

Vendor Access User Guide



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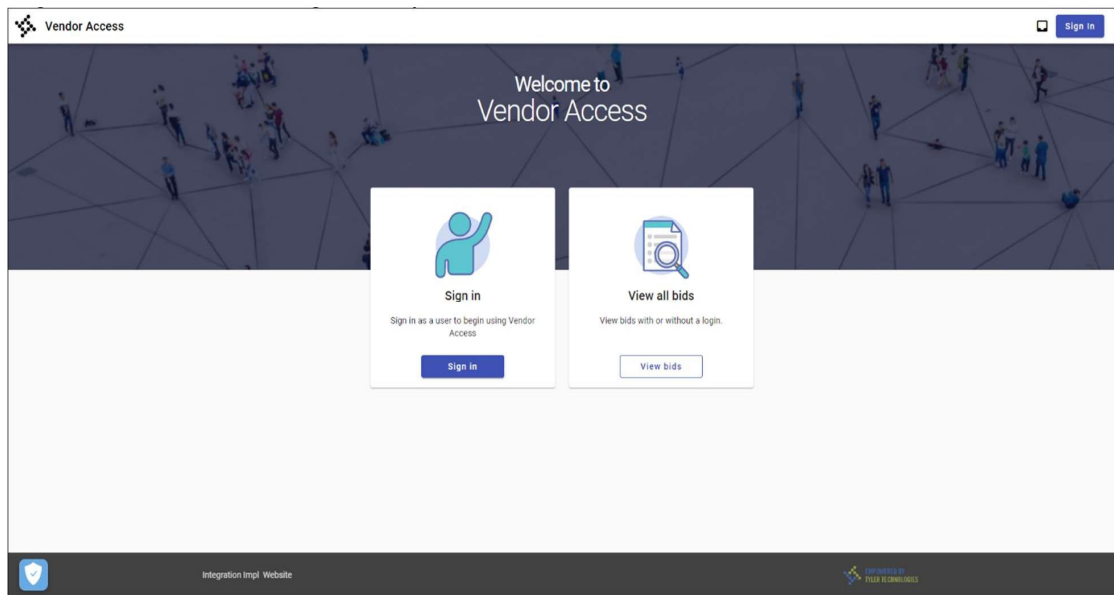
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Overview

Vendor Access provides vendors with cloud-based access to information stored in the City of Lawrence ERP solution. Using Vendor Access, vendors can enter and maintain their contact and remittance information, discount and payment terms, required documentation, and the commodity codes that represent the goods and services the vendor can provide.

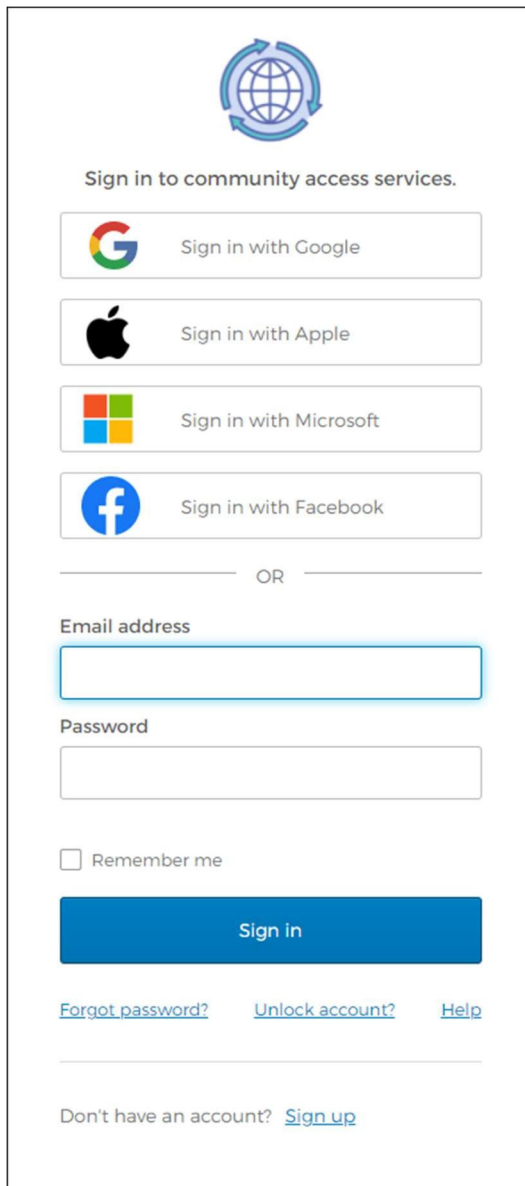
A listing of the vendor's current and prior purchase orders, invoices, contracts, and checks is available in Vendor Access for inquiry purposes.



User Accounts

Vendors who access your organization's Vendor Access application must create a Tyler Identity log-in account. The log-in account requires an active email address and a password.

When accessing Vendor Access, the application presents the Community Access sign- in screen with options to associate an existing log-in from Google®, Apple®, Microsoft®, or Facebook® with the Tyler Identity account. Or, users can create a new account by clicking the Sign Up link at the bottom of the screen. The Help link on this screen also provides detailed steps for password management, including setting up multi-factor authentication.



The image shows a sign-in interface for 'community access services'. At the top is a circular logo with a globe and arrows. Below the logo is the text 'Sign in to community access services.' There are four social login buttons: 'Sign in with Google' (with Google logo), 'Sign in with Apple' (with Apple logo), 'Sign in with Microsoft' (with Microsoft logo), and 'Sign in with Facebook' (with Facebook logo). Below these is a horizontal line with 'OR' in the center. Underneath is the 'Email address' label followed by a text input field. Below that is the 'Password' label followed by a text input field. A checkbox labeled 'Remember me' is positioned below the password field. A large blue 'Sign in' button is centered below the checkbox. At the bottom, there are three links: 'Forgot password?', 'Unlock account?', and 'Help'. At the very bottom, there is a link 'Don't have an account? Sign up'.

Sign in to community access services.

Sign in with Google

Sign in with Apple

Sign in with Microsoft

Sign in with Facebook

OR

Email address

Password

☐ Remember me

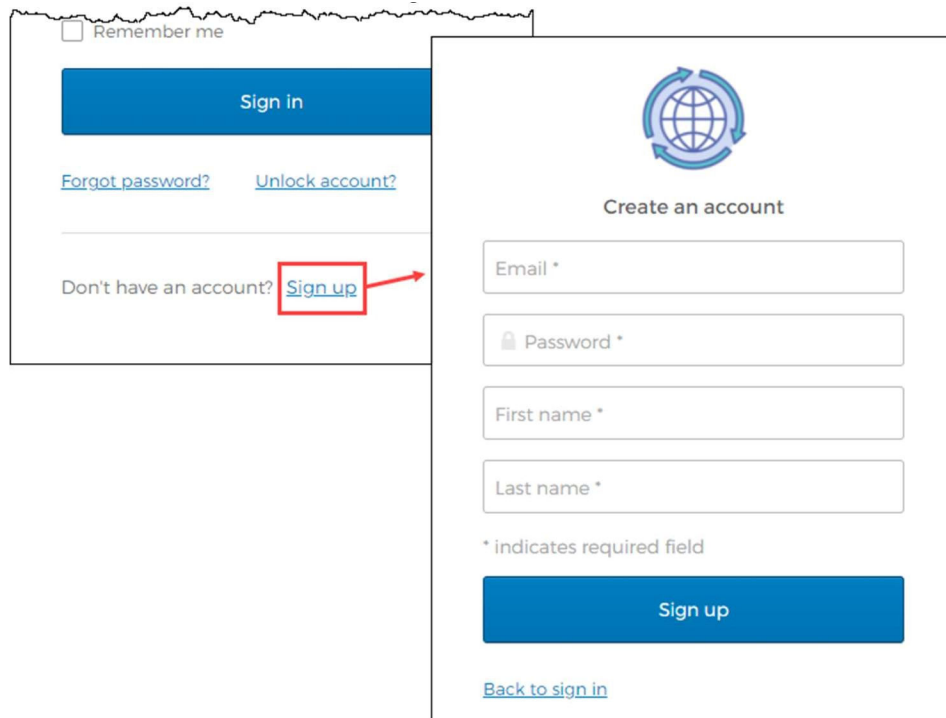
Sign in

[Forgot password?](#) [Unlock account?](#) [Help](#)

Don't have an account? [Sign up](#)

New Users

For first-time users, clicking the Sign Up link at the bottom of the sign-in screen presents the Create an Account dialog box.



Remember me

Sign in

[Forgot password?](#) [Unlock account?](#)

Don't have an account? [Sign up](#)

Create an account

Email *

Password *

First name *

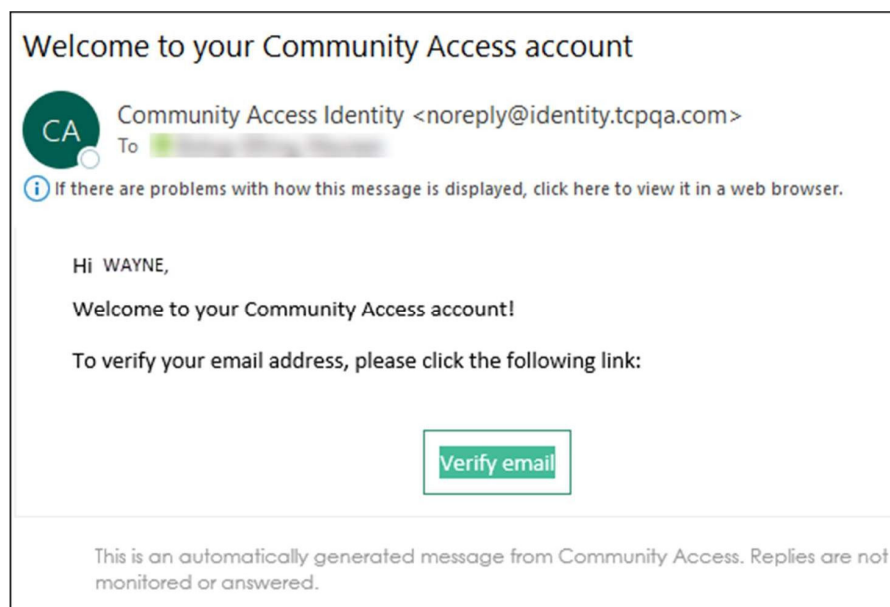
Last name *

* indicates required field

Sign up

[Back to sign in](#)

Enter a valid email address, create a password, enter the first and last name, and click Sign Up to create the Tyler Identity account. The application sends a confirmation email to the email address entered.



Welcome to your Community Access account

CA Community Access Identity <noreply@identity.tcpqa.com>
To [redacted]

If there are problems with how this message is displayed, click here to view it in a web browser.

Hi WAYNE,

Welcome to your Community Access account!

To verify your email address, please click the following link:

Verify email

This is an automatically generated message from Community Access. Replies are not monitored or answered.

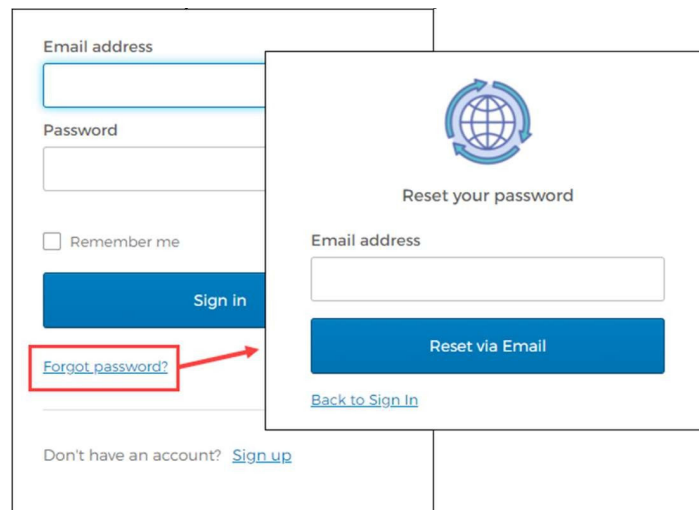
Once the user receives the email and clicks the Verify Email link, Vendor Access presents the User Profile page. Using this page, users can complete their profile information, connect accounts, establish payment methods, and set notification preferences.

Existing Users

For existing users, enter the registered email address and password and click the Sign In button to access the home page.

Password Resets

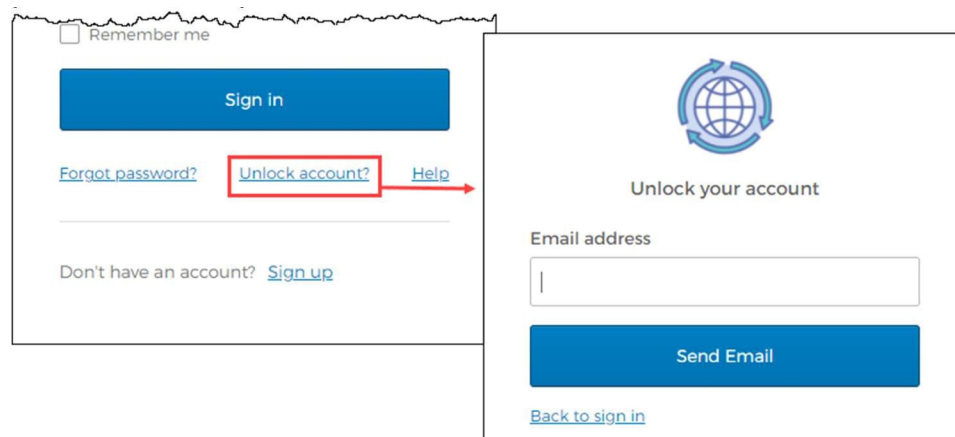
If a user forgets their assigned password, clicking the Forgot Password? link on the Sign-in screen provides the steps to reset the password. The Help link on the Sign-In screen also provides detailed password retrieval instructions.



The image shows a 'Sign In' form with fields for 'Email address' and 'Password', a 'Remember me' checkbox, and a 'Sign in' button. A red box highlights the 'Forgot password?' link, with an arrow pointing to a callout box. The callout box, titled 'Reset your password', contains an 'Email address' field, a 'Reset via Email' button, and a 'Back to Sign In' link. At the bottom of the sign-in form is a link: 'Don't have an account? [Sign up](#)'.

Locked Accounts

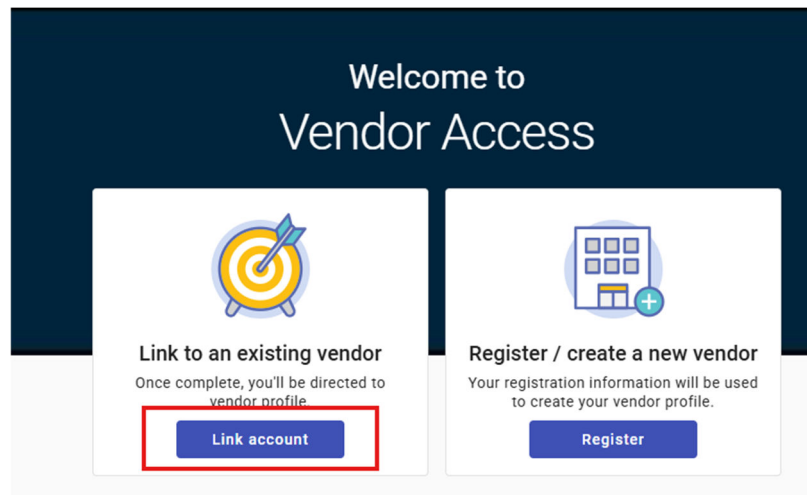
If a user's account is locked, clicking the Unlock Account? link on the Sign-in screen provides the steps to unlock the account.



The image shows a 'Sign In' form with a 'Remember me' checkbox, a 'Sign in' button, and links for 'Forgot password?', 'Unlock account?', and 'Help'. A red box highlights the 'Unlock account?' link, with an arrow pointing to a callout box. The callout box, titled 'Unlock your account', contains an 'Email address' field, a 'Send Email' button, and a 'Back to sign in' link. At the bottom of the sign-in form is a link: 'Don't have an account? [Sign up](#)'.

The Welcome Screen

When you log in to Vendor Access for the first time, the Welcome to Vendor Access screen provides options to establish a link to an existing vendor record from the City of Lawrence ERP solution, or register or create a new vendor record. Once a vendor profile is established, this screen is bypassed and users are taken directly to the home page.



The options available on this screen are as follows:

- Link to an existing vendor—This option associates the currently logged in user with an existing vendor account that has been established with the integrated Tyler product, such as Enterprise ERP. The vendor number and the federal identifier (FID), such as a Social Security number or Taxpayer Identification Number, are required to verify the account. See [Linking to an Existing Vendor](#) for more information.
- Register/create a new vendor—This option creates a new vendor profile. It is used when the vendor does not have an existing vendor account in the integrated Tyler product. The user must complete the steps to establish the vendor profile, such as providing the business name, location, contacts, and payment information. Depending on the integrating Tyler product's configuration, users at your organization may need to approve the vendor's account information before the vendor can use Vendor Access to submit invoices, bid proposals, and so on. For more details, see [Registering/Creating a New Vendor](#).

Additionally, this screen includes the Resources and User Information/Sign In buttons in the banner. These options are found on all Vendor Access screens.

- Resources—This button provides access to useful links and documents your organization has added for vendors.
- User Information/Sign In—Clicking this button provides the name and email address of the user who is currently logged in through Tyler Identity, as well as an option to sign out. If you sign out, the button changes to a Sign In option and you must enter a valid Tyler Identity user name and password to sign in again.

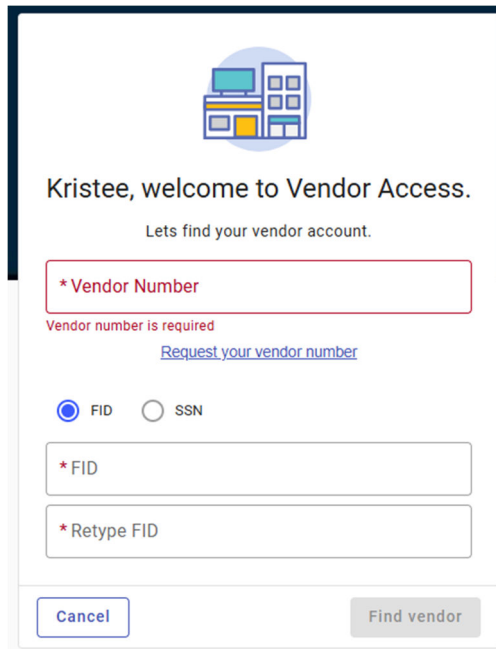


Linking to an Existing Vendor

If you have an existing vendor file the City of Lawrence ERP solution database, Vendor Access provides the Link Account option to establish the connection.

1. Click Link Account to associate the user who is currently logged in with your existing vendor record.
2. Enter the vendor number (as established in the ERP solution) and the vendor's federal identifier (FID) or Social Security number (SSN) to search for the existing vendor record.

The Request Your Vendor Number link provides the contact details for the person at the City of Lawrence who handles these requests.



The screenshot shows a web interface for 'Vendor Access'. At the top, there is a logo of a building with a computer monitor. Below the logo, the text reads 'Kristee, welcome to Vendor Access.' followed by 'Lets find your vendor account.' There are two main input fields: '* Vendor Number' and '* FID'. The '* Vendor Number' field has a red border and a red asterisk, with a red error message 'Vendor number is required' below it. A blue link 'Request your vendor number' is positioned below the error message. Below the '* FID' field is a '* Retype FID' field. At the bottom, there are two buttons: 'Cancel' and 'Find vendor'.

Kristee, welcome to Vendor Access.

Lets find your vendor account.

* Vendor Number

Vendor number is required

[Request your vendor number](#)

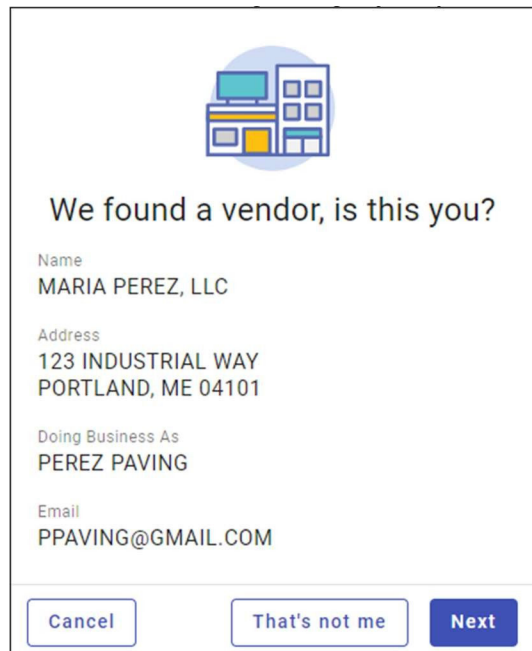
☒ FID ☐ SSN


* FID

* Retype FID

Cancel Find vendor

3. Click Find Vendor.
The application searches and retrieves the vendor information stored on the vendor record.





We found a vendor, is this you?

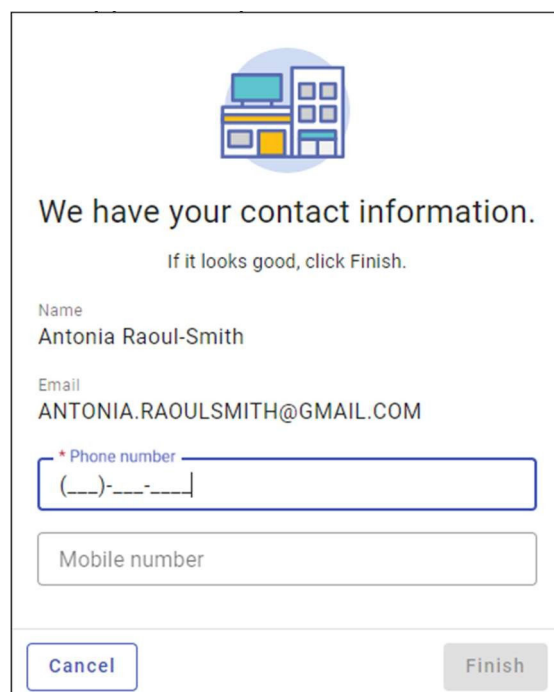
Name
MARIA PEREZ, LLC


Address
123 INDUSTRIAL WAY
PORTLAND, ME 04101

Doing Business As
PEREZ PAVING

Email
PPAVING@GMAIL.COM

4. If this is the correct vendor, click Next. If not, click That's Not Me to return to the previous screen to re-enter the vendor information and correct any errors.
The application provides the name and email address of the logged-in user.





We have your contact information.

If it looks good, click Finish.

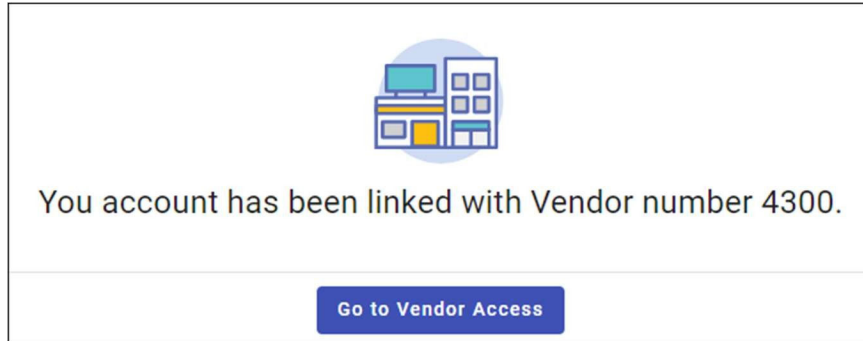
Name
Antonia Raoul-Smith

Email
ANTONIA.RAOULSMITH@GMAIL.COM

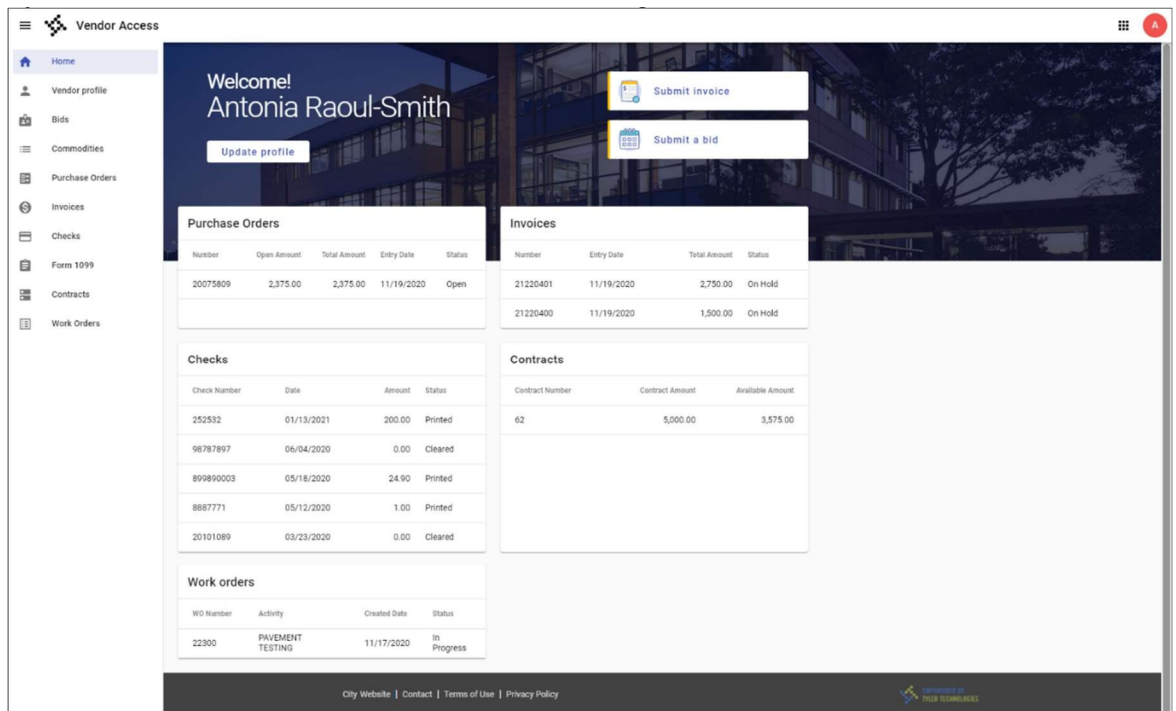
* Phone number
(---)----

Mobile number

5. Enter at least one phone number to use for this email address and then click Finish.
The Finish button is not available until the required fields are completed.
The application saves the information and links the vendor account to the logged-in user.



6. Click Go to Vendor Access to open the home page. Invoices, purchase orders, and other such data that are associated with the existing vendor from the City of Lawrence ERP solution are now linked and searchable through Vendor Access.

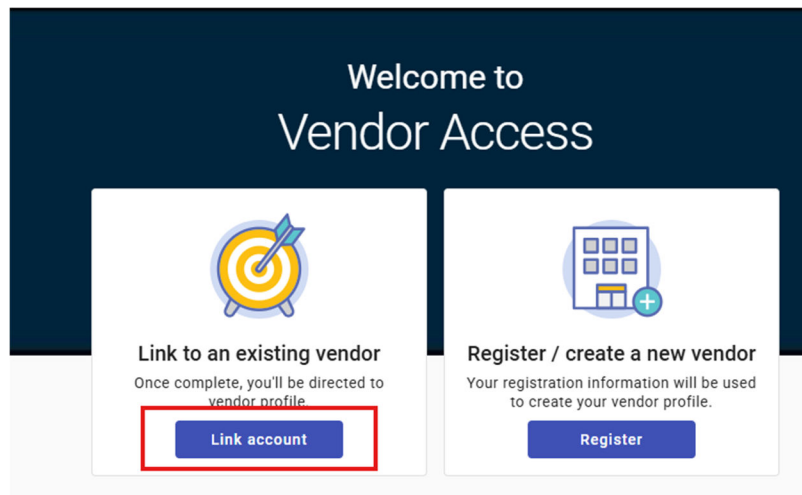


Registering/Creating a New Vendor

It is important to note that the fields and options that are available on these screens vary depending on the City of Lawrence settings. Some options that are shown in these examples are not available for City of Lawrence vendors.

To register a new vendor:

1. On the Welcome screen after you log in to Vendor Access, click Register to create a profile for a new vendor.



The program provides step 1 of the Vendor Registration screen with fields to define the name of the business and the vendor's federal identification number (FID) or Social Security number (SSN). All fields marked with a red asterisk (*) are required.

Note: Clicking Cancel at any point during the registration process exits the registration screens and removes all of the entered information.

- Complete the fields and click Next to continue to step 2 of the registration process to define the location details, referring to the following table for information.

Field	Description
Vendor Information	
Vendor Type	Indicates the type of vendor, such as a payroll vendor, employee, or equipment vendor.
Doing Business As	Specifies the vendor's Doing Business As (DBA) name.
Vendor Email	Identifies the vendor's email address.
Website	Indicates the vendor's website address.
Address Information	
Address City, State ZIP Code	Indicates the vendor's mailing address, including the city, state, and ZIP Code™.
Bank Information <i>Click Update My Bank Account to add vendor banking information, if applicable. The bank code and account information must exist in the ERP system. Vendor Access verifies the entered information matches the existing bank account information in the ERP system.</i>	

- After completing the fields, click Next to proceed to step 3 to specify any applicable minority business enterprise (MBE) classifications and payment terms.

Vendor registration

Profile
Location
3 Information
4 Contacts
5 Documentation
6 Review

Minority business enterprise

Do any of the following MBE classifications apply to your business?

Applies	Description	Certifications	Actions
<input type="checkbox"/>	African-American Owned	0	▼
<input type="checkbox"/>	Asian-American Owned	0	▼
<input type="checkbox"/>	Woman Owned	0	▼
<input type="checkbox"/>	Native American Owned	0	▼

Payment terms

Do you have any payment discounts?

Discount percent
Days to discount
Days to net

Which delivery methods do you accept?

Accounts payable *
Printed
Fax
Email

Purchasing *
Printed
Fax
Email

Cancel
Previous
Next

- If the payment terms are known, complete the fields, referring to the following table for specific field details.
- If the payment terms are not known at this time, click Next to skip this step and proceed to step 4.

Field	Description
Minority Business Enterprise <i>These options vary depending on your organization's setup.</i>	
Do any of the following MBE classifications apply to your business?	
Applies Description Certifications Actions	If MBE classifications are enabled, this table provides the available MBE classifications with options to select any that apply. Once selected, an Add (+) option is available to add a certificate that includes the following fields: <ul style="list-style-type: none"> • Agency • Issue Date • Expiration Date • Notes
Payment Terms	
Do you have any payment discounts?	
Discount Percent	Sets the discount percentage offered by the vendor if the invoice is paid within the Days to Discount timeframe.
Days to Discount	Contains the number of days within which the invoice must be paid to qualify for the vendor discount.
Days to Net	Holds the number of days allowed from the invoice date to pay the full invoice.
Which delivery methods do you accept?	
Accounts Payable	Provides options to select one or more accepted delivery methods for accounts payable: <ul style="list-style-type: none"> • Printed—The vendor accepts printed delivery. • Email—The vendor accepts delivery by email.
Purchasing	Provides options to select one or more accepted delivery methods for purchasing: <ul style="list-style-type: none"> • Printed—The vendor accepts printed purchase orders. • Email—The vendor accepts purchase orders by email.



4. Click Next to proceed to step 4 to define the contacts.

Vendor registration

✓ Profile — ✓ Location — ✓ Information — **4 Contacts** — 5 Documentation — 6 Review

Nice work!

We have your email, but how else can you be contacted?

Full Name*
Antonia Raoul-Smith

Type*
▼

Phone*

Mobile Phone

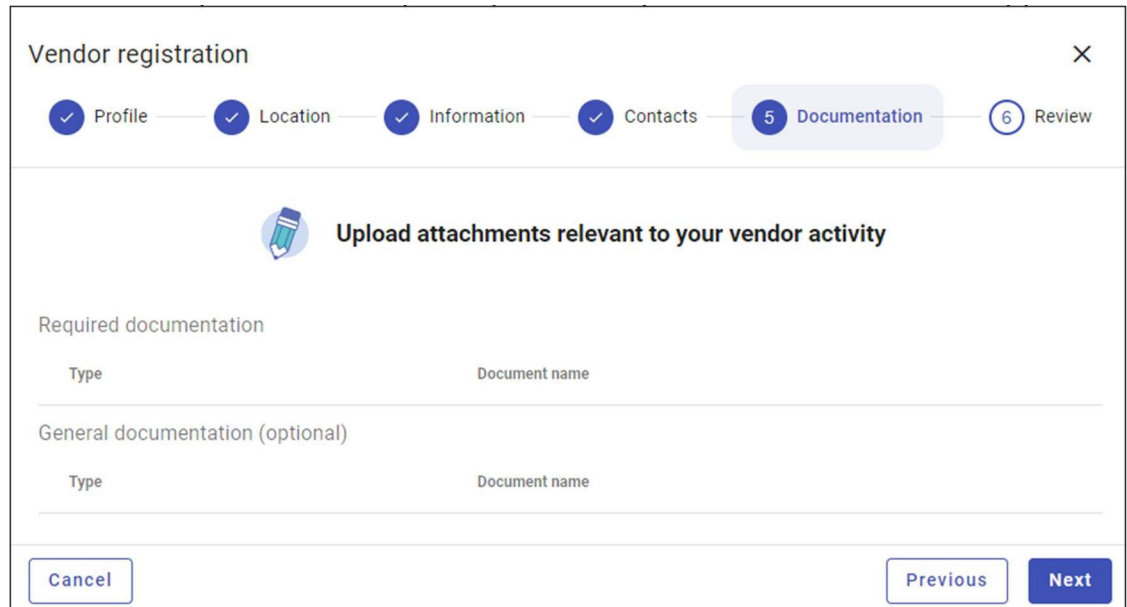
Email*
antonia.raoulsmith@gmail.com

Comments

Cancel Previous Next

Field	Description
Full Name	Indicates the full name of the person registering as a vendor. The app automatically completes this information based on the email address you provided when logging in. For example, if you logged in through Google, the full name associated with your Google account is provided in this field.
Type	Specifies the type of contact: <ul style="list-style-type: none">• General Contacts• Accounts Payable Contacts• Purchasing Contacts
Phone	Establishes the phone number of the contact. A phone number is required.
Mobile Phone	Indicates the mobile phone number of the contact, if different from the phone number entered in the Phone field.
Email	Identifies the email address of the contact. The app automatically completes this information based on the email address you provided when logging in.
Comments	Provides a text box to enter any comments associated with the contact information. For example, the contact's job role or preferred contact method.

- Click Next to proceed to step 5 to provide any relevant documents, if applicable.



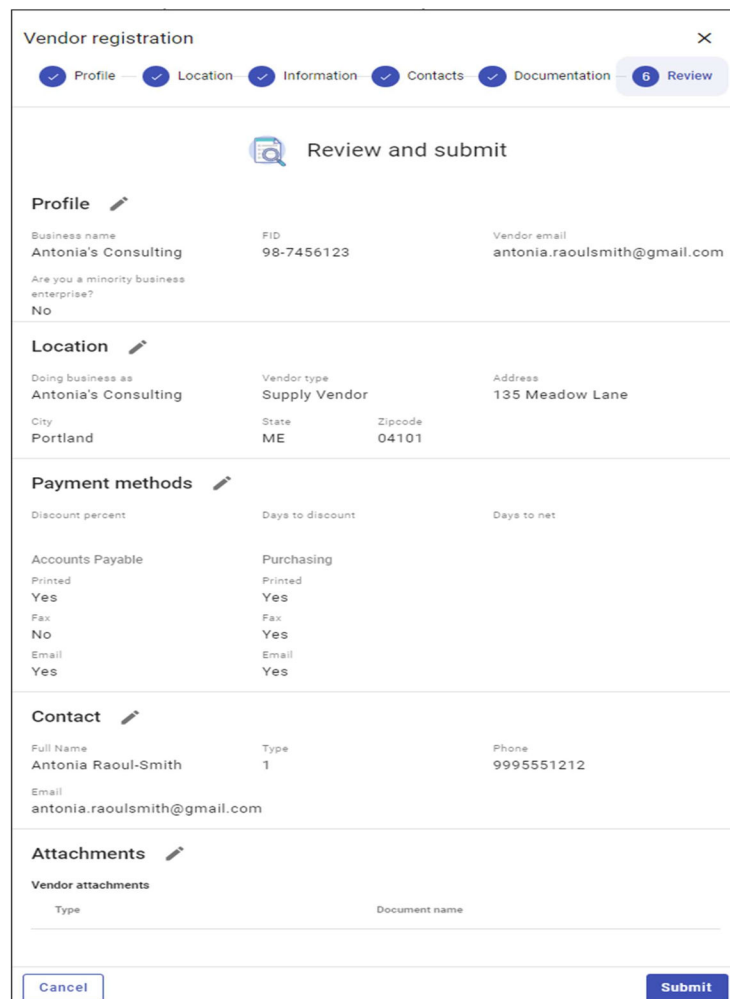
The screenshot shows the 'Vendor registration' window at step 5, 'Documentation'. The progress bar at the top indicates steps 1 through 6, with step 5 highlighted. The main heading is 'Upload attachments relevant to your vendor activity'. Below this, there are two sections for 'Required documentation' and 'General documentation (optional)'. Each section has a table with columns for 'Type' and 'Document name'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'.

Type	Document name

Type	Document name

Buttons: Cancel, Previous, Next

- Click Next to proceed to the final step to review the entered information.



The screenshot shows the 'Vendor registration' window at step 6, 'Review'. The progress bar at the top indicates steps 1 through 6, with step 6 highlighted. The main heading is 'Review and submit'. Below this, there are several sections for reviewing the entered information: 'Profile', 'Location', 'Payment methods', 'Contact', and 'Attachments'. Each section has a table with various fields. At the bottom, there are two buttons: 'Cancel' and 'Submit'.

Profile		
Business name	FID	Vendor email
Antonia's Consulting	98-7456123	antonia.raoulsmith@gmail.com
Are you a minority business enterprise?		
No		

Location		
Doing business as	Vendor type	Address
Antonia's Consulting	Supply Vendor	135 Meadow Lane
City	State	Zipcode
Portland	ME	04101

Payment methods		
Discount percent	Days to discount	Days to net
Accounts Payable		
Printed	Purchasing	Printed
Yes	Yes	Yes
Fax	Fax	Yes
No	Yes	Yes
Email	Email	Yes
Yes	Yes	Yes

Contact		
Full Name	Type	Phone
Antonia Raoul-Smith	1	9995551212
Email		
antonia.raoulsmith@gmail.com		

Attachments	
Vendor attachments	
Type	Document name

Buttons: Cancel, Submit

7. Review the information and click Submit to complete the registration. To make changes, either click the step or click the Edit option beside the step heading to return to that step to update the information. Click Review to return to the final step.

Vendor registration

Profile Location Information Contacts Documentation 6 Review

Review and submit

Profile

Business name
Fritz Fencing

Location

Doing business as

Vendor registration

Profile Location Payment Contacts Documentation 6 Review

Hi there!

Let's create your vendor profile. First, share some information about yourself.

* Business name
Fritz Fencing

☒ FID ☐ SSN

* FID
55-4261800

* Retype FID
55-4261800

Cancel Review

8. Once the vendor registration is submitted, the program provides a confirmation message. Click I'm Done to continue to the Vendor Access home page.

Nice work!

Your registration has been submitted and your vendor profile is being created.

I'm done

Home Page

Once a vendor profile is established, the Vendor Access home page serves as the primary landing page when users log in to Vendor Access. It provides the vendor's profile information and access to other options, such as Commodities, Purchase Orders, Invoices, Checks, and Contracts.

The screenshot shows the Vendor Access Home Page. On the left is a sidebar menu with options: Home, Vendor profile, Bids, Commodities, Purchase Orders, Invoices, Checks, Form 1099, Contracts, and Work Orders. The top navigation bar includes a hamburger menu, the Vendor Access logo, and a 'Submit a bid' button. The main content area features a large 'Update profile' button, a section for 'Announcements' with a speaker icon and the text 'You're all caught up on announcements', and a 'Purchase Orders' table.

Number	Open Amount	Total Amount	Entry Date	Status
20230016	0.00	2,190.00	12/01/2022	Closed
20220022	449.99	449.99	01/10/2022	Open
20220021	0.00	1,490.54	12/16/2021	Closed
20220020	0.00	1,490.54	12/16/2021	Closed
20220019	0.00	1,490.54	12/16/2021	Closed

At the bottom right of the Purchase Orders table is a button labeled 'All purchase orders'.

This screen also provides any announcements, if applicable.

The screenshot shows the Vendor Access Home Page for a specific vendor, Antonia Raoul-Smith. The top navigation bar includes a hamburger menu, the Vendor Access logo, and buttons for 'Submit invoice' and 'Submit a bid'. The main content area features a 'Welcome! Antonia Raoul-Smith' message, an 'Update profile' button, and four tables: 'Purchase Orders', 'Invoices', 'Checks', and 'Work orders'.

Number	Open Amount	Total Amount	Entry Date	Status
20075809	2,375.00	2,375.00	11/19/2020	Open

Number	Entry Date	Total Amount	Status
21220401	11/19/2020	2,750.00	On Hold
21220400	11/19/2020	1,500.00	On Hold

Check Number	Date	Amount	Status
252532	01/13/2021	200.00	Printed
98787897	06/04/2020	0.00	Cleared
899800003	05/18/2020	24.90	Printed
8887771	05/12/2020	1.00	Printed
20101089	03/23/2020	0.00	Cleared

Contract Number	Contract Amount	Available Amount
62	5,000.00	3,575.00

WO Number	Activity	Created Date	Status
22300	PAVEMENT TESTING	11/17/2020	In Progress

At the bottom of the page is a footer with links: City Website | Contact | Terms of Use | Privacy Policy, and a logo for 'POWERED BY FLEX TECHNOLOGIES'.

The bottom of the home page provides overview information about the records that are associated with the vendor. These are informational only. To access the records, use the navigation menu.

Vendor Access

Welcome! Antonia Raoul-Smith

[Update profile](#)

[Submit invoice](#)

[Submit a bid](#)

Purchase Orders

Number	Open Amount	Total Amount	Entry Date	Status
20075809	2,375.00	2,375.00	11/19/2020	Open

Invoices

Number	Entry Date	Total Amount	Status
21220401	11/19/2020	2,750.00	On Hold
21220400	11/19/2020	1,500.00	On Hold

Checks

Check Number	Date	Amount	Status
252532	01/13/2021	200.00	Printed
98787897	06/04/2020	0.00	Cleared
899890003	05/18/2020	24.90	Printed
8887771	05/12/2020	1.00	Printed
20101089	03/23/2020	0.00	Cleared

Contracts

Contract Number	Contract Amount	Available Amount
62	5,000.00	3,575.00

Work orders

WO Number	Activity	Created Date	Status
22300	PAVEMENT TESTING	11/17/2020	In Progress

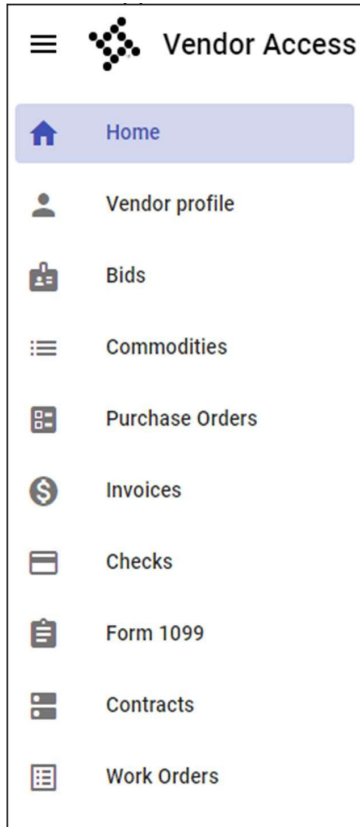
City Website | Contact | Terms of Use | Privacy Policy

POWERED BY TRULIO TECHNOLOGIES

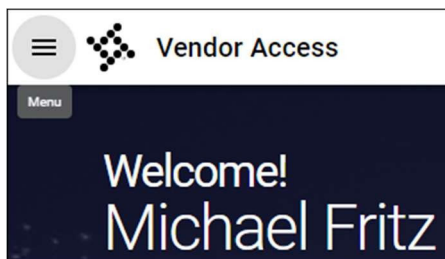


Using the Navigation Menu

The navigation menu serves as the primary means of navigating through the Vendor Access application. Available options vary depending on City of Lawrence settings.



Clicking the Menu button at the top of the page hides or displays the navigation menu.



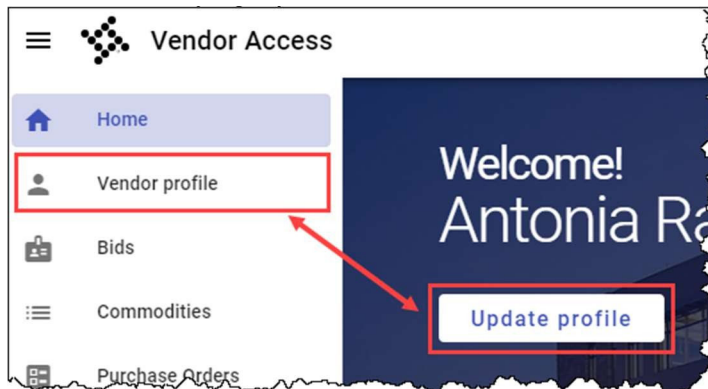
Vendor Profile

The Vendor Profile provides essential information about the vendor, including associated locations, contacts, payment terms, and attachments.

The screenshot shows the 'Vendor Access' application interface. On the left is a navigation menu with options: Home, Vendor profile (selected), Bids, Commodities, Purchase Orders, Invoices, Checks, Form 1099, Contracts, and Work Orders. The main content area is titled 'Vendor profile' and has two tabs: 'Locations' and 'Attachments'. The 'Locations' tab is active, showing a 'Location' dropdown set to 'Nexus'. Below this, there are fields for 'Name' (Nexus), 'Remit Address' (89 Sustainable Drive, Portland, ME 04101), and 'Address Type' (Accounts Payable). To the right, there are sections for 'Business owner' (with email and website links) and 'Bank information' (with an 'Update my bank account' button). Below the location section, there are sections for 'Contacts' (showing 'No contacts found.') and 'Payment Terms'. The 'Payment Terms' section includes fields for 'Discount percent', 'Days to discount', and 'Days to net', as well as checkboxes for 'Accounts payable' and 'Purchasing' delivery methods (Email, Fax, Mail).

Maintaining Profile Information

In addition to selecting Vendor Profile in the navigation menu, the Update Profile option on the home page provides access to the Vendor Profile page.



Locations


The Locations tab provides information for a selected location associated with the vendor, including the remit address, contact names and phone numbers, and accepted delivery and payment methods.

The Add and Edit options in each group allow vendors to maintain the information.

The screenshot displays the 'Vendor profile' interface with the 'Locations' tab selected. A modal window titled 'Edit Location' is open, showing the details for 'MARIA PEREZ, LLC'. The modal includes fields for Location Name, Doing Business As, Email address, Type, Address, Address line 2, City, State, and Zip Code. A red arrow points to the edit icon (pencil) in the top right corner of the location list.

Vendor profile

Locations Attachments

Location MARIA PEREZ, LLC + 

Name: MARIA PEREZ, LLC Doing business as: PEREZ PAVING

Remit Address: 123 INDUSTRIAL W
SUITE 103
ATTN: MARIA PERE
PORTLAND, ME 041

Edit Location

Location Name* MARIA PEREZ, LLC

Doing Business As PEREZ PAVING

Email address MARIA.PEREZ@PEREZPAVING.NET

Type* General

Address* 123 INDUSTRIAL WAY

Address line 2 SUITE 103

City PORTLAND

State ME Zip Code 04101

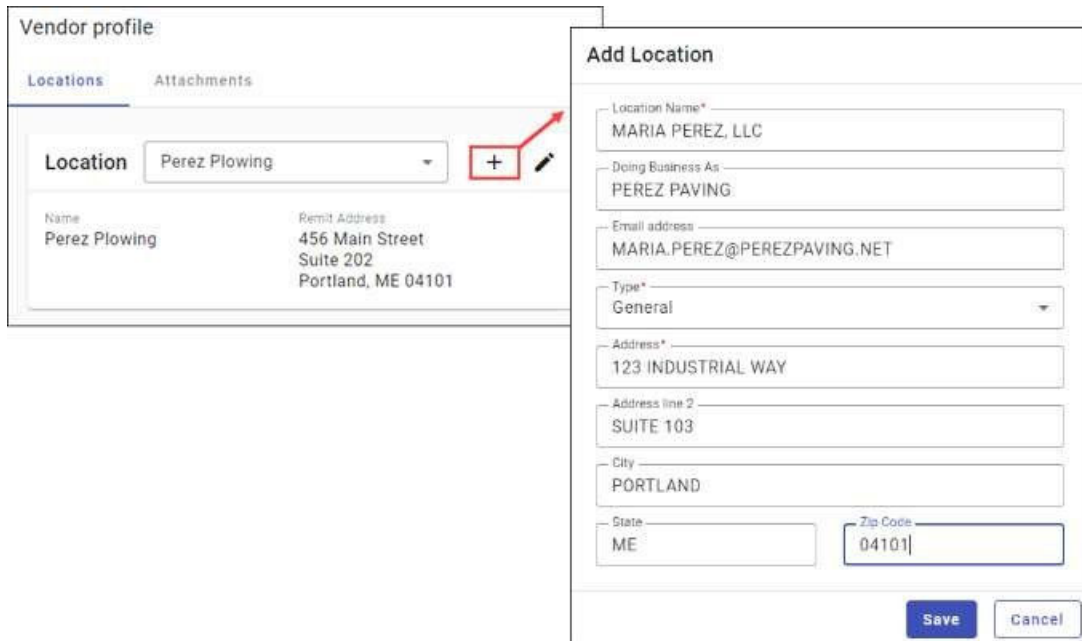
Save Cancel

To view or maintain a different location, click the Location list and select the location. The screen refreshes to show the information for the selected location.



The screenshot shows the 'Vendor profile' page with the 'Locations' tab selected. A dropdown menu is open for the 'Location' field, which currently displays 'MARIA PEREZ, LLC'. The dropdown list contains three options: 'MARIA PEREZ, LLC', 'MARIA PEREZ, LLC', and 'Perez Plowing'. A red arrow points to the 'Perez Plowing' option. The background shows the details for the currently selected location, 'MARIA PEREZ, LLC', including its name and remittance address: '123 INDUSTRIAL WAY, SUITE 103, PORTLAND, ME 04101'.

To add a new location, click Add, complete the fields to define the location, and click Save.



The screenshot shows the 'Vendor profile' page with the 'Locations' tab selected. The 'Location' dropdown now shows 'Perez Plowing'. A red box highlights the '+' icon next to the dropdown, with a red arrow pointing to the 'Add Location' modal. The modal contains the following fields: 'Location Name*' (MARIA PEREZ, LLC), 'Doing Business As' (PEREZ PAVING), 'Email address' (MARIA.PEREZ@PEREZPAVING.NET), 'Type*' (General), 'Address*' (123 INDUSTRIAL WAY), 'Address line 2' (SUITE 103), 'City' (PORTLAND), 'State' (ME), and 'Zip Code' (04101). 'Save' and 'Cancel' buttons are at the bottom right.



Bank Information

Click Update My Bank Account to add or change bank account information.

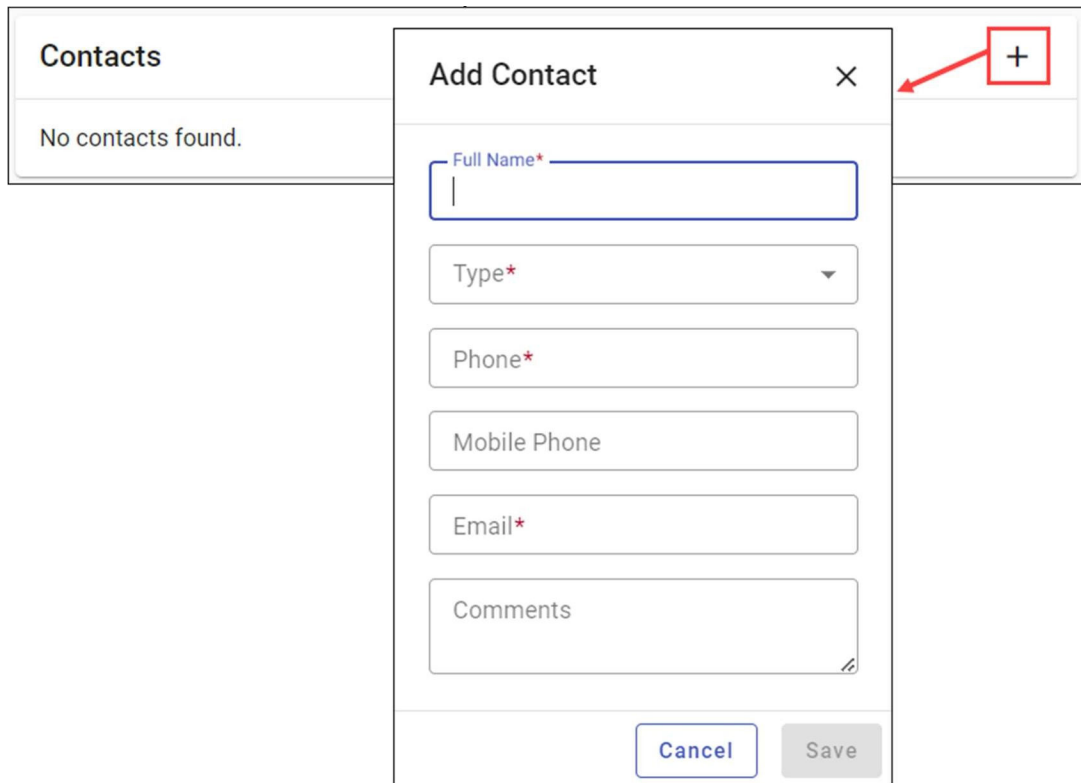
The screenshot shows the 'Vendor profile' page with tabs for 'Locations' and 'Attachments'. The 'Locations' tab is active, showing a 'Location' dropdown set to 'Nexus'. Below this, there are fields for 'Name' (Nexus), 'Remit Address' (89 Susta, Portland), and 'Address Type' (Accounts Payable). A 'Contacts' section indicates 'No contacts found.' On the right, the 'Business owner' section displays 'Vendor email' (dell@tylerdemo.net) and 'Website' (https://www.dell.com/en-us). The 'Bank information' section is highlighted with a red box, containing a blue button labeled 'Update my bank account'. A modal window titled 'Update Bank Account' is open in the center, featuring input fields for 'Routing number*' and 'Account number*', radio buttons for 'Checking' (selected) and 'Savings', and 'Save' and 'Cancel' buttons.

The View option allows you to show or hide bank account information for privacy and security.

The screenshot shows the 'Bank information' section. It includes a piggy bank icon, labels for 'Routing number', 'Account number', and 'Account type', and a blue button labeled 'Update my bank account'. A red box highlights an eye icon in the top right corner, which is used to toggle the visibility of the bank account information.

Contacts

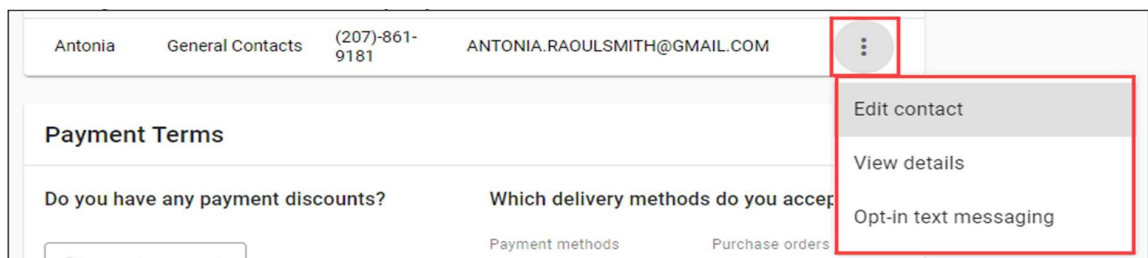
The Contacts group provides a list of contacts associated with the selected location. If no contacts exist, use the Add option to enter a new contact.



The screenshot shows a 'Contacts' section with the text 'No contacts found.' and an 'Add Contact' modal form. The modal form has a close button (X) in the top right corner. A red box highlights a '+' button in the top right corner of the main interface, with a red arrow pointing to it. The 'Add Contact' form contains the following fields:

- Full Name* (text input)
- Type* (dropdown menu)
- Phone* (text input)
- Mobile Phone (text input)
- Email* (text input)
- Comments (text area)
- Cancel (button)
- Save (button)

Clicking the More button displays a list of available actions for each contact record.

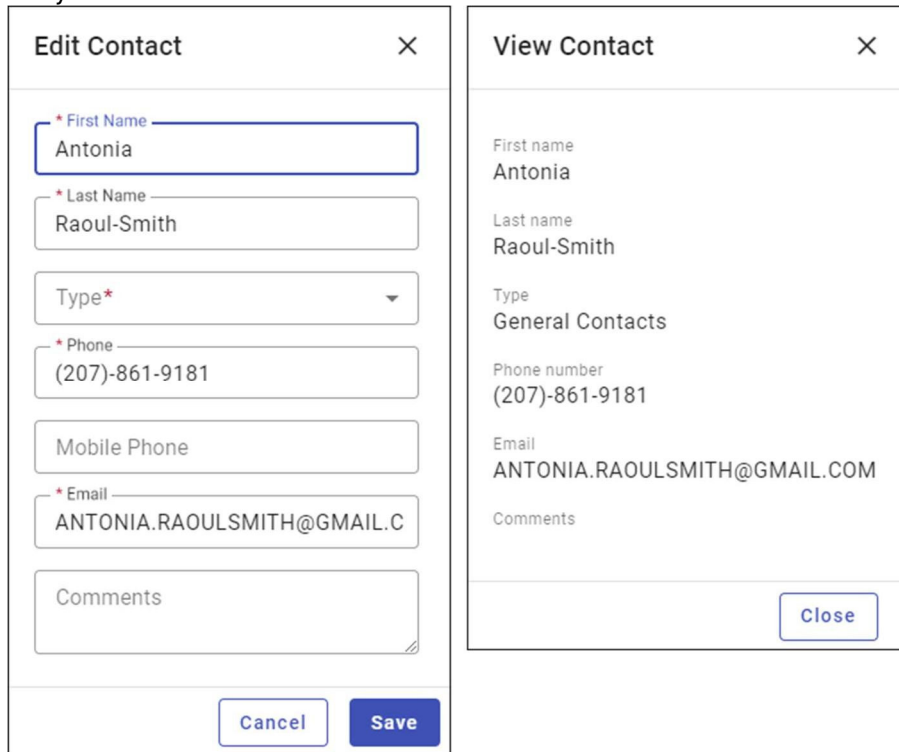


The screenshot shows a contact record for 'Antonia' with the following details: 'General Contacts', '(207)-861-9181', and 'ANTONIA.RAOULSMITH@GMAIL.COM'. A red box highlights a three-dot menu button (More) in the top right corner of the contact record. A dropdown menu is open, showing the following options:

- Edit contact
- View details
- Opt-in text messaging

Below the contact record, there is a 'Payment Terms' section with the text 'Do you have any payment discounts?' and 'Which delivery methods do you accept?'. There are also links for 'Payment methods' and 'Purchase orders'.

The Edit Contact and View Details options provide information about the selected contact. The Edit Contact window provides access to the fields to update the information whereas the View Contact window is informational only.



The image displays two side-by-side windows for managing contact information. The 'Edit Contact' window on the left features a form with input fields for First Name, Last Name, Type (a dropdown menu), Phone, Mobile Phone, Email, and a text area for Comments. It includes 'Cancel' and 'Save' buttons at the bottom. The 'View Contact' window on the right displays the same information in a read-only format, with a 'Close' button at the bottom right.

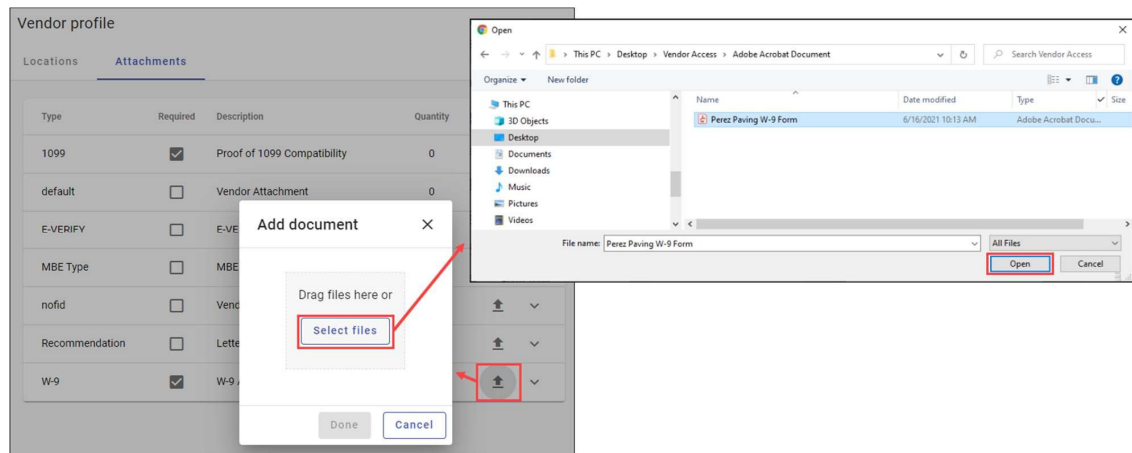
Field	Edit Contact	View Contact
First Name	Antonia	Antonia
Last Name	Raoul-Smith	Raoul-Smith
Type	General Contacts	General Contacts
Phone	(207)-861-9181	(207)-861-9181
Mobile Phone		
Email	ANTONIA.RAOULSMITH@GMAIL.COM	ANTONIA.RAOULSMITH@GMAIL.COM
Comments		

Attachments

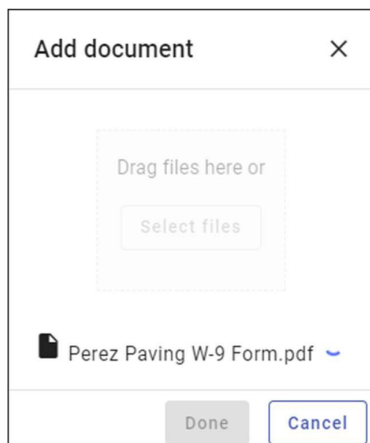
The Attachments tab displays a list of attachment types the City of Lawrence has established for vendors. Attachments may be required or optional.

Vendor profile				
Locations		Attachments		
Type	Required	Description	Quantity	Actions
default	<input checked="" type="checkbox"/>	Vendor Attachment	0	
Insurance Document	<input checked="" type="checkbox"/>	Vendor Insurance	1	
Test Attachment Type VA	<input checked="" type="checkbox"/>	TEST Vendor Attachment	0	
W-9	<input checked="" type="checkbox"/>	Vendor W-9	1	

Clicking the Upload button provides the Add Document dialog box for selecting the file to attach from the workstation.



The selected attachment is added to the vendor profile.



Commodities

Clicking Commodities on the navigation menu displays the Commodities page with panels showing all of the available commodity codes in the system on the left and the commodity codes that are associated with the selected vendor on the right. The vendor's associated commodities determine which categories of goods and services the vendor can provide when bid opportunities arise in the City of Lawrence's ERP solution.

Vendor Access

Commodities

Click the commodities in the table below to save them to your vendor profile.

257305 results [Filter](#)

Code	Description
1	test
00514040559	1 IN. X 50 YDS. ROLL, 320 GRIT
00514041151	1-1/2 IN. W. 30 FT. ROLL, 120 GRIT
00514041409	1 1/2 IN. X 50 YD. ROLL, 80 GRIT
00514041656	1-1/2 IN. X 50 YD. ROLL, 120 GRIT
00514080449	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, COARSE 36 GRIT
00514080555	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, MEDIUM 50 GRIT
00514080662	CLOSED COAT 3 IN. X 24 IN., BELT SIZE 60, (1/2) GRIT
00514080670	CLOTH, 2 IN. X 48 IN., 60 GRIT
00514080688	CLOTH, 2 IN. X 48 IN., 120 GRIT
00514080779	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, FINE 100 GRIT
00514080787	CLOTH, 3 IN. X 24 IN., 120 GRIT
00514080795	CLOTH, 3 IN. X 21 IN., DRY, 40 GRIT
00514080803	CLOTH, 3 IN. X 21 IN., DRY, 60 GRIT

Your commodities

Commodities added below are automatically saved to your profile.

6 results [Filter](#)

Code	Description	Actions
00514040559	1 IN. X 50 YDS. ROLL, 320 GRIT	
00514080555	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, MEDIUM 50 GRIT	
00514080662	CLOSED COAT 3 IN. X 24 IN., BELT SIZE 60, (1/2) GRIT	
00514080779	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, FINE 100 GRIT	
02215256302	SPRING, IDLER, FLAIL, NO. A-7111	
07048588755	OPTION - SPRINGS, FRONT, HEAVY DUTY, FOR SNOW PLOW PACKAGE	

The Filter options are available in each group to enter criteria to narrow the number of results.

Your commodities

Commodities added below are automatically saved to your profile.

6 results [Filter](#)

Code [↑](#) Description

00514040559 1 IN. X 50 YDS. ROLL, 320 GRIT

Adding a Commodity Code

Commodity codes that exist in the integrating system can be added to individual vendors. To add a commodity code to the selected vendor, search for the needed code and select it from the Commodities group.

Commodities

Click the commodities in the table below to save them to your vendor profile.

5 results [Filter](#)

Code ↑	Description
<input type="text" value="Filter code"/>	<input type="text" value="closed coat"/>
00514080449	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, COARSE 36 GRIT
00514080555	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, MEDIUM 50 GRIT
00514080662	CLOSED COAT 3 IN. X 24 IN., BELT SIZE 60, (1/2) GRIT
00514080779	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, FINE 100 GRIT
00514320969	7 IN. X NH, 50/60 GRIT, TYPE C, CLOSED COAT

Rows per page: 1-5 of 5 < >

✓ Your commodities

Commodities added below are automatically saved to your profile.

6 results [Filter](#)

Code ↑	Description	Actions
00514040559	1 IN. X 50 YDS. ROLL, 320 GRIT	
00514080555	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, MEDIUM 50 GRIT	
00514080662	CLOSED COAT 3 IN. X 24 IN., BELT SIZE 60, (1/2) GRIT	
00514080779	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, FINE 100 GRIT	
02215256302	SPRING, IDLER, FLAIL, NO. A-7111	
07048588755	OPTION - SPRINGS, FRONT, HEAVY DUTY, FOR SNOW PLOW PACKAGE	

The screen refreshes to add the selected commodity code to the Your Commodities group, updating the number of results accordingly.

Commodities

Click the commodities in the table below to save them to your vendor profile.

5 results [Filter](#)

Code ↑	Description
<input type="text" value="Filter code"/>	<input type="text" value="closed coat"/>
00514080449	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, COARSE 36 GRIT
00514080555	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, MEDIUM 50 GRIT
00514080662	CLOSED COAT 3 IN. X 24 IN., BELT SIZE 60, (1/2) GRIT
00514080779	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, FINE 100 GRIT
00514320969	7 IN. X NH, 50/60 GRIT, TYPE C, CLOSED COAT

Rows per page: 1-5 of 5 < >

✓ Your commodities

Commodities added below are automatically saved to your profile.

7 results [Filter](#)

Code ↑	Description	Actions
00514040559	1 IN. X 50 YDS. ROLL, 320 GRIT	
00514080555	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, MEDIUM 50 GRIT	
00514080662	CLOSED COAT 3 IN. X 24 IN., BELT SIZE 60, (1/2) GRIT	
00514080779	CLOSED COAT 3 IN. X 24 IN., BELT SIZE TYPE A, FINE 100 GRIT	
00514320969	7 IN. X NH, 50/60 GRIT, TYPE C, CLOSED COAT	
02215256302	SPRING, IDLER, FLAIL, NO. A-7111	
07048588755	OPTION - SPRINGS, FRONT, HEAVY DUTY, FOR SNOW PLOW PACKAGE	

Deleting a Commodity Code

Deleting a commodity code removes it from the selected vendor record only. It does not remove the code from the system.

1. From the Your Commodities group, locate the commodity code to remove and select the Delete option. The application provides a confirmation message.
2. Click Confirm Delete to continue. The screen refreshes to remove the code from the Your Commodities group.

Purchase Orders

Purchase Orders provides a list of purchase orders issued to the vendor from the City of Lawrence.

Purchase Orders

My purchase orders

Last 7 Days

Last 30 Days

Number ↑	Description	Open Amount	Total Amount	Status
<input type="text" value="Filter number"/>	<input type="text" value="Filter description"/>	<input type="text" value="Filter open amt"/>	<input type="text" value="Filter total amt"/>	<input type="text" value="Filter status"/>
20075809	Plow Post Office Parking Lot	2,375.00	2,375.00	Open

Rows per page: 25 1-1 of 1

Overview

You have 1 open PO's

Open amount

\$2,375.00

Total amount

\$2,375.00

Amounts as of Jun 16, 2021

The Last 7 Days and Last 30 Days filters allow vendors to quickly view the purchase orders that have been issued in the past week and past month. Filters can also be applied by purchase order number, description, open amount, total amount, or status.

My purchase orders

Last 7 Days

✓ Last 30 Days

Number ↑	Description	Open Amount	Total Amount	Status
<input type="text" value="Filter number"/>	<input type="text" value="Filter description"/>	<input type="text" value="Filter open amt"/>	<input type="text" value="Filter total amt"/>	<input type="text" value="Filter status"/>

No matching records found

Clicking the arrow for a purchase order provides additional details.

Purchase Orders

My purchase orders

Last 7 Days

Last 30 Days

Number ↑	Description	Open Amount	Total Amount	Status
<input type="text" value="Filter number"/>	<input type="text" value="Filter description"/>	<input type="text" value="Filter open amt"/>	<input type="text" value="Filter total amt"/>	<input type="text" value="Filter status"/>
20075809	Plow Post Office Parking Lot	2,375.00	2,375.00	Open

Overview

You have 1 open PO's

Open amount

\$2,375.00

Total amount

\$2,375.00

Amounts as of Jun 16, 2021

Vendor Access

← Purchase Order #20075809

Related information

Summary

Addresses

Central Location Building
370 US Route 1
Falmouth, ME

Ship To
Building 370 Location
370 US Route 1
Falmouth, ME

Purchase order balance

Subtotal

\$2,375.00

Tax

\$0.00

Amount paid

(\$0.00)

Open amount

\$2,375.00

Available amount

\$2,375.00

Submit Invoice

Details

Issue date

06/16/2021

Line items (1)

Number	Description	Quantity	Open Amount	Total Amount
<input type="text" value="Filter numb"/>	<input type="text" value="Filter descrip"/>	<input type="text" value="Filter qty"/>	<input type="text" value="Filter open am"/>	<input type="text" value="Filter total an"/>
1	Plow Post Office Parking Lot	20.00	2375.00	2375.00

Invoices

Clicking Invoices provides the vendor's submitted invoices.

Vendor Access

Home

Vendor profile

Commodities

Purchase Orders

Invoices

Checks

Form 1099

Contracts

Invoices

My Invoices

Last 7 Days

Last 30 Days

Filter

Number ↑	Description	Total Amount	
21220400	Fix Pot Holes Along Main Stree	1500.00	>
21220401	Repair Potholes	2750.00	>

Rows per page: 25 1-2 of 2 < >

Overview

You have 2 Invoices

Total amount \$4,250.00

Amounts as of Jun 15, 2021

Recently submitted invoices

Number	Amount	Actions
989	125.00	
8967	125.00	
1245	125.00	
123456	.00	
123456	.00	
123	2375.00	
123	2375.00	

Checks

Clicking Checks displays a list of the checks that have been issued to the vendor, including EFTs, manual checks, printed checks, voided checks, and stale checks.

Vendor Access

Home

Vendor profile

Bids

Commodities

Purchase Orders

Invoices

Checks

Form 1099

Contracts

Work Orders

Checks

My Checks

Last 7 Days

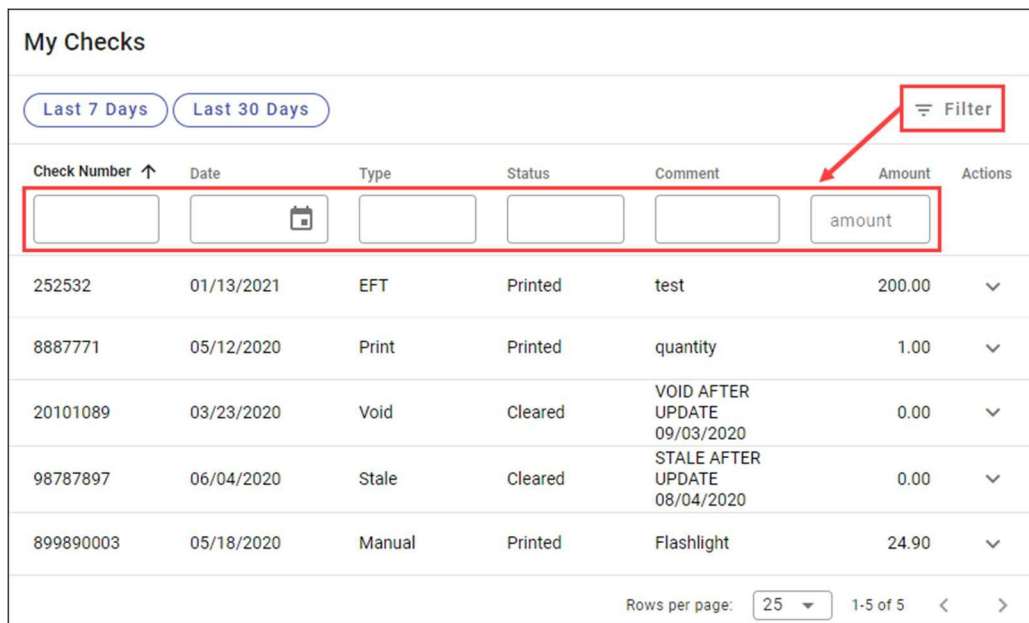
Last 30 Days

Filter

Check Number ↑	Date	Type	Status	Comment	Amount	Actions
252532	01/13/2021	EFT	Printed	test	200.00	▼
8887771	05/12/2020	Print	Printed	quantity	1.00	▼
20101089	03/23/2020	Void	Cleared	VOID AFTER UPDATE 09/03/2020	0.00	▼
98787897	06/04/2020	Stale	Cleared	STALE AFTER UPDATE 08/04/2020	0.00	▼
899890003	05/18/2020	Manual	Printed	Flashlight	24.90	▼

Rows per page: 25 1-5 of 5 < >

The checks can be filtered by the last 7 days or the last 30 days. Clicking the Filter option provides additional fields to apply specific filter criteria to the results, such as a check number, date, or amount.



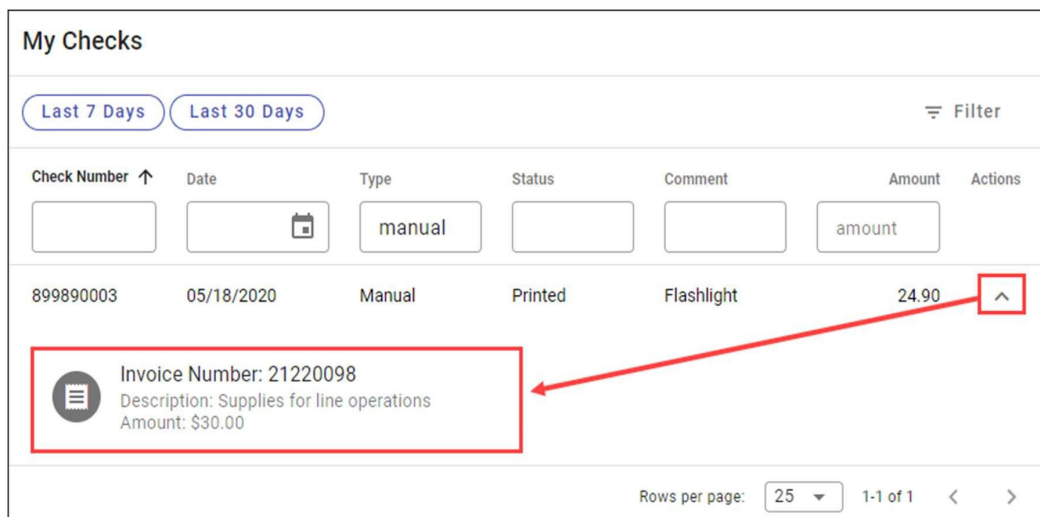
My Checks

Last 7 Days Last 30 Days Filter

Check Number ↑	Date	Type	Status	Comment	Amount	Actions
<input type="text"/>	<input type="text" value="amount"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="amount"/>	
252532	01/13/2021	EFT	Printed	test	200.00	⌵
8887771	05/12/2020	Print	Printed	quantity	1.00	⌵
20101089	03/23/2020	Void	Cleared	VOID AFTER UPDATE 09/03/2020	0.00	⌵
98787897	06/04/2020	Stale	Cleared	STALE AFTER UPDATE 08/04/2020	0.00	⌵
899890003	05/18/2020	Manual	Printed	Flashlight	24.90	⌵

Rows per page: 25 1-5 of 5 < >


Clicking the arrow for an individual check provides additional information, such as the invoice associated with the check. Select the invoice to view the full invoice details.



My Checks

Last 7 Days Last 30 Days Filter

Check Number ↑	Date	Type	Status	Comment	Amount	Actions
<input type="text"/>	<input type="text" value="amount"/>	manual	<input type="text"/>	<input type="text"/>	<input type="text" value="amount"/>	
899890003	05/18/2020	Manual	Printed	Flashlight	24.90	⌵



Invoice Number: 21220098
Description: Supplies for line operations
Amount: \$30.00

Rows per page: 25 1-1 of 1 < >

Contracts

The vendor's associated contracts are provided in the Contracts section.

The screenshot shows the 'Vendor Access' interface with the 'Contracts' section selected in the sidebar. The main content area displays a table of contracts. The first contract is highlighted, and an 'Overview' panel on the right provides a summary of the contract details.

Contract Number	Description	Contract Amount	Start date
20200013	Computer Hardware Contract	160000.00	2020-05-01 00:00:00.000

Overview Summary:

- You have 1 contracts
- Total amount: \$160,000.00
- Amounts as of Jan 19, 2023

Click the arrow for a contract to view the contract details, including a summary, general information, the contract balance, available amount, and any associated items.

The screenshot shows the detailed view of contract 20200013. The interface includes a sidebar with navigation options and a main content area with a summary, general information, balance, and items section. A red box highlights the arrow icon in the contract list, indicating where to click to view the details.

Contract 20200013 Summary:

- General:** Start Date: 05/01/2020, Expiration Date: 06/30/2023, Renewal Date: 06/30/2023, End Date: 06/30/2023
- Balance:** Revised Amount: \$160,000.00, Paid to Date: (\$0.00), Available Amount: \$157,912.52
- Available Amount:** \$157,912.52

Items:

Item	Description	Qty	Unit of measure	Unit price	Total
No matching records found					