To successfully transact in the Statewide Financial System (SFS), it is important to **first** refer to the related SFS Handbook. Job aids should be referred to as quick reminders on how to process transactions. SFS Handbooks provide more context and include screenshots.

Job Aid Number	JAA-VEN101-001
Purpose	In this quick guide, you will learn how to log into Vendor Self-Service with the temporary password.
User Role	**Delegated Administrator**
Date Modified	**12/20/2023**
Related SFS Handbook	SFS Training for Vendors

Concept: Upon creation of a new registered New York State (NYS) vendor account, the vendor's primary contact will receive an email with instructions on how to enroll in the online Vendor Self-Service application.

The email will include the following information needed to enroll in Vendor Self-Service:
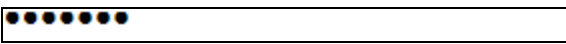
• Web address of self-service screen
• Temporary User ID to login
• Temporary Password to login
• Access code
• NYS Vendor ID

Once the account is established, the vendor's primary contact may designate a Delegated Administrator (Delegated Admin) on the account to manage user accounts and account data maintenance on their behalf.

Predecessor(s)	
Transactions that should occur before this task.	
N/A	

Successor(s)	
Transactions that should occur after this task.	
JAA-VEN101-006 Add a Contact to a NYState Vendor Record	If you know that your Primary Contact is leaving your company, have a Delegated Admin submit a **Supplier Change Request** to update the contacts on your Vendor Portal record.

Procedure

Step	Action
1.	Using the login credentials provided in the email sent to the vendor primary contact; navigate to the URL for the application. The **SFS Supplier Portal** page displays.
2.	Enter the **User ID** provided in your welcome letter into the **User ID** field, which is case-sensitive. User ID
3.	Enter the temporary password provided in your welcome letter into the **Password** field. Password
4.	Click the **Vendor Online Services' Terms of Service** hyperlink. ●●●●●●●
5.	The **Vendor Online Services' Terms of Service** opens in a new window. Review the information and then click the **Close Tab (X)** icon to close the window. ✕
6.	If you do not agree to the **Vendor Online Services' Terms of Service**, you will NOT be able to proceed and use the Vendor Portal. Click the **I agree to Vendor Online Services' Terms of Service** option. ☐ I agree to Vendor Online Services' Terms of Service
7.	Click the **Sign In** button. Sign In
8.	Click the **Create New User** tile. This will be the initial Delegate Admin User Role for this Vendor Account.
9.	Note: Determine if you will be the sole Delegated Admin on the Vendor Account or if you plan to designate a Delegated Admin. If you plan to add a Delegated Admin, you will need to log back in as a user and add an alternate Delegated Admin user account.

Step	Action
10.	Click the scrollbar to scroll down.
11.	Enter the **Access Code** from the Welcome email into the **Access Code** field.
12.	Enter the **Supplier ID** from the Welcome email into the **Supplier ID** field.
13.	Click the **Generate PIN** button.
14.	The **Generate Pin** button will send an email with a PIN number to the primary contact associated to the vendor account. **Note:** The Access Code and Supplier ID are in the Welcome letter you received. The PIN is generated in this process.
15.	Upon receipt of the email containing the PIN(s), enter the PIN(s) into the PIN field.
16.	Create a **User ID** for future logins and enter it into the **Requested User ID** field. **Note:** The requested **User ID** must be unique within the system and is case-sensitive. You may be asked to modify your **User ID** if it is already assigned to another user.
17.	Create a unique **Password** to access the profile created and enter it into the **Password** field. The password must be 8 characters long and contain at least one number and one special character. (e.g., Summer1#).
18.	Confirm the password created in the **Confirm Password** field.
19.	In the optional **Description** field, it is suggested that you enter the Vendor Name or Vendor ID.
20.	In the **Email ID** field, enter your email address where you will receive communications related to the account.
21.	**Language Code** - Leave the default as English. **Time Zone** - Select the appropriate time zone. **Currency Code** - Leave the currency code as 'USD'. New York State will only make payment using US dollars. **Rate Type -** Leave the Rate Type as 'CRRNT'. (Current type)
22.	Click the **Terms of Agreement** link to read and accept the **Terms of Agreement**.
23.	The system navigates you to the **Terms of Agreement** page. The **Terms of Agreement** must be accepted before a **User ID** can be created.
24.	Click the **Return** button when you finish reviewing the **Terms of Agreement**.

Step	Action
25.	Click the **Click to accept the Terms of Agreement below** option.
26.	Click the **Submit** button to process the user account.
27.	The system confirms that the new user account has been successfully created. Click the **OK** button. **Note:** In the event that you receive an error message: • Ensure all the necessary values are entered on the Registration page. • Verify the password is in accordance with the acceptable parameters. • Re-enter the password into the Confirm Password field. • Try another User ID. The Vendor Self-Service system does not allow the same User ID to be used for more than one user.
28.	Your User ID has now been created
29.	Log Out of SFS
30.	Log Back in with your new User ID and Password. You'll be required to create your Password Hints at this time.
31.	**End of Procedure**