Contents
Changing your W9/1099 Classification ................................................................. 2
Changing the Legal Name of your company ......................................................... 6
How to change your Legal Address ...................................................................... 9
How to add an Address ...................................................................................... 12
How to change your EFT information ................................................................. 12
How to Change an Address and/or Contact ...................................................... 15
How Add an Address and/or Contact ................................................................ 17
How to Add Account Users ............................................................................... 21
How to Modify an Existing User ........................................................................ 24
How to Add/Remove Commodity Codes ............................................................ 25
How to Add/Update/Delete Business Types (MWSBE/HUB certifications) ....... 28
Changing your W9/1099 Classification

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

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.

4. Under Organization Information, to the right of Classification, click the Find button
5. Find the appropriate classification and click the Select link to the left of the classification

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

![Image of the Thank You page]

Thank you for updating your Legal Information. Changes to your legal name or TIN require time. Before you can proceed, you need to download the Substitute W-9 Certification Form. This will open a W-9 as a PDF with the changes you made.

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, Fax 877-280-9020


Note that the check box for Pending Changes is checked.

![Image of the pending changes check box]

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).”

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

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.

5. To change the Legal Name, delete what is there and type in what is on Line 1 of your W9.
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, Fax 877-280-9020
   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
3. Click the Update button
4. Under Legal (1099) Address Information, make any required changes.

- **Legal Name Information**
  - Legal Name on W-9: test364
  - Name on Check: Legal Name
  - Alias/DBA (Business Name): 

- **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.

- **Legal (1099) Address Information**
  - Street: 
  - City: charlotte
  - State/Province: North Carolina
  - Zip/Postal Code: 12345

5. Click the Save Changes button.
6. You will see

```
Test364
```

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. Email or fax the W9 to Vendor.Management@MecklenburgCountyNC.gov, Fax 877-280-9020
   
   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 Make Changes to Your Account in MECKProcure

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
3. Click the Update button

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

5. Click the Save Changes button.
How to Make Changes to Your Account in MECKProcure

6. You will see

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, Fax 877-280-9020
   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 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
3. You will see this screen

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.

   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.
   
   ![Update Contacts Table]

   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](https://www.meckprocure.com)
2. Click on the Addresses & Contacts tab at the top of the screen
3. You will see this screen

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.

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

...
5. Choose the Address Type

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

9a. Payment

9b. Billing

   ▼ Address

   *Address ID:

   *Street 1:

   Street 2:

   *City:

   *State/Province:

   *Zip/Postal Code:

   Country Name: UNITED STATES

   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
13. Click Next

14. Complete the Principle Contact for this address
   a. If the Principle Contact will be the same as one that exists, do the following. Otherwise go to step 14.b
      i. Click the Find Button to the right of the Principle Contact ID
      ii. Choose the appropriate contact
      iii. The required fields will be filled in
   b. Enter a Contact Name
   c. Enter the Email
   d. Enter the Phone
   e. 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 Make Changes to Your Account in MECKProcure

**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](https://www.meckprocure.com)
2. Click on the Users tab at the top of the screen
3. You will see this screen
4. Click the Add button
5. Enter the User Information

- **User Information**
  - User ID (case sensitive): 
    - (User ID should be between 5 and 16 characters in length)
  - First Name: 
  - Last Name: 
  - Email: 
  - Re-enter Email: 
  - Phone: 
    - Ext.: 
  - 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.

- **Account Locked**
  - Your account has been locked. You will not be able to access the application to view or update your account information. Please contact your Primary Account Administrator to unlock your account. Set the new password when you are prompted.

- Back

- 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

   Access Levels
   Select one Primary Access Level and any Optional Access Levels.

   User ID: Test1564
   First Name: Test
   Last Name: Test

   User
   Role

   Primary Access Level
   Select the primary access level to be assigned to the user.
   Access Level  Description
   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 Users account. Account Administrator users will also be capable of updating their own profile information.
   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.
   Delete Only  Delete 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
   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.
   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.
   Query Tax Information  Query Tax Information will allow a user to view tax information for their account.

l. Click Save
How to Make Changes to Your Account in MECKProcure

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
3. You will see this screen

   ![Account Summary](image)

   **Account Summary**

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

   ![Announcements](image)

   **Announcements**

   ![Account Users](image)

   **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 a user record. You may delete users by selecting the 'Delete' link next to the corresponding record.

   ![User List](image)

   **User List**

   - User ID
   - First Name
   - Last Name
   - Access Level
   - Account Status
   - View/Modify
   - Delete

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
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](https://www.meckprocure.com)
2. Click on the Commodities tab at the top of the screen

![Account Summary](image)

The 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 "I
3. You will see this screen

![Commodities Screen](image)

Commodities

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

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

Existing Commodities

<table>
<thead>
<tr>
<th>Commodity/Service Code</th>
<th>Commodity Description</th>
<th>Pending Deletion</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>00656</td>
<td>Abrasive Equipment and Tools</td>
<td></td>
<td>Delete</td>
</tr>
</tbody>
</table>

Add Items button

View Pending Additions button

4. To add a commodity code

   a. Click the Add Items button
   b. Find the codes that apply and check the box to the left of the description.

   If using the Commodity Description field to do keyword searches, it is recommended to place an * before and after the search term.

   ![Browse and Clear Buttons](image)

   ![Commodity Description Search](image)

<table>
<thead>
<tr>
<th>Commodity Description</th>
<th>Commodity/Service Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelters, Decontamination (All Types)</td>
<td>15575</td>
</tr>
<tr>
<td>Shelters, Bus Waiting</td>
<td>15576</td>
</tr>
<tr>
<td>Shelters, Fire</td>
<td>15577</td>
</tr>
<tr>
<td>Shelters, Insulated (For Remote Equipment)</td>
<td>15578</td>
</tr>
<tr>
<td>Shelters, Non-Insulated</td>
<td>15579</td>
</tr>
<tr>
<td>Shelters, Portable</td>
<td>15580</td>
</tr>
</tbody>
</table>

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

   ![Warning](image)

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

Business Types

Here is the current list of business types associated with your organization. You can add new business types by clicking the “Add Items” button. To modify an existing business type, click the “Edit” 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 in the grid that you wish to delete.

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.

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 box 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 entered the Business Types Enter/Update page where additional information can be entered for the selected business type.

<table>
<thead>
<tr>
<th>Business Type ID</th>
<th>Business Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>DBAI</td>
<td>DBE-ASIAN INDIAN</td>
</tr>
<tr>
<td>DBAP</td>
<td>DBE-ASIAN PACIFIC</td>
</tr>
<tr>
<td>DBEC</td>
<td>DBE-CAUCASIAN</td>
</tr>
<tr>
<td>HBAP</td>
<td>NC-HUB-ASIAN AMER/PACIF ISL</td>
</tr>
<tr>
<td>MNAP</td>
<td>MEE-ASIAN PACIF ISL</td>
</tr>
</tbody>
</table>

Browse Clear

- 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

<table>
<thead>
<tr>
<th>Existing Business Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Type ID</td>
</tr>
<tr>
<td>DBAI</td>
</tr>
</tbody>
</table>

Add Items View Pending Additions

- Make the needed changes
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
   b. You will get
   c. Click OK to proceed. Otherwise, click Cancel.