Roswell
g e o r g i a

December 14, 2022

To: All City of Roswell Suppliers, Vendors, and Contractors

SUBJECT: PAYMENT SYSTEM UPGRADE – DUAL FACTOR AUTHENTICATION

Dear Partner,

We wanted to let everyone who currently does business with the City of Roswell know that the City is going through a required update to our online vendor tracking and payment system.

Summary:
For any supplier who uses the City's online Vendor Self Service function as a day to day tool (i.e. to track payment and invoice records, etc.), or if you frequently make changes to your vendor ID, etc…, this change will impact how you access the system, and you will be required to "link" your vendor profile in the old system to the updated (dual authentication security) vendor profile in the new system.

For suppliers who don't often use the Vendor Self Service feature, you will only need to access and link your new and old profiles if you need to make changes to your profile (i.e. update tax information or payment processing or identification information).

Detailed Change Process:

Attached is a detailed walk through that will show you how to create an individual account, link company accounts in the system, and upload current W-9.

You will need your Vendor number (available in the current system and on checks and POs) and your FID / SSN #.

Best,

Greg Anderson

Greg Anderson, Purchasing Manager

City of Roswell Vendor Self Service MUNIS UPGRADE

Task 1 – Establish Tyler Portico Account (Individual – Dual Authentication)

Task 2 – Link Old Munis (Munis 11.3) Vendor Account to New Munis Vendor Account (2021)

Task 3 – Upload W-9

Recorded Steps

Step 1: User left click on "Vendor Self Service"

Step 2: User left click on "Login / Register".
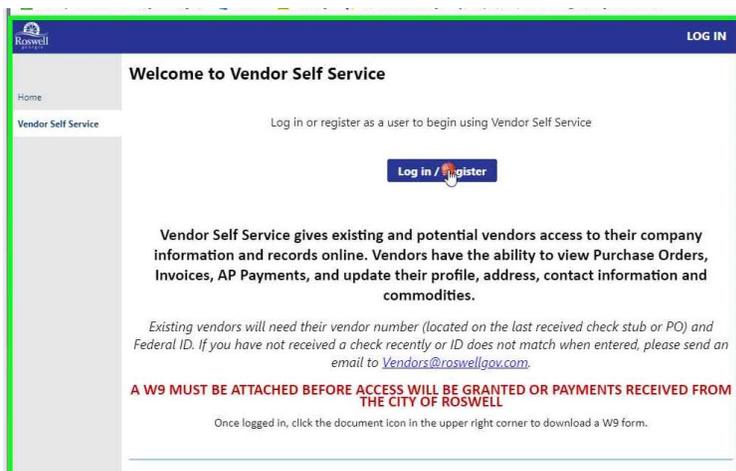
Step 3: User Left Click on "Sign up".
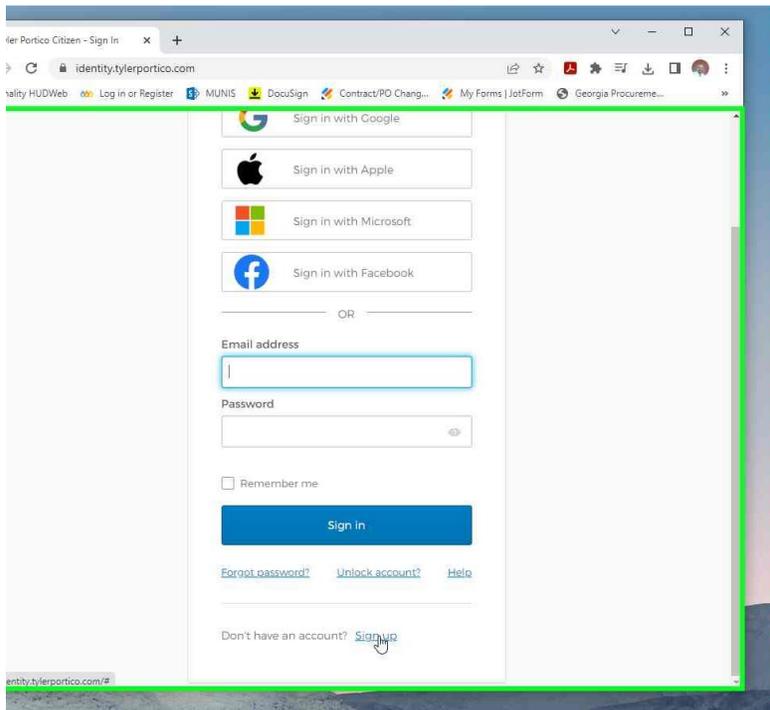
Step 4: User fill out Account Information and left click "Sign up".
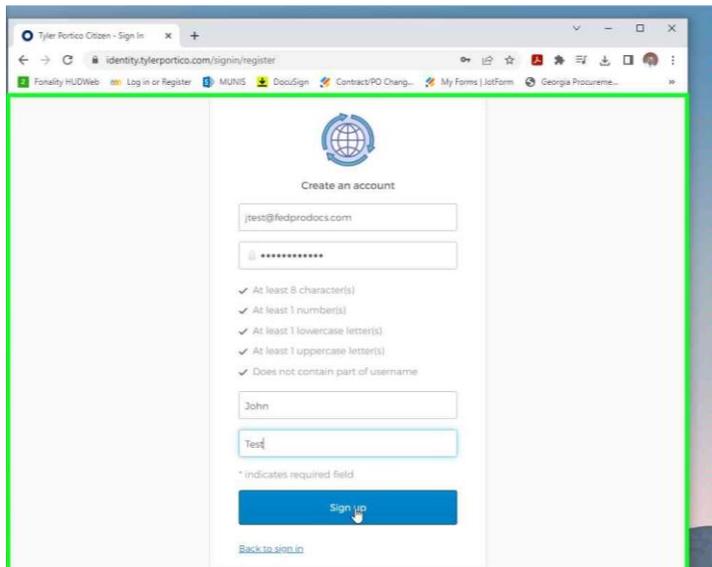
Step 5: System will send email to signup account email.
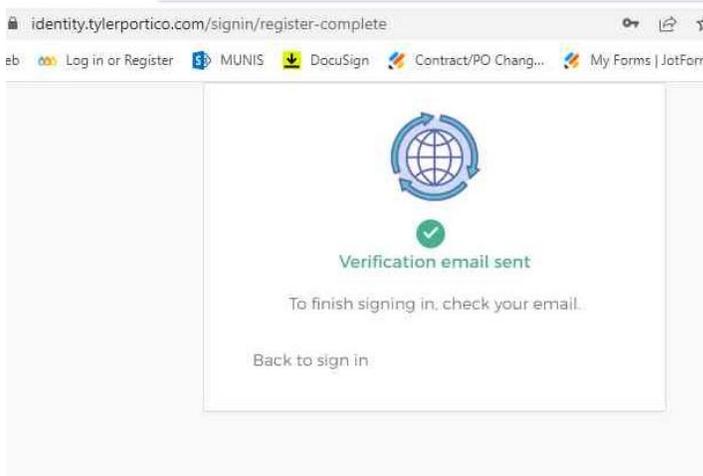
Step 6: User left click in email on "Activate Account"
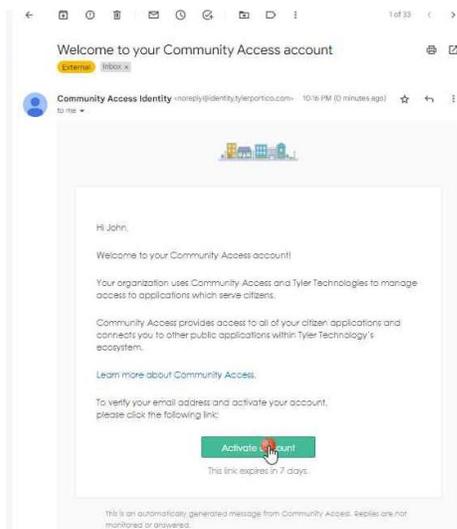
Step 7: User left click on "Sign in" in Tyler Portico Citizen - Sign In. **At this point, at successful Sign In, Vendor will have completed Task 1 of establishing an individual account successfully.**
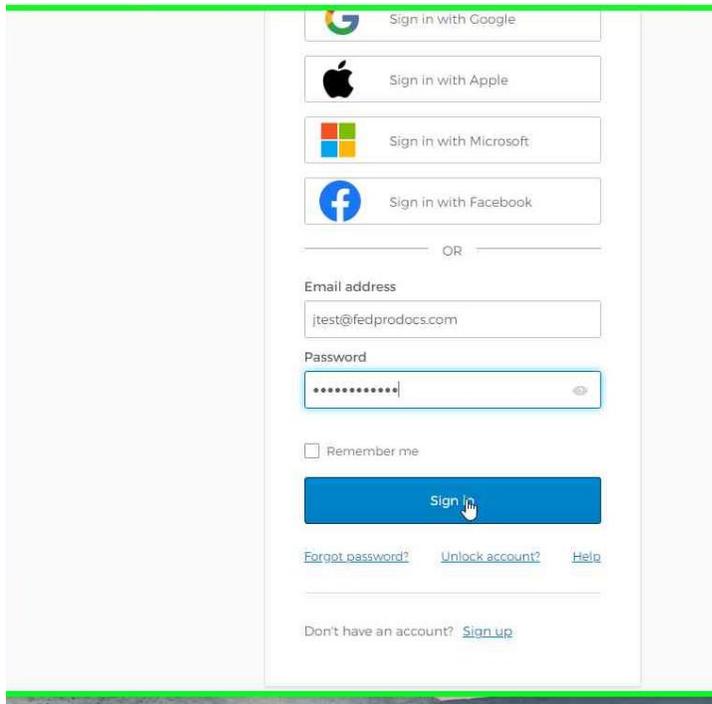
Step 8: User left click "Yes" if they accept terms and conditions.

Step 9: User left click on "Link to Existing" __NOTE__: at this point, a supplier who does not have a previous account in Munis 11.3 can select "Create New Vendor" and follow prompts to create an unlinked new account – you will need to upload a W-9 in either case. The remainder of this document will include steps to link accounts, NOT to create a new account.
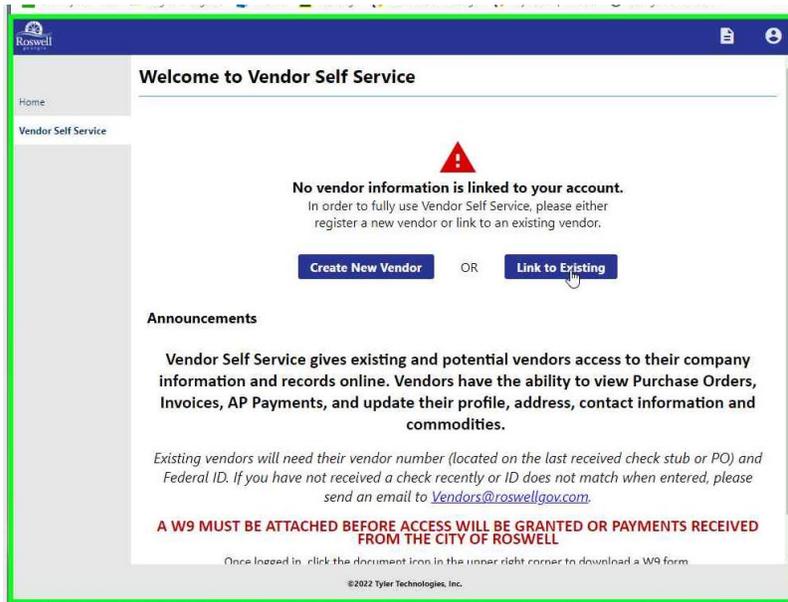
Step 10: User input previous account information – the previous (Munis 11.3) vendor number and FID / SSN information - Left click on Link to Existing"
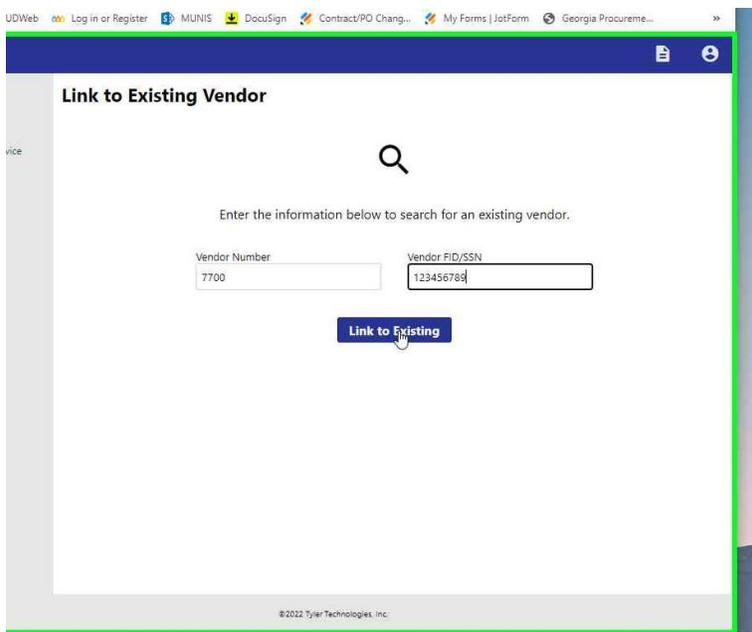
Step 11: User fill out required contact information and left click on "Continue". NOTE: suggest using Contact Type "GENERAL – General Contacts". This can be updated after linking accounts and uploading W-9.

Step 12: User will be returned to "Vendor Self Service" page and the accounts will be linked as shown below. **This is the End of Task 2.**

Step 13: User left click on "Vendor Information" in Left menu.
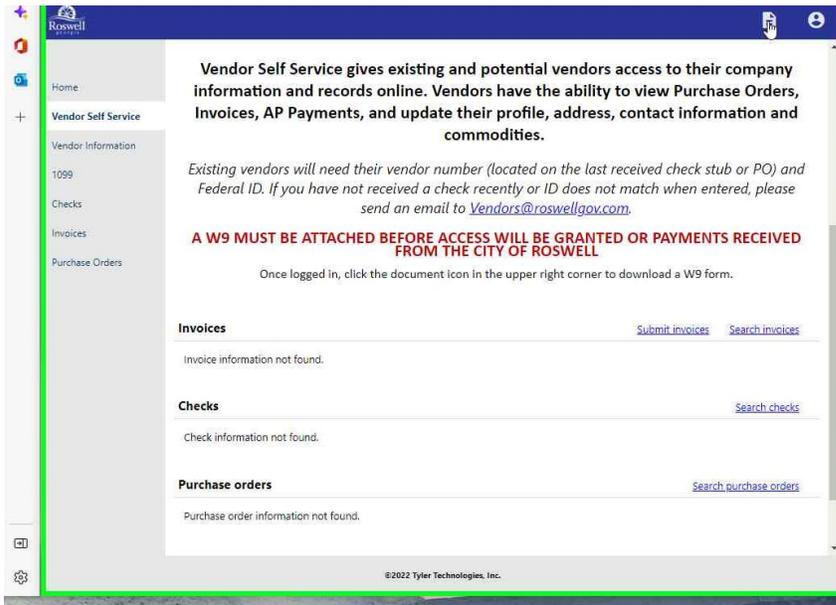
Step 14: User left click on "Attachments" in left menu.
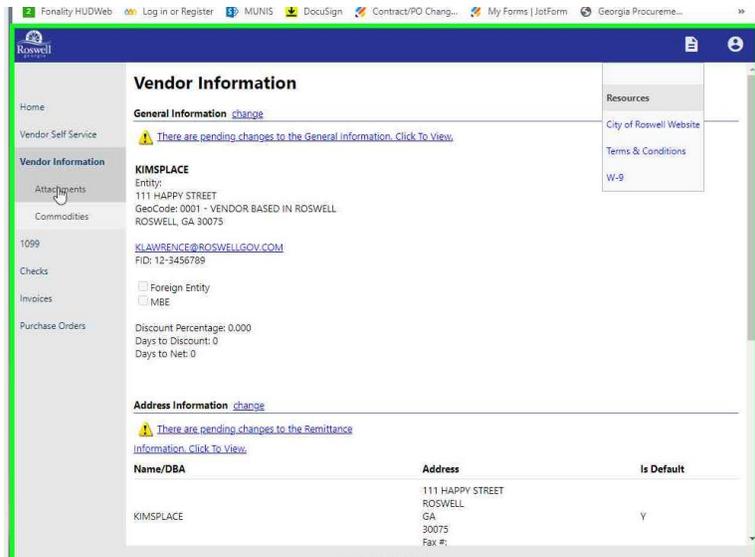
Step 15: User left click on "Attach" Button.
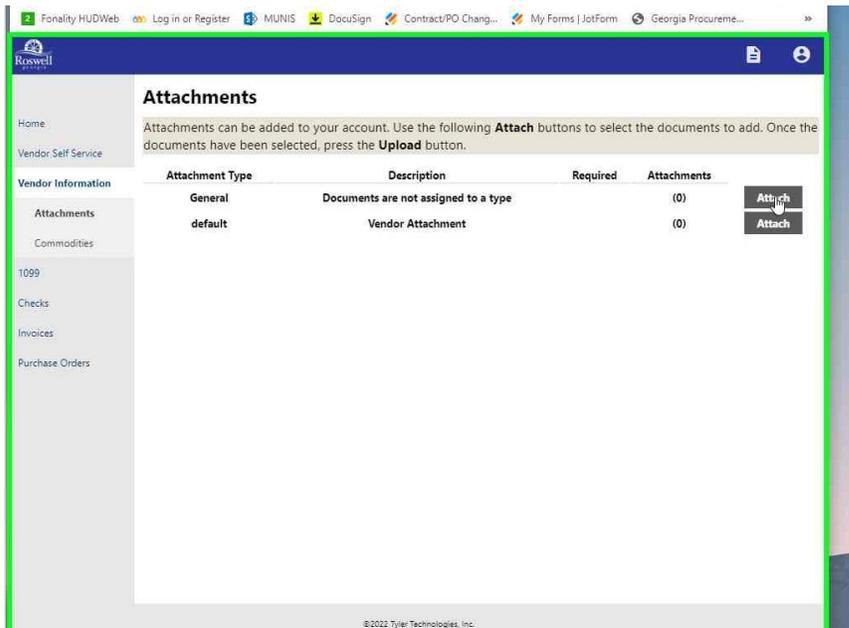
Step 16: User left click on "Choose File"
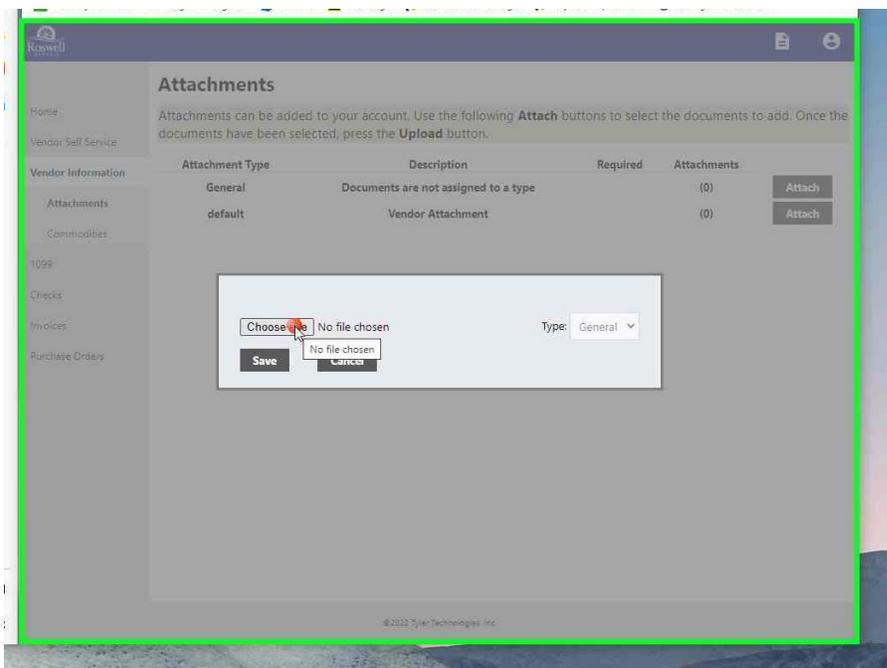
Step 17: Browse to where you have saved your W-9, then User left double click on W-9 Adobe file to upload.
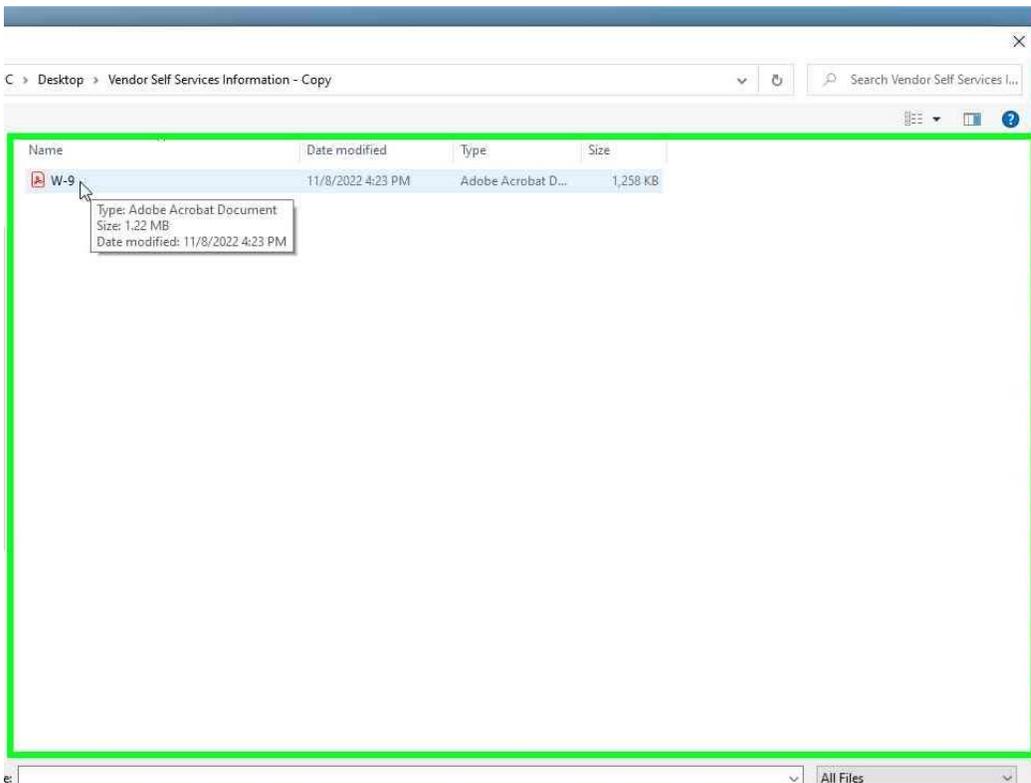
Step 18: User left click on "Continue"
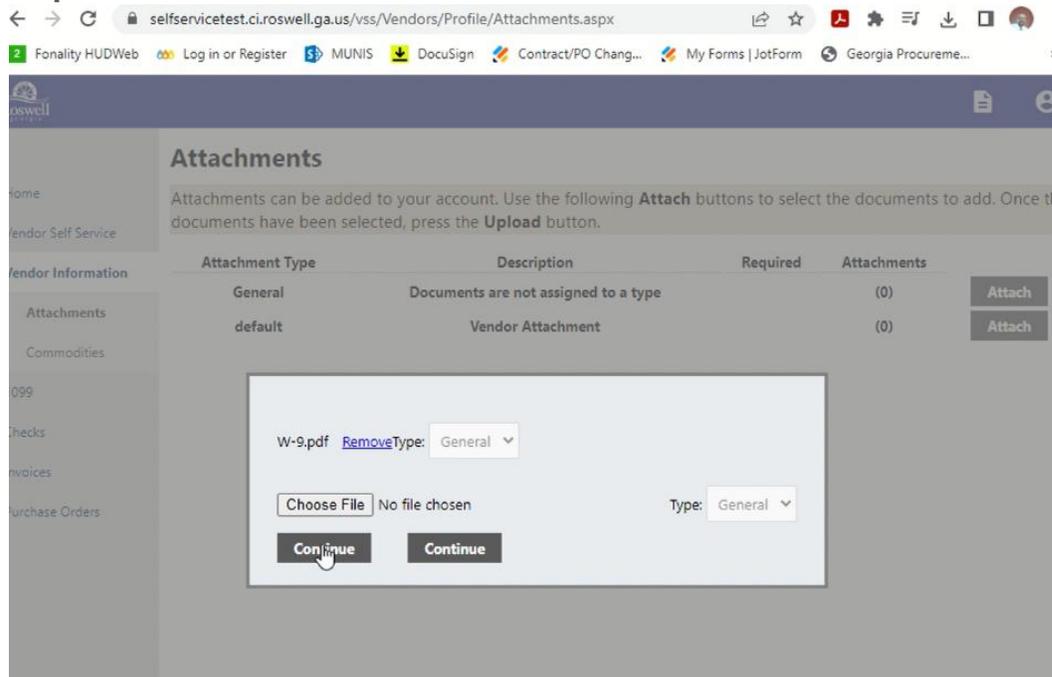
Step 19: Attachments are uploaded – the W-9 has been attached to your account in the new system. User Left click on "Vendor Self Service" on Left menu. End of Task 3.

Step 20: Screen below indicates that Supplier has completed Tasks 1-3. Accounts are now linked and current W-9 is uploaded. User can now view system information and update account (including adding additional contacts, etc...). **END OF WALK THROUGH**