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## Changing your W9/1099 Classification

Your W9/1099 classification is found on your W9, in Section 3. It is your “federal tax classification”.

Form <b>W-9</b> (Rev. December 2014) Department of the Treasury Internal Revenue Service	<h3>Request for Taxpayer Identification Number and Certification</h3>
Print or type specific instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
	2 Business name/disregarded entity name, if different from above
	3 Check appropriate box for federal tax classification; check only <b>one</b> of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ <input type="text"/> <b>Note.</b> For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶ <input type="text"/>
	4 Ex cert instr Exen Exen code (Applie
	5 Address (number, street, and apt. or suite no.)     Requester's name and ac

Your classification in MECKProcure must match this information. Should it change from when your company registered with Mecklenburg County, please do the following:

1. Login to <https://www.meckprocure.com>
2. Click on the Business Info tab at the top of the screen

3. Click the Update button

**While updating Business Information, DO NOT put information in the discounts section. Doing so may affect payments to your company**

Account

Summary Business Info Addresses & Contacts | U

## My Business Information

This is your Business Information. The buttons described below are conditionally display these buttons. Select the 'Update' button to modify your general information. Select the 'Pending 1099 Additions' button to display requested TIN changes that are not approved. Select the 'Add Business Location' button to register new locations for this headquarters Account.

Update View Pending Changes Pending 1099 Additions Change TIN

▼ Organization Information

4. Under Organization Information, to the right of Classification, click the Find button

Account

Summary Business Info Addresses & Contacts | U

## Update My Business Information

Edit the fields below to request the change of your information, and click the use the 'View Pending Changes' button on the main page to see a detailed list

Save Changes Cancel

► Organization Information

Organization Type : Company

\* Classification : 4 Find

Corporation

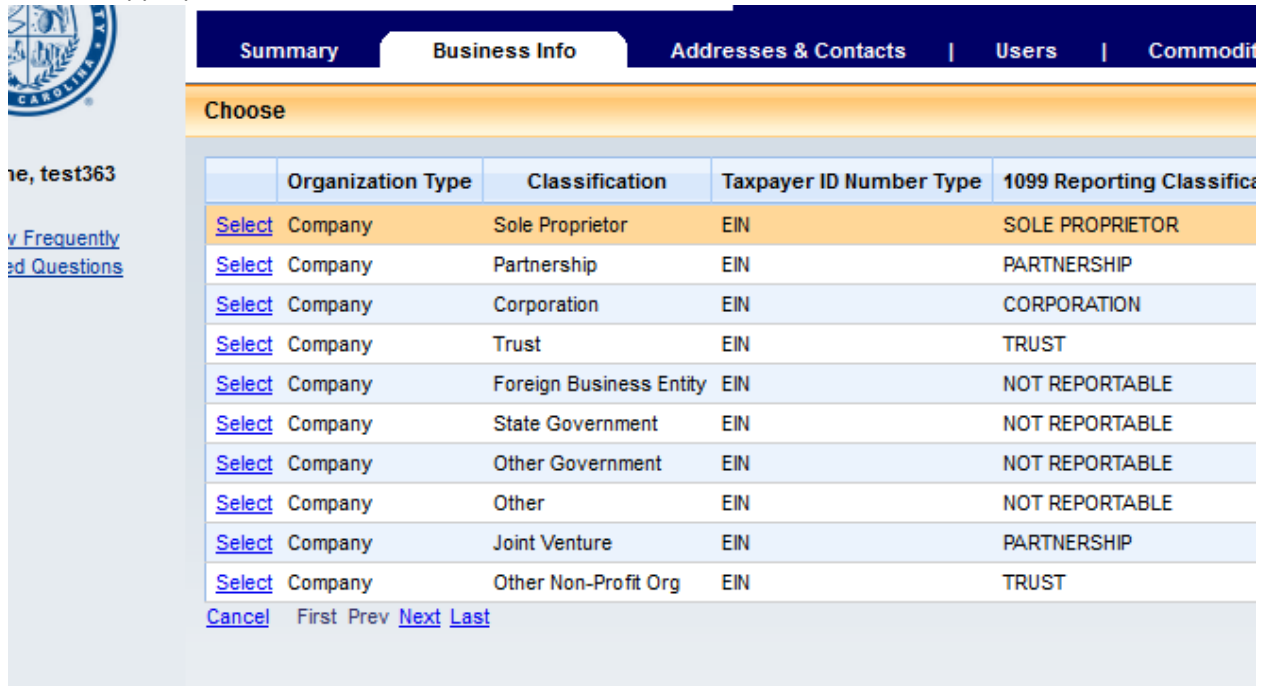
Location Web Address :

Number of Employees :

Annual Income :

## How to Make Changes to Your Account in MECKProcure

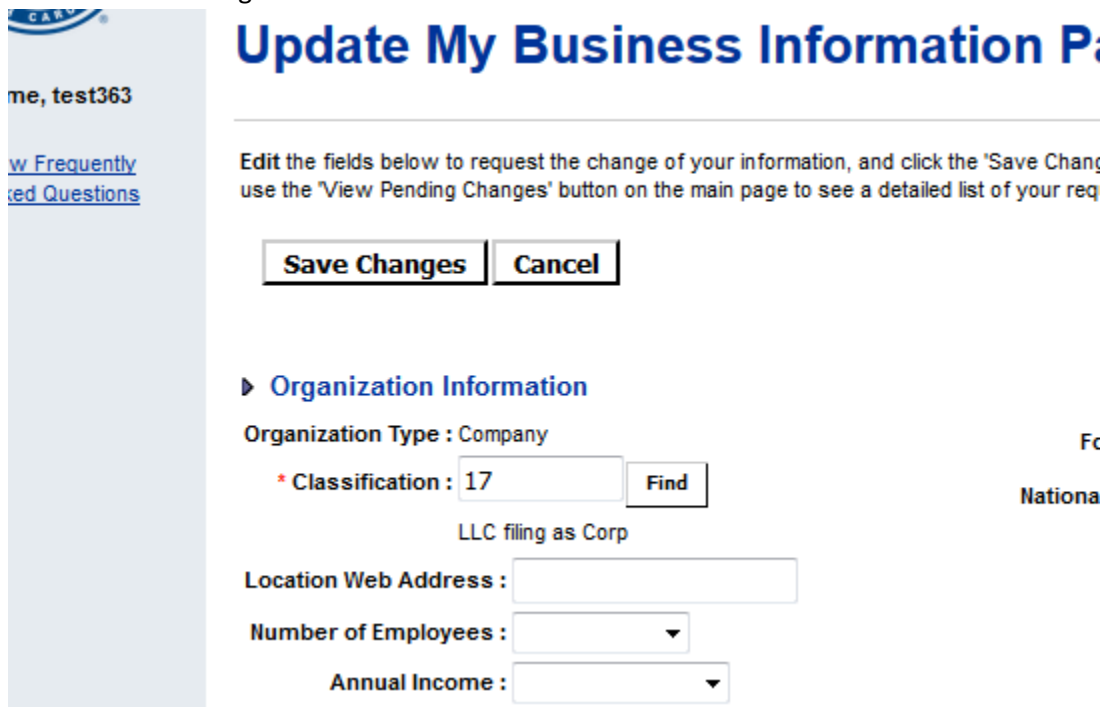
5. Find the appropriate classification and click the Select link to the left of the classification



The screenshot shows the 'Choose' page in the MECKProcure system. The page has a navigation bar with tabs for 'Summary', 'Business Info', 'Addresses & Contacts', 'Users', and 'Commodities'. The 'Business Info' tab is active. Below the navigation bar is a table with the following columns: 'Organization Type', 'Classification', 'Taxpayer ID Number Type', and '1099 Reporting Classification'. Each row in the table has a 'Select' link to its left. The table lists various organization types such as Company, Partnership, Corporation, Trust, Foreign Business Entity, State Government, Other Government, Other, Joint Venture, and Other Non-Profit Org. At the bottom of the table, there are navigation links: 'Cancel', 'First', 'Prev', 'Next', and 'Last'.

	Organization Type	Classification	Taxpayer ID Number Type	1099 Reporting Classification
<a href="#">Select</a>	Company	Sole Proprietor	EIN	SOLE PROPRIETOR
<a href="#">Select</a>	Company	Partnership	EIN	PARTNERSHIP
<a href="#">Select</a>	Company	Corporation	EIN	CORPORATION
<a href="#">Select</a>	Company	Trust	EIN	TRUST
<a href="#">Select</a>	Company	Foreign Business Entity	EIN	NOT REPORTABLE
<a href="#">Select</a>	Company	State Government	EIN	NOT REPORTABLE
<a href="#">Select</a>	Company	Other Government	EIN	NOT REPORTABLE
<a href="#">Select</a>	Company	Other	EIN	NOT REPORTABLE
<a href="#">Select</a>	Company	Joint Venture	EIN	PARTNERSHIP
<a href="#">Select</a>	Company	Other Non-Profit Org	EIN	TRUST

6. Click the Save Changes Button



The screenshot shows the 'Update My Business Information' page in the MECKProcure system. The page has a navigation bar with tabs for 'Summary', 'Business Info', 'Addresses & Contacts', 'Users', and 'Commodities'. The 'Business Info' tab is active. Below the navigation bar is a form with the following fields: 'Organization Type' (set to 'Company'), 'Classification' (set to '17'), 'Location Web Address', 'Number of Employees', and 'Annual Income'. There is a 'Find' button next to the 'Classification' field. At the bottom of the form, there are two buttons: 'Save Changes' and 'Cancel'.

**Update My Business Information Page**

Edit the fields below to request the change of your information, and click the 'Save Changes' button. Use the 'View Pending Changes' button on the main page to see a detailed list of your requests.

**Save Changes** **Cancel**

► **Organization Information**

Organization Type : Company

\* Classification : 17 **Find**

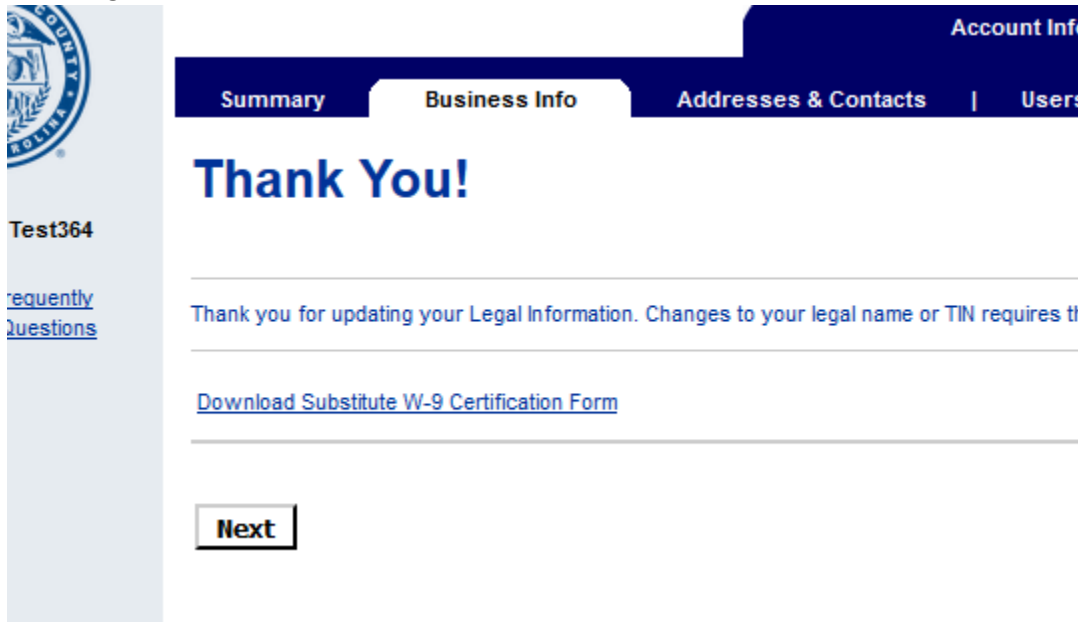
LLC filing as Corp

Location Web Address :

Number of Employees :

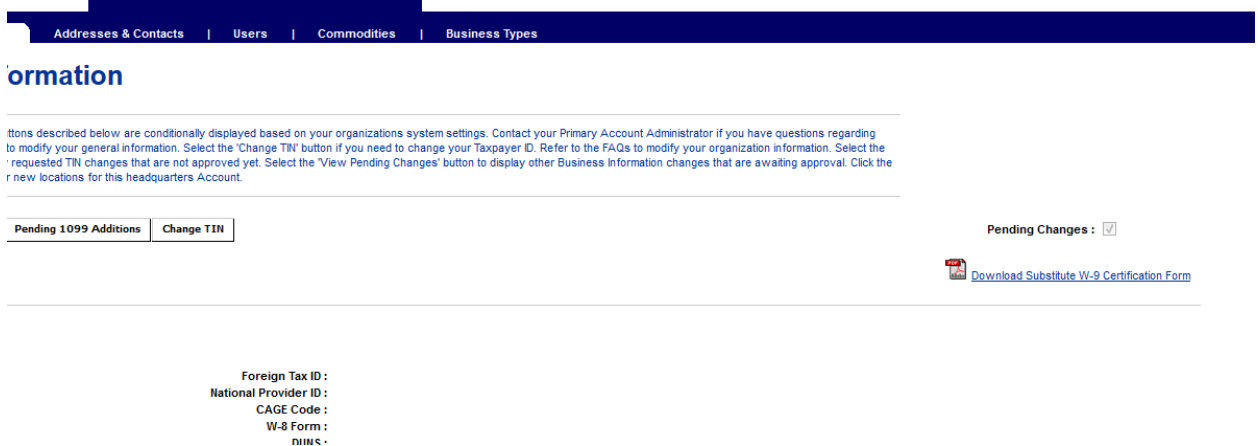
Annual Income :

7. You will get



8. Click the "Download Substitute W-9 Certification Form link. This will open a W9 as a PDF with the changes you made.
9. Print the W9
10. Have it signed and dated by an authorized representative of your company.
11. Email or fax the W9 to [Vendor.Management@MecklenburgCountyNC.gov](mailto:Vendor.Management@MecklenburgCountyNC.gov) , Fax 877-280-9020
12. Back in MECKProcure, click Next.

Note that the check box for Pending Changes is checked.



This will stay checked till the changes have been approved by Mecklenburg County.

## Changing the Legal Name of your company

The Legal Name of your company must match what is in Line 1 of your W9, "Name (as shown on your income tax return)."

Form <b>W-9</b> (Rev. December 2014) Department of the Treasury Internal Revenue Service	<b>Request for Taxpayer Identification Number and Certificati</b>	
	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
type tions on page 2.	3 Check appropriate box for federal tax classification; check only <b>one</b> of the following seven boxes:	
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Tr <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶	

1. Login to <https://www.meckprocure.com>
2. Click on the Business Info tab at the top of the screen

MECKLEBURG COUNTY  
NORTH CAROLINA

Welcome, test363

[View Frequently Asked Questions](#)

Account Information

[Summary](#) | [Business Info](#) | [Addresses & Contacts](#) | [Users](#) | [Commodities](#)

## Account Summary

This page displays a summary of your account information. If you have any questions please contact your Primary ,

▼ **Announcements**

Type	Date	Message
------	------	---------

3. Click the Update button

Account

Summary Business Info Addresses & Contacts | U

## My Business Information

This is your Business Information. The buttons described below are conditionally display these buttons. Select the 'Update' button to modify your general information. Select the 'Pending 1099 Additions' button to display requested TIN changes that are not approved 'Add Business Location' button to register new locations for this headquarters Account.

[View Frequently Asked Questions](#)

Update View Pending Changes Pending 1099 Additions Change TIN

▼ Organization Information

4. Under Legal Name Information, in the Legal Name On W-9 field, is the legal name that was entered when your company was registered with Mecklenburg County.

► Organization Information

Organization Type : Company

\* Classification : 4 Find

Corporation

Location Web Address :

Number of Employees :

Annual Income :

Foreign Tax ID :

National Provider ID :

CAGE Code :

W-8 Form :

DUNS :

9 digits (no dashes)

Extended DUNS :

4 digits (no dashes)

Internet Catalog :

Please include http:// or https://

Preferred Ordering Method :

Pcard Acceptance Level :

► Legal Name Information

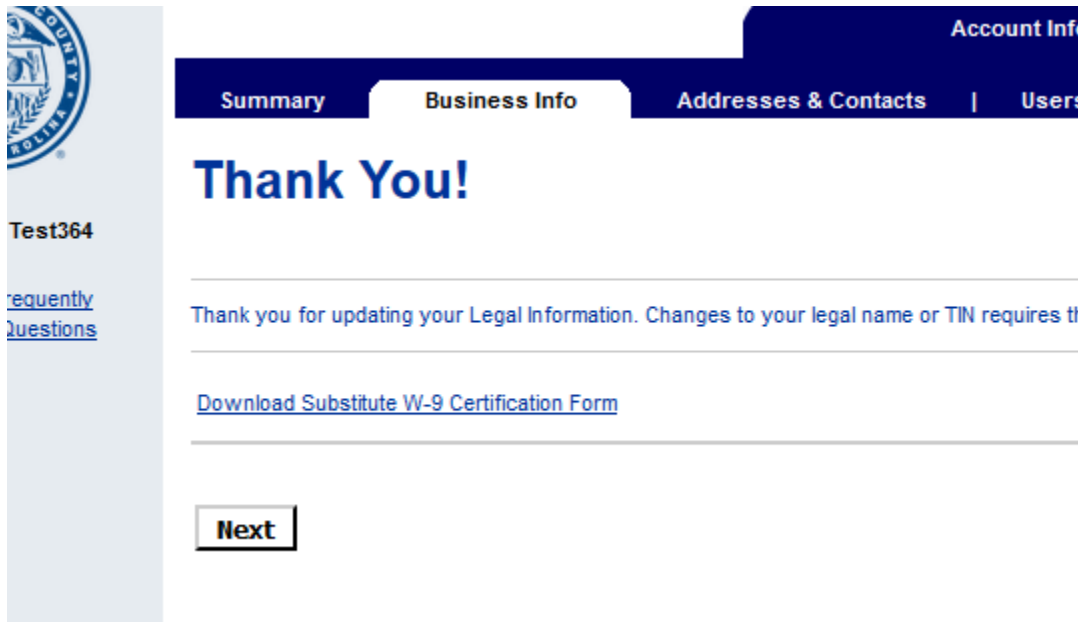
Legal Name on W-9 : test364 Name on Check : Legal Name

Alias/DBA (Business Name) :

5. To change the Legal Name, delete what is there and type in what is on Line 1 of your W9.

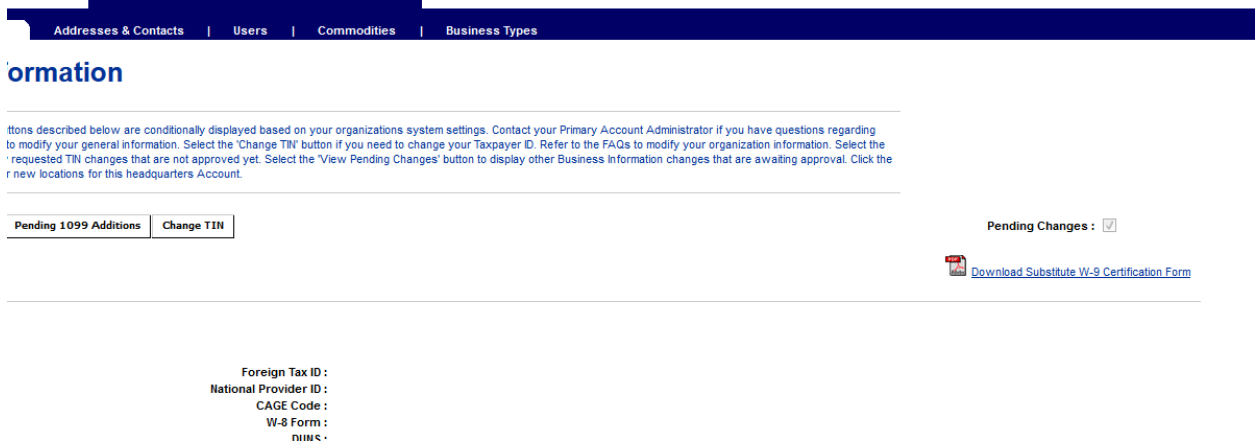
## How to Make Changes to Your Account in MECKProcure

6. Click the Save Changes Button
7. You will see



8. Click the "Download Substitute W-9 Certification Form link. This will open a W9 as a PDF with the changes you made.
9. Print the W9
10. Have it signed and dated by an authorized representative of your company.
11. Email or fax the W9 to [Vendor.Management@MecklenburgCountyNC.gov](mailto:Vendor.Management@MecklenburgCountyNC.gov) , Fax 877-280-9020
12. Back in MECKProcure, click Next.

Note that the check box for Pending Changes is checked.



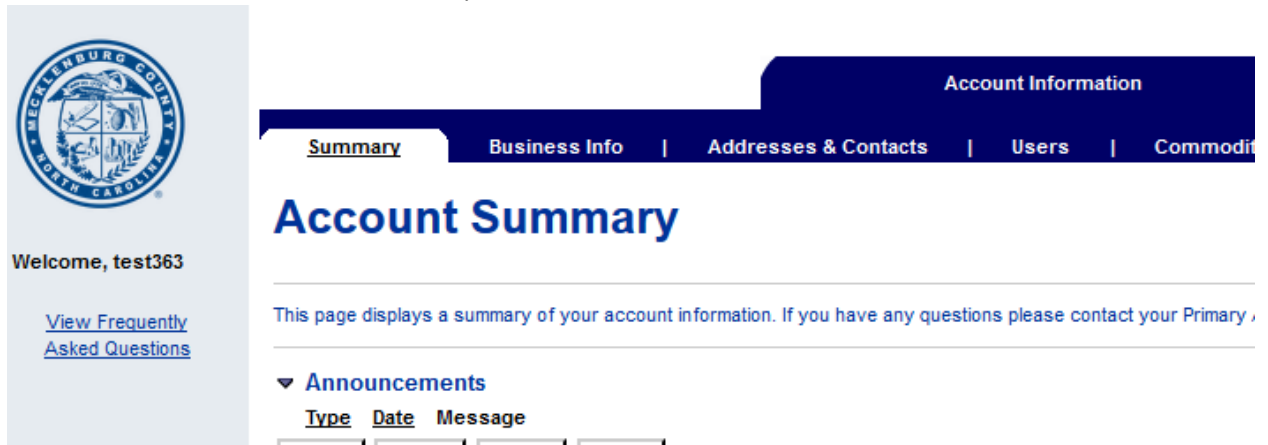
This will stay checked till the changes have been approved by Mecklenburg County.



## How to change your Legal Address

Your Legal Address is the address on your W9. This is the address the IRS has on file for your company for tax purposes. This is the address Mecklenburg County will send a 1099 to, if your company is 1099 reportable.

1. Login to <https://www.meckprocure.com>
2. Click on the Business Info tab at the top of the screen



Account Information

Summary | Business Info | Addresses & Contacts | Users | Commodities

### Account Summary

Welcome, test363

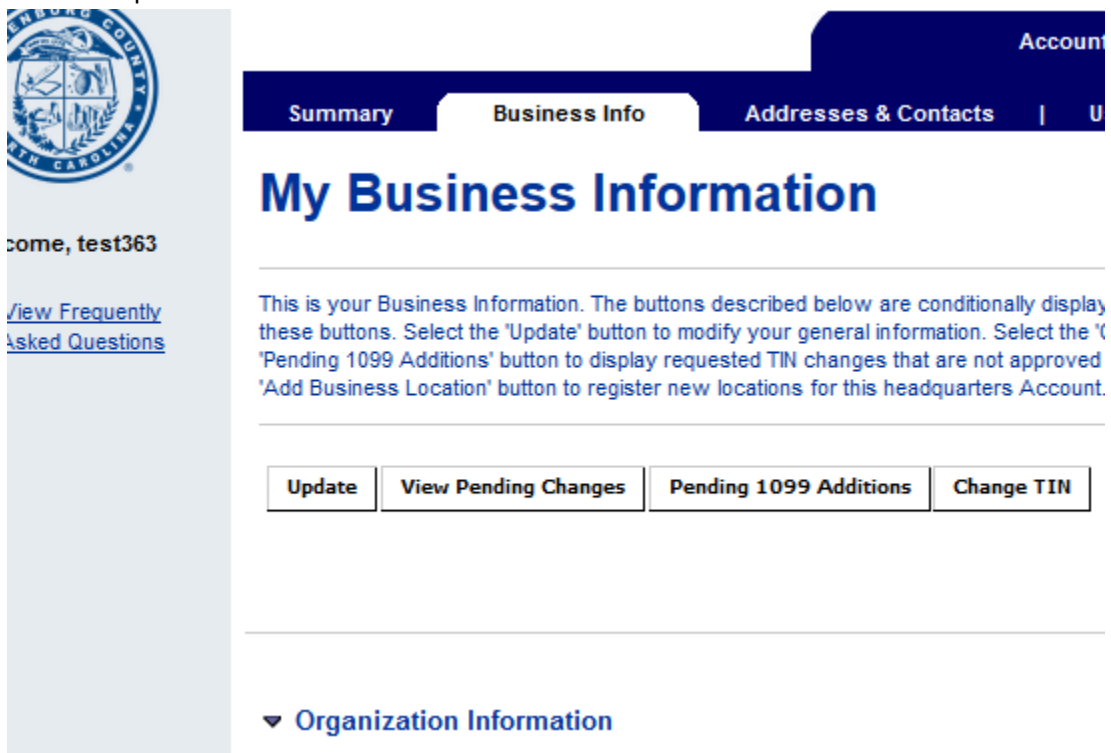
[View Frequently Asked Questions](#)

This page displays a summary of your account information. If you have any questions please contact your Primary .

▼ Announcements

Type	Date	Message
------	------	---------

3. Click the Update button



Account Information

Summary | Business Info | Addresses & Contacts | Users

### My Business Information

Welcome, test363

[View Frequently Asked Questions](#)

This is your Business Information. The buttons described below are conditionally display these buttons. Select the 'Update' button to modify your general information. Select the 'Pending 1099 Additions' button to display requested TIN changes that are not approved. 'Add Business Location' button to register new locations for this headquarters Account.

[Update](#) [View Pending Changes](#) [Pending 1099 Additions](#) [Change TIN](#)

▼ Organization Information

## How to Make Changes to Your Account in MECKProcure

- Under Legal (1099) Address Information, make any required changes.

▶ **Legal Name Information**

Legal Name on W-9 :  Name on Check :

Alias/DBA (Business Name) :

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▶ **1099 TIN Information**

Taxpayer ID Number : 364364364 1099 Reportable : No

Taxpayer ID Number Type : EIN

Please note that your TIN Type is determined by your Classification.

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▶ **Legal (1099) Address Information**

\*Street 1 :

\*City :

\* State/Province :

\*Zip/Postal Code :

- Click the Save Changes button.
- You will see

The screenshot shows the MECKProcure account management interface. On the left is a sidebar with the Mecklenburg County logo, the text 'Test364', and a link for 'Frequently Asked Questions'. The main content area has a dark blue header with tabs for 'Summary', 'Business Info', 'Addresses & Contacts', and 'Users'. Below the header, a large 'Thank You!' message is displayed. Underneath, there is a message: 'Thank you for updating your Legal Information. Changes to your legal name or TIN requires th...'. A link for 'Download Substitute W-9 Certification Form' is provided. At the bottom, there is a 'Next' button.

- Click the "Download Substitute W-9 Certification Form link. This will open a W9 as a PDF with the changes you made.
- Print the W9
- Have it signed and dated by an authorized representative of your company.
- Email or fax the W9 to [Vendor.Management@MecklenburgCountyNC.gov](mailto:Vendor.Management@MecklenburgCountyNC.gov) , Fax 877-280-9020

## How to Make Changes to Your Account in MECKProcure

11. Back in MECKProcure, click Next.

Note that the check box for Pending Changes is checked.


Addresses & Contacts | Users | Commodities | Business Types

### Information

Items described below are conditionally displayed based on your organizations system settings. Contact your Primary Account Administrator if you have questions regarding to modify your general information. Select the 'Change TIN' button if you need to change your Taxpayer ID. Refer to the FAQs to modify your organization information. Select the requested TIN changes that are not approved yet. Select the 'View Pending Changes' button to display other Business Information changes that are awaiting approval. Click the new locations for this headquarters Account.

Pending 1099 Additions | Change TIN

Pending Changes :

 [Download Substitute W-9 Certification Form](#)

Foreign Tax ID :  
National Provider ID :  
CAGE Code :  
W-8 Form :  
nims -

This will stay checked till the changes have been approved by Mecklenburg County.

## How to add an Address

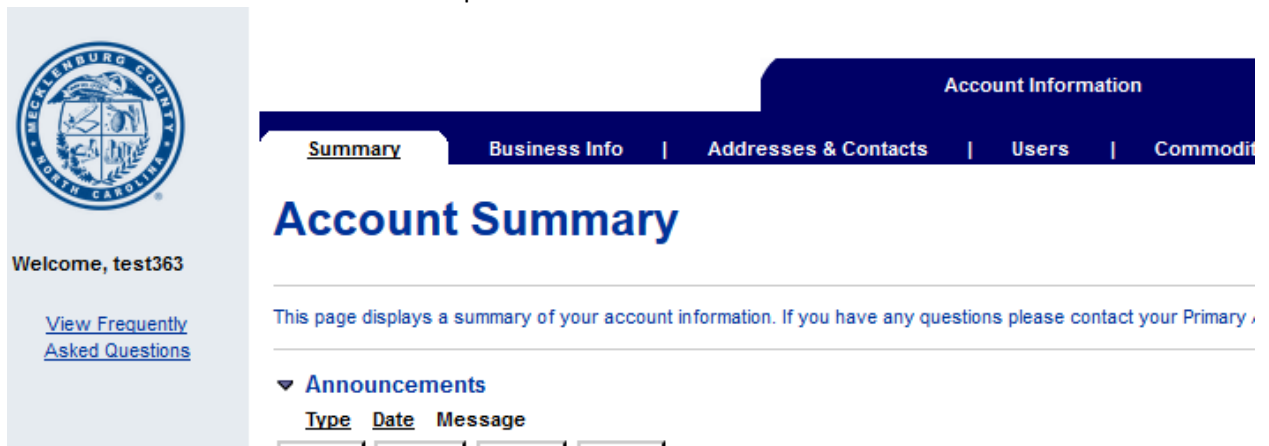
MECKProcure allows a company to have 4 types of address, not including the Legal Address:

1. Billing address – The address Mecklenburg County would send a bill/invoice to should the need arise.
2. Payment address – The remit address Mecklenburg County would send a check to should the EFT system fail.
3. Ordering address – The address Mecklenburg County would mail a purchase order to should we not be able to send it electronically.
4. Web Registrar – This address is created from the registration.

## How to change your EFT information

Mecklenburg County policy is to pay vendors via EFT. Thus you are required to have EFT information in your account. If you need to change your Eft banking information, do the following:

1. Login to <https://www.meckprocure.com>
2. Click on the Business Info tab at the top of the screen



The screenshot displays the MECKProcure user interface. On the left is a sidebar with the Mecklenburg County logo and a welcome message: "Welcome, test363". Below the message is a link for "View Frequently Asked Questions". The main content area features a dark blue navigation bar with tabs: "Summary", "Business Info", "Addresses & Contacts", "Users", and "Commodities". The "Summary" tab is active. Below the navigation bar, the heading "Account Summary" is displayed. A message states: "This page displays a summary of your account information. If you have any questions please contact your Primary ,". Below this is a section for "Announcements" with a table header: "Type", "Date", and "Message".

3. Click the Update button

Account

Summary Business Info Addresses & Contacts | U

## My Business Information

This is your Business Information. The buttons described below are conditionally display these buttons. Select the 'Update' button to modify your general information. Select the 'Pending 1099 Additions' button to display requested TIN changes that are not approved. Select the 'Add Business Location' button to register new locations for this headquarters Account.

[Update](#) [View Pending Changes](#) [Pending 1099 Additions](#) [Change TIN](#)

▼ **Organization Information**

4. Under EFT Information, make any needed changes. Please note the fields that must have information are: ABA Number; Account Type; Account Number.

ABA Number : 011001234

MELLON TRUST OF NEW ENGLAND, N.A.

Account Type :

Account Number : 123456

Routing ID Number :

▶ **Discount Information**

5. Click the Save Changes button.

## How to Make Changes to Your Account in MECKProcure

6. You will see

Account Info

Summary | **Business Info** | Addresses & Contacts | Users

# Thank You!

Thank you for updating your Legal Information. Changes to your legal name or TIN requires th

[Download Substitute W-9 Certification Form](#)

**Next**

Test364

[Frequently Asked Questions](#)

7. Click the "Download Substitute W-9 Certification Form link. This will open a W9 as a PDF with the changes you made.
8. Print the W9
9. Have it signed and dated by an authorized representative of your company.
10. Print and complete the ACH-IAT forms that is available on the MECKProcure login page.
11. Email or fax the W9 and ACH-IAT forms to [Vendor.Management@MecklenburgCountyNC.gov](mailto:Vendor.Management@MecklenburgCountyNC.gov) , Fax 877-280-9020
12. Back in MECKProcure, click Next.

Note that the check box for Pending Changes is checked.

Addresses & Contacts | Users | Commodities | **Business Types**

## Business Information

Information described below are conditionally displayed based on your organizations system settings. Contact your Primary Account Administrator if you have questions regarding to modify your general information. Select the 'Change TIN' button if you need to change your Taxpayer ID. Refer to the FAQs to modify your organization information. Select the 'requested TIN changes that are not approved yet. Select the 'View Pending Changes' button to display other Business Information changes that are awaiting approval. Click the 'new locations for this headquarters Account.

Pending 1099 Additions | **Change TIN**

Pending Changes :

[Download Substitute W-9 Certification Form](#)

Foreign Tax ID :  
National Provider ID :  
CAGE Code :  
W-8 Form :  
NIMS -

This will stay checked till the changes have been approved by Mecklenburg County.

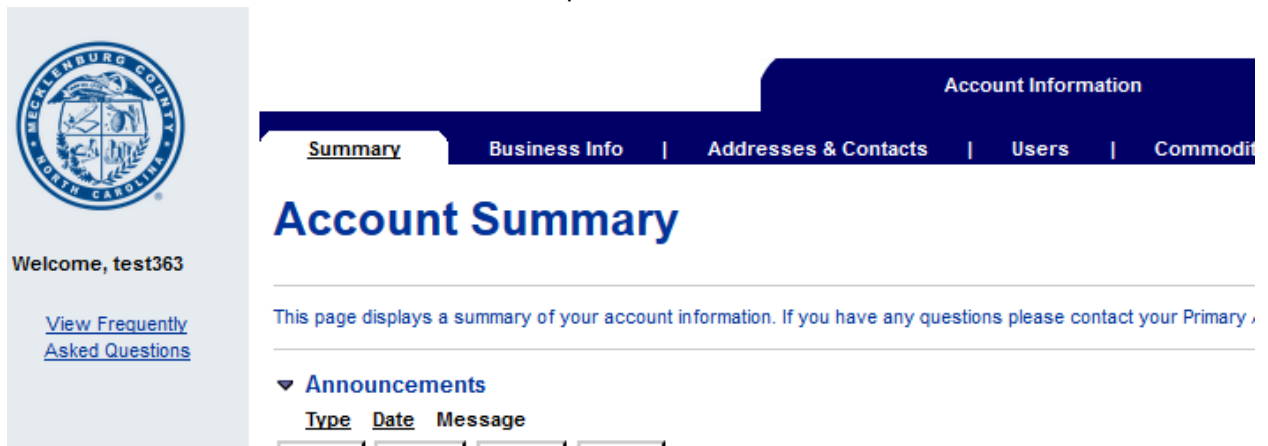
## How to Change an Address and/or Contact

Your account can have up to four (4) different types of address:

- Billing address – The address Mecklenburg County would send a bill to should we need to bill your company.
- Payment address – The address Mecklenburg County would mail payment to should the EFT system fail.
- Ordering address – The address Mecklenburg County would mail an order to should we not be able to send the order electronically.
- Web Registrar – This an Administrative address.

To change an address and/or a contact:

1. Login to <https://www.meckprocure.com>
2. Click on the Addresses & Contacts tab at the top of the screen



MECKLENBURG COUNTY  
SOUTH CAROLINA

Welcome, test363

[View Frequently Asked Questions](#)

Account Information

[Summary](#) | [Business Info](#) | [Addresses & Contacts](#) | [Users](#) | [Commodities](#)

## Account Summary

This page displays a summary of your account information. If you have any questions please contact your Primary .

▼ **Announcements**

Type	Date	Message
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## How to Make Changes to Your Account in MECKProcure

### 3. You will see this screen

### Addresses & Contacts

Here are your addresses and contacts that are used for your financial transactions. You can add new addresses and contacts by clicking the 'Assign/Create Addresses & Contacts' button. You can view your requests that are pending approval by selecting the 'View Pending Additions' button.

To modify the type of address select the 'View/Update' link under the Existing Address & Contact Assignments section next to the record you wish to update. To modify actual addresses and contacts use the 'View/Update' link next to the appropriate record under the Update Addresses and Update Contacts sections.

#### Existing Address & Contact Assignments

Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To	Pending Changes		
AD0003	Billing	street, charlotte, NC, 12345	test364		No	07/11/2016		<input type="checkbox"/>	<a href="#">View/Update</a>	<a href="#">View Pending Changes</a>
AD0003	Payment	street, charlotte, NC, 12345	test364		No	07/11/2016		<input type="checkbox"/>	<a href="#">View/Update</a>	<a href="#">View Pending Changes</a>
AD0003	Ordering	street, charlotte, NC, 12345	test364		No	07/11/2016		<input type="checkbox"/>	<a href="#">View/Update</a>	<a href="#">View Pending Changes</a>
AD0003	Web Registrar	street, charlotte, NC, 12345	test364		No	07/11/2016		<input type="checkbox"/>	<a href="#">View/Update</a>	<a href="#">View Pending Changes</a>

First Prev Next Last Assign/Create Addresses & Contacts View Pending Additions

#### Update Addresses

Address ID	Address	Pending Changes		
AD0003	street, charlotte, NC, 12345	<input type="checkbox"/>	<a href="#">View/Update</a>	<a href="#">View Pending Changes</a>

First Prev Next Last

#### Update Contacts

Contact ID	Contact Name	Contact Address	Pending Changes		
PC003	test364	street, charlotte, NC, 12345	<input type="checkbox"/>	<a href="#">View/Update</a>	<a href="#">View Pending Changes</a>

First Prev Next Last

The “Existing Address & Contact Assignments” section shows which contacts are associated to which addresses. You cannot change the addresses or contacts here.

### 4. To change an address

- a. In the “Update Addresses” section, click the View/Update link to the right of the desired address.

First Prev Next Last Assign/Cre

#### Update Addresses

Address ID	Address	Pending Changes		
AD0003	street, charlotte, NC, 12345	<input type="checkbox"/>	<a href="#">View/Update</a>	<a href="#">View Pending Changes</a>

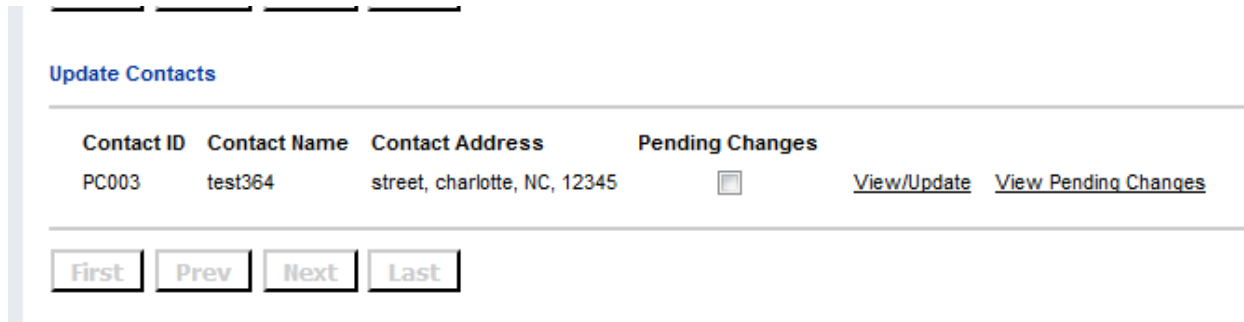
First Prev Next Last

- b. Make the needed changes.
- c. Click the Save button. Note that the Pending Changes box will be checked for the address that was changed. Once the change syncs with the County procurement system, this check box will be cleared.



**5. To change a contact**

- a. In the "Update Contacts" section, click the View/Update link to the right of the desired contact.



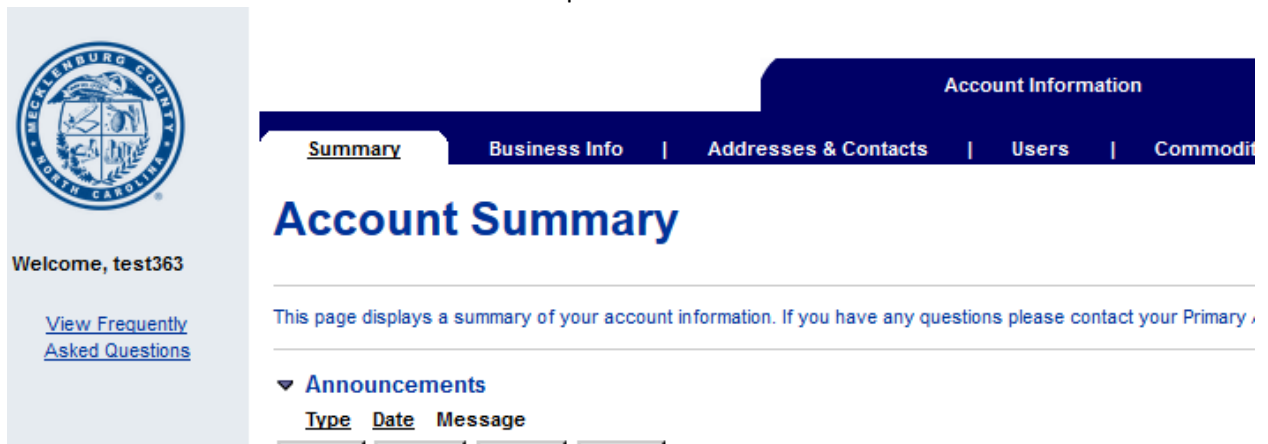
- b. Make the desired changes
- c. Click the Save button. Note that the Pending Changes box will be checked for the address that was changed. Once the change syncs with the County procurement system, this check box will be cleared.

## How Add an Address and/or Contact

You can create four (4) different types of address. You may have as many of each address as desired.

- Billing address – The address Mecklenburg County would send a bill to should we need to bill your company.
- Payment address – The address Mecklenburg County would mail payment to should the EFT system fail.
- Ordering address – The address Mecklenburg County would mail an order to should we not be able to send the order electronically.
- Account Administrator – This tells us where the main administrative functions for your organization take place besides Ordering, Payment, and Billing.

1. Login to <https://www.meckprocure.com>
2. Click on the Addresses & Contacts tab at the top of the screen



## How to Make Changes to Your Account in MECKProcure

3. You will see this screen

### Addresses & Contacts

Here are your addresses and contacts that are used for your financial transactions. You can add new addresses and contacts by clicking the 'Assign/Create Addresses & Contacts' button. You can view your requests that are pending approval by selecting the 'View Pending Additions' button.

To modify the type of address select the 'View/Update' link under the Existing Address & Contact Assignments section next to the record you wish to update. To modify actual addresses and contacts use the 'View/Update' link next to the appropriate record under the Update Addresses and Update Contacts sections.

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**Existing Address & Contact Assignments**

Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To	Pending Changes
AD0003	Billing	street, charlotte, NC, 12345	test364		No	07/11/2016		<input type="checkbox"/> <a href="#">View/Update</a> <a href="#">View Pending Changes</a>
AD0003	Payment	street, charlotte, NC, 12345	test364		No	07/11/2016		<input type="checkbox"/> <a href="#">View/Update</a> <a href="#">View Pending Changes</a>
AD0003	Ordering	street, charlotte, NC, 12345	test364		No	07/11/2016		<input type="checkbox"/> <a href="#">View/Update</a> <a href="#">View Pending Changes</a>
AD0003	Web Registrar	street, charlotte, NC, 12345	test364		No	07/11/2016		<input type="checkbox"/> <a href="#">View/Update</a> <a href="#">View Pending Changes</a>

---

**Update Addresses**

Address ID	Address	Pending Changes
AD0003	street, charlotte, NC, 12345	<input type="checkbox"/> <a href="#">View/Update</a> <a href="#">View Pending Changes</a>

---

**Update Contacts**

Contact ID	Contact Name	Contact Address	Pending Changes
PC003	test364	street, charlotte, NC, 12345	<input type="checkbox"/> <a href="#">View/Update</a> <a href="#">View Pending Changes</a>

The “Existing Address & Contact Assignments” section shows which contacts are associated to which addresses. You cannot change the addresses or contacts here.

4. Click the Assign/Create Addresses and Contacts button

### Existing Address & Contact Assignments

Address ID	Address Type	Address	Principal Contact	EFT Status	Prevent New Processing	Active From	Active To
AD0003	Billing	street, charlotte, NC, 12345	test364		No	07/11/2016	
AD0003	Payment	street, charlotte, NC, 12345	test364		No	07/11/2016	
AD0003	Ordering	street, charlotte, NC, 12345	test364		No	07/11/2016	
AD0003	Web Registrar	street, charlotte, NC, 12345	test364		No	07/11/2016	

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**Update Addresses**

Address ID	Address	Pending Changes

## How to Make Changes to Your Account in MECKProcure

### 5. Choose the Address Type

▼ Address Types	*Active From	Active To	Default Record	Department/Division
<input type="checkbox"/> Account Administrator	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/> Ordering	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/> Payment	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/> Billing	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

6. Enter the Active Date (the date the address can start to be used)
7. If this new address will be the default address for the selected Address Type, check the Default Record box.
8. If desired, enter a Department or Division
9. If you want to duplicate an existing address of another type do the following. Otherwise go to step 10.
  - a. Click the Find button to the right Address ID

<input type="checkbox"/> <b>Payment</b>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> <b>Billing</b>	<input type="text"/>	<input type="text"/>

---

▼ **Address**

\*Address ID:  **Find**

\*Street 1:

Street 2:

\*City:

\*State/Province:

\*Zip/Postal Code:

Country Name:

- b. Choose the address to duplicate. This will cause the remaining address fields to be completed
10. Enter the complete address: Street, City, State/Province, Zip/Postal Code
11. Ensure the Country Name is correct
12. Enter a phone

## How to Make Changes to Your Account in MECKProcure

### 13. Click Next

[County](#)  
[stitutions](#)

Your address may be validated according to postal standards. If prompted, review the address if it was not validated.

---

▼ **Address Types**

	*Active From	Active To
<input type="checkbox"/> Account Administrator	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Ordering	07/13/2016	<input type="text"/>
<input type="checkbox"/> Payment	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Billing	<input type="text"/>	<input type="text"/>

---

▼ **Address**

### 14. Complete the Principle Contact for this address

- If the Principle Contact will be the same as one that exists, do the following. Otherwise go to step 14.b
  - Click the Find Button to the right of the Principle Contact ID
  - Choose the appropriate contact
  - The required fields will be filled in
- Enter a Contact Name
- Enter the Email
- Enter the Phone
- All other fields are not required

### 15. Click Next

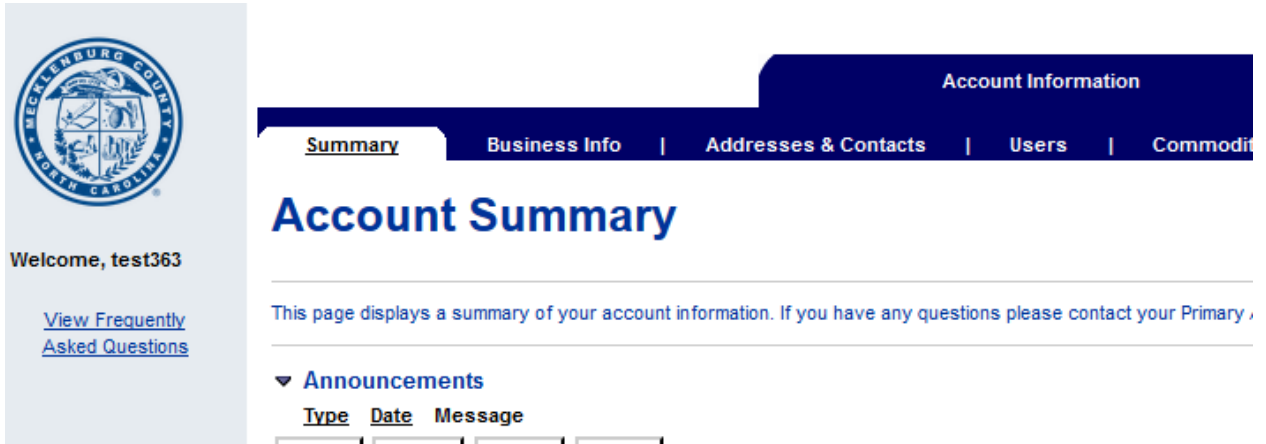
### 16. Click Save

17. The new address and contact will be displayed after MECKProcure syncs with the County's procurement system. Till then, use the View Pending Additions to see recently added addresses and contacts.

## How to Add Account Users

You can add as many account users as desired. You can designate the access rights for each.

1. Login to <https://www.meckprocure.com>
2. Click on the Users tab at the top of the screen



Account Information

Summary | Business Info | Addresses & Contacts | Users | Commodities

### Account Summary

Welcome, test363

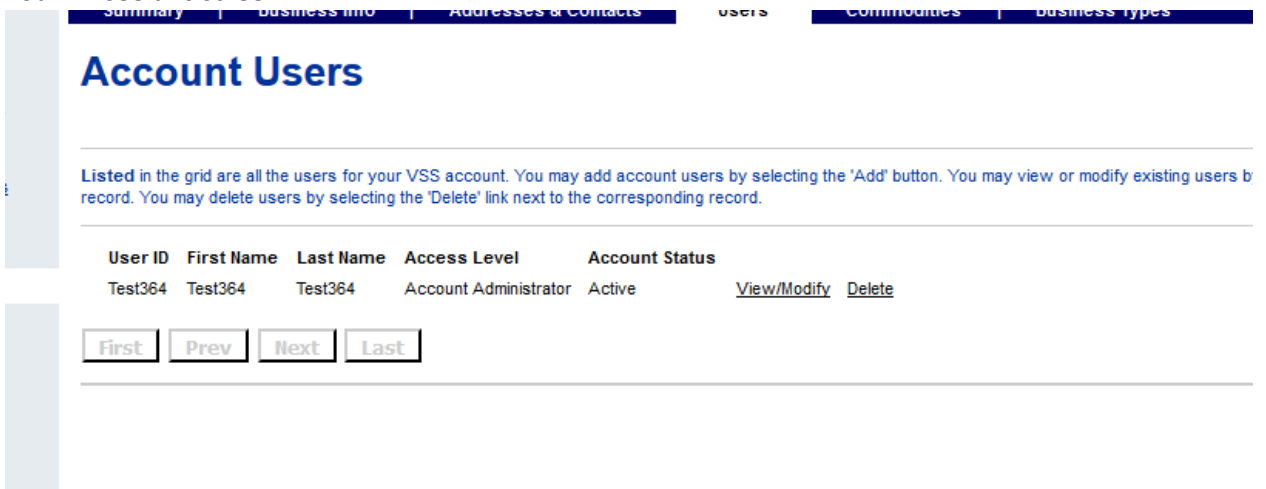
[View Frequently Asked Questions](#)

This page displays a summary of your account information. If you have any questions please contact your Primary .

▼ **Announcements**

Type	Date	Message
------	------	---------

3. You will see this screen



Summary | Business Info | Addresses & Contacts | Users | Commodities | Business Types

### Account Users

Listed in the grid are all the users for your VSS account. You may add account users by selecting the 'Add' button. You may view or modify existing users by selecting the 'View/Modify' link. You may delete users by selecting the 'Delete' link next to the corresponding record.

User ID	First Name	Last Name	Access Level	Account Status	
Test364	Test364	Test364	Account Administrator	Active	<a href="#">View/Modify</a> <a href="#">Delete</a>

[First](#) [Prev](#) [Next](#) [Last](#)

4. Click the Add button

5. Enter the User Information

▼ **User Information**

\*User ID (case sensitive):  **Find**

**\*(User ID should be between 5 and 16 characters in length )**

\*First Name :

\*Last Name :

\*Email :

\*Re-enter Email :

\*Phone :  Ext. :

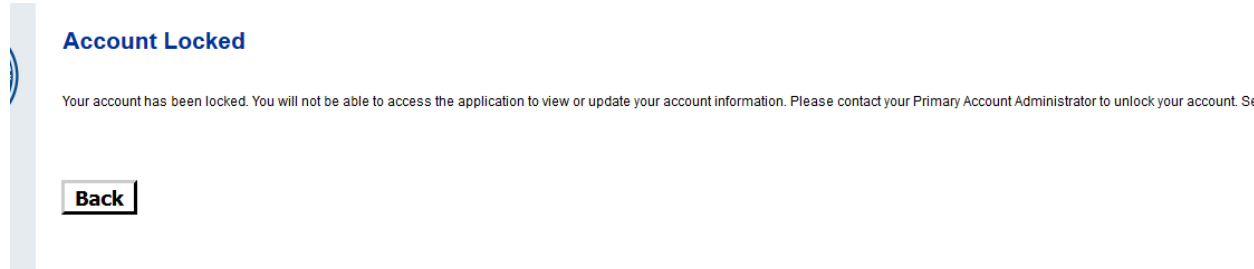
XXX-XXX-XXXX

Fax Number :

Primary Account Administrator :

Locked :

- ▼ **Password**
- (Passwords should be between 6 and 16 characters in length )**
- a. User ID
  - b. First and Last Name
  - c. Email
  - d. Phone
  - e. If Primary Account Administrator is chosen, the user will be able to:
    - i. Grants VSS account access to other individuals in their organization.
    - ii. Designates another individual to perform the role of the Primary Account Administrator.
    - iii. Primary point of contact to receive all emails related to your account status.
    - iv. Primary point of contact for other individuals in your organization requesting VSS account access. (Or a password reset)
  - f. If Locked is chosen, the user not be able to access the account till an Account Administrator removes the lock. The user will get this screen when they log in.



- g. Set a Password

## How to Make Changes to Your Account in MECKProcure

- h. Choose actions this user will receive Email Notifications for.

\*Password :

\*Re-enter Password :

---

▼ **Email Notifications**

Registration :

Account Maintenance :

Recent Financial Transactions :

---

▼ **Security Questions and Answers**

\*Security Question :

- i. Set the Security Questions and Answer
- j. Click Next
- k. Choose the Primary and Optional Access Levels

Summary | Business Info | Addresses & Contacts | Users | Commodities | Business Types

### Access Levels

Select one Primary Access Level and any Optional Access Levels.

User ID : Test364a  
First Name : test364a  
Last Name : test364a

**Primary Access Level**  
Select one primary access level to be assigned to the user.

Access Level	Description
<input type="radio"/> Account Administrator	Account Administrator users have the ability to add account users, and assign access levels to each user. They may also update the Account Information and User's account. Account Administrator users will also be capable of updating their own profile information.
<input type="radio"/> Full Access	Full Access users may only update the account Information other than User Information. They will also have the ability to view financial transactions pertaining to the account.
<input checked="" type="radio"/> Display Only	Display Only users will be able to view the Account Information other than User Information. They will also have the ability to view financial transactions pertaining to the account.

**Optional Access Levels**  
Select any optional access levels to be made available to the user.

Access Level	Description
<input type="checkbox"/> Create Invoice	This optional level allows a User to create an invoice. All Users can view invoice information but a User must have this access level to create an invoice.
<input type="checkbox"/> Create Solicitation Response	This optional level allows a User to respond to solicitations. All Users can view solicitations but a User must have this access level to create a response.
<input type="checkbox"/> Query Tax Information	Query Tax Information will allow a user to view tax information for their account.

Save

- l. Click Save

## How to Modify an Existing User

1. Login to <https://www.meckprocure.com>
2. Click on the Users tab at the top of the screen

Account Information

[Summary](#) | [Business Info](#) | [Addresses & Contacts](#) | [Users](#) | [Commodities](#)

### Account Summary

Welcome, test363

[View Frequently Asked Questions](#)

This page displays a summary of your account information. If you have any questions please contact your Primary ,

▼ **Announcements**

Type	Date	Message

3. You will see this screen

[Summary](#) | [Business Info](#) | [Addresses & Contacts](#) | [Users](#) | [Commodities](#)

### Account Users

Listed in the grid are all the users for your VSS account. You may add account users by selecting the 'Add' button. You may view record. You may delete users by selecting the 'Delete' link next to the corresponding record.

User ID	First Name	Last Name	Access Level	Account Status	
Test364	Test364	Test364	Account Administrator	Active	<a href="#">View/Modify</a> <a href="#">Delete</a>
Test364a	test364a	test364a	Display Only	Locked	<a href="#">View/Modify</a> <a href="#">Delete</a>

[First](#) [Prev](#) [Next](#) [Last](#)

4. Click the View/Modify link to the right of the desired user.
5. User Information
  - a. Make any needed changes
6. Email Notification
  - a. Make any needed changes
7. Security Questions and Answers
  - a. Make any needed changes
8. Change Access Level
  - a. Click the Change Access Levels button
  - b. Make any needed changes
  - c. Click Save



## How to Make Changes to Your Account in MECKProcure

9. Change Password
  - a. Click the Change Password button
  - b. Type and retype the new password
  - c. Click Save
10. Click Save

## How to Add/Remove Commodity Codes

Commodity codes define the products and services your company offers. Mecklenburg County uses the codes companies choose to:

- Do searches to find a vendor for a need
- Distribution lists for quoting and bidding opportunities
- And more...

**If you don't have all the codes that apply to your company associated to your company, you may miss an opportunity.**

1. Login to <https://www.meckprocure.com>
2. Click on the Commodities tab at the top of the screen

The screenshot shows the 'Account Information' page in MECKProcure. The navigation bar at the top includes 'Summary', 'Business Info', 'Addresses & Contacts', 'Users', 'Commodities', and 'Business Types'. The 'Commodities' tab is currently selected. Below the navigation bar, the page title is 'Account Summary'. A descriptive text states: 'This page displays a summary of your account information. If you have any questions please contact your Primary Account Administrator or submit a question using the "Feedback" button.' Below this, there is a section for 'Announcements' with a table header containing 'Type', 'Date', and 'Message'. At the bottom of the announcements section, there are four buttons: 'First', 'Prev', 'Next', and 'Last'.

## How to Make Changes to Your Account in MECKProcure

3. You will see this screen

Account Information

Summary | Business Info | Addresses & Contacts | Users | **Commodities** | Busi

# Commodities

Here is the current list of commodity codes/classes that describe the goods and services that your organization "Add Items" button. To delete a commodity/service codes, click the "Delete" link next to the record in the grid th

Any request to add a new Commodity that is awaiting approval can be viewed by clicking the 'View Pending Additions' button. A request awaiting approval is noted in the 'Pending Deletion' column.

---

**Existing Commodities**

Commodity/Service Code	Commodity Description	Pending Deletion	
00505	Abrasive Equipment and Tools	<input type="checkbox"/>	<a href="#">Delete</a>

[First](#) [Prev](#) [Next](#) [Last](#) [Add Items](#) [View Pending Additions](#)

4. To add a commodity code

- Click the Add Items button
- Find the codes that apply and check the box to the left of the description.  
If using the Commodity Description field to do key word searches, it is recommended to place an \* before and after the search term.

[undefined Commodity/Service Code link.](#)

[Browse](#) [Clear](#)

Commodity/Service Code :

Commodity Description :

<u>Commodity Description</u>	<u>Commodity/Service Code</u>
<input type="checkbox"/> Shelters, Decontamination (All Types)	15575
<input type="checkbox"/> Shelters, Bus Waiting	15576
<input type="checkbox"/> Shelters, Fire	15577
<input type="checkbox"/> Shelters, Insulated (For Remote Equipment)	15578
<input type="checkbox"/> Shelters, Non-Insulated	15579
<input type="checkbox"/> Shelters, Portable	15580

- If your search gives you more than one page of results, choose all that apply, then click OK.

## How to Make Changes to Your Account in MECKProcure

To see all the added codes, click the View Pending Codes button. The added codes will display in the main list once they have synced with the County procurement system.

5. To delete a code
  - a. Click the Delete link to the right of the desired code.
  - b. You will get this warning

The screenshot shows the 'Commodities' page in MECKProcure. A warning dialog box is overlaid on the page, stating: "Warning: You are about to delete a commodity. Select OK to continue or Cancel to go back to the Commodities page". The dialog box has 'OK' and 'Cancel' buttons. In the background, the 'Commodities' table is visible, showing a row for 'Abrasive Equipment and Tools' with a 'Delete' link. Below the table are navigation buttons: 'Prev', 'Next', 'Last', 'Add Items', and 'View Pending Additions'.

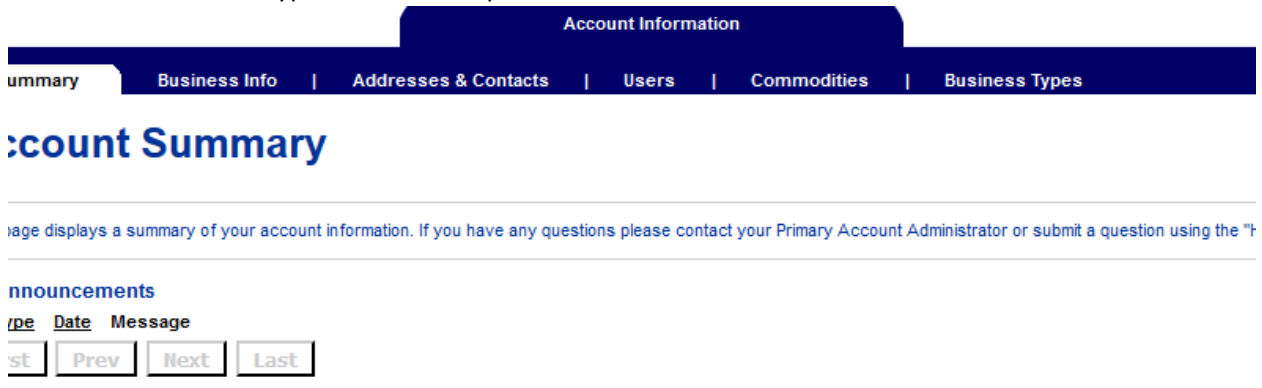
- c. Click OK if you want to proceed. Otherwise click Cancel.  
If OK was clicked, the Pending Deletion box will be checked for the code till it syncs with the County procurement system.

The screenshot shows the 'Existing Commodities' page in MECKProcure. The page displays a table with the following columns: 'Commodity/Service Code', 'Commodity Description', 'Pending Deletion', and 'Delete'. The table contains one row with the following data: '00505', 'Abrasive Equipment and Tools', a checked checkbox, and a 'Delete' link. Below the table are navigation buttons: 'First', 'Prev', 'Next', 'Last', 'Add Items', and 'View Pending Additions'.

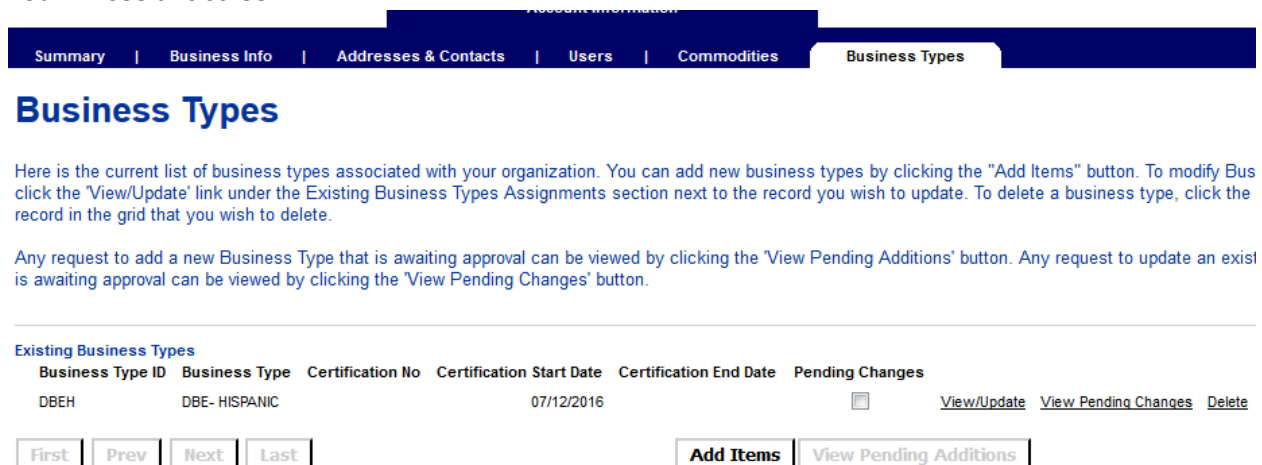
## How to Add/Update/Delete Business Types (MWSBE/HUB certifications)

Mecklenburg County tracks its usage of MWSBE (Minority/Woman/Small Business Enterprise) and HUB (Historically Under-utilized Business) businesses. Mecklenburg County recognizes most certifying agencies, as long as the certification has a reasonably rigorous process for certifying your business's standing. Mecklenburg County cannot give preference based on MWSBE/HUB status. The County does actively pursue ensuring MWSBE/HUB businesses have equal opportunity to do business with Mecklenburg County and the County does set MWSBE/HUB goals for each procurement project. All MWSBE/HUB certifications that are entered into MECKProcure are required to have a certification and will be vetted/approved by the Vendor Management Program Office (VMPO) prior to acceptance.

1. Login to <https://www.meckprocure.com>
2. Click on the Business Types tab at the top of the screen



3. You will see this screen



4. **Add a Business Type (MWSBE/HUB certification)**

- a. Click the Add Items button
- b. Find the Business Type/s that apply to your business and certifications and check the checkbox to the left of the Business Type ID.  
If using the Business Type field to do key word searches, it is recommended to place an

## How to Make Changes to Your Account in MECKProcure

\* before and after the search term.

a valid business type in the Business Type search field and click the Browse link. Once your business type is selected, you will be taken to the Business Types Enter/Update page where additional information can be entered for the selected business type.

**Browse** **Clear**

Business Type : \*ASIAN\*

Business Type ID	Business Type
<input type="checkbox"/> DBAI	DBE- ASIAN INDIAN
<input type="checkbox"/> DBAP	DBE- ASIAN PACIFIC
<input type="checkbox"/> DBEC	DBE- CAUCASIAN
<input type="checkbox"/> HBAP	NC HUB-ASIAN AMER/PACIFIC ISL
<input type="checkbox"/> MNAP	MBE- ASIAN PACIFIC ISL

**First** **Prev** **Next** **Last**

**OK** **Cancel**

- If your search gives you more than one page of results, choose all that apply, then click OK.
- Enter the Certification No, Certification Start and End Dates

Here you can enter or update Business Type information.

Business Type ID	Business Type	Certification No	Certification Start Date	Certification End Date
DBAI	DBE- ASIAN INDIAN	<input type="text"/>	<input type="text"/>	<input type="text"/>

**First** **Prev** **Next** **Last** **Save** **Cancel**

- Click Save
- The new Business Type will display after MECKProcure syncs with the County procurement system. Till then, click the View Pending Additions button to view the new entries.

### 5. To Update an existing Business Type (MWSBE/HUB certification)

- Click the View/Update link to the right of the desired Business Type

Any request to add a new Business Type that is awaiting approval can be viewed by clicking the 'View Pending Additions' button. Any request to update an existing Business Type that is awaiting approval can be viewed by clicking the 'View Pending Changes' button.

**Existing Business Types**

Business Type ID	Business Type	Certification No	Certification Start Date	Certification End Date	Pending Changes
DBEH	DBE- HISPANIC		07/12/2016		<input type="checkbox"/> <a href="#">View/Update</a> <a href="#">View Pending Additions</a>

**First** **Prev** **Next** **Last** **Add Items** **View Pending Additions**

- Make the needed changes

## How to Make Changes to Your Account in MECKProcure

c. Click Save

### 6. To Delete a Business Type (MWSBE/HUB certification)

a. Click the Delete link to the right of the desired Business Type

is awaiting approval can be viewed by clicking the [View Pending Changes](#) button.

#### Existing Business Types

Business Type ID	Business Type	Certification No	Certification Start Date	Certification End Date	Pending Changes
DBEH	DBE- HISPANIC		07/12/2016		<input type="checkbox"/> <a href="#">View/Update</a> <a href="#">View Pending Changes</a> <a href="#">Delete</a>

[First](#) [Prev](#) [Next](#) [Last](#)

[Add Items](#) [View Pending Additions](#)

b. You will get

ent list of business types associated with your organization. You can add new business types by clicking the "Add Items" button. To modify Business Type information, click the "View/Update" link under the Existing Business Types Assignments section next to the record you wish to update. To delete a business type, click the "Delete" link next to the record that you wish to delete.

To add a new Business Type that is awaiting approval, you can view it by clicking the "View Pending Additions" button. Any request to update an existing Business Type that is awaiting approval can be viewed by clicking the "View Pending Changes" button.

Warning: You are about to delete a business type. Select OK to continue or Cancel to go back to the Business Types page

[OK](#) [Cancel](#)

c. Click OK to proceed. Otherwise, click Cancel.