

# 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

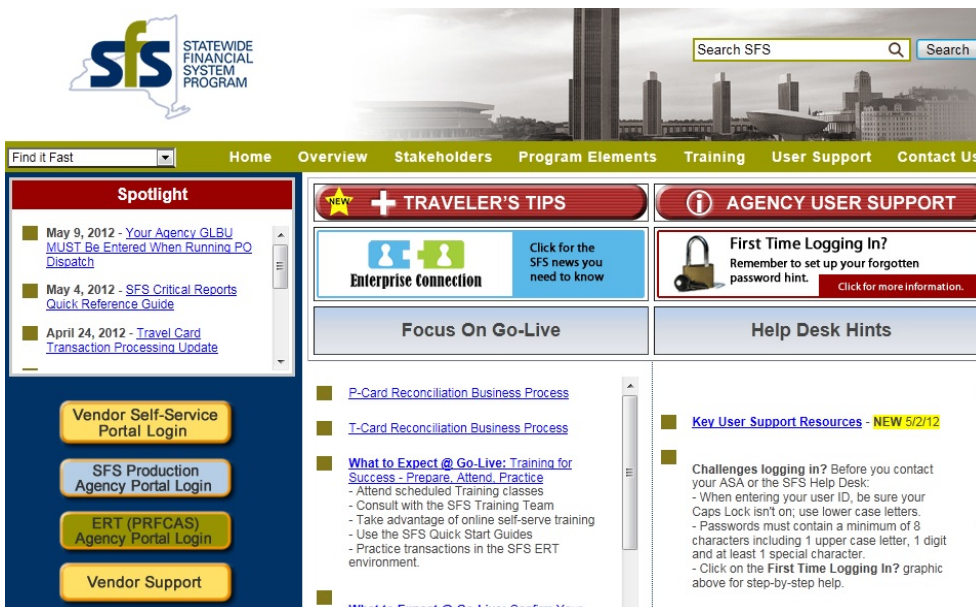
If there is a valid email on record but you have not received an email with instructions on how to use the Portal, or if you forget your User ID and Password, please contact the SFS Help Desk:

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

Email: [helpdesk@sfs.ny.gov](mailto:helpdesk@sfs.ny.gov)

## How to access the Vendor Self-Service Portal

1. In your internet browser, enter the web address: [www.sfs.ny.gov](http://www.sfs.ny.gov)
2. Click on the yellow button at the left of the screen labeled “Vendor Self-Service Portal Login”

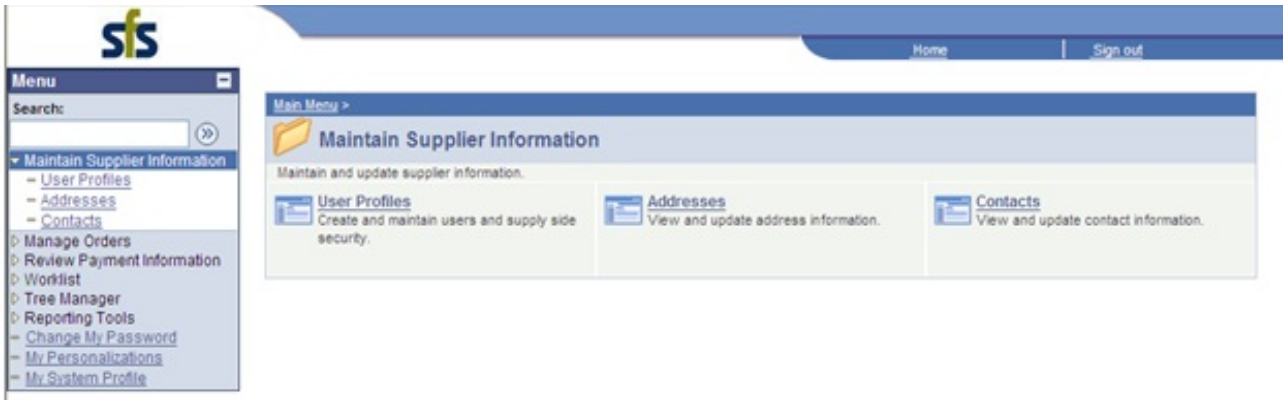


3. Enter the username and password provided during the registration process

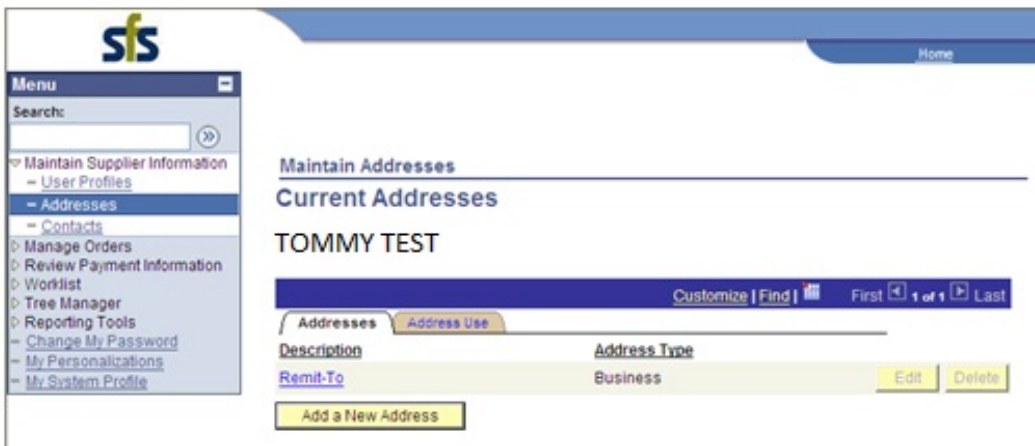
The image shows a screenshot of the SFS login form. At the top left is the SFS logo with the text "STATEWIDE FINANCIAL SYSTEM PROGRAM". Below the logo is a form with two input fields: "User ID:" and "Password:". Below the "Password:" field is a "Sign In" button. At the bottom of the form is a link that says "I forgot my password?".

## How to update address information

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

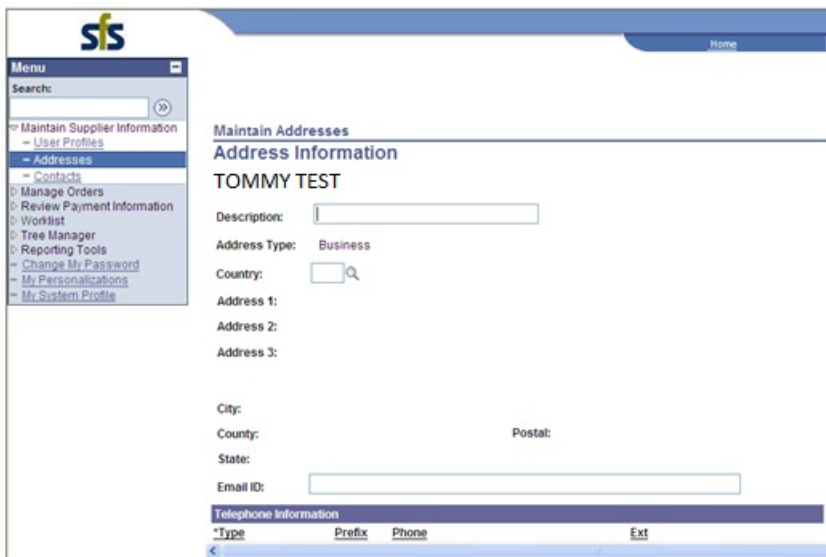


2. Click on the link for "Addresses"



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



4. Enter a Description for this address (ex: “Rochester Office”)
5. Click the magnifying glass icon next to Country

**Menu**

Search:

- ▾ Maintain Supplier Information
  - User Profiles
  - **Addresses**
  - Contacts
- Manage Orders
- Review Payment Information
- Worklist
- Tree Manager
- Reporting Tools
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)

**Look Up Country**

Country:

Description:

[Basic Lookup](#)

**Search Results**

View All First 1 of 1 Last

Country	Description
<a href="#">USA</a>	<a href="#">United States</a>

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

**Menu**

Search:

- ▾ Maintain Supplier Information
  - User Profiles
  - **Addresses**
  - Contacts
- Manage Orders
- Review Payment Information
- Worklist
- Tree Manager
- Reporting Tools
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)

Description:

Address Type:

Country:

Address 1:

Address 2:

Address 3:

City:

County:  Postal:

State:

Email ID:

*Type	Prefix	Phone	Ext
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Date Change Will Take Effect:  (example: 12/31/2000)


[Return to Current Addresses](#) [Future Address](#)

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:  Postal:

State:  

Email ID:

**Telephone Information**

*Type	Prefix	Phone	Ext		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>	<input type="button" value="Delete"/>

Date Change Will Take Effect:   (example: 12/31/2000)

[Return to Current Addresses](#)      [Future Address](#)

\* 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”



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

**Review Payments**

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**Filter Options**


Enter search criteria and click on Search. Leave blank for all values.

**Search Criteria**

Invoice Number:

Payment Reference:

From Payment Date:   (example: 12/31/2000)

To Payment Date:   (example: 12/31/2000)

     [Return to Vendor List](#)

**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 D03	Phone:	518457
Method:	ACH	Payment Date:	04/20/2012
Amount:	\$35,561.38 USD	Pay Status:	Paid
Paid To:			
Country: USA United States			
Address 1: 123 Test Street			
Address 2:			
Address 3:			
City: Rochester			
County:	Monroe	Postal:	11211
State:	NY	New York	
From:	Test Bank		

Payment Advice				
Invoice	Gross Amount	Discount	Discount Taken	Paid Amount
037 D02	14,651.15 USD	0.00 USD	0.00 USD	14,651.15 USD
025 D03	10,347.59 USD	0.00 USD	0.00 USD	10,347.59 USD
033 D03	10,562.64 USD	0.00 USD	0.00 USD	10,562.64 USD

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 )

## Review Payments

### Payments Made

[Set filter options](#) [Return to Vendor List](#)

Reference	Invoice Number	Payment Date	Amount
<a href="#">00015</a>	011 D03	04/18/2012	\$4,767.24 USD
<a href="#">00015</a>	025 D03	04/20/2012	\$35,561.38 USD
<a href="#">00015</a>	033 D03	04/20/2012	\$35,561.38 USD
<a href="#">00015</a>	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"

**Review Invoices**

**Filter Options**

**TOMMY TEST**

Enter search criteria and click on Search. Leave blank for all values.

**Search Criteria**

From Invoice Number:

To Invoice Number:

Item ID:

Vendor Item ID:

From Date:  (example: 01/31/2000)

To Date:  (example: 01/31/2000)

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.

**Review Invoices**

**Invoice List**

**TOMMY TEST**

[Set filter options](#)

[Customize](#) | [Eind](#) | [First](#) | [1-11 of 11](#) | [Last](#)

Invoice Number	Invoice Date	Gross Amt	Approval Status	Due Date	Voucher
<a href="#">05/04/12</a>	05/14/2012	\$300.00 USD	Pending	05/14/2012	00011
<a href="#">03/02_15_23</a>	05/04/2012	\$1,200.00 USD	PendingOSC	05/03/2012	00008
<a href="#">04/06_13_20/20</a>	05/04/2012	\$900.00 USD	PendingOSC	05/03/2012	00008
<a href="#">JHO 4/25.5/2 KI</a>	05/02/2012	\$600.00 USD	PendingOSC	05/02/2012	00009
<a href="#">JHO 4/24_27 KI</a>	04/27/2012	\$600.00 USD	PendingOSC	04/27/2012	00009
<a href="#">04/26/2012 KI</a>	04/26/2012	\$300.00 USD	Approved	05/02/2012	00007
<a href="#">04/23/2012 KI</a>	04/23/2012	\$300.00 USD	Approved	05/02/2012	00007
<a href="#">04/19/2012 KI</a>	04/19/2012	\$300.00 USD	Approved	05/02/2012	00007
<a href="#">JHO 4/4_11_18 KI</a>	04/18/2012	\$900.00 USD	Pending	04/18/2012	00009
<a href="#">Invoice Number YCI</a>	04/17/2012	\$600.00 USD	Approved	05/24/2012	00008
<a href="#">04/16/2012 KI</a>	04/16/2012	\$300.00 USD	Approved	05/02/2012	00007

4. Click on the link for Invoice Number to get to the Invoice Detail screen

The screenshot shows the 'Review Invoices' page for 'TOMMY TEST'. The left sidebar contains a menu with options like 'Maintain Supplier Information', 'Manage Orders', and 'Review Payment Information'. The main content area displays the following details:

- Business Unit:** UCS05
- Invoice Number:** 05/04/12 E
- Invoice Date:** 05/14/2012
- Due Date:** 05/14/2012
- Discount End Date:**
- Approval Status:** Pending Approval
- Payment Status:** To be Paid
- Phone:** 1800COURTNY

An 'Invoice Total' box shows:

Gross Amount:	\$300.00 USD
Discount:	\$0.00 USD
Net Amount:	\$300.00 USD

The 'Invoice Line Details' table is as follows:

Item ID	Description	Statistic Amount	UOM	Unit Price	Amount
	JHO (ARG & SAP)		DAY	300.00000	\$300.00 USD

The 'Payment Schedule' table is as follows:

Scheduled to Pay	Payment Number	Gross Amt	Discount	Method	Status	On Hold	Wrt
05/14/2012		\$300.00 USD	\$0.00 USD	Check	Unselected	No	No

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**

The screenshot shows the 'Payments Made' section of the invoice detail page. It displays a table with the following data:

SCHEDULED TO PAY	PAYMENT NUMBER	GROSS AMT	DISCOUNT	METHOD	STATUS	ON HOLD	WRT
05/14/2012		\$300.00 USD	\$0.00 USD	Check	Unselected	No	No

Below this table, there are sections for 'Payments Made', 'Purchase Orders', and 'Receipts', each with a table header and a 'No [Section Name] Found' message.

- Payments Made:** Reference, Date, Amount. Amount: \$0.000.
- Purchase Orders:** Purchase Order, PO Date, Status.
- Receipts:** Received Date, Receipt Number, Bill of Lading, Packing Slip.

A 'Return to Invoice List' link is located at the bottom of the page.