

Getting Started Guide: SFS Vendor Portal

The Statewide Financial System

The Statewide Financial System (SFS) is New York State (NYS) government's accounting and financial management system. As a vendor who provides goods and services to NYS agencies or a Not for Profit (NFP) working with agencies to fulfill your mission, you can use the Statewide Financial System (SFS) Vendor Portal to transact online.

Access to SFS provides the ability to submit invoices electronically and view payments and purchase orders from NYS agencies. This includes payments to businesses or individuals providing goods or services to NYS. SFS access also enables you to manage your NYS profile and payment options. Grant related payments are also processed through SFS. The SFS Vendor Portal is available from the [SFS Public Website](#).

The SFS Vendor Portal

Vendors registered with a New York State (NYS) Vendor ID* can use the [Statewide Financial System \(SFS\) Vendor Portal](#) to:

- ✓ Check the status of invoices, purchase orders, and payments
- ✓ Submit electronic invoices (eInvoices)
- ✓ Update contact, address, and payment information
- ✓ Sign up for electronic payments
- ✓ Find, apply for, and manage NYS grants

*Note: The NYS Vendor ID is not your Taxpayer ID or Employee Identification Number (EIN). If you don't have a NYS Vendor ID, contact the NYS agency that you are planning to do business with or receiving a payment from, to request a Vendor ID.

Getting Started as a NYS Vendor

All vendors providing goods or services to NYS must be registered in the SFS. An agency must register a vendor, if the vendor is not already registered in the SFS.

If your organization is not registered with a NYS Vendor ID:

- ☐ Contact the NYS agency that you are planning to do business with or receiving a payment from.
- ☐ Be prepared to provide the agency with information about your organization (e.g., Substitute W-9), to support the vendor registration process.
 - The contact provided in Part IV of the Substitute W-9 determines the initial Primary Contact for your organization's SFS Account.
 - This person will receive the Vendor Registration Welcome packet and may serve as the Delegated Admin for the SFS account.
 - The Delegated Admin can perform password resets and unlock user accounts.
 - The Delegated Admin is also responsible for making account and user changes in the SFS Vendor Portal.
- ☐ Receive your Vendor Registration Portal Welcome email. This email will include your vendor identification number (Vendor ID).
- ☐ Direct the Primary Contact to complete the online registration in the SFS Vendor Portal.
 - Instructions are included in the Welcome email.

Getting Started with the SFS Vendor Portal

The SFS Vendor Portal is available from the [SFS Public Website](#).

- ☐ The Primary Contact should log in to the SFS Vendor Portal to:
 - Ensure the correct contact information, email address, and payment information is set up in the SFS Vendor Portal.
 - Enroll in Direct Deposit (ACH). Direct deposit to your online bank account is the NYS standard for remitting payments.
 - Set up additional users in the organization who should have access to the SFS Vendor Portal, to view invoice payment status and purchase orders, and submit invoices.
 - Ensure that additional users understand their role in SFS.
- ☐ Communicate to additional users who the Delegated Admin is, and what tasks can only be done by the Delegated Admin.
- ☐ Review step-by-step instructions accessible by clicking the SFS Coach icon on the homepage of the SFS Vendor Portal.
- ☐ **Tip** – Put a reminder on your calendar to log in to SFS once a month to keep your SFS access active.



Maintaining Your Vendor Information

It is important to keep your vendor information up to date in the SFS Vendor Portal. Failure to do so **may result in payment delays**.

The Delegated Admin is responsible for:

- ☐ Ensuring the correct contact information, email address, and payment information is set up and updated when needed, in the SFS Vendor Portal.
 - Attachments with supporting documentation will be required for certain account updates (i.e., company name changes require a current W-9 from the IRS that reflects the intended updates).
- ☐ Adding and removing additional contacts to the SFS Vendor Portal.
- ☐ Requesting a change or replacement for the Primary Contact.
- ☐ Resetting and unlocking user passwords.

It is recommended that your organization identify at least two Delegated Admins, to share the responsibility, and ensure that there is more than one person available to manage your SFS account.

TROUBLESHOOTING TIPS

What if I cannot find my Vendor ID?

If you cannot find your Vendor ID, active users may contact the SFS Help Desk at helpdesk@sfs.ny.gov or (855) 233-8363.

What if my User ID and password does not work for the SFS Vendor Portal?

SFS users must log in to SFS at least monthly to ensure their user credentials remain active. If your User ID is no longer working, notify the Delegated Admin on your account to reset or unlock your access.

What if I cannot find the enrollment/Welcome email?

If you already have a NYS Vendor ID but never received, or no longer have an enrollment email from SFS, contact the SFS Help Desk at helpdesk@sfs.ny.gov or (855) 233-8363.

Can anyone from our organization contact the Help Desk and update information in SFS?

Any active users in SFS for the vendor account can contact the SFS Help Desk. The Primary Contact can work with the Delegated Admin or the SFS Help Desk to have their own user ID unlocked. The Delegated Admin is also responsible for resetting and unlocking user passwords and making account and user changes in the SFS Vendor Portal.

What if our Vendor Primary Contact is no longer with the company?

If your Primary Contact is no longer with the company, contact the SFS Help Desk at helpdesk@sfs.ny.gov or (855) 233-8363.

Vendor Support

Once a vendor has access to the SFS Vendor Portal, simple step-by-step instructions for various help topics are available within the SFS application. To access instructions on demand, log in to the SFS Vendor Portal, and click the SFS Coach icon from the SFS Vendor Portal homepage.

For questions relating to the work you are doing within an agency, contact the agency you are doing business with or receiving a payment from.

For questions or assistance using SFS, you may contact the SFS Help Desk at helpdesk@sfs.ny.gov or (855) 233-8363.

