



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-VEN101-032
Purpose	This quick guide provides you with a walk through of the SFS homepage and how to use some of the key features available.
User Role	
Date Modified	4/20/2023
Related SFS Handbook	SFS Training for Vendors

Concept



Effective July 29, the SFS will be refreshed, presenting vendors with a more user-friendly Homepage. Upon logging in, tiles to transaction pages will be defaulted to the Vendor Portal 'My Homepage' so you can easily access the applicable SFS page(s) with one click on any size or type of device. This quick guide provides you with a walk through of the SFS homepage and how to use some of the key features available.




Users also have the option of customizing their existing SFS homepages by adding new Tiles for additional system navigation or creating new SFS homepages. In addition to the Tiles, users can use the NavBar which is a navigation menu for access to Recent Places, My Favorites, and Menu.





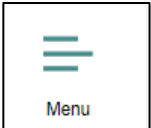
Predecessor(s)	
Transactions that should occur before this task.	
N/A	


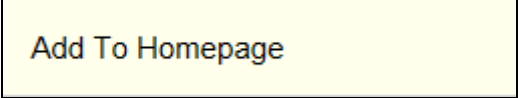



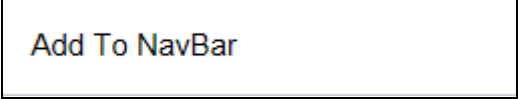

Successor(s)	
Transactions that should occur after this task.	
N/A	

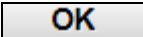

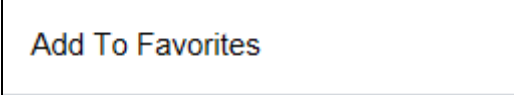

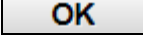



Procedure


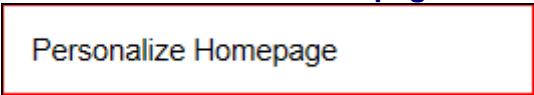


Step	Action
1.	<p>Note: The SFS homepage provides access to the Home button, Homepages/Homepage menus, Tiles, Actions List, and NavBar.</p> <p>Homepages are designed for specific user security roles. Tiles displayed on each homepage provide quick access to essential pages within the SFS, based on role, so you can easily access the applicable SFS page(s) with one click on any size or type of device.</p>
2.	<p>Note: All SFS Notifications display on the SFS Notices tile on My Homepage, which is used to communicate important SFS announcements and materials.</p> <p>Click the SFS Notices tile to view additional notices detail information.</p> <div data-bbox="391 898 760 1020" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Recent updates to the Portal include more intuitive navigation options and enhanced page layouts.</p> </div>
3.	<p>After reviewing the additional notices detail information, click the My Homepage button to return to My Homepage.</p> <div data-bbox="391 1108 675 1182" style="border: 2px solid red; padding: 5px; margin-top: 10px;"> <p>< My Homepage</p> </div>
4.	<p>Click the Maintain Your Information tile to maintain user information, maintain address and contact information, add/view vendor locations, and/or certify for NYS prompt pay.</p> <div data-bbox="391 1297 618 1423" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Maintain Your Information</p>  </div>
5.	<p>Click the My Homepage button to return to My Homepage.</p> <div data-bbox="391 1476 675 1549" style="border: 2px solid red; padding: 5px; margin-top: 10px;"> <p>< My Homepage</p> </div>
6.	<p>Click the Invoice and Payment inquiry tile to view invoice and payment information.</p> <div data-bbox="391 1633 630 1759" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Invoice and Payment inquiry</p>  </div>
7.	<p>Click the My Homepage button to return to My Homepage.</p> <div data-bbox="391 1812 675 1885" style="border: 2px solid red; padding: 5px; margin-top: 10px;"> <p>< My Homepage</p> </div>

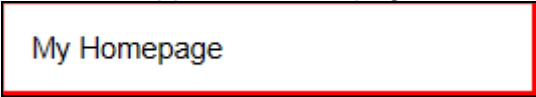


Step	Action
8.	Click the PO and Receipt Inquiry tile to view PO and Receipt information. 
9.	Click the My Homepage button to return to My Homepage. 
10.	Click the Register for ePayments tile to enroll in the direct deposit program with NYS. 
11.	Click the My Homepage button to return to My Homepage. 
12.	Click the Register for POs via Email tile to enroll in the program to receive POs through email. 
13.	Click the My Homepage button to return to My Homepage. 
14.	Click the Add/Maint Self-Service Invoice tile to create and maintain self-service invoices. 
15.	Click the My Homepage button to return to My Homepage. 
16.	Click the FAQs/Contact Us tile to view answers to frequently asked questions.
17.	Review answers to frequently asked questions. Note: For additional questions, click the SFS Help Desk link to send an email to the SFS Help Desk.

Step	Action
18.	After reviewing answers to the FAQs, click the Close Tab (X) icon in the upper-right corner of the page to close the FAQs page. 
19.	Click the NavBar button to access the NavBar options. To close the NavBar without selecting any options, click the NavBar button again. 
20.	Note: The NavBar provides access to Recent Places , My Favorites , and Menu .
21.	Recent Places provides you with quick links to pages you've recently accessed in the SFS. Click the Recent Places button to view pages you recently accessed. 
22.	To view your Favorites, click the My Favorites button. 
23.	Note: To edit your favorites (e.g., to add a new favorite or remove an existing favorite) you can click the Edit Favorites option.
24.	Note: <ul style="list-style-type: none"> • The Menu provides a list of places you are authorized to access, based on your user security roles. • The list is organized in the same way, and equivalent to the breadcrumbs and Classic menu pagelet, accessible through the Classic homepage view.
25.	From the Menu , navigate to the page you want to create a Tile for, on your SFS homepage. 

Step	Action
26.	<p>After navigating to a page, you can use the Actions List button to add pages to your Homepage, NavBar and Favorites.</p> <p>Click the Actions List button.</p> 
27.	<p>First, add the page as a Tile on your SFS homepage.</p> <p>Click the Add To Homepage menu.</p> 
28.	<p>In instances where you have multiple homepages, you can select which homepage you want the page added.</p> <p>Click the My Homepage link to have the page added as a Tile to your homepage.</p> 
29.	<p>A message appears confirming that the page has been added to your homepage.</p> <p>Click the OK button.</p> 
30.	<p>Next, add the page to the NavBar.</p> <p>Click the Actions List button.</p> 
31.	<p>Click the Add To NavBar menu.</p> 
32.	<p>Update the information in the Tile Label field for the page if desired.</p>
33.	<p>Click the Add button.</p> 

Step	Action
34.	<p>A message appears confirming that the page has been added to the NavBar.</p> <p>Click the OK button.</p> 
35.	<p>Next, add the page to your Favorites.</p> <p>Click the Actions List button.</p> 
36.	<p>Click the Add To Favorites menu.</p> 
37.	<p>Update the information in the Favorite Label field for the page if desired.</p>
38.	<p>Click the Add button.</p> 
39.	<p>A message appears confirming that the page has been added to Favorites.</p> <p>Click the OK button.</p> 
40.	<p>Click the NavBar button to view the recently added page on the NavBar.</p> 
41.	<p>Click the My Favorites button to see the newly added favorite.</p> 
42.	<p>Click the Home button to view how the new Tile is displayed on your homepage.</p> 
43.	<p>Note: You can follow the same steps, using the Actions List button, to have additional Tiles added to your homepage.</p>

Step	Action
44.	<p>If at any point you would like to remove a Tile that you added, you can do so by using the Personalize Homepage option, located under the Actions List.</p> <p>Click the Actions List button, located at the top, right corner of the homepage, next to the Home icon.</p> 
45.	<p>The Actions List includes links to Personalize your Homepage, sign out of the SFS, and Help which accesses the self-paced training course for vendors.</p>
46.	<p>Click the Personalize Homepage menu.</p> 
47.	<p>You can use the Personalize Homepage page to remove Tiles added to your homepage.</p> <p>This page can also be used to add and maintain new Homepages.</p>
48.	<p>You can click the X at the top right corner of the specified Tile to have it removed from your homepage.</p>
49.	<p>Note: If you've selected to remove the Tile in error, you can click the Cancel button at the top left corner of the page to cancel the removal.</p>
50.	<p>Note: You can also add new homepages, if desired, by clicking the Add Homepage button.</p>
51.	<p>To change the order of a homepage, click on the menu and drag the mouse to the new desired position.</p> <p>Note: You cannot change the order of the My Homepage menu since this homepage is the default homepage and always displays after initial sign in to the SFS.</p>
52.	<p>Note: You can also delete a newly added homepage by clicking the X located to the right of the newly added homepage.</p>
53.	<p>Click the Save button to save your changes.</p> 
54.	<p>Click the Homepage drop-down menu at the top of the page to navigate to different homepages.</p> 

Step	Action
55.	Select the applicable homepage menu to display that homepage. 
56.	Note: <ul style="list-style-type: none"> • If using a mobile device, you can swipe the homepage left and right to scroll through the different homepages. • The circle indicators located at the bottom of the page tell the user what homepage sequence they are currently on and how many homepages exist for the user.
57.	You can also reposition Tiles on your homepage, by selecting the Tile, and dragging it to the new desired position. This also works for organizing homepages and NavBar items.
58.	To reposition a Tile, click on the tile and drag the mouse to the new desired position .
59.	To switch the Tile back to its original position, click on the tile and drag the mouse to the original position .
60.	To sign out of the SFS Vendor Portal, click the Actions List button, first. 
61.	Then, click the Sign Out menu. 
62.	End of Procedure.