# Vendor Self-Service Portal Guide

The purpose of this guide is to assist Attorneys for Children in accessing the Vendor Self-Service Portal so they can maintain their Vendor information and view voucher payment information.

## How to obtain a User ID and Password for the Vendor Self-Service Portal

If there is a valid email on record but you have not received an email with instructions on how to use the Portal, or if you forget your User ID and Password, please contact the SFS Help Desk:

Phone: (855) 233-8363 or (518) 457-7717

Email: <u>helpdesk@sfs.ny.gov</u>

### How to access the Vendor Self-Service Portal

- 1. In your internet browser, enter the web address: www.sfs.ny.gov
- 2. Click on the yellow button at the left of the screen labeled "Vendor Self-Service Portal Login"



3. Enter the username and password provided during the registration process



## How to update address information

1. Click on the arrow next to "Maintain Supplier Information" at the left of the screen

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- User Profiles	Maintain and update supplier information.			
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Tree Manager Reporting Tools				
- <u>Change My Password</u> - <u>My Personalizations</u> - <u>My System Profile</u>				

2. Click on the link for "Addresses"

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3. Click on the "Add a New Address" button to add a new address

OR select an existing address from the list to edit an address

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- My Personalizations	Country:	Q			
- My System Profile	Address 1:				
	Address 2:				
	Address 3:				
	City:				
	County:			Postal:	
	State:				
	Email ID:				
	Telephone Inform	nation			
	*Type	Prefix	Phone		Ext
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- 4. Enter a Description for this address (ex: "Rochester Office")
- 5. Click the magnifying glass icon next to Country

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- 6. Enter the Country in the text field (ex: USA) and click the "Look Up" button
- 7. Select the Country from the Search Results

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	Return to Current	Addresses Futu	re Address		
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8. The screen is now populated with the Country you selected and you can continue to add the new address NOTE: To specify when the address you enter will take effect, enter a date in the "Date Change Will Take Effect" field at the bottom of the screen.

9. Scroll down to the bottom of the screen and click the "Save" button to save the new address

City: County: State:	Q	Postal:			
Email ID:					
Telephone Info	rmation		2000		
*Type	Prefix	Phone	Ext	Add	Delete
Date Change W	III Take Effect:	05/09/2012 (example: 12/31/	2000)		
Return to Curren	nt Addresses	Future Address			
Save					
* Required Field					

NOTE: If you update your address via the Vendor Self-Service Portal, it will be immediately updated in SFS. The Attorney for the Child e-voucher application will receive a nightly update so you can see the address in the application the next day.

#### How to review payment information

- 1. Click on the arrow next to "Review Payment Information" at the left of the screen
- 2. Click on the link for "Payments"

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Bearch:     Bullion Supplier     Information     Maintain Supplier     Information     Manage Orders     Review Prayment Information     Emclicit     Earmenta     Exercises	Value Merry >	Parametrita View payment information.	Account Balances View open account balances.

3. Enter your search criteria on the Review Payments screen and click the "Search" button



# NOTE: The Invoice Number is the *SFS Document Number* that is on the top of your voucher (ex: A000012E)

Reference:	00015		Business Unit	DOT01		
Invoice Number:	025 003		Phone:	518457		
Method	400		Daymont Date	04/20/2012		
inection.	AUR		Payment Date.	04/20/2012		
Amount:		\$35,561.38 USD	Pay Status:	Paid		
Paid To:						
Country:	USA	United States				
Address 1:	123 Tes	st Street				
Address 2:						
Address 3:						
City:	Roches	ter				
County:	Monroe	2	Postal:	11211		
State:	NY	New York				
From:	Test Bar	nk				
Payment Advice						
Invoice		Gross Amount		Discount	Discount Taken	Paid Amount
037 D02		14,651.15 U	SD	0.00 USD	0.00 USD	14,651.15 US
025 D03		10,347.59 U	SD	0.00 USD	0.00 USD	10,347.59 USI
033 D03		10,562.64 U	SD	0.00 USD	0.00 USD	10,562.64 USI

4. Click on any available links in the Search Results to see more information

(ex: click on the link in the "Reference" column to view payment details and see the breakdown of each invoice contained in that one check )

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00015	025 D03	04/20/2012	\$35,561.38 USD
00015	033 D03	04/20/2012	\$35,561.38 USD
00015	037 D02	04/20/2012	\$35,561.38 USD

## How to review invoice information

- 1. Click on the arrow next to "Review Payment Information" at the left of the screen
- 2. Click on the link for "Invoices"

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Information Manage Orders	Filter Options	
<ul> <li>Review Payment Information</li> <li>Invoices</li> </ul>	TOMMY TEST	
- Payments - Account Balances	Enter search criteria and click on Search. Leave blank for all v	values.
D Worklist	Search Criteria	
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- My System Profile	item ID:	
	Vendor Item ID:	٩
	From Date: 04/14/2012 间 (example: 01/31/2	2000)
	To Date: 05/14/2012 🗎 (example: 01/31/2	2000)
	From Amount:	
	To Amount:	
	Approval Status:	
	Search	

3. Enter the desired search criteria, or simply click the "Search" button to bring back all invoices applicable to this Vendor.

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03/02 16:23	05/04/2012	\$1,200.00 USD	PendingOSC	06/03/2012	00008
04/06.13.20/20	05/04/2012	\$900.00 USD	PendingOSC	06/03/2012	00008
JH0 4/25.5/2 KI	05/02/2012	\$600.00 USD	PendingOSC	05/02/2012	00009
JH0 4/24, 27 N	04/27/2012	\$600.00 USD	PendingOSC	04/27/2012	00009
04/26/2012 KI	04/26/2012	\$300.00 USD	Approved	06/02/2012	00007
04/22/2042 1/1	04/22/2012	\$300.00 USD	Approved	05/02/2012	00007
0412212012 N	04/23/2012	4444.44 444			
04/19/2012 KI	04/19/2012	\$300.00 USD	Approved	06/02/2012	00007
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4. Click on the link for Invoice Number to get to the Invoice Detail screen

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	05/14/2012		\$300.00 USD		\$0.00 USD	Check	Unselected	No	N

5. Scroll down to the "Payments Made" section to see payment information (in this example, this invoice is not yet paid)

#### NOTE: If there was a payment made, the "Reference" is the check number or ACH number

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