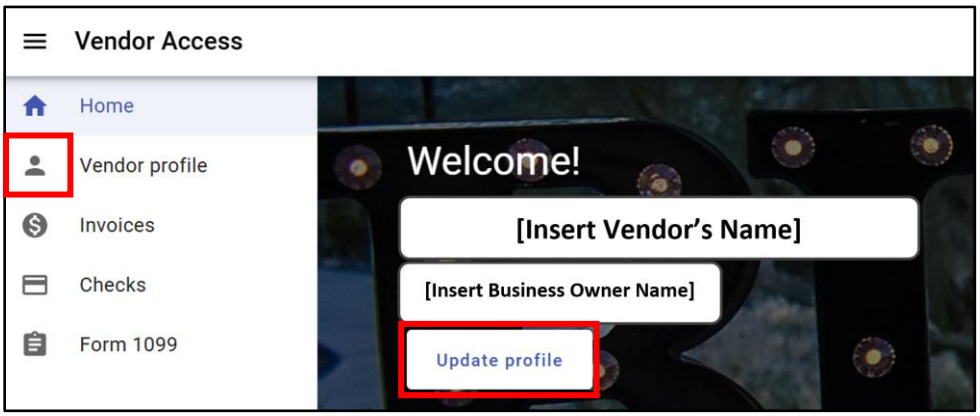
2. Select "**Sign in**" using one of the two options.

3. In the **Email address** field, enter the email address associated with the account and select "**Next**".

4. In the **Password** field, enter the password associated with the account and select "**Verify**". If the password is not known, select the "**Forgot password?**" link to have a verification code sent to the email address associated with the account.



5. Select either "**Update profile**" or the "**Vendor profile**  **icon**".



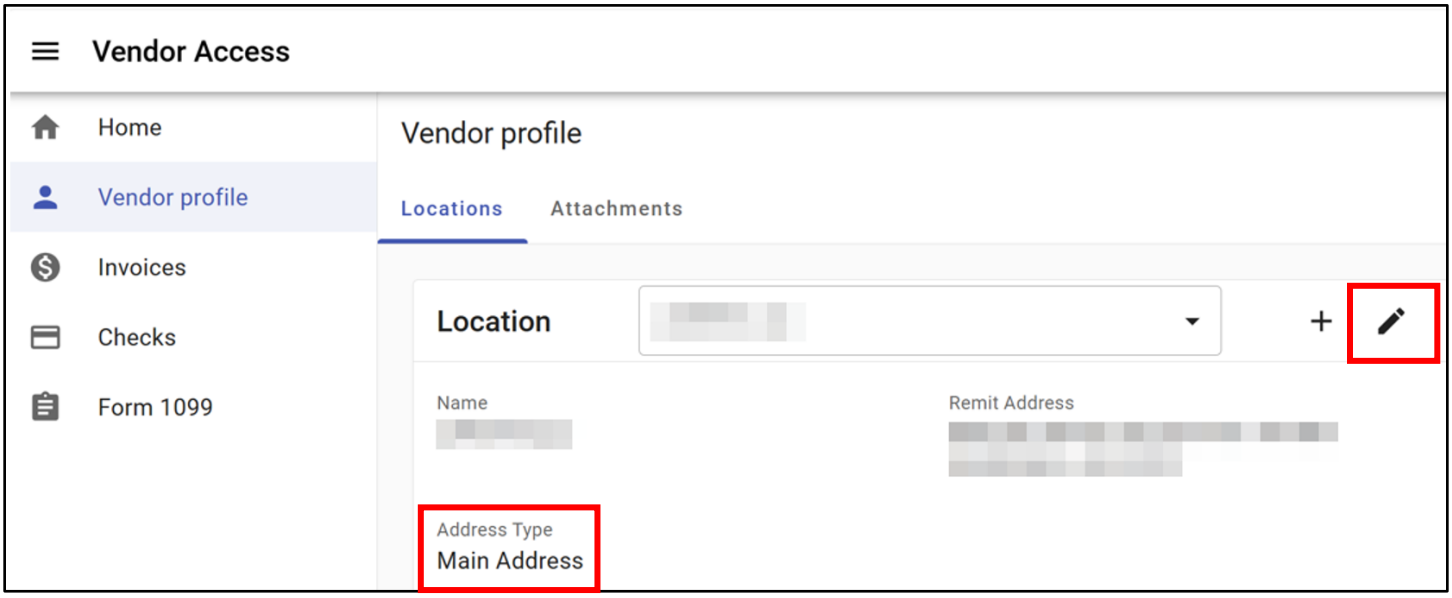
Note: The Vendor Access side menu can be collapsed or expanded by selecting the "three-line menu  **icon."**

Update W-9 Forms

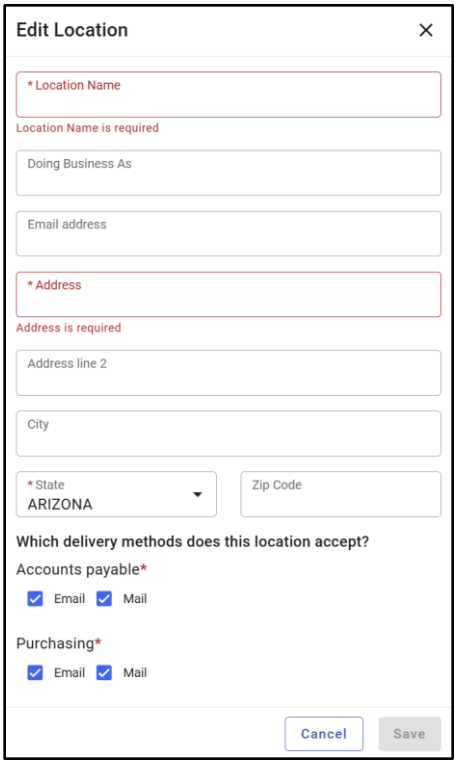
Vendor W-9 forms are uploaded during initial vendor account creation in VA. If a vendor needs to change any information on their W-9 form, they should update any applicable fields on their profile (e.g. company name, doing business as, or address fields) to match those values on their updated W-9 as well as uploading a new W-9 to their profile. The following steps will detail how to complete this process.

1. Sign in to your vendor profile following the "**Sign in**" instructions above.
2. On the **Vendor profile** screen, **Locations** tab:
    a. In the **Location** section, select the "**pencil**  **icon**" to update the needed fields.

Note: Ensure you are on the main Location screen before making any updates. The main location screen will have "Main Address" listed under the Address Type field.



3. In the **Edit Location** window:



   a. Update the **Location Name**, **Doing business as**, and address fields with the needed updates as applicable.

   b. Make any adjustments to the Accounts payable or Purchasing delivery methods if applicable. Options include Mail or Email.

      i. Accounts payable delivery method: Pertains to Accounts payable check or EFT remittances advice statements that will be sent to the vendor.

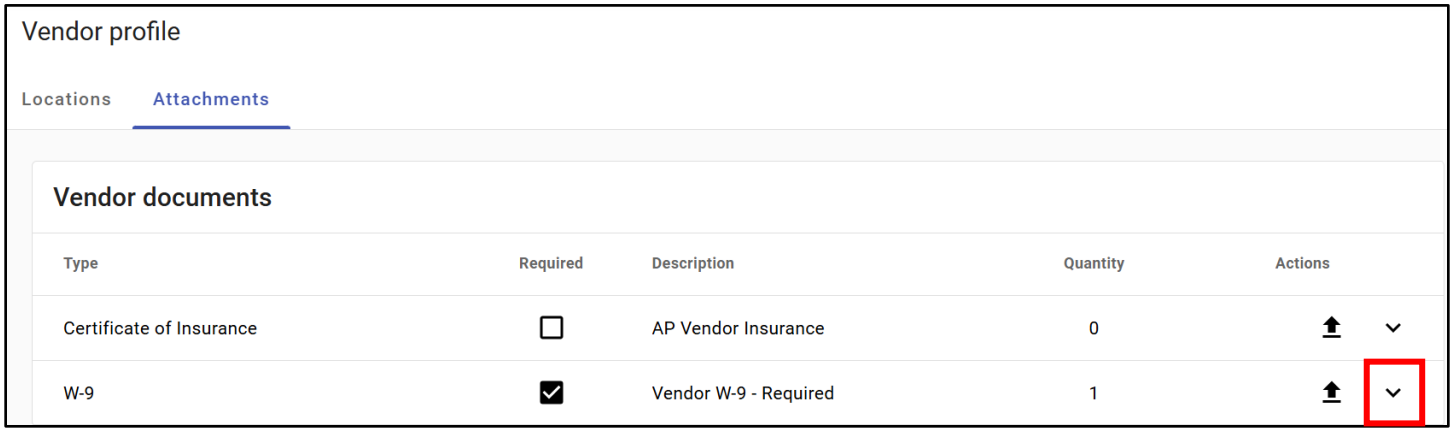
      ii. Purchasing delivery method: Pertains to Purchase Orders (POs) that will be sent to the vendor.

Note: The Save button will not highlight to allow the vendor to advance until at least one option is selected for both Accounts payable and Purchasing.

   c. Select "**Save**".

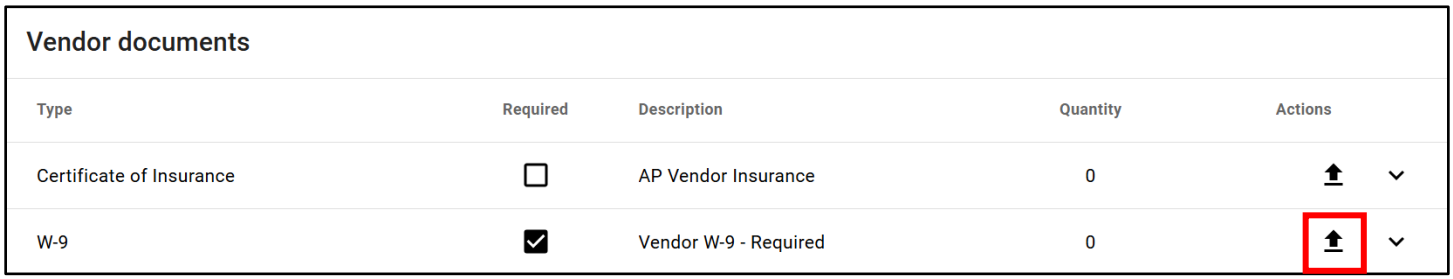
4. On the **Vendor profile screen**, **Attachments** tab:

   a. In the **Vendor documents** section, **W-9** line, select the "**down arrow** ⌄ **icon**".

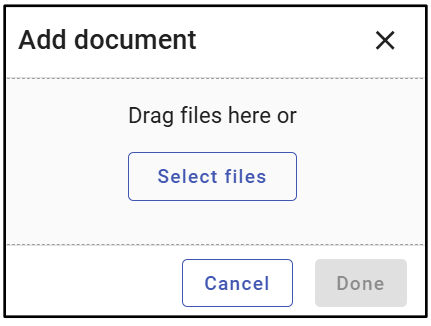


b. Select the "**trash can**  **icon**" to delete the current W-9.

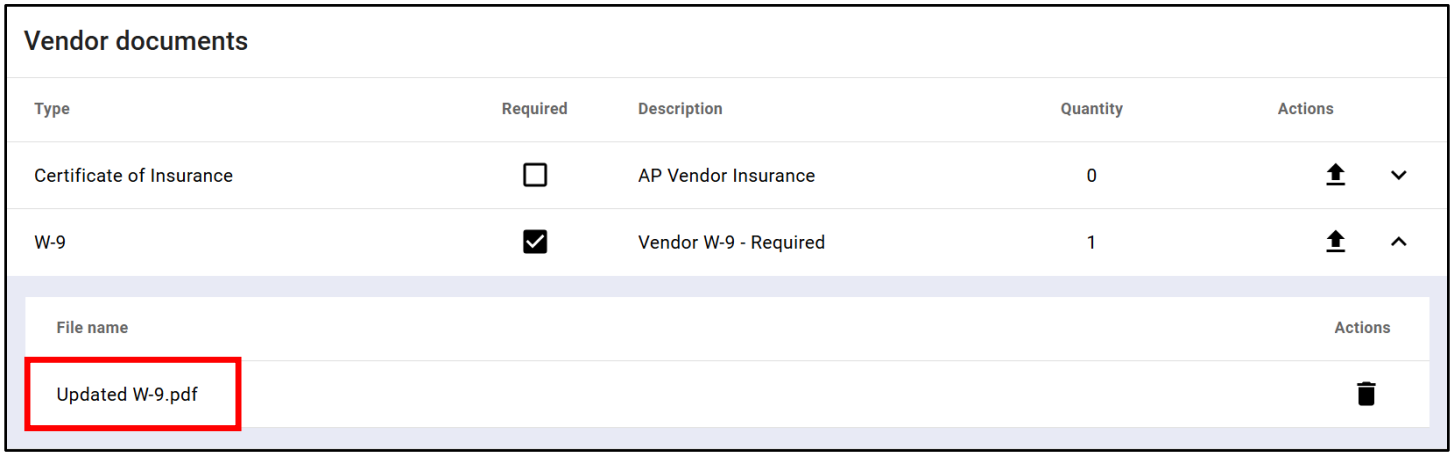
c. In the **Vendor documents** section, **W-9** line, select the "**Upload**  **icon**" to upload the new vendor W-9 form.



d. Upload a new document by either dragging and dropping the file onto the pop-out window or by selecting "**Select files**" and then locating the file to be uploaded. Then select "**Done**".



e. When complete the updated form will appear on the W-9 line.



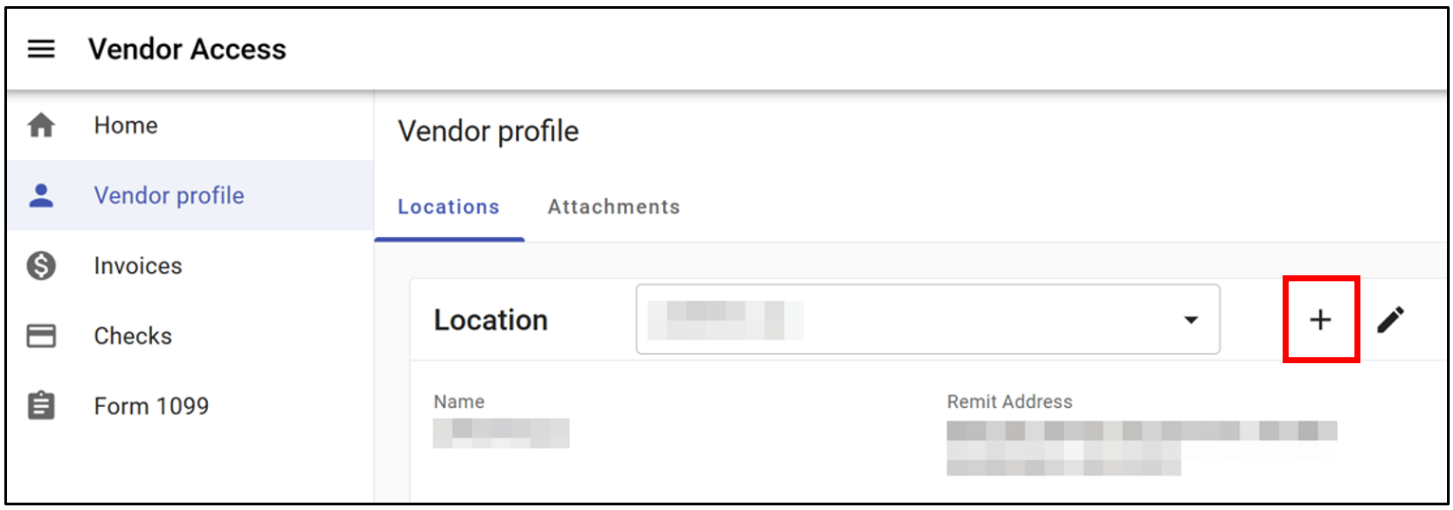
5. The request will then be routed to City of Buckeye personnel for approval. Personnel will review the W-9 and will update the federal identification (FID) or social security number (SSN) on file to that detailed on the updated W-9 form.

Note: If the only update on the W-9 is a change to the vendor's FID or SSN, vendors should remove the old W-9 and upload the new W-9 following the steps above. They should then send an email to hreyes@buckeyeaz.gov with email subject line "Change in W-9" along with a copy of the new W-9 form.

Add a Remit to Address

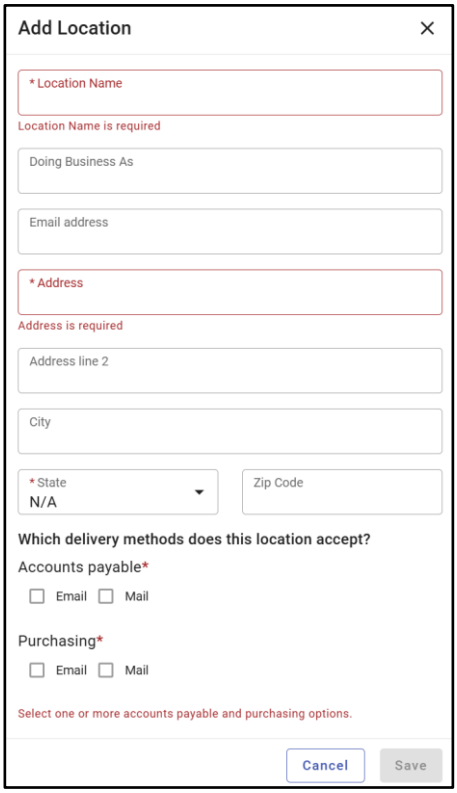
If a vendor wants to have payments mailed to an address other than the main address on file, they need to add a remit to address to their vendor profile in VA.

1. Sign in to your vendor profile following the "**Sign in**" instructions detailed previously.
2. In the **Location** section, select the "**plus** + **icon**" to add the remit to address.



3. In the **Add Location** window:
    a. In the **Location Name** field, enter the name of the vendor.

b. Leave the Doing Business As field blank.



Note #1: If a vendor needs to update their Doing Business As name, they should navigate to the main Location screen and select the "pencil  **icon" to edit the listed value to the updated value.**

Note #2: Vendors should ensure that the Location Name and Doing Business As entered match their remit to address.

c. Enter the remit to address information in the **Address**, **Address line 2**, **City**, **State**, and **Zip Code** fields respectively.

d. Make any adjustments to the Accounts payable or Purchasing delivery methods if applicable. Options include Mail or Email.

e. Select "**Save**".

4. The request will then be routed to City of Buckeye personnel for approval before the change is approved on the vendor's profile.

Add/Update an Authorized Account Contact

Vendors may have the need to add authorized individuals to their vendor accounts. These individuals can be added as Contacts to serve as additional points of contact for general business inquires, Accounts Payable topics or Purchasing topics. Assigning a user as a Contact also informs City of Buckeye personnel whom to reach out to if there is a concern regarding any of these topics.

Note #1: Any individuals added as a Contact will have the ability to update and view vendor record information, to include payment and banking information. Vendors should ensure that only individuals who need to have access to this information are added as Contacts to their vendor accounts.

Note #2: If a vendor wants to add a user as a point of contact to their vendor record but does NOT want to provide that user with access to their vendor record, they should add the user's email address following the "Add Location" instructions detailed above. This will inform the City of Buckeye that this user can be contacted related to General, Accounts Payable or Purchasing matters, but the user will not have access to the vendor record in VA.

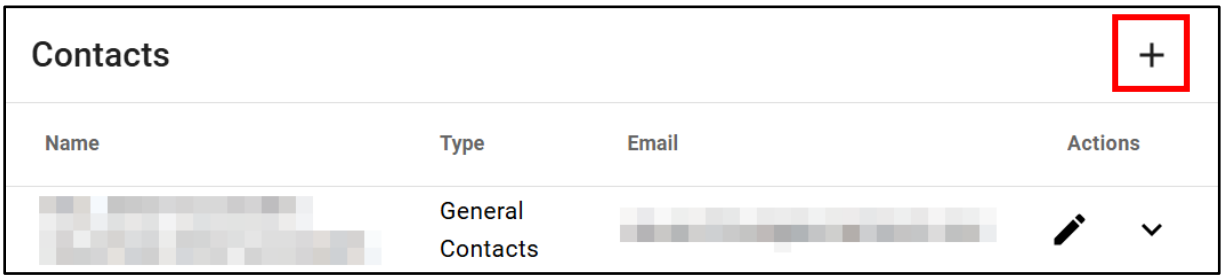
If an existing vendor account Contact needs to be changed it is recommended that the vendor edit and update the existing Contact. At this time, vendors do not have the ability to delete Contacts from their vendor records. These instructions will provide guidance on how to add a user as a Contact to a vendor account in VA as well as how to edit an existing account Contact.

1. Sign in to your vendor profile following the "**Sign in**" instructions detailed previously.
2. Complete the "**Add a Contact**" or "**Update a Contact**" instructions detailed below.

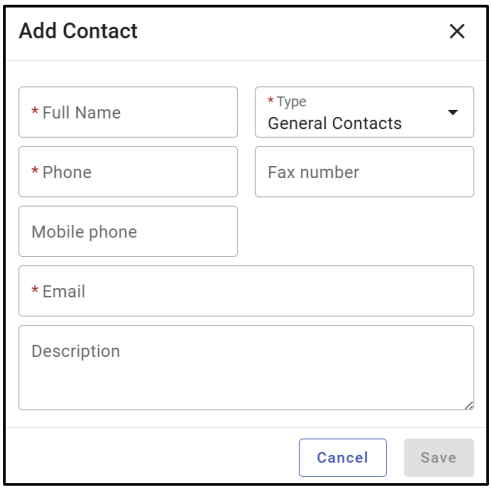
Add a Contact

Note: Adding a Contact from inside the vendor record has the same result as having a new user link to an existing vendor account. See the Vendor Access – Link to an Existing Account guide for more information.

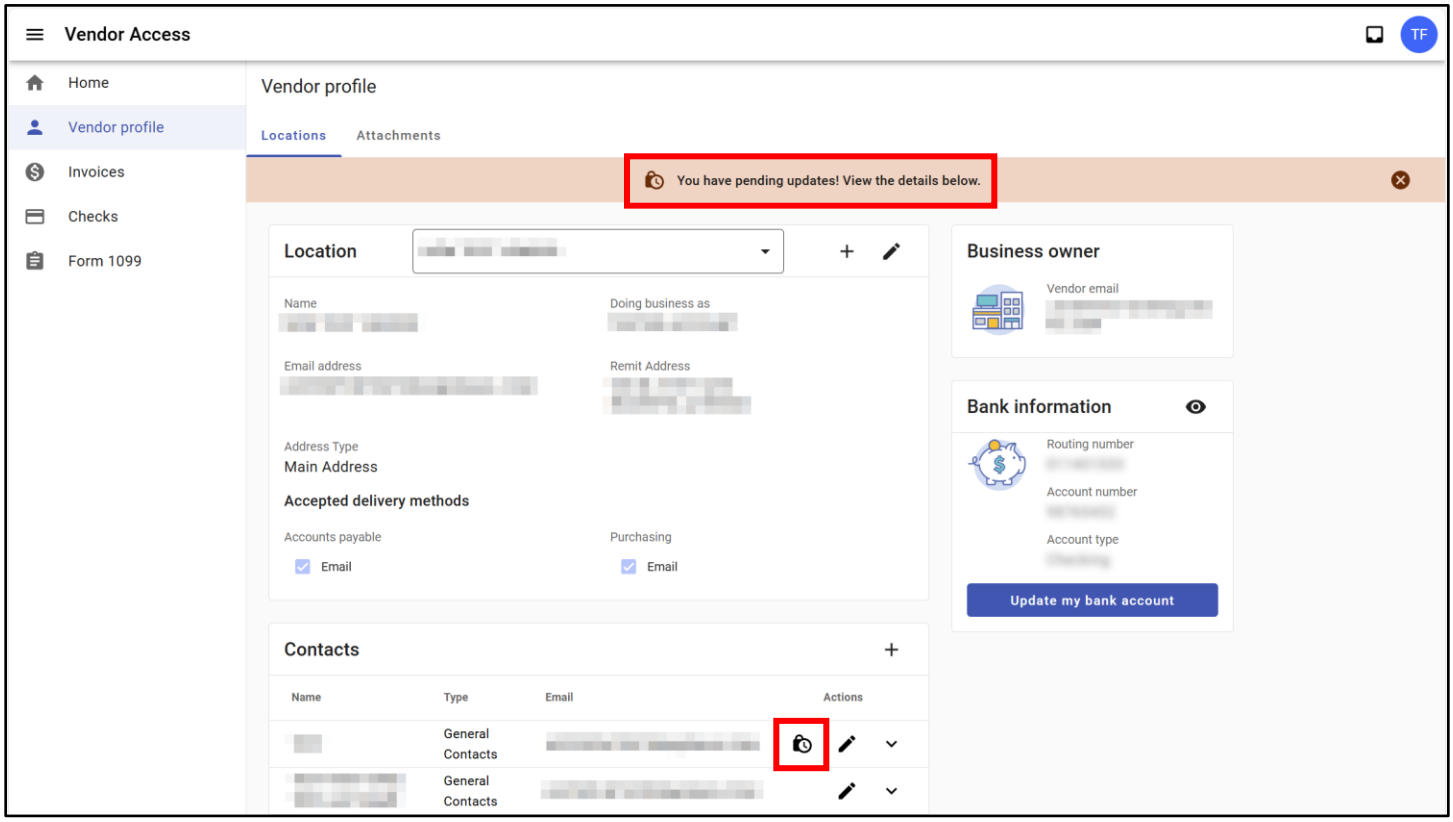
1. On the **Vendor profile** screen, **Contacts** section, select the "**plus** [+] **icon**".



2. In the **Add Contact** window:
   a. In the **Full Name** field, enter the name of the authorized contact.
   b. In the **Type** field, select one of the following options from the drop down menu:
      i. **General Contacts**: Select for users who are authorized to discuss any business topics.
      ii. **Accounts Payable Contacts**: Select for users who are authorized to discuss business inquires related to vendor invoices or payments.
      iii. **Purchasing Contacts**: Select for users who are authorized to discuss business inquiries related to requisitions, contracts or purchase orders.
   c. In the **Phone** field, enter the primary phone number for the contact.
   d. Notice that the Fax number and Mobile phone fields are optional.
   e. In the **Email** field, enter a valid email address for the authorized contact.
   f. In the optional **Description** field, enter a description of the contact if desired.
   g. Select "**Save"**.



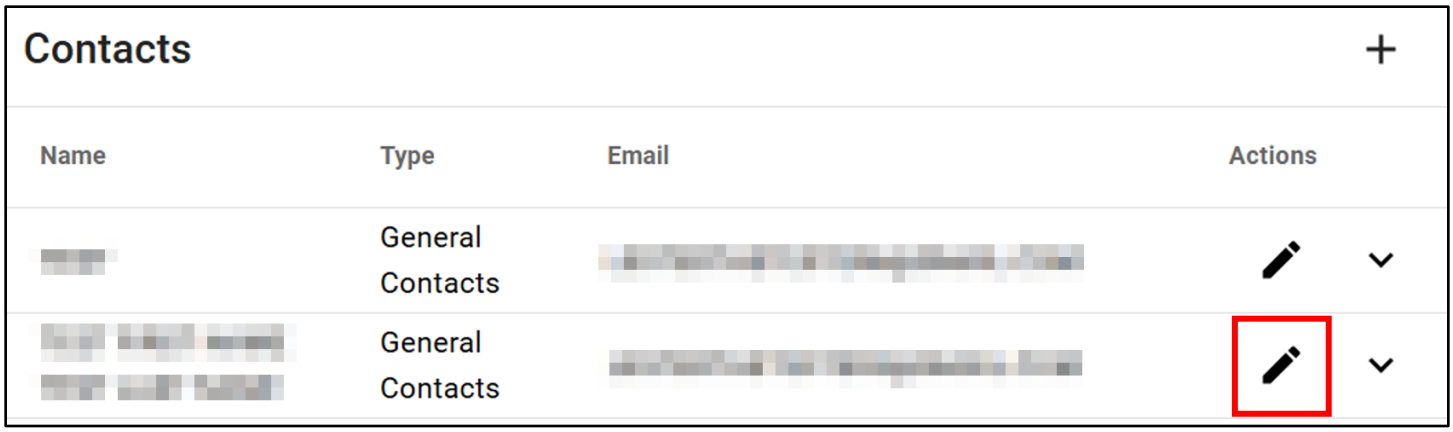
3. After selecting Save, the following alert will appear on screen "**You have pending updates! View the details below.**" and the "**pending change** [icon] **icon**" will appear next to the section that is being updated.



4. The vendor profile update is then routed to City of Buckeye personnel for approval.

Update a Contact

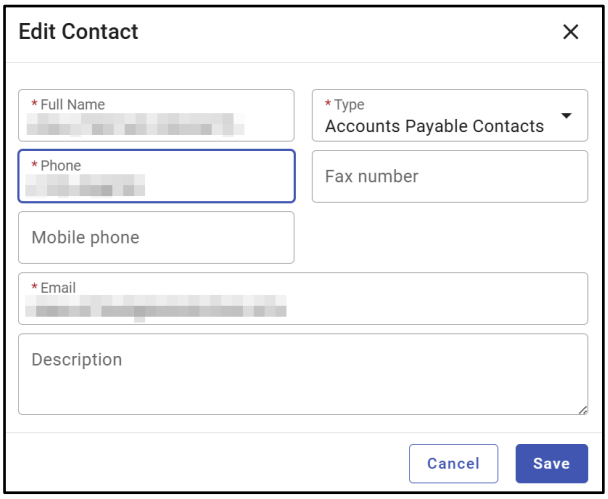
1. On the **Vendor profile** screen, **Contacts** section, select the "**Edit** [✎] **icon**".



2. In the **Edit Contact** screen that generates, enter the following:

a. In the **Full Name** field, update the name of the authorized contact.

b. In the **Type** field, update the drop down selection if applicable. As a reminder:



   i. **General Contacts**: Select for users who are authorized to discuss any business topics.

   ii. **Accounts Payable Contacts**: Select for users who are authorized to discuss any business inquires related to vendor invoices or payments.

   iii. **Purchasing Contacts**: Select for users who are authorized to discuss any business inquiries related to requisitions, contracts or purchase orders.

c. In the **Phone** field, update the primary phone number for the contact.

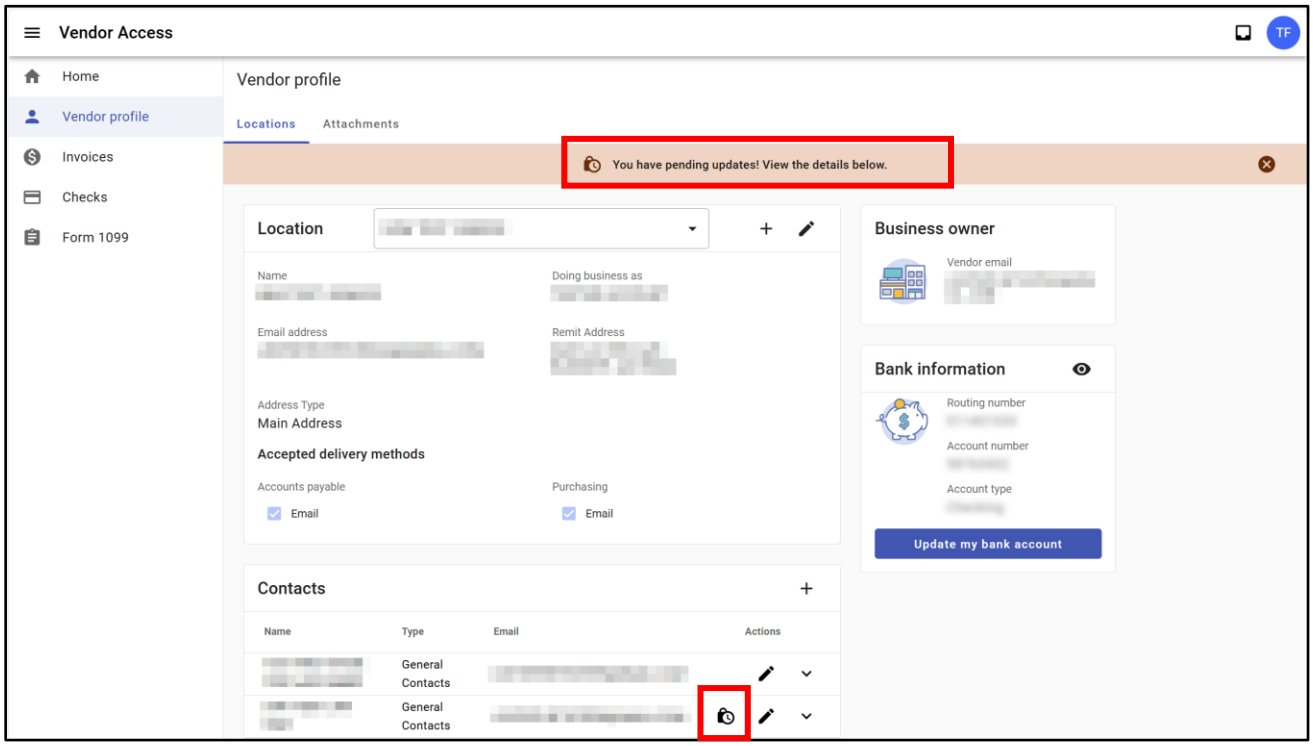
d. Notice that the Fax number and Mobile phone fields are optional.

e. In the **Email** field, update the email address for the authorized contact.

f. In the optional **Description** field, update a description of the vendor if desired.

g. Select "**Save"**.

3. After selecting Save the following alert will appear on screen "**You have pending updates! View the details below**" and the "**Pending change** [icon] **icon**" will appear next to the section that is being updated.



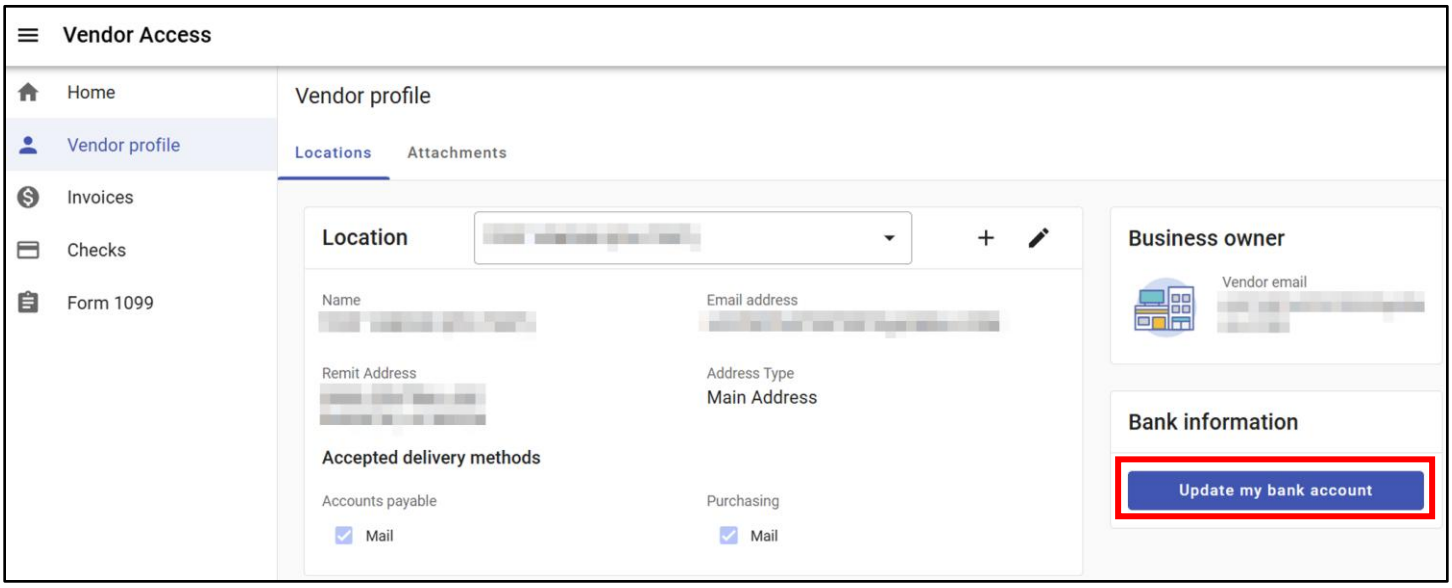
4. The vendor profile update is then routed to City of Buckeye personnel for approval.

Note: If a Contact Type for an existing Contact is modified, the update will appear in the vendor record after the change has been approved. In the example above, the Contact was changed from "General Contacts" to "Accounts Payable Contacts". The vendor record will continue to display "General Contacts" until the record is approved.

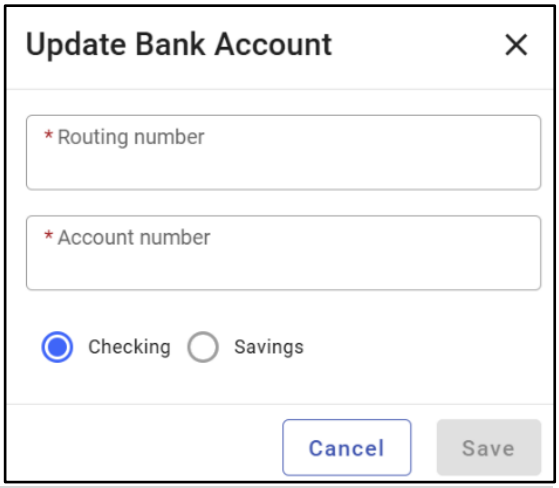
Enroll in EFT

The City of Buckeye offers vendors the option to either receive a printed check for payments or to receive an Electronic Funds Transfer (EFT) payment. These instructions provide guidance to vendors who currently receive a printed check on how to update their vendor profiles to request payments via EFT. **Note: If a vendor wants to receive a printed check, they should NOT enter any bank account information in VA. See the Vendor Access – Create a New Account instructions for more information.**

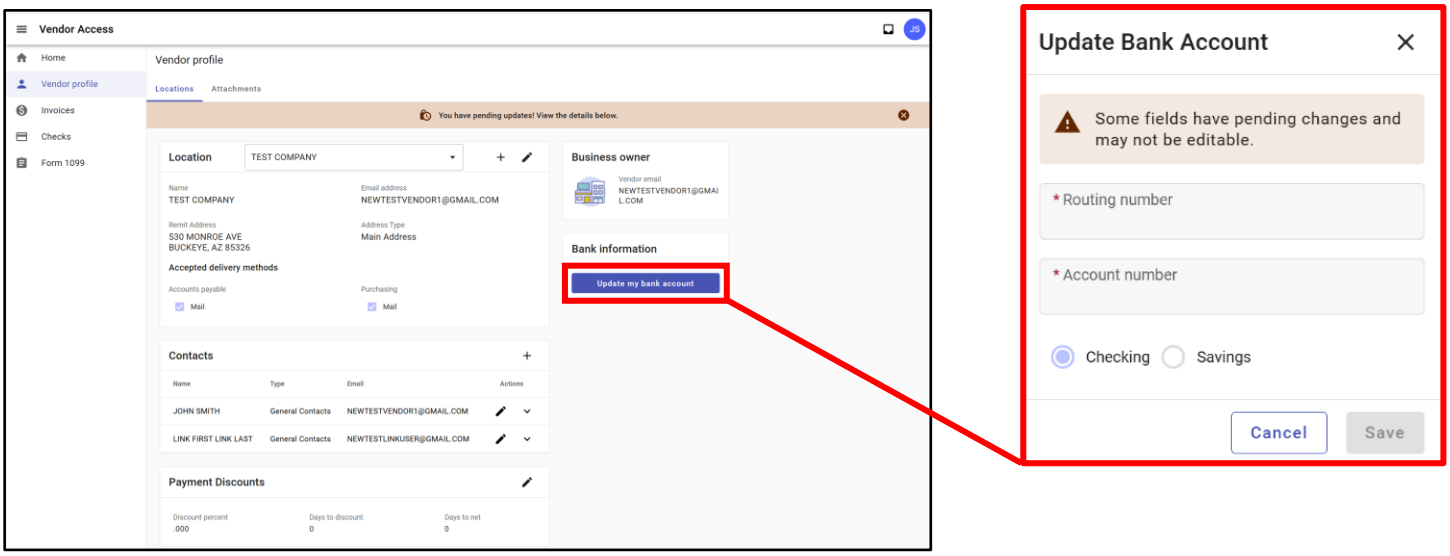
1. Sign in to your vendor profile following the "**Sign in**" instructions detailed previously.
2. On the **Vendor profile** screen, in the **Bank information** section, select "**Update my bank account**".



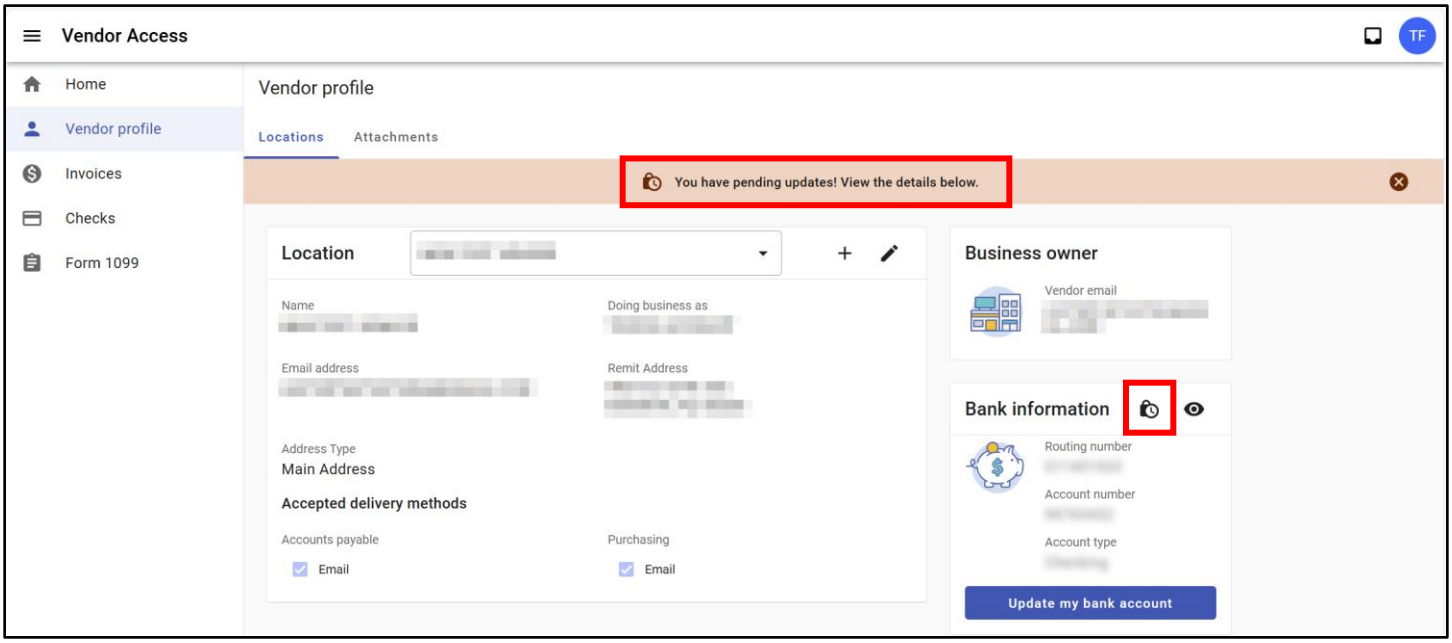
3. In the **Update Bank Account** window:
   a. In the **Routing number** field, enter the vendor's bank routing number.
   b. In the **Account number** field, enter the vendor's bank account number.
   c. Select either the "**Checking**" or "**Savings**" radio button.
   d. Select "**Save**".
4. After selecting Save the following alert will appear on screen "**You have pending updates! View the details below.**" Notice



that there is not any corresponding "**pending change** **icon**" displayed. The vendor will need to click "**Update my bank account**" in order to see the pending message.



Note: When submitting changes to existing bank information, the "pending change **icon" will appear next to the Bank information section.**

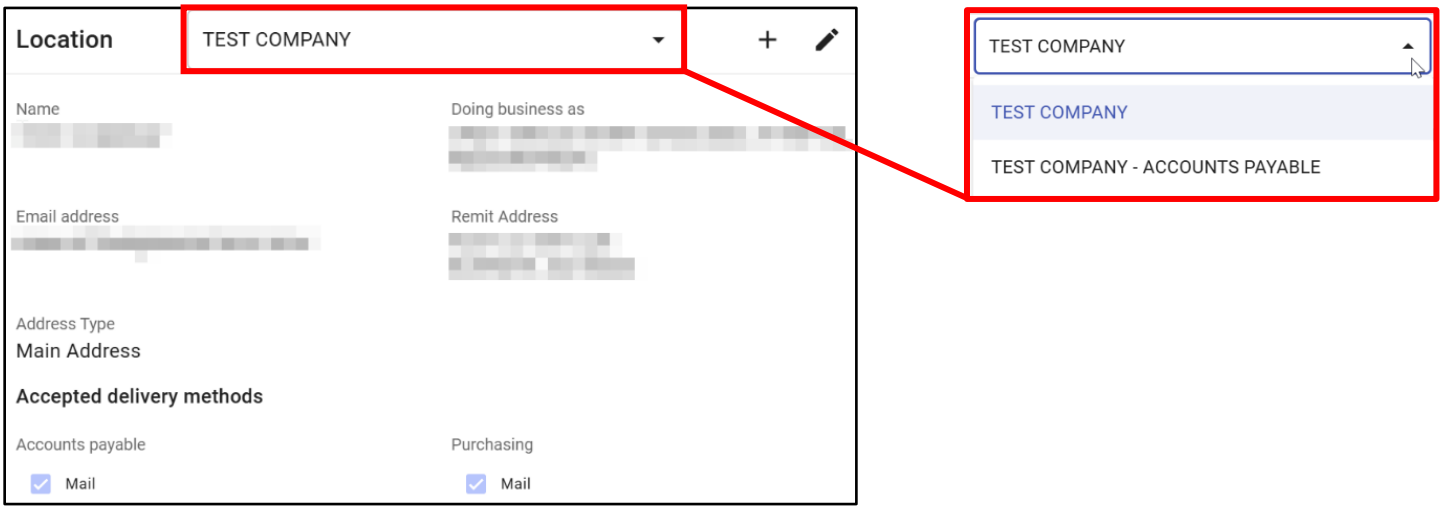


5. The vendor profile update is then routed to City of Buckeye personnel for approval.

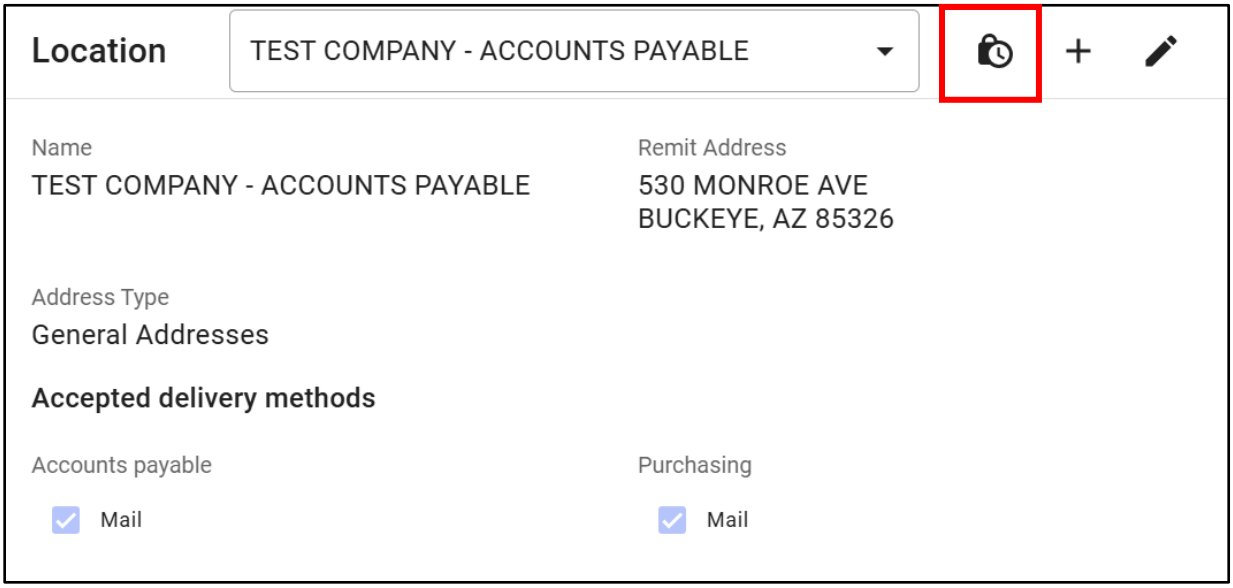
Good to know:

- When updating a vendor account, if a new location is added the "**pending change** **icon**" will appear on the associated screen.

- In the example below, a new location **TEST COMPANY – ACCOUNTS PAYABLE** has been added to the vendor profile for vendor **TEST COMPANY**. The pending change icon does not appear on the main vendor profile screen.
- Select the **TEST COMPANY** drop down field and select "**TEST COMPANY – ACCOUNTS PAYABLE**".



- The **TEST COMPANY – ACCOUNTS PAYABLE** location screen then generates and the "**Pending change icon**" appears next to the update.



- Vendors should **NOT** attempt to cancel updates they have made to their vendor profiles (e.g. a Contact email address was updated incorrectly). If a vendor change was made in error, they should email hreyes@buckeyeaz.gov to have this error corrected.