Activation Quick Start Guide for Payee/Vendor

Overview

This guide has been developed to provide an overview of an account setup in the Payee Information Portal (PIP) application. You should follow this guide if:

You have an **existing** payee/vendor code account from the City of New York, and wish to **activate your account on this website**. If you have more than one payee/vendor code number and cannot activate your desired account, please contact the City of New York at 212-857-1777.

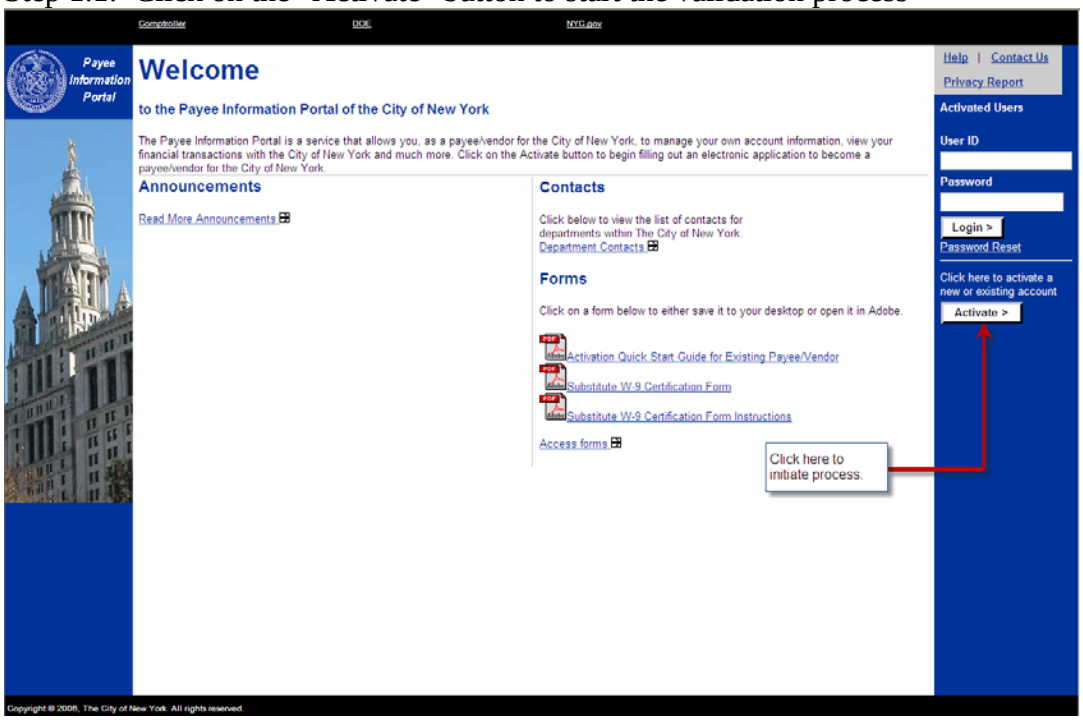
OR

You are a **new** payee/vendor conducting business with the City of New York for the first time, and need **to create a new payee/vendor code account.**

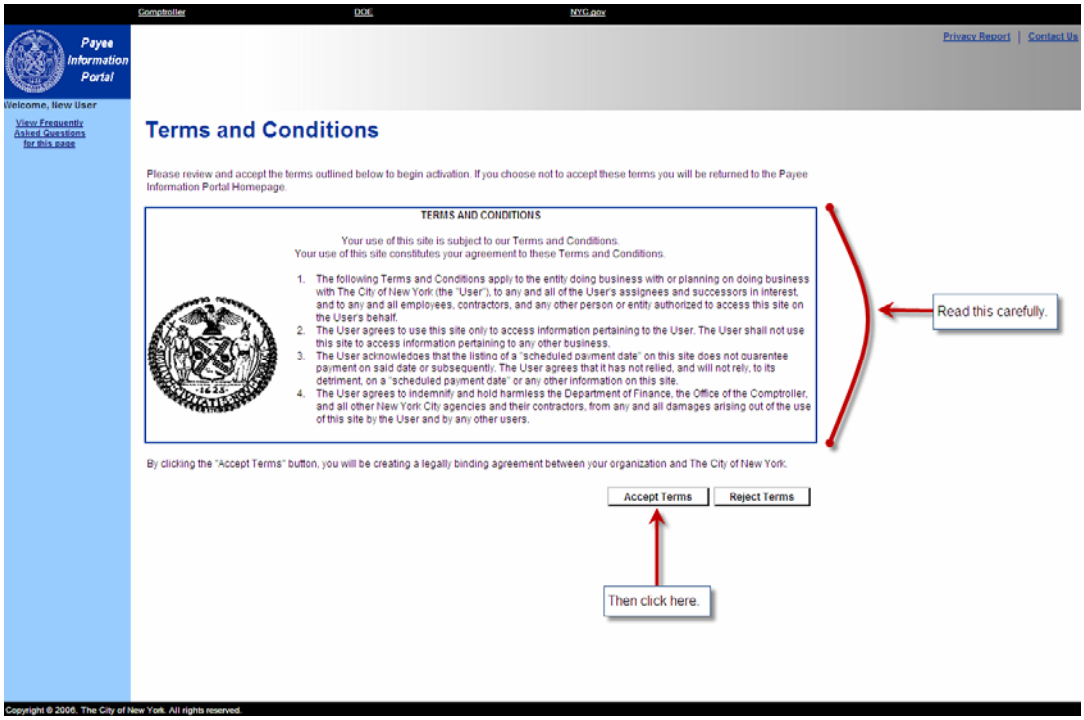
IMPORTANT: Please remember your User ID and Password when you create them as you will need them to log back into the PIP system. Both the User ID and Password are case sensitive.

Section 1: Look to See if a Payee/Vendor Code Account Exists in PIP

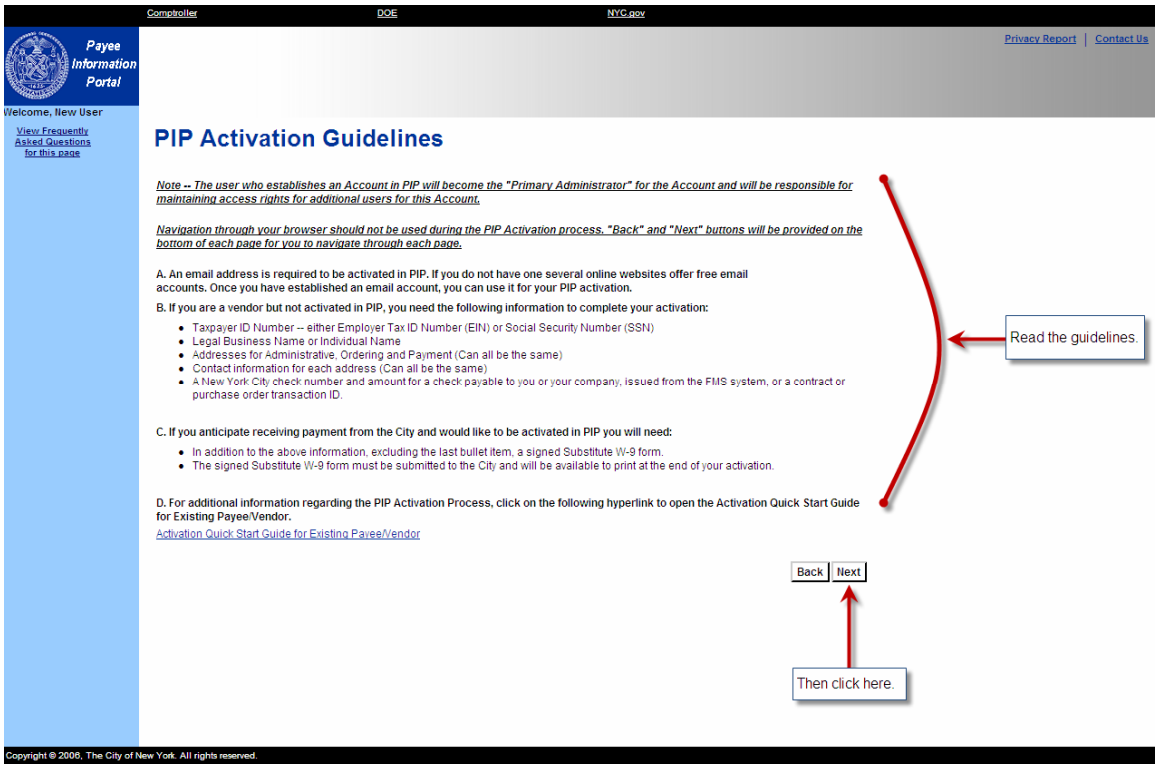
Step 1.1: Click on the "Activate" button to start the validation process



Step 1.2: Carefully read the “Terms and Conditions” and then click on the “Accept Terms” button.

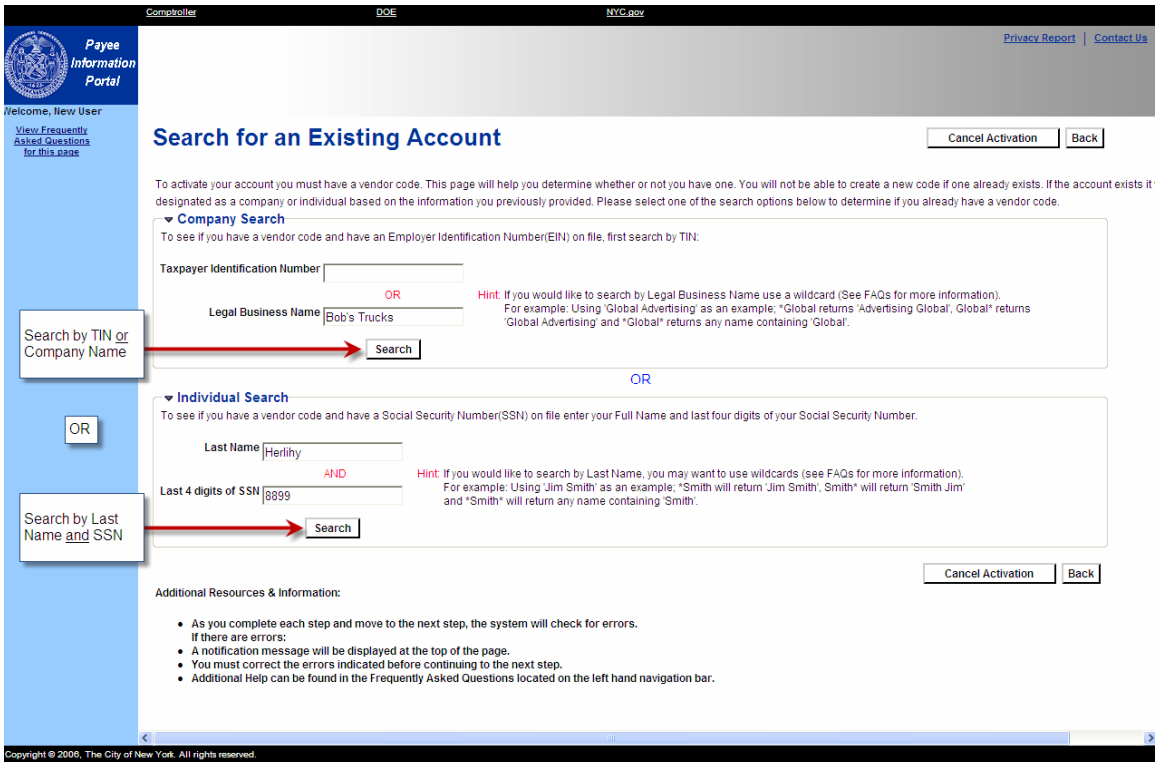


Step 1.3: This screenshot provides an overview of the “PIP Activation Guidelines”. Please read this and then click on the “Next” button.



Step 1.4: This screen determines if you have an existing vendor code account.

To initiate the search process, you can choose to search by Company or by Individual. The distinction between these two is that an Individual's Taxpayer Identification Number is his/her Social Security Number (SSN) whereas a Company's Taxpayer Identification is not a Social Security Number (SSN). Select which search option you would like, enter the pertinent information and then click on the Search button.

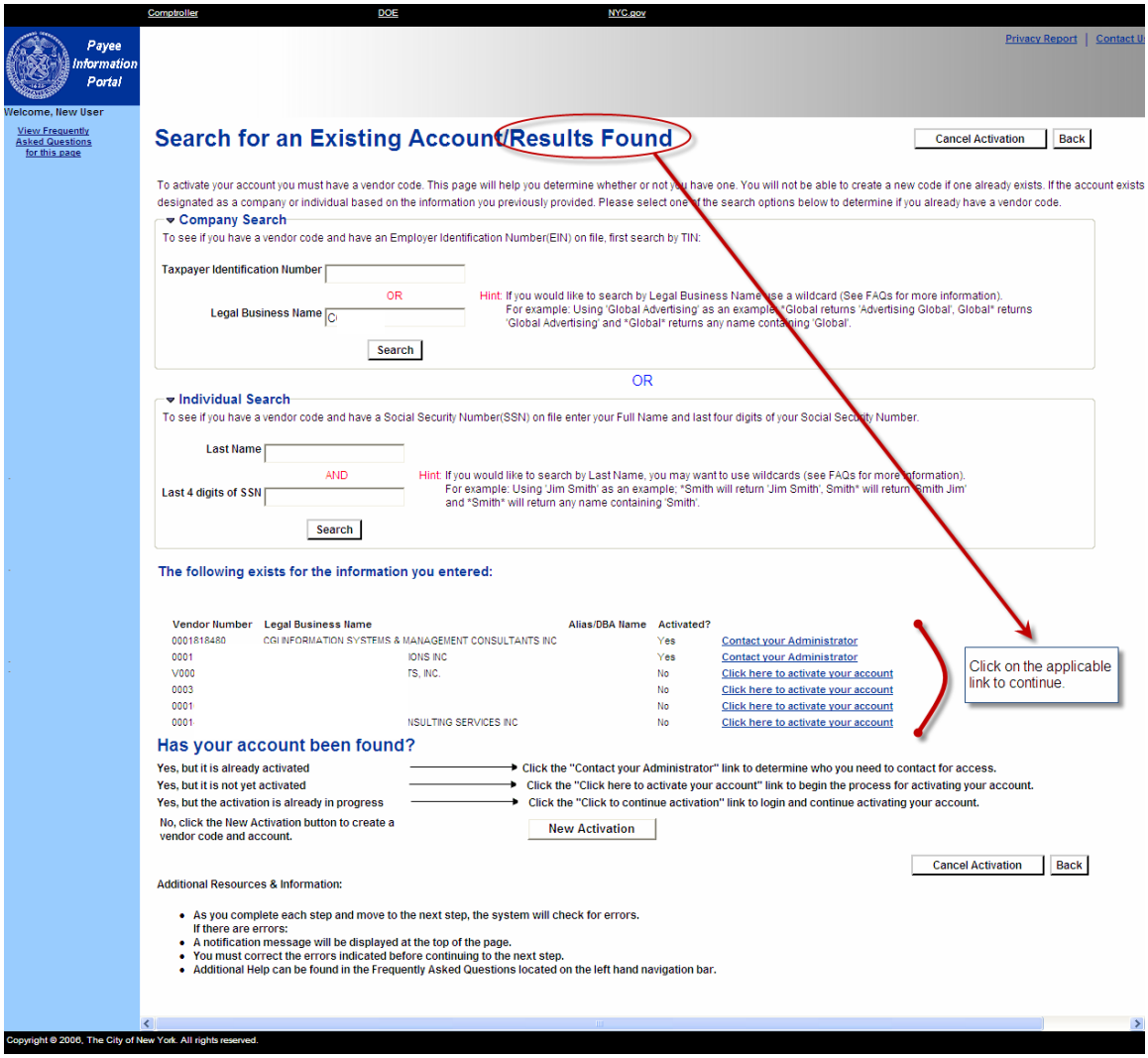


Based on the search results:

- If your account has been found, please continue to Step 2 below.
- If your account has NOT been found, and you believe you have an existing vendor code account, please try again, and read the hints displayed on the screen above in using wildcards to help in your search. If you still cannot find your account, then please contact the City of New York at 212-857-1777 for assistance.
- If your account has NOT been found, and you are a **new** vendor conducting business with the City of New York for the first time, please skip Section 2 below, and proceed directly to Section 3.

Section 2: An Existing Account HAS BEEN FOUND

In the screenshot example below, an EXISTING account has been found.



From the above screen, there are three types of links to select; review the choices below, and select the link that best addresses your needs. Most likely, you will be selecting the link described in Step 2.3 below.

Step 2.1 "Contact your Administrator" link

- Explanation – an id and password have already been set up for your company. A vendor administrator at your company has already been established.

- Action – Click on this link to display your vendor administrator. Feel free to reach out to him/her to establish a new userid/password for you.

Step 2.2 "Click to Continue Activation" link

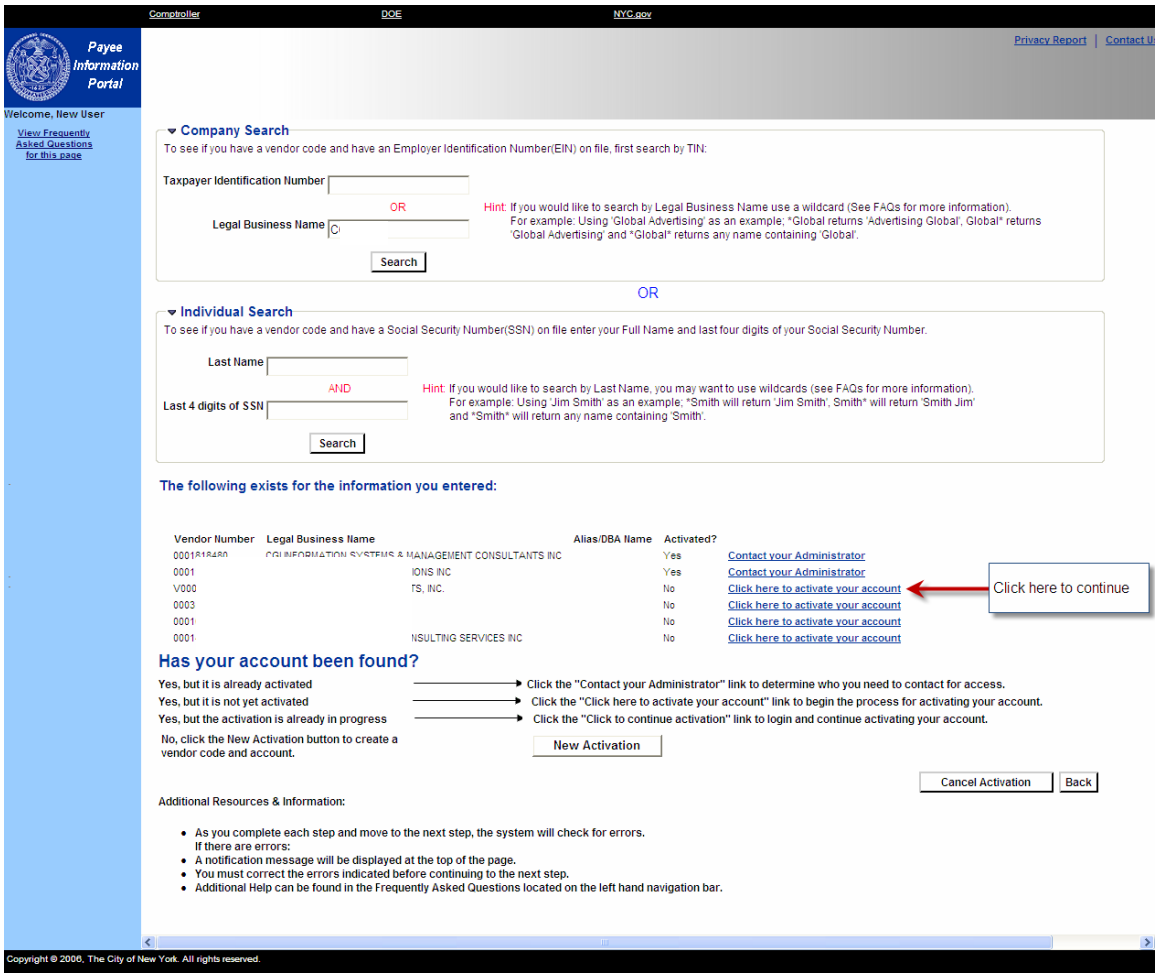
- Explanation - your company was in the process of creating an account but in the middle of the activation, the person stopped the process momentarily. Thus, he/she can return at a later date to complete the process.

- Action – Click on this link to pick up from where it was left off to complete the activation process. Please note: you will be asked to verify the password of the User who originated the activation process. So only the person that began the process of activating the account will be able to continue.

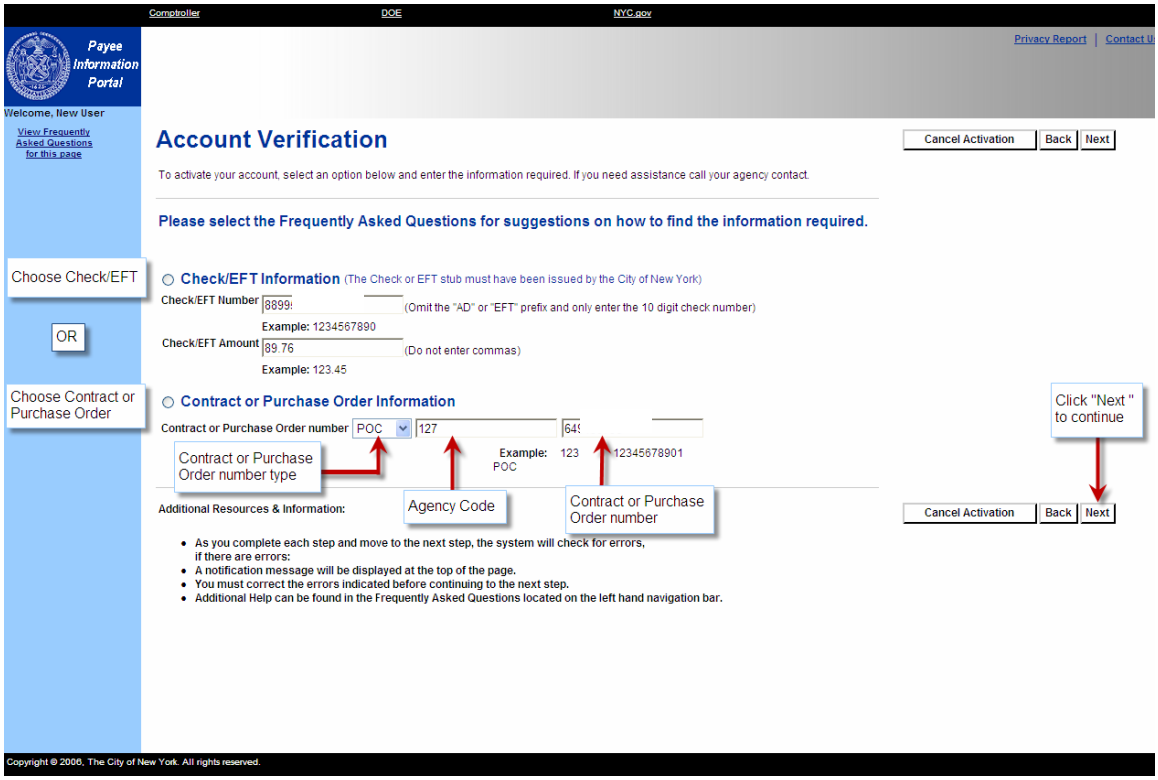
Step 2.3 "Click here to activate your account" link

- Explanation - your company has done business previously with the City of New York but has not yet established an account. Click on the link to continue the process of creating your account.

- Action - Click on this link below to continue the process to create an account.

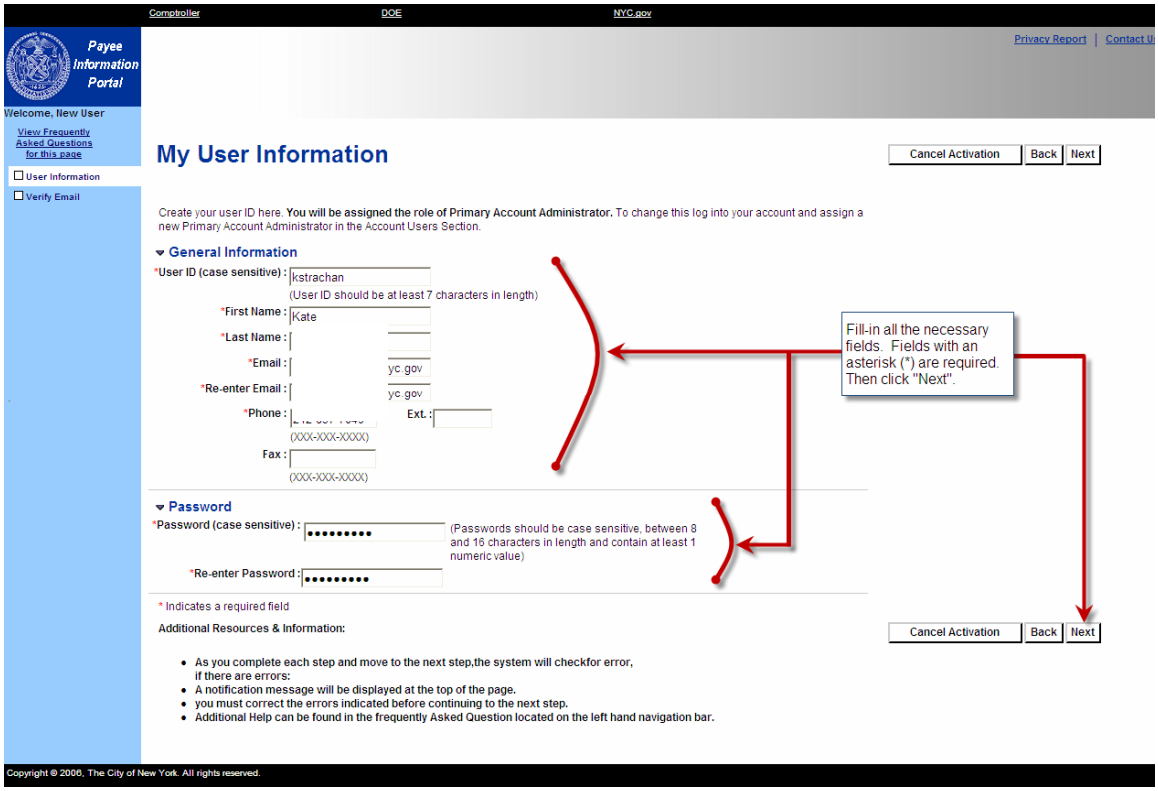


Step 2.3.1 – At the Account Verification screen, verify your account by entering: 1) existing Check/EFT Information or 2) existing Contract/Purchase Order Information, then click “Next” button to continue.

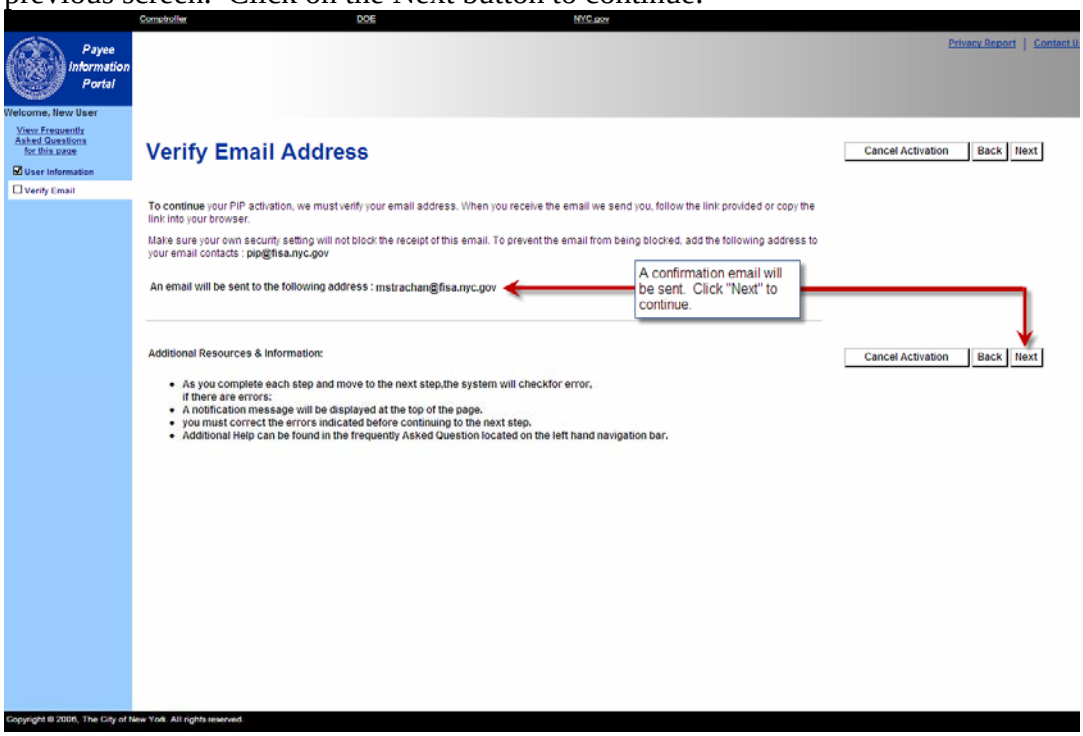


Step 2.3.2 – Once your financial transaction has been verified by the system, it will bring you next to the “My User Information” screen.

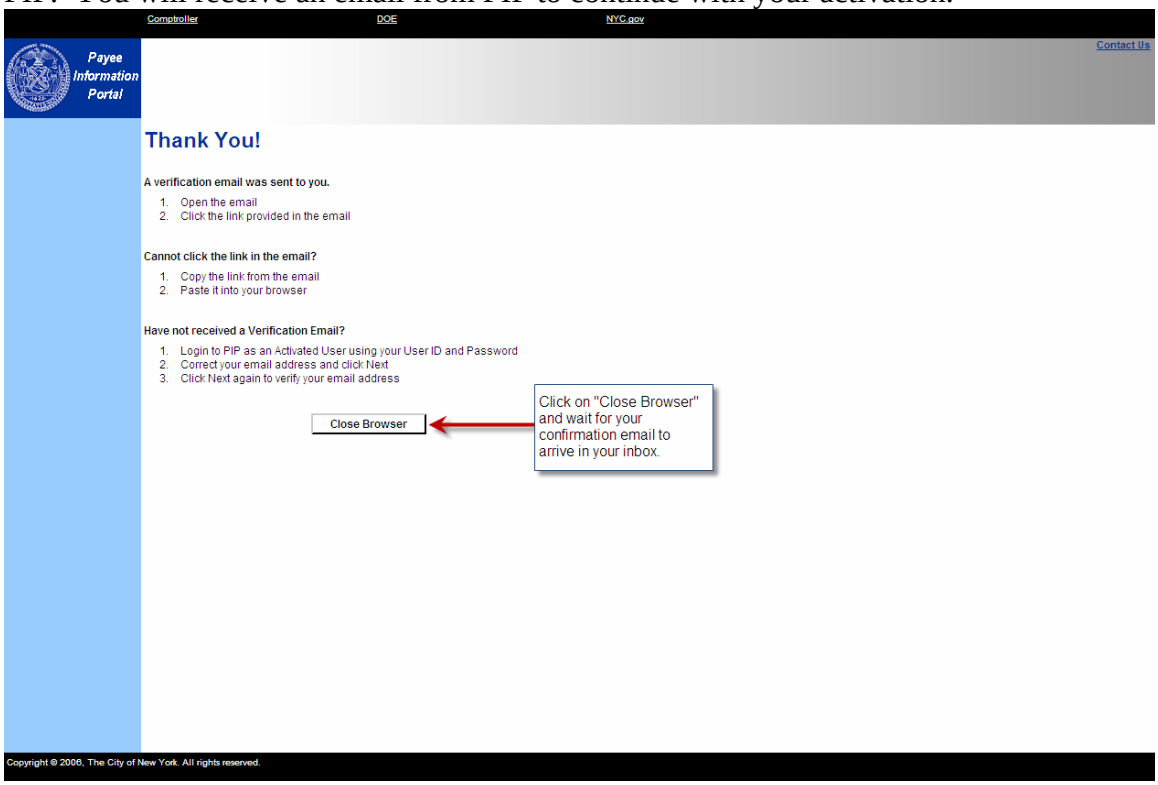
Complete all the fields indicated with an asterisk and click on Next button to continue. Important: PLEASE REMEMBER YOUR USER ID AND PASSWORD IN ORDER TO LOG INTO PIP.



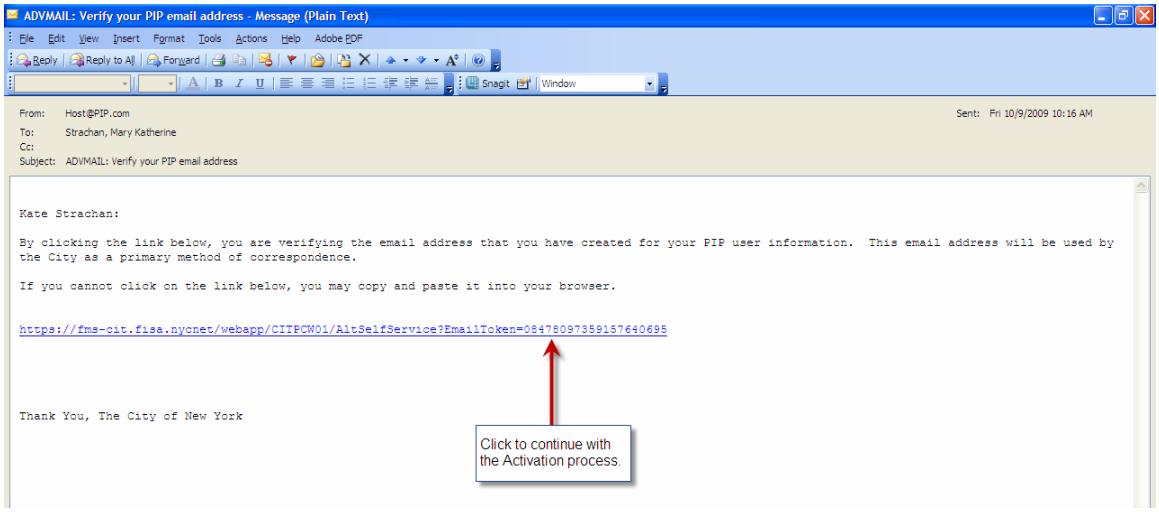
Step 2.3.3: A confirmation email will be sent to the email address that you entered in the previous screen. Click on the Next button to continue.



Step 2.3.4: Read the information on this page and click "Close Browser" to exit from PIP. You will receive an email from PIP to continue with your activation.

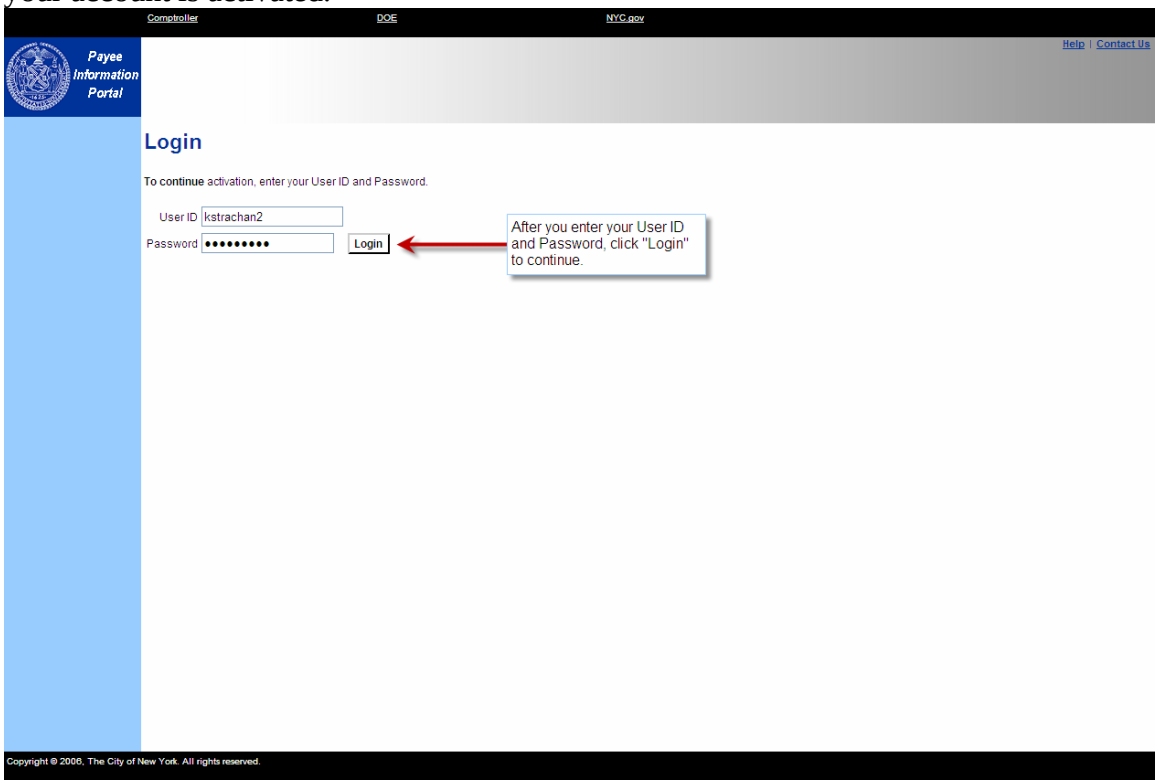


Step 2.3.5: Open your email and click on the link provided to continue with the process.

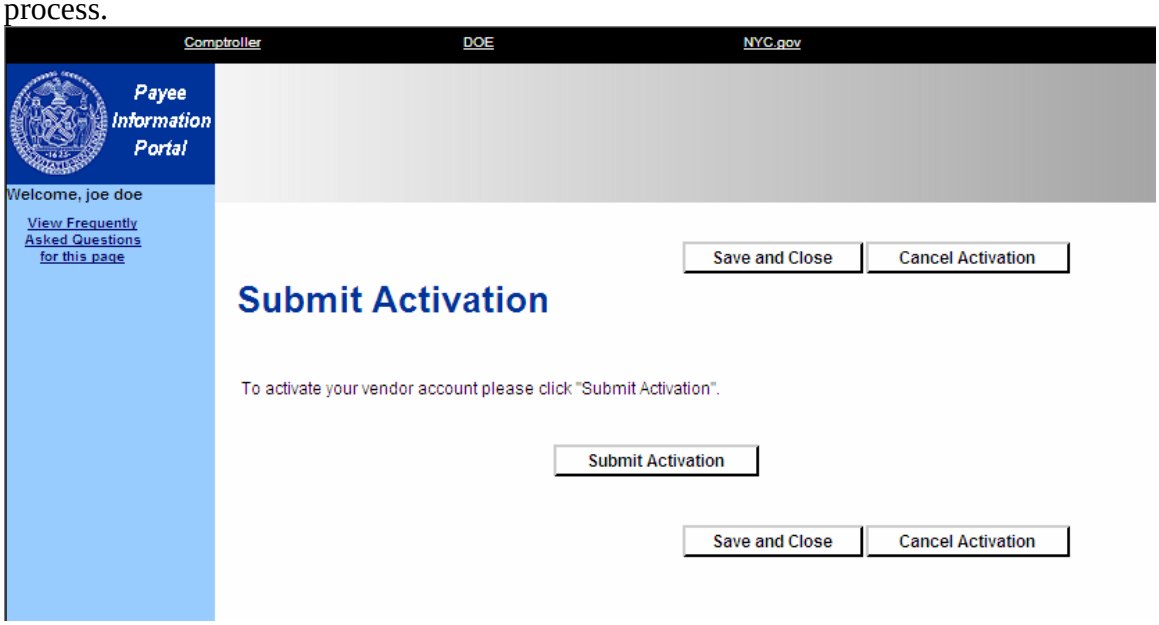


Step 2.3.6: After you click on the link, you will be brought to this login page. Enter the User ID and Password that you created earlier. Remember that both User ID and Password are case sensitive. Then click on "Login" button to continue with the process.

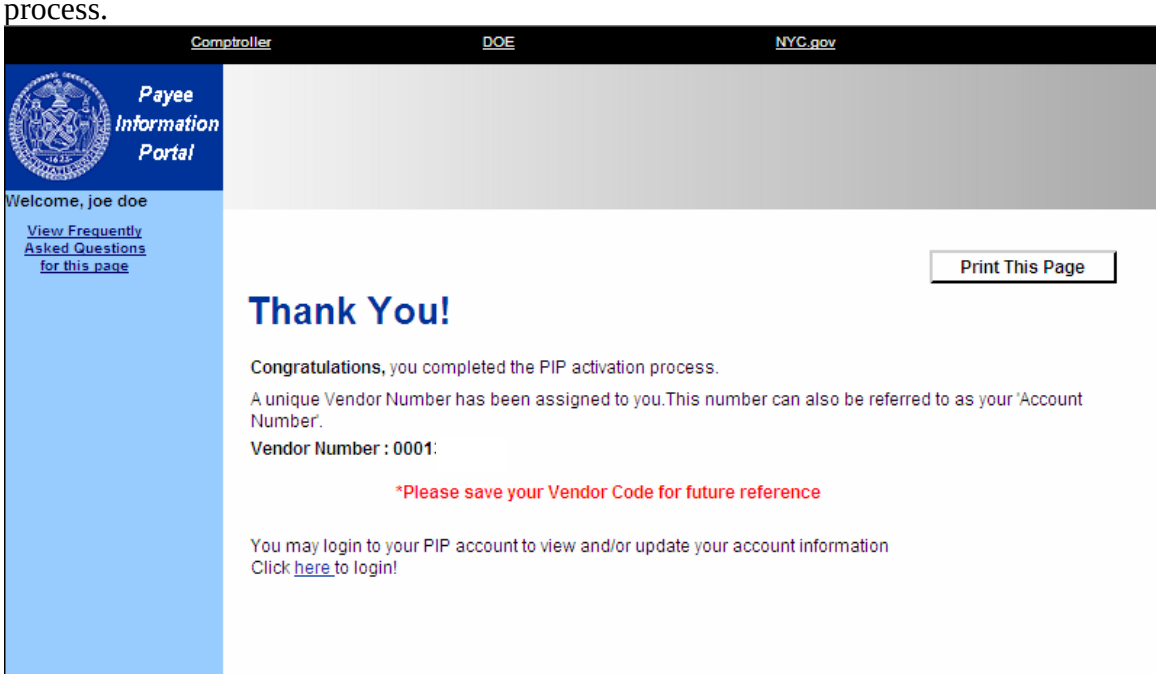
Note: Do not bookmark this page. You will be logging in from the PIP Home Page once your account is activated.



Step 2.3.7: Just click on "Submit Activation" button below to finish your Activation process.



You will then see the next screen below, and you have then finished the Activation process.

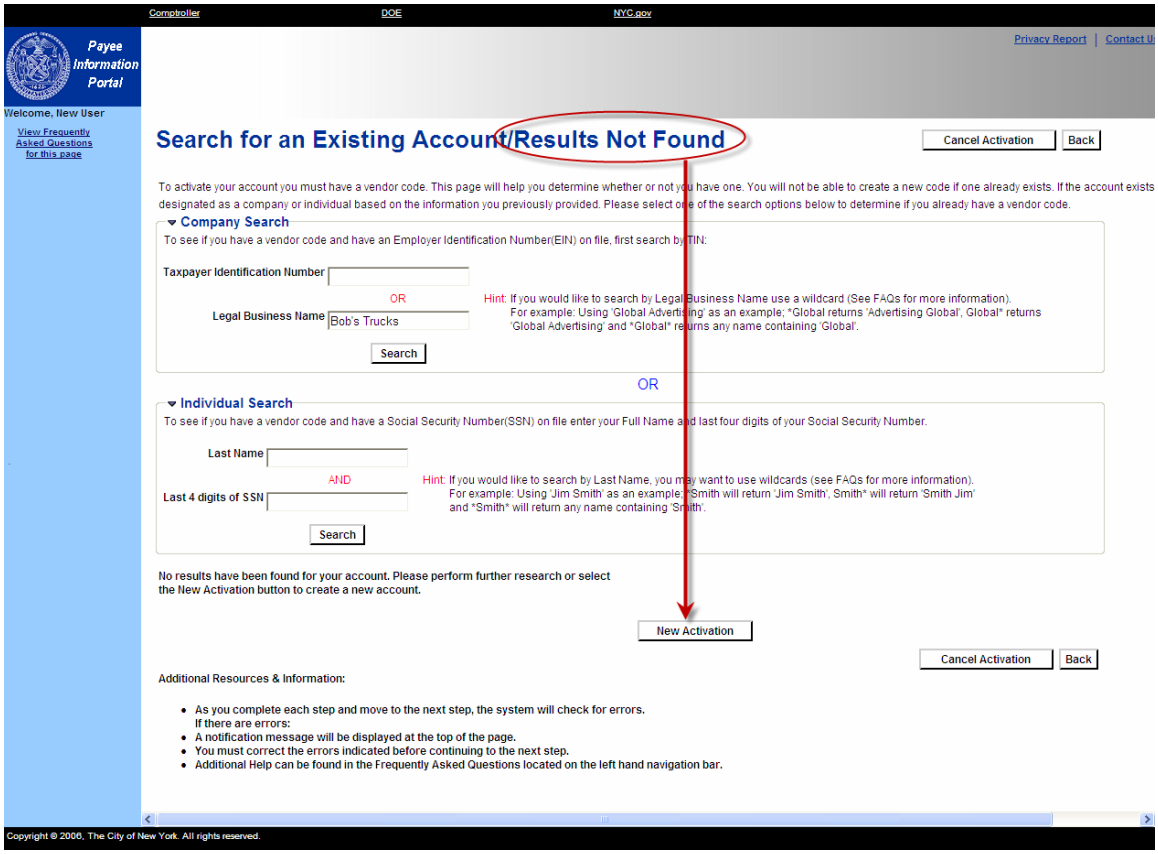


You have now completed the activation process, and going forward, can login to PIP using your User ID and password (via the website https://a127-pip.nyc.gov). Please note that your User ID and password are both case sensitive.

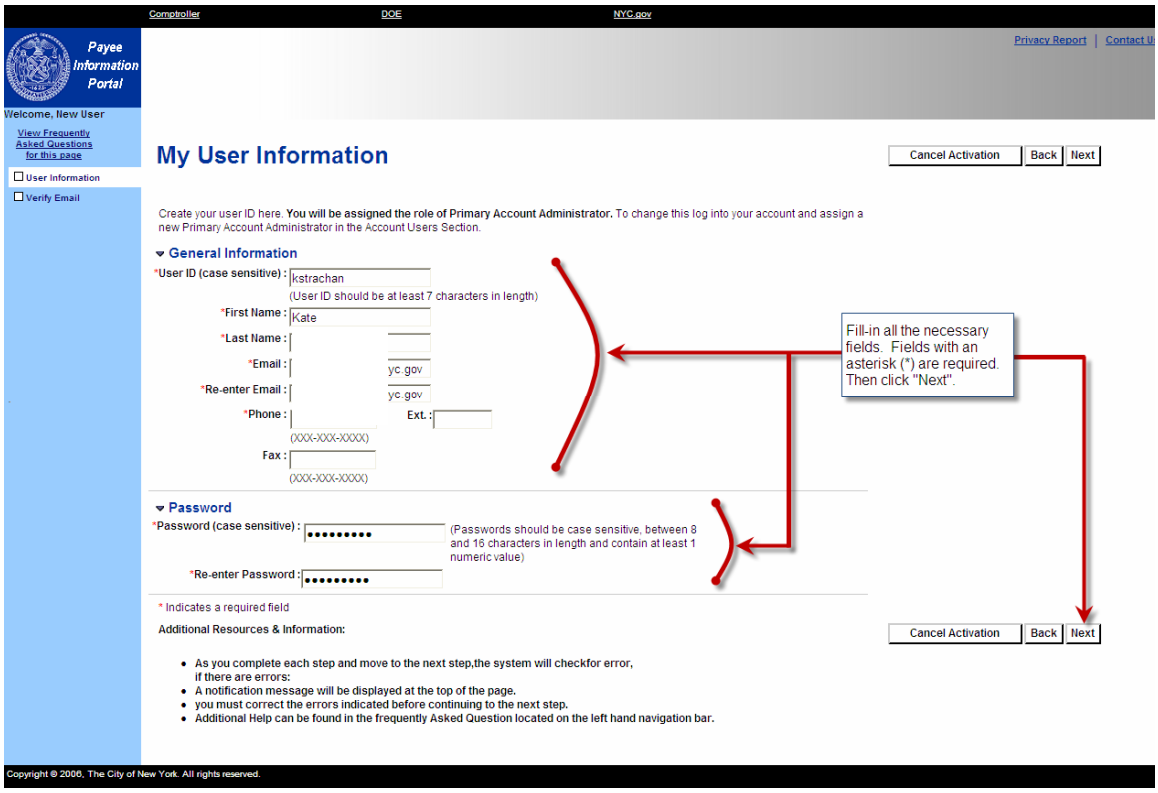
BECAUSE YOU HAVE COMPLETED THE ACTIVATION PROCESS, YOU CAN STOP HERE, AND SKIP THE REST OF THIS DOCUMENT.

Section 3: Your Account HAS NOT BEEN FOUND (from Section 1)

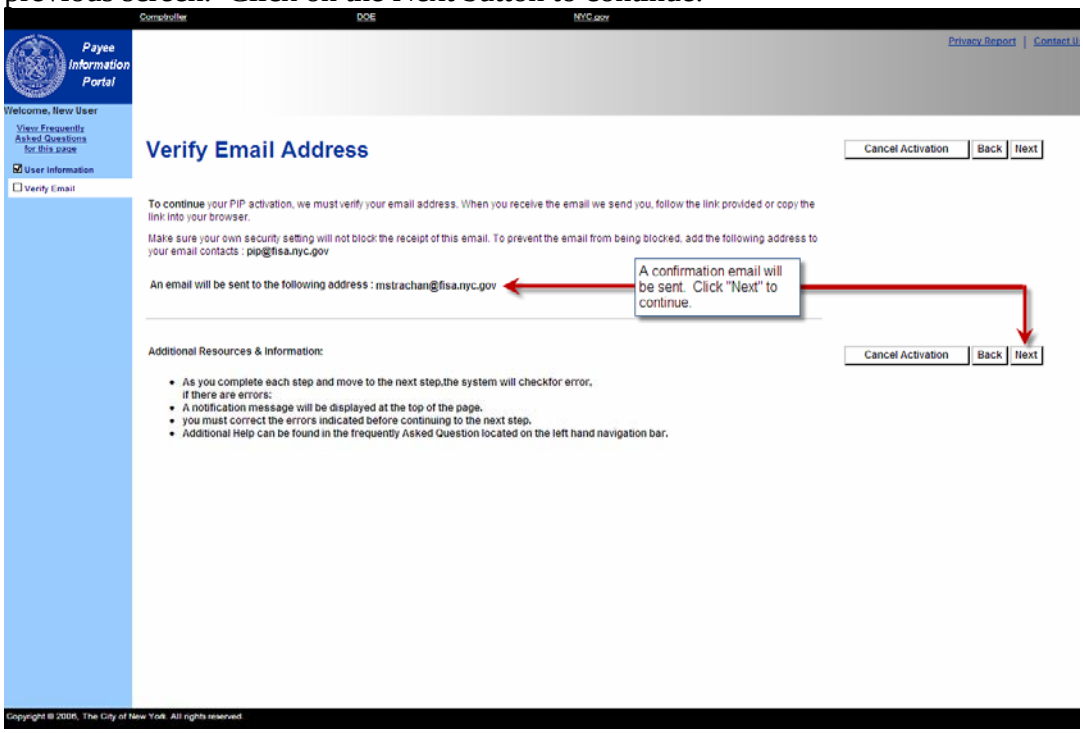
In the screenshot example below, since NO existing account has been found, click on the New Activation button to setup a new vendor code account.



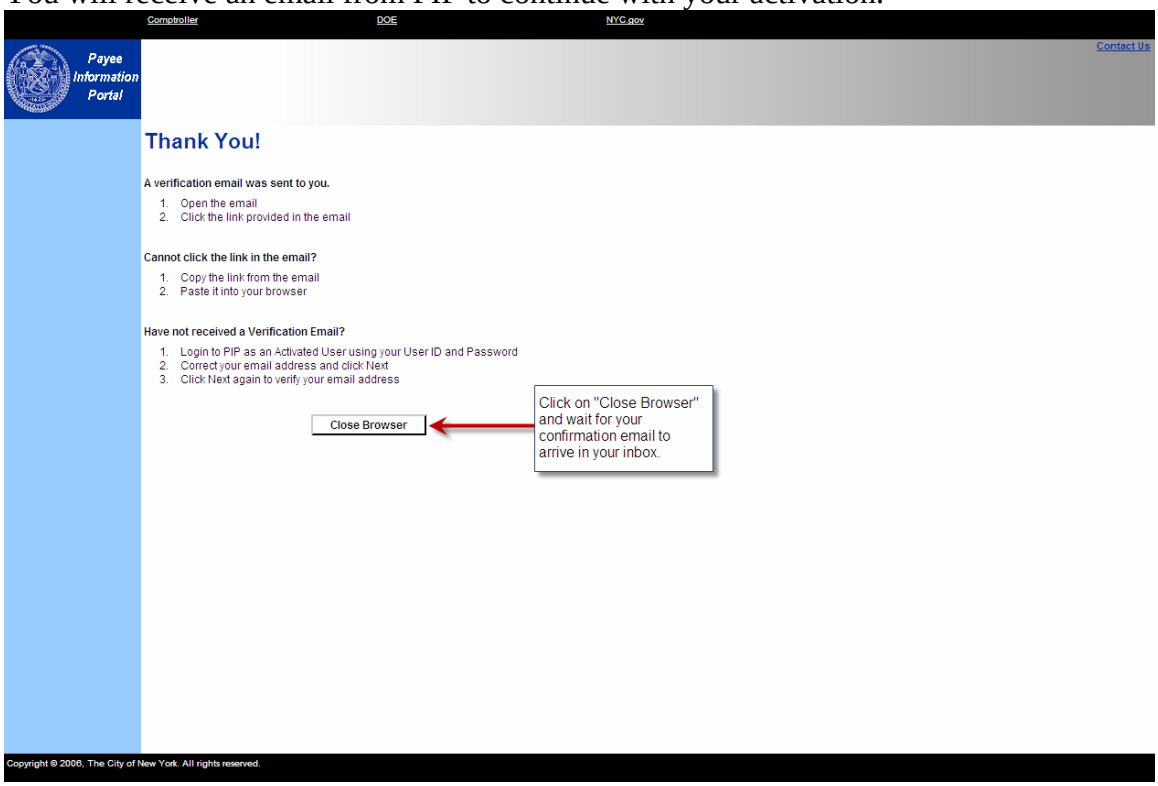
Step 3.1: Complete all the fields indicated with an asterisk and click on Next button to continue. Important: PLEASE REMEMBER YOUR USER ID AND PASSWORD IN ORDER TO LOG INTO PIP.



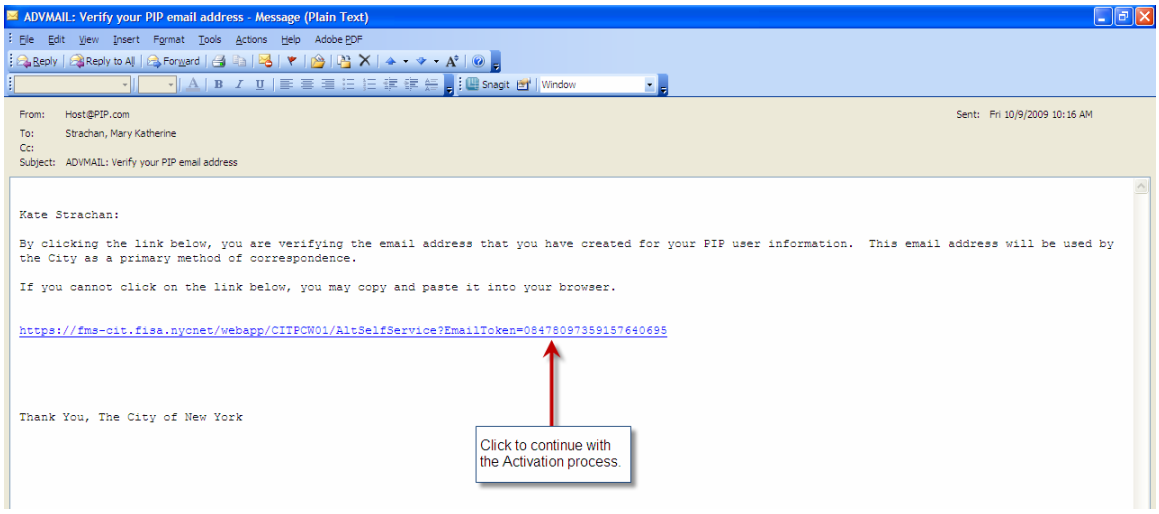
Step 3.2: A confirmation email will be sent to the email address that you entered in the previous screen. Click on the Next button to continue.



Step 3.3: Read the information on this page and click "Close Browser" to exit from PIP. You will receive an email from PIP to continue with your activation.

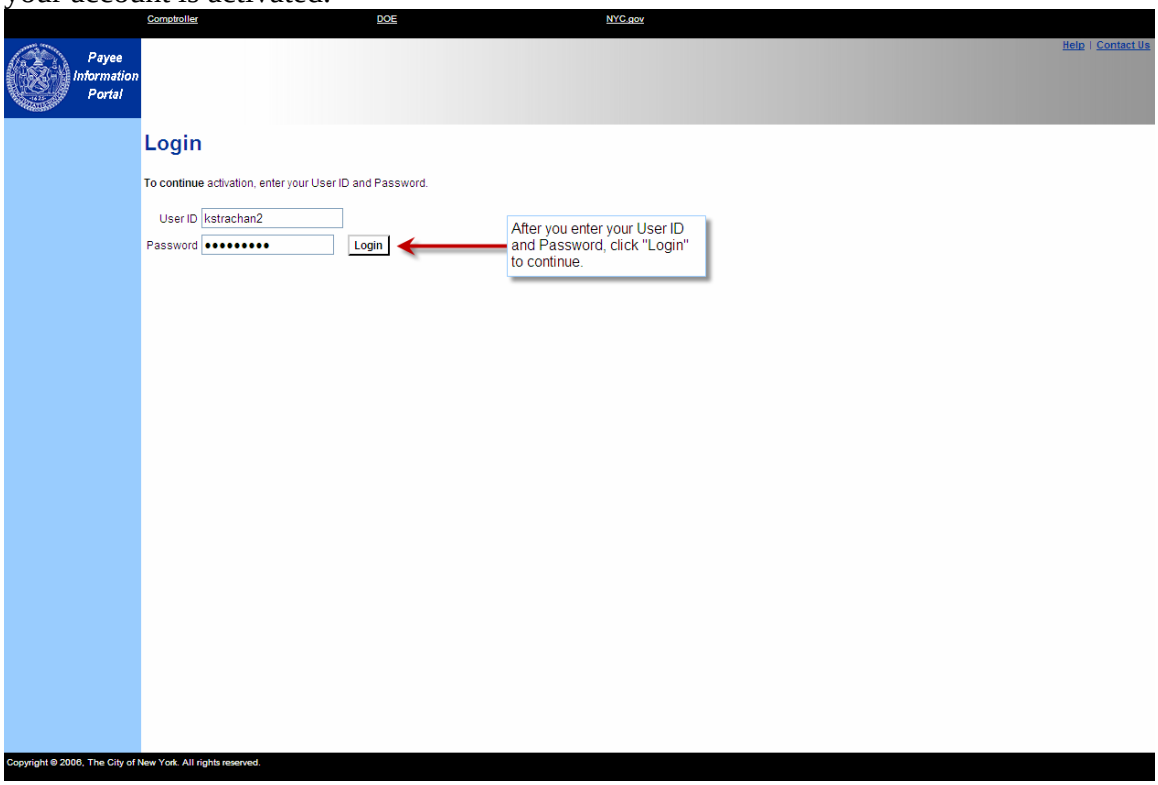


Step 3.4: Open your email and click on the link provided to continue with the process.

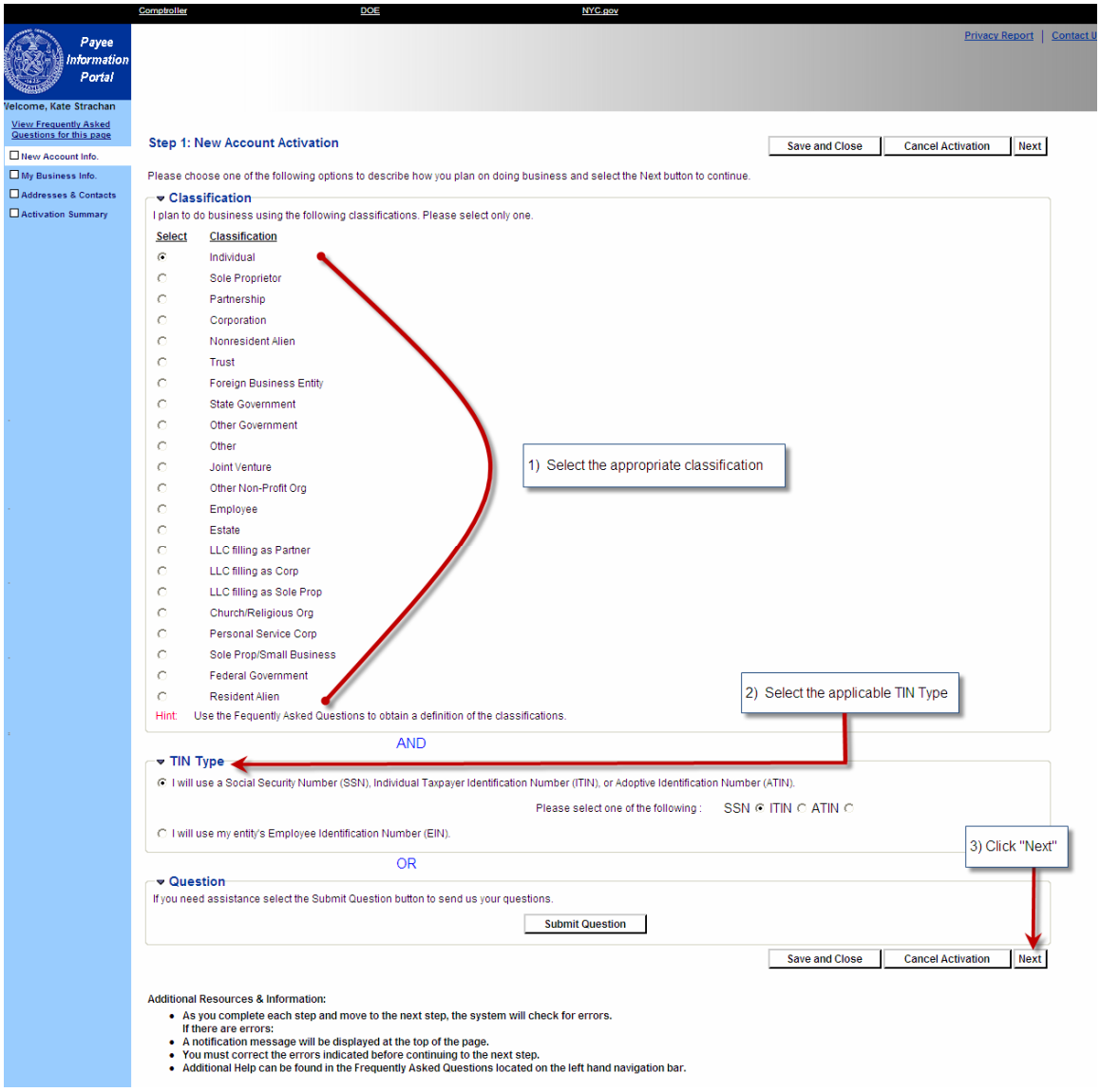


Step 3.5: After you click on the link, you will be brought to this login page. Enter the User ID and Password that you created earlier. Remember that both User ID and Password are case sensitive. Then click on “Login” button to continue with the process.

Note: Do not bookmark this page. You will be logging in from the PIP Home Page once your account is activated.

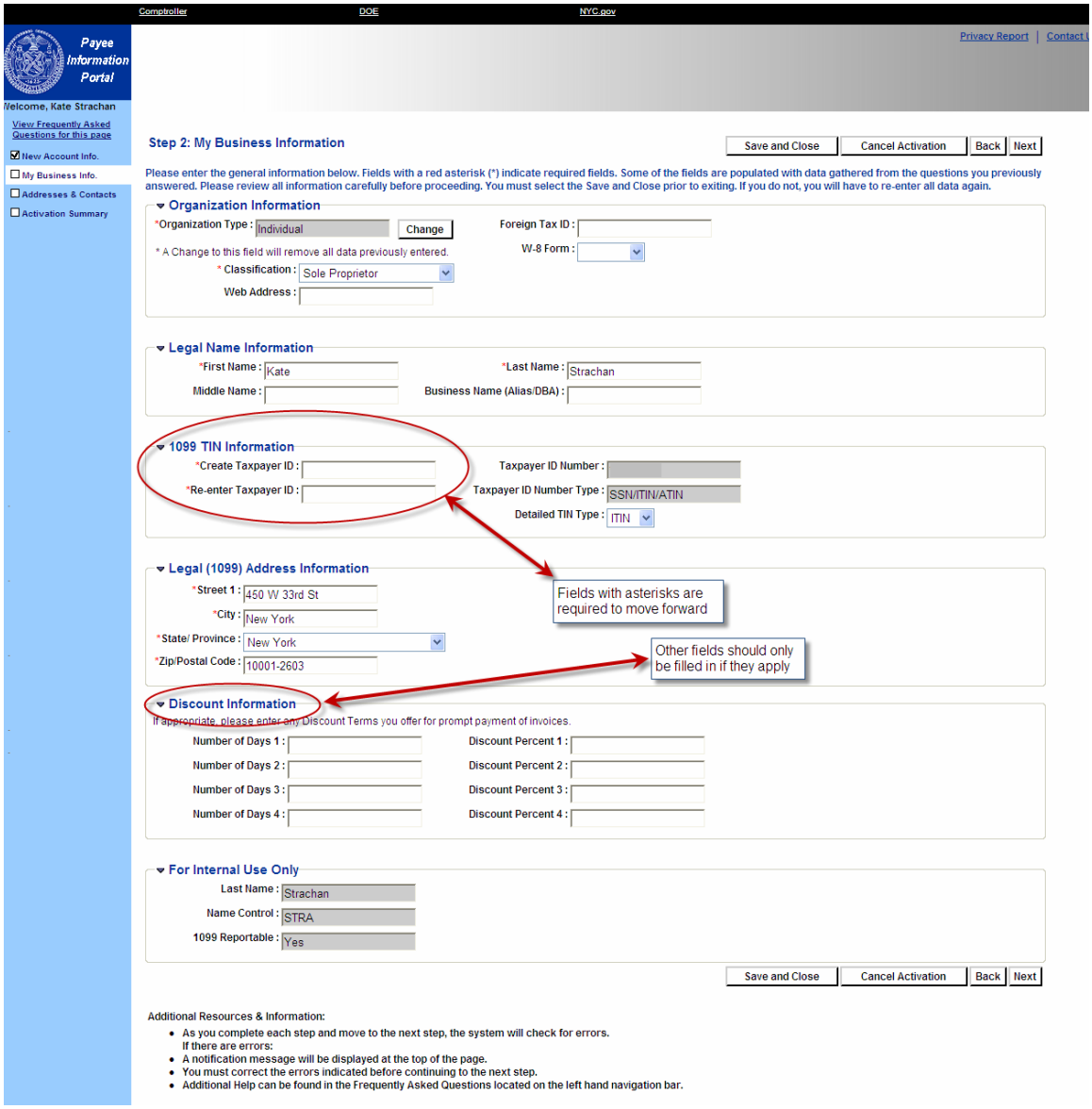


Step 3.6: Continue with your New Account Activation. Select the classification that applies to your particular business, then indicate which TIN Type you will be using. (If you select Social Security Number be sure to select whether you will be using SSN, ITIN, or ATIN.) Then click Next.

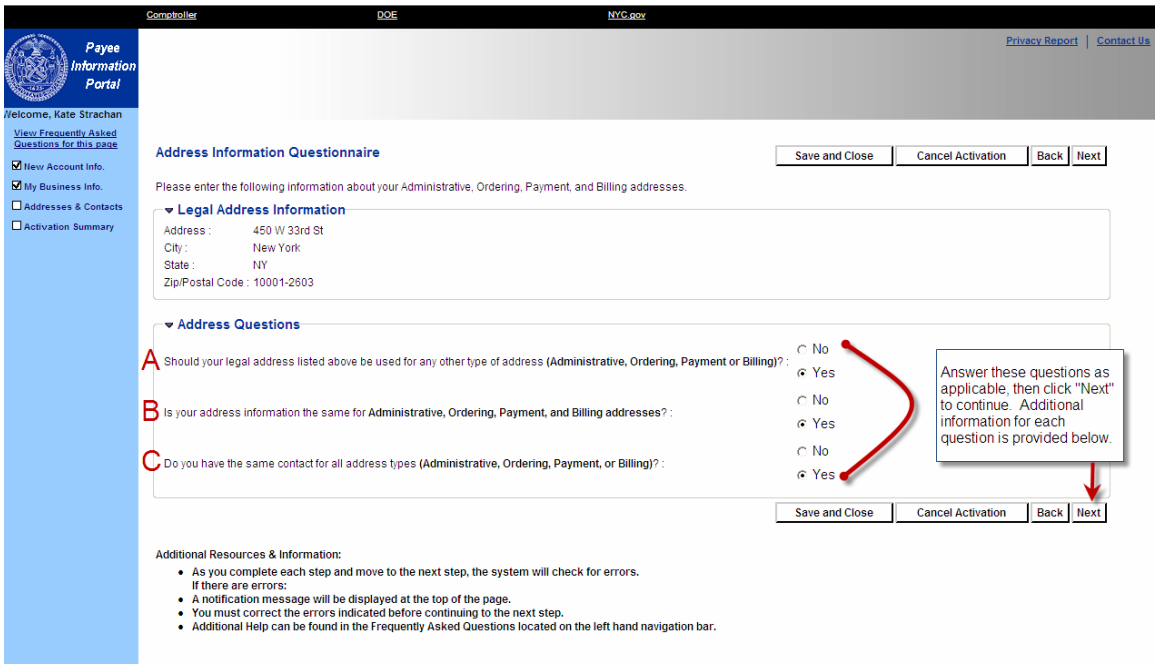


Note: If you have any issues with how you should answer any of these questions, click the "Submit Question" button at the bottom of the screen. A pre-filled email form will open and you can ask your question and submit it. PIP will remember your progress and, once you have received an answer to your question, you can log back in and it will return you to the place where you left off.

Step 3.7: Next is the "My Business Information" page. Most of the fields on this screen will be pre-populated by answers you gave to previous questions. Only the fields with red asterisks (*) are required to move forward. However, if any of the other fields are applicable to you, we suggest you fill them in.



Step 3.8: From the previous step, you have already entered your Legal address. In this step, the system will ask you for 4 additional types of addresses; it needs an address for Administrative correspondence, an address for Ordering from you, an address for Payment to you, and an address for Billing to you. You can choose to specify the same or different address for each of these 4 address types.



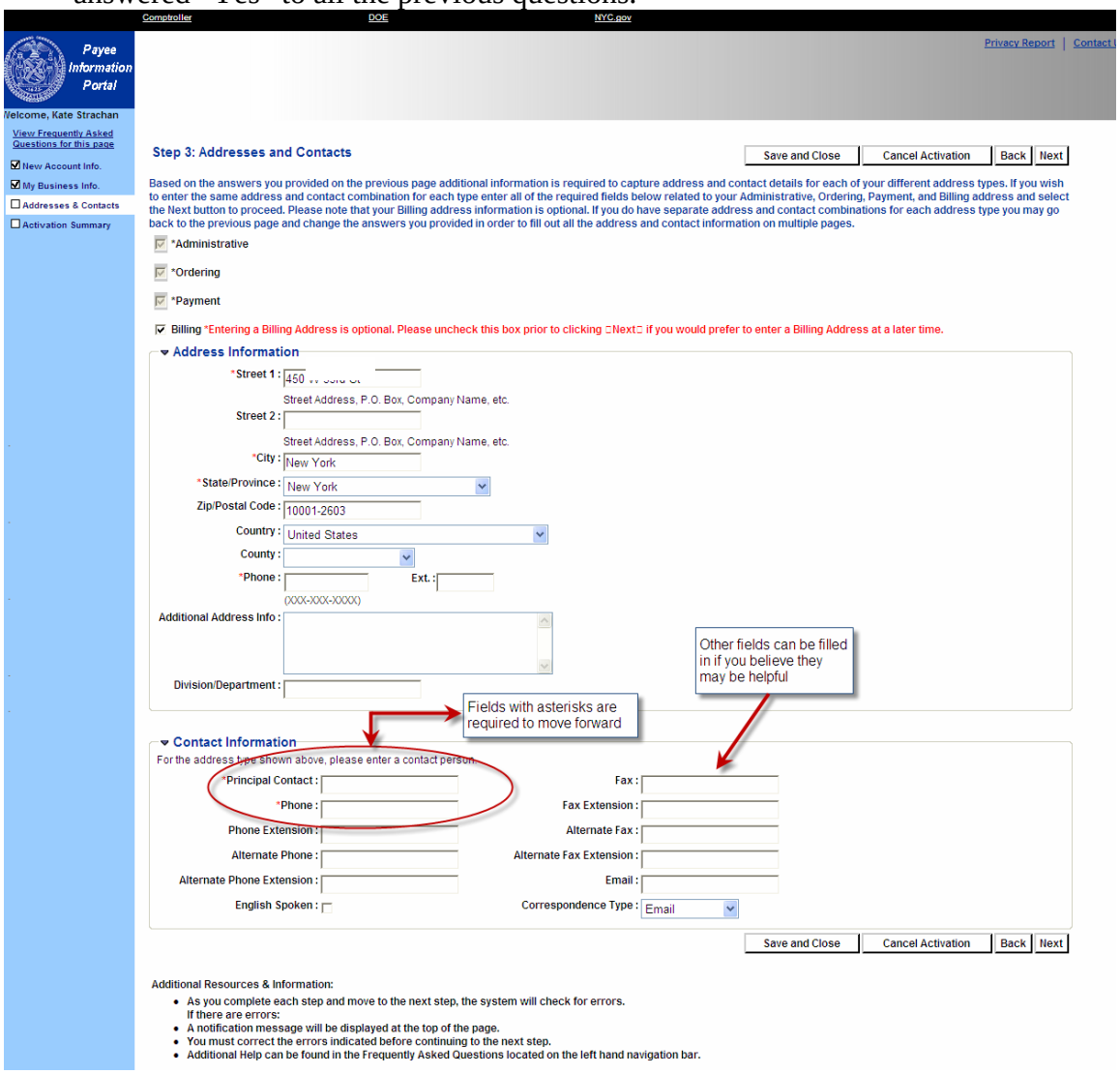
Note the three Address Questions above on this screen (marked in this sample screen as A, B, C). Here is a short explanation on what these questions are:

A: If your Legal address is the same address as <u>any one</u> of the additional 4 address types (Administrative, Ordering, Payment, and Billing), choose “Yes” on A. Otherwise, choose “No”.

B: Regardless if you choose "Yes" or "No" on A above, if your Administrative, Ordering, Payment, and Billing addresses are all the same address, choose “Yes” on B. Otherwise, choose “No”.

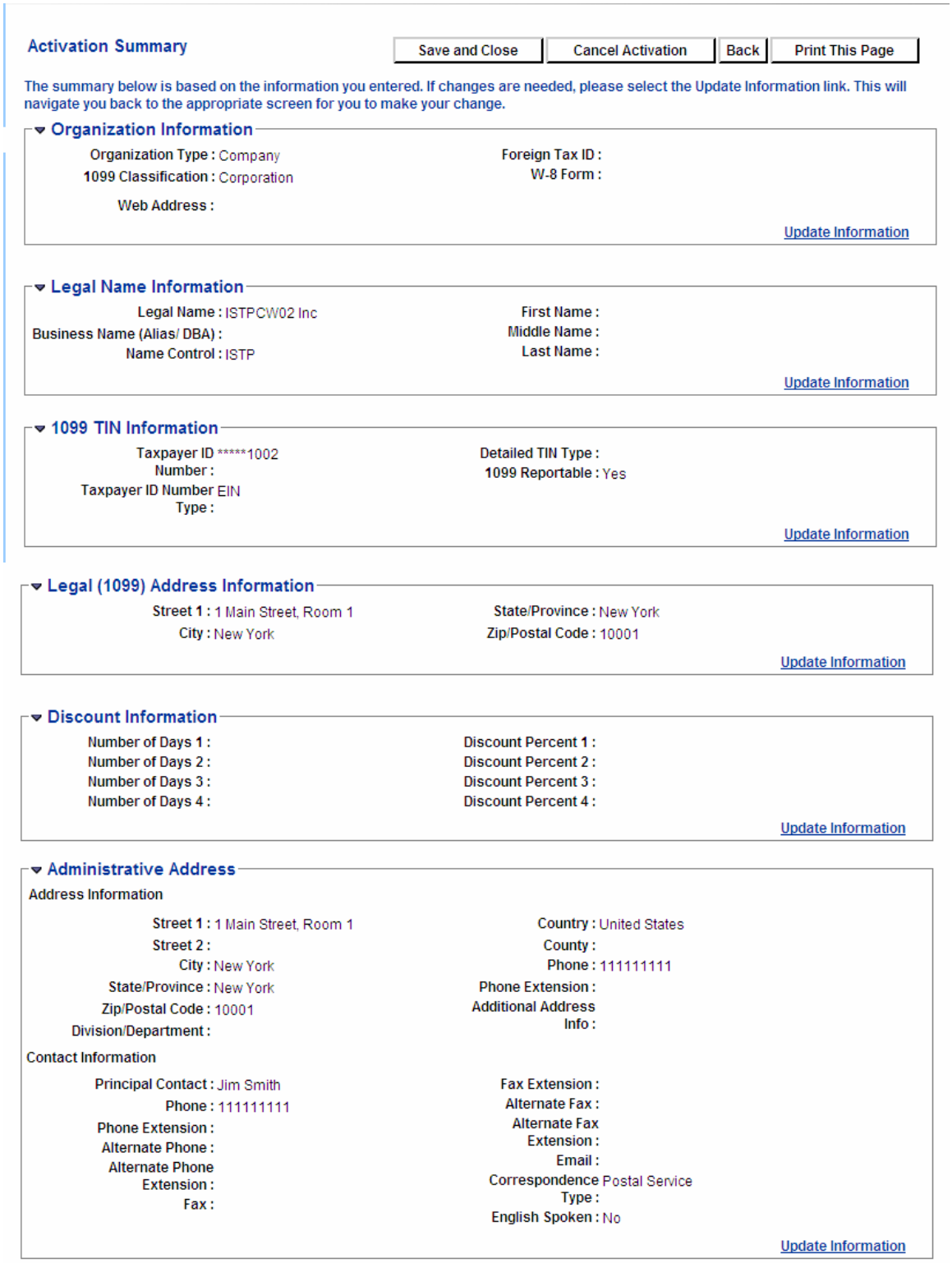
C: If you want a single contact person for all 4 address types, choose “Yes” on C. Otherwise, choose “No”.

Below is an example of what the Address and Contacts screen will look like if you answered "Yes" to all the previous questions.



Activation Quick Start Guide for Payee/Vendor

After you have completed the above sections, you will next see the Activation Summary Screen, which displays all the information you have entered thus far for you to review (sample screen shown below).



Activation Summary

Save and Close | Cancel Activation | Back | Print This Page

The summary below is based on the information you entered. If changes are needed, please select the Update Information link. This will navigate you back to the appropriate screen for you to make your change.

Organization Information

Organization Type : Company
1099 Classification : Corporation
Web Address :
Foreign Tax ID :
W-8 Form :

Update Information

Legal Name Information

Legal Name : ISTPCW02 Inc
Business Name (Alias/ DBA) :
Name Control : ISTP
First Name :
Middle Name :
Last Name :

Update Information

1099 TIN Information

Taxpayer ID Number : *****1002
Taxpayer ID Number Type : EIN
Detailed TIN Type :
1099 Reportable : Yes

Update Information

Legal (1099) Address Information

Street 1 : 1 Main Street, Room 1
City : New York
State/Province : New York
Zip/Postal Code : 10001

Update Information

Discount Information

Number of Days 1 :
Number of Days 2 :
Number of Days 3 :
Number of Days 4 :
Discount Percent 1 :
Discount Percent 2 :
Discount Percent 3 :
Discount Percent 4 :

Update Information

Administrative Address

Address Information

Street 1 : 1 Main Street, Room 1
Street 2 :
City : New York
State/Province : New York
Zip/Postal Code : 10001
Division/Department :
Country : United States
County :
Phone : 111111111
Phone Extension :
Additional Address Info :

Contact Information

Principal Contact : Jim Smith
Phone : 111111111
Phone Extension :
Alternate Phone :
Alternate Phone Extension :
Fax :
Fax Extension :
Alternate Fax :
Alternate Fax Extension :
Email :
Correspondence Type : Postal Service
English Spoken : No

Update Information

Ordering Address

Address Information

Street 1 : 1 Main Street, Room 1
Street 2 :
City : New York
State/Province : New York
Zip/Postal Code : 10001
Division/Department :
Country : United States
County :
Phone : 111111111
Phone Extension :
Additional Address Info :

Contact Information

Principal Contact : Jim Smith
Phone : 111111111
Phone Extension :
Alternate Phone :
Alternate Phone Extension :
Fax :
Fax Extension :
Alternate Fax :
Alternate Fax Extension :
Email :
Correspondence Type : Postal Service
English Spoken : No

Update Information

Payment Address

Address Information

Street 1 : 1 Main Street, Room 1
Street 2 :
City : New York
State/Province : New York
Zip/Postal Code : 10001
Division/Department :
Country : United States
County :
Phone : 111111111
Phone Extension :
Additional Address Info :

Contact Information

Principal Contact : Jim Smith
Phone : 111111111
Phone Extension :
Alternate Phone :
Alternate Phone Extension :
Fax :
Fax Extension :
Alternate Fax :
Alternate Fax Extension :
Email :
Correspondence Type : Postal Service
English Spoken : No

Update Information

Billing Address

Address Information

Street 1 : 1 Main Street, Room 1
Street 2 :
City : New York
State/Province : New York
Zip/Postal Code : 10001
Division/Department :
Country : United States
County :
Phone : 111111111
Phone Extension :
Additional Address Info :

Contact Information

Principal Contact : Jim Smith
Phone : 111111111
Phone Extension :
Alternate Phone :
Alternate Phone Extension :
Fax :
Fax Extension :
Alternate Fax :
Alternate Fax Extension :
Email :
Correspondence Type : Postal Service
English Spoken : No

Update Information

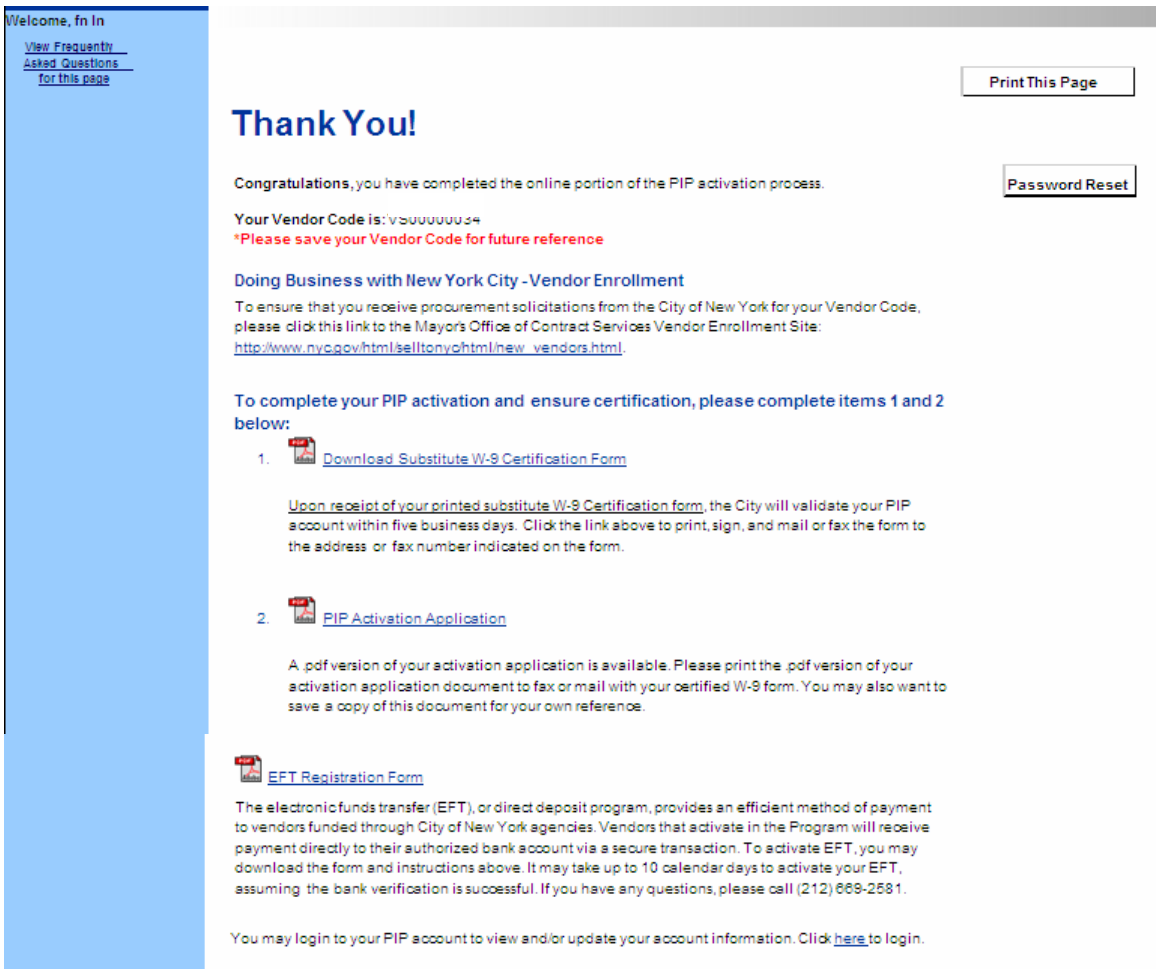
Save and Close | Cancel Activation | Back | Submit Activation

Additional Resources & Information:

- As you complete each step and move to the next step, the system will check for errors. If there are errors:
- A notification message will be displayed at the top of the page.
- You must correct the errors indicated before continuing to the next step.
- Additional Help can be found in the Frequently Asked Questions located on the left hand navigation bar.

After you have reviewed the above screen with the information that you have entered thus far, and find everything correct, click on the "Submit Activation" button located at the bottom of the screen to continue (indicated by red box above).

You will then see the next screen shown below.



You have now completed the activation process, and going forward, can login to PIP using your User ID and password (via the website https://a127-pip.nyc.gov). Please note that your User ID and password are both case sensitive.

YOU HAVE NOW COMPLETED THE ACTIVATION PROCESS.