STAARS

State of Alabama Accounting and Resource System

Vendor Self Service Guide

October 2015

STAARS Support Center

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STAARS.Support@finance.alabama.gov

www.alabama.gov/VSS

Table of Contents

Tips for Using this Guide

The table of contents is hyperlinked to make it easy for you to navigate in this document. Click a chapter or section title above to move directly to that location.

Tips for Using VSS

- Avoid browser issues by using Microsoft Internet Explorer versions 8, 9, or 10, or Mozilla Firefox 10. Disable all pop-up blockers.
- Every page within VSS contains specific informational tips or guidance for ease of use.
- VSS includes a built-in Help feature. The link is in the top left corner, above the Account Information tab.
- We recommend that you bookmark https://procurement.staars.alabama.gov as your login page.
- When registering new accounts, each new account is verified by the State of Alabama Comptroller's Office. Vendors will receive emails regarding their account status.
- After registration, keep your account updated with current information. Refer to Section 1 to learn how to review and update your account information. All account updates made in Alabama VSS are pending until approved by the State of Alabama. For this reason, it is highly recommended that you make all, or as many updates as possible, at one time to prevent delays. Vendors will receive email notification regarding the status of their updates. Once notified, additional changes can be made at that time.

Screen shots used in this guide are for illustrative purposes only and may not be an actual representation of the current website. Actual website experience may differ from what is illustrated in this guide.

OVERVIEW

This guide provides an overview of various functions available to vendors on Alabama's Vendor Self Service (VSS) Portal. This guide is useful for vendors who have registered on Alabama VSS.

The Alabama VSS Portal is a website where companies and individuals are able to register and maintain vendor account information. Vendors are able to manage financial transactions, to include creating invoices, monitoring scheduled payments, electronic fund transfers, and monitoring all agreements. Solicitations for goods and services, as well as construction notices for state agencies, are published on Alabama VSS. For more information on how to do business with the State of Alabama, please refer to the Alabama Division of Purchasing Office: http://purchasing.alabama.gov/

Terminology

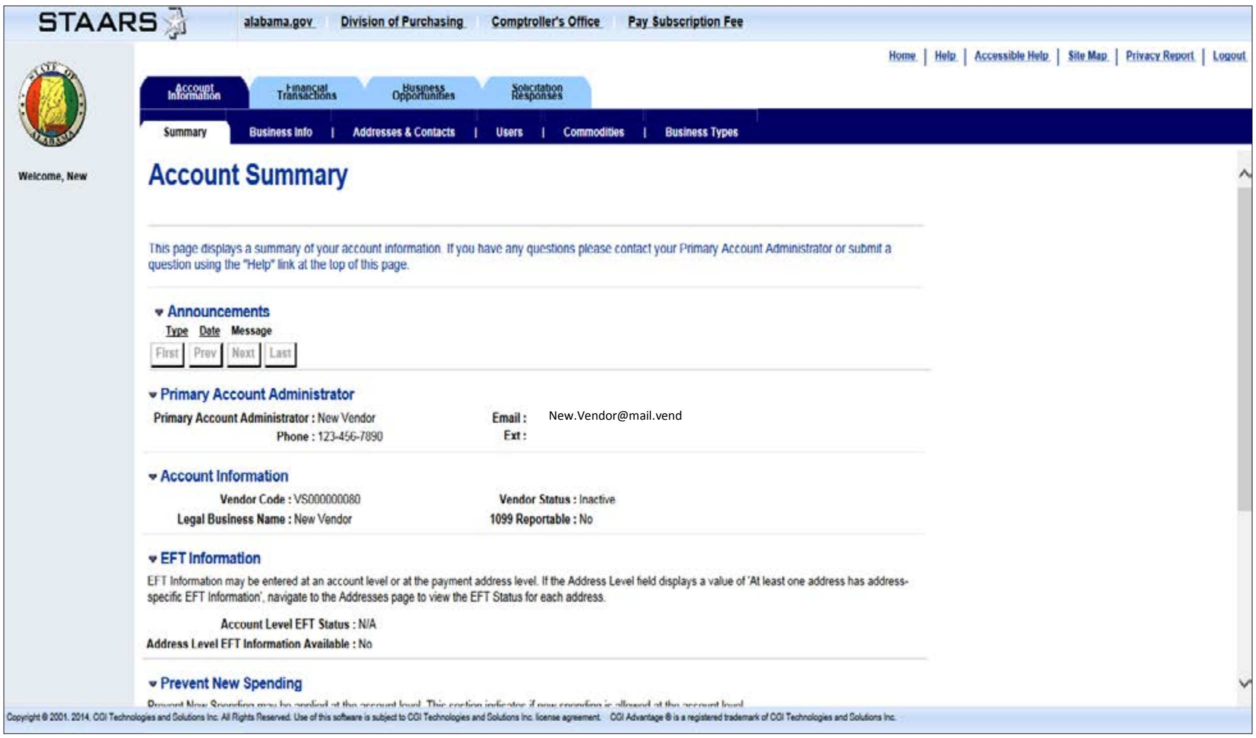
The following table provides a quick reference to terms you will see throughout VSS.

#	Term	Description
1	Request for Bid (RFB)	Document that enables agency or central purchasing users to establish a purchasing request for a good or service that will result in an encumbering contract or purchase order. The document is used for procurements where the commodities for goods/services are delineated.
2	Request for Proposal (RFP)	Document that enables an agency to establish a request for a professional service that will result in an encumbering master agreement or contract.
3	Master Agreement (MA)	Document used to set prices, terms, and conditions by which the agency can purchase itemized goods or services from a vendor at a negotiated price.
4	Delivery Order (DO)	Orders made against an approved MA. A DO is a type of Purchase Order.
5	Purchase Order (PO)	Document used to encumber funds to be used to procure goods.
6	Invoice (IN)	Document used to record a vendor's invoice for the shipment of goods or the dollar amount of services rendered.
7	Payment Request Commodity-based (PRC)	Document created manually to make payments to a vendor for commodity-based expenditures.

SECTION 1: ACCOUNT INFORMATION

1.1 Account Summary

Once you are logged in to VSS, the default landing page is **Account Summary** under the **Account Information tab**. This page displays information unique to your account—including announcements and a financial balance overview based on your current open agreements—and scheduled payments, including the current calendar year overall.

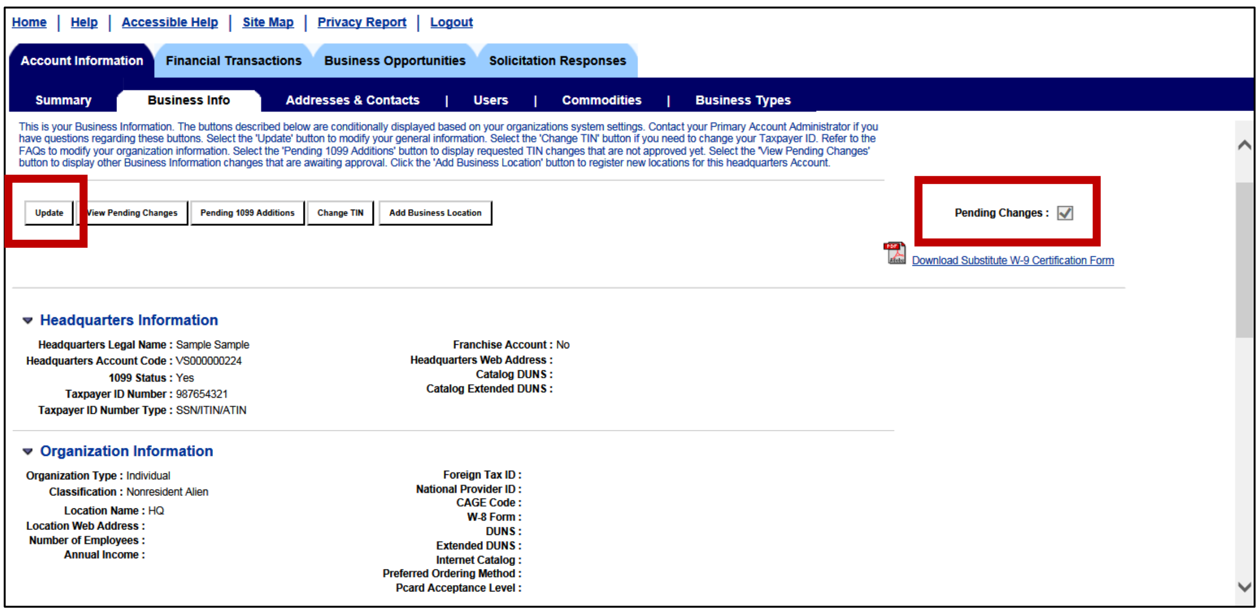


Other areas under the Account Information tab include **Business Info**, **Address & Contacts**, **Users**, **Commodities**, and **Business Types**. All of these areas are fairly self-explanatory when you need make a change or addition. It is important that the e-mail addresses in the **Address & Contacts** and **Users** areas are valid and up-to-date, as communication is conducted via e-mail. It is also important to maintain the **Commodities** area with the appropriate commodities your company provides to ensure that you receive notifications of business opportunities. (All companies or individuals will still have the ability to review/search all opportunities via the Business Opportunities tab.) Please note that the State of Alabama will be using new NIGP Commodity Codes with the implementation of STAARS and VSS. The full list of Commodity Codes can be accessed in the Commodities area. See sections 1.2 – 1.6 for more information.

1.2 Business Information

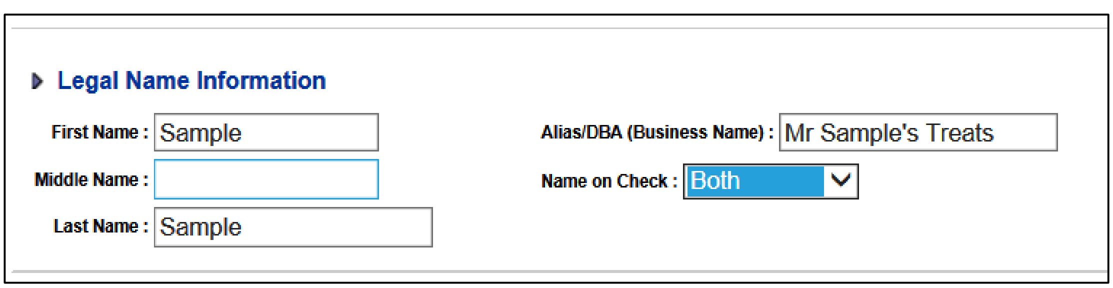
In the **Business Information** area, you can update **Headquarters Information**, **Organization Information**, **Legal Name Information**, **1099 TIN Information**, **Legal Address (physical address)**, **EFT Information**, and **Discount Information**. All of these fields may be viewed by using the scroll bar on the right. To change any of this information, select the **Update** button.

Please note the **Pending Changes** check box on the right side of the screen. If it is selected (checked), as in this sample, there are changes that are currently pending approval by the State. Any <u>new</u> requested updates will be approved only after the changes that are currently pending. **<u>It is highly recommended that you make as many changes as possible at one time rather than multiple small changes.</u>** Doing so will ensure that your account is as accurate as possible. Additionally, when you are registering a new account, any updates for Business Information also require Addresses & Contacts updates that **<u>must include e-mail address, phone number and correspondence type must reflect e-mail for the principal contact</u>**. These fields are mandatory.



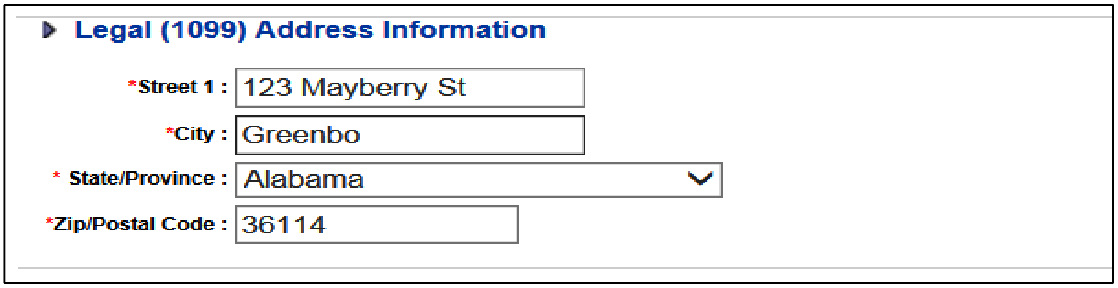
1.2.1 Legal Name Information

If you are a private business, and you receive payments under both your name and your business name, ensure that you select "Both" in the **Name on Check** field.



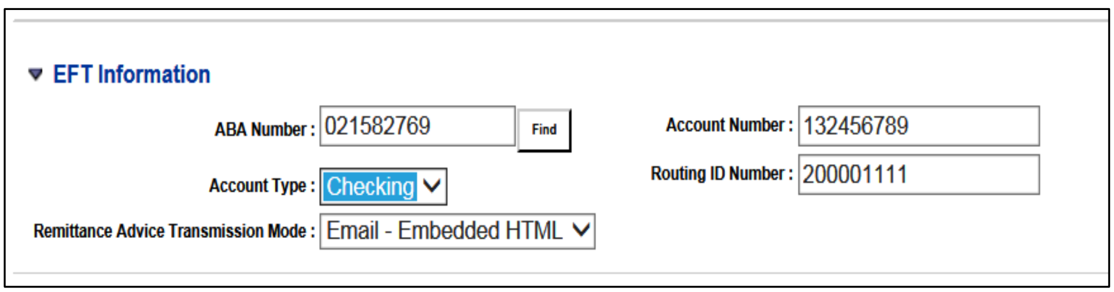
1.2.2 Legal (1099) Address Information

When updating this information, ensure that you are using a physical address.



1.2.3 EFT Information

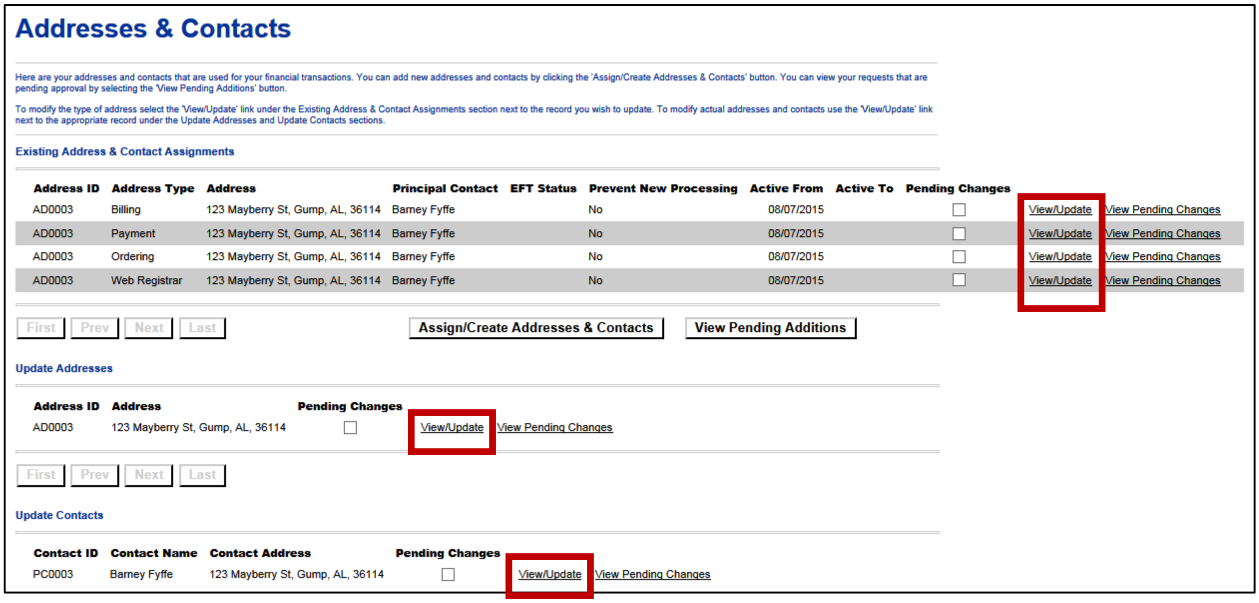
If you wish to use EFT, use the **Find** button to select your financial institution. In the **Account Type** field, use the drop-down to select the appropriate account type (checking or savings). In the **Remittance Advice Transmission Mode** field, use the drop-down to select “Email – Embedded HTML.” Enter the **Account Number** and **Routing ID Number** accordingly.



1.3 Addresses & Contacts

In the **Addresses & Contacts** area you will store the 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 in the Existing Address & Contact Assignments section, click the “View/Update” link under to the right of record you wish to update.
- To modify actual addresses in the Update Addresses section, click the “View/Update” link.
- To modify contacts in the Update Contacts section, click the “View/Update” link.



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	123 Mayberry St, Gump, AL, 36114	Barney Fyffe		No	08/07/2015		☐	View/Update	View Pending Changes
AD0003	Payment	123 Mayberry St, Gump, AL, 36114	Barney Fyffe		No	08/07/2015		☐	View/Update	View Pending Changes
AD0003	Ordering	123 Mayberry St, Gump, AL, 36114	Barney Fyffe		No	08/07/2015		☐	View/Update	View Pending Changes
AD0003	Web Registrar	123 Mayberry St, Gump, AL, 36114	Barney Fyffe		No	08/07/2015		☐	View/Update	View Pending Changes

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

Update Addresses

Address ID	Address	Pending Changes		
AD0003	123 Mayberry St, Gump, AL, 36114	☐	View/Update	View Pending Changes

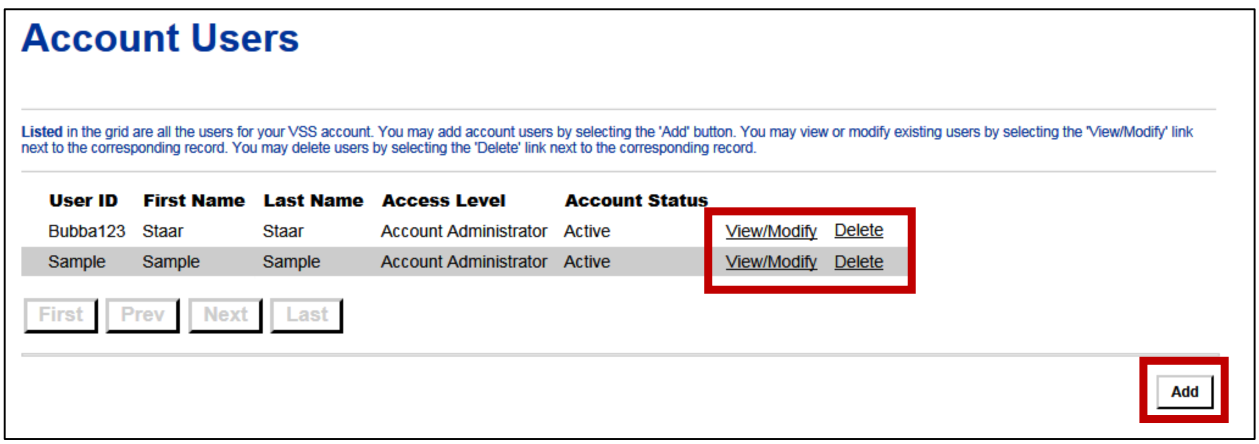
First Prev Next Last

Update Contacts

Contact ID	Contact Name	Contact Address	Pending Changes		
PC0003	Barney Fyffe	123 Mayberry St, Gump, AL, 36114	☐	View/Update	View Pending Changes

1.4 Users

The **Users** area is used to store all of 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 next to the corresponding record. You may delete users by selecting the **Delete** link next to the corresponding record.



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 next to the corresponding 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		
Bubba123	Staar	Staar	Account Administrator	Active	View/Modify	Delete
Sample	Sample	Sample	Account Administrator	Active	View/Modify	Delete

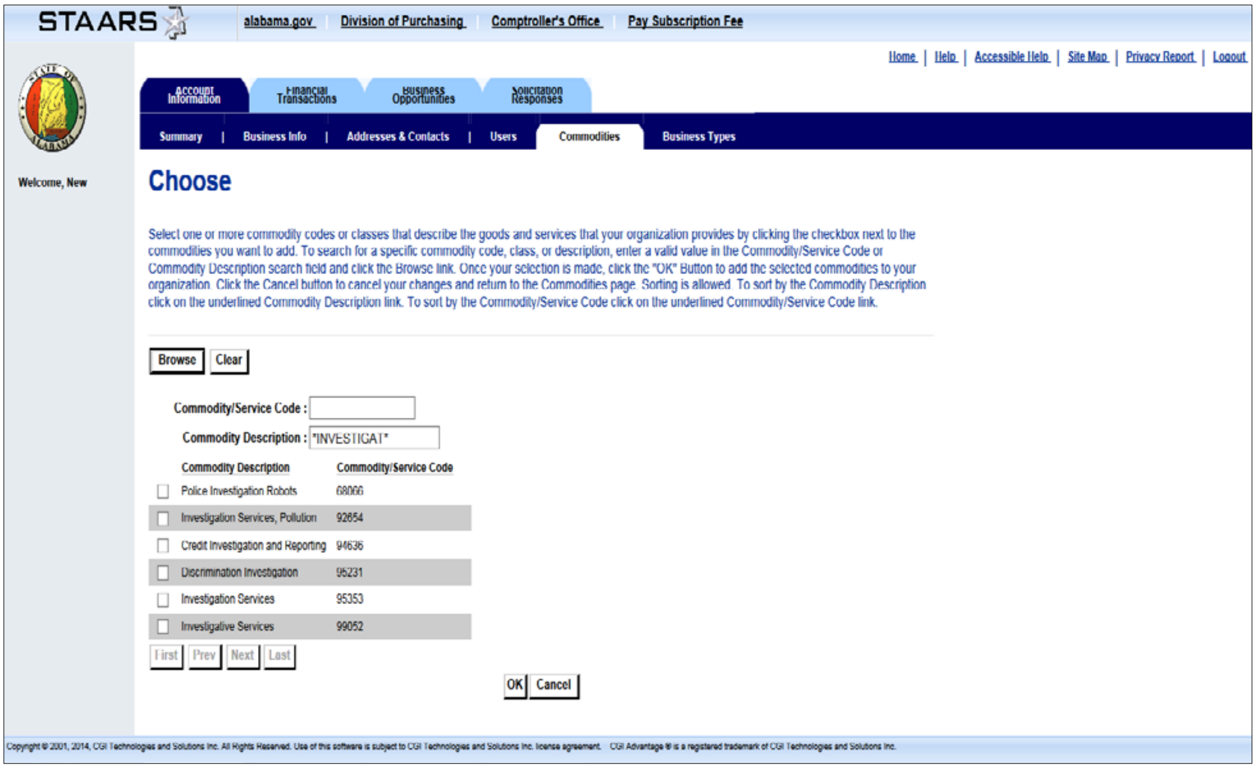
First Prev Next Last

Add

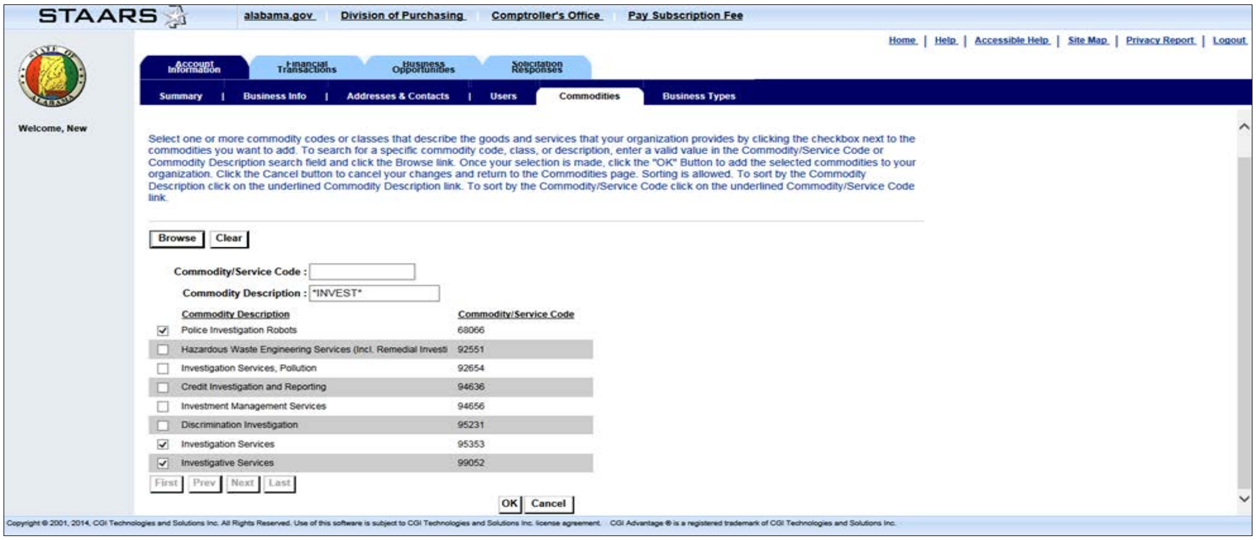
1.5 Commodities

Updating the **Commodities** area might appear to be a daunting task, but it is quite simple to add or delete commodities. However, a few tips will make this process a little easier.

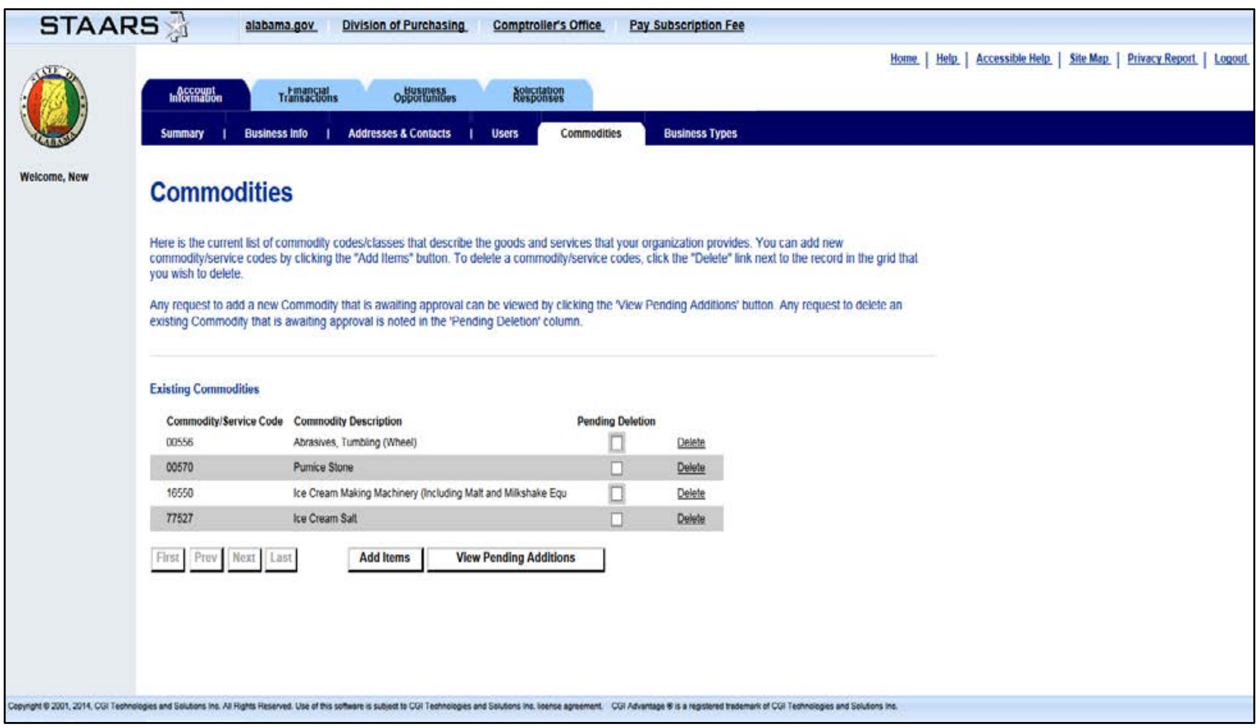
First, the use of a wild card character can help you navigate a little easier. The asterisk (*) is the wild card character to use in VSS. As you can see in the image below, the wild card character is used to bookend a brief or abbreviated description. Using this method will collect the description in any manner in which it appears. In the example below, if we had used *invest*, VSS would have returned commodities that involved investment and not just investigations.



Once you have identified a particular commodity, select the corresponding check box and then select **OK**, as shown in the following image.

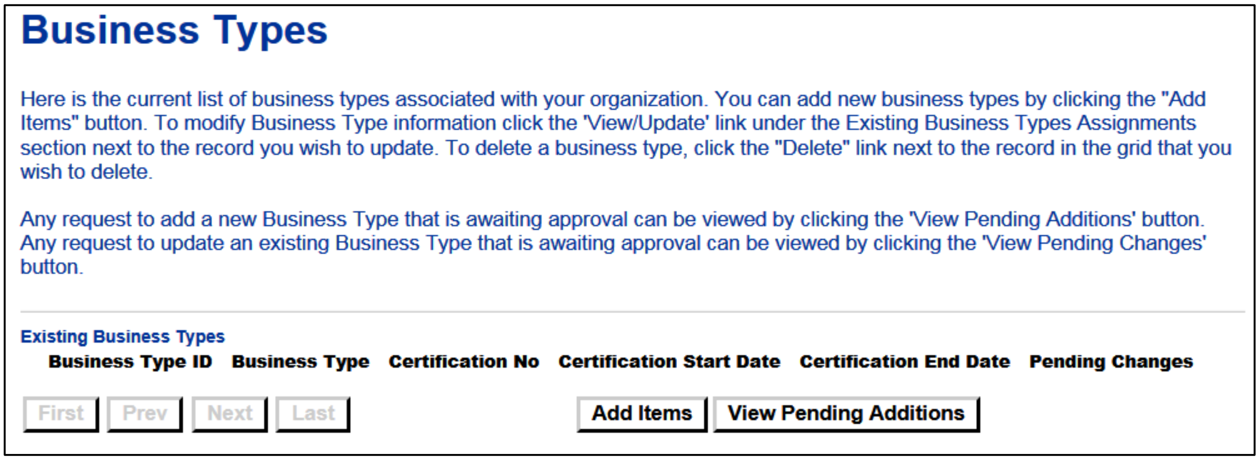


All additions will not display immediately. As seen in the following image, any request to add a new commodity that is awaiting approval can be viewed by clicking the **View Pending Additions** button.

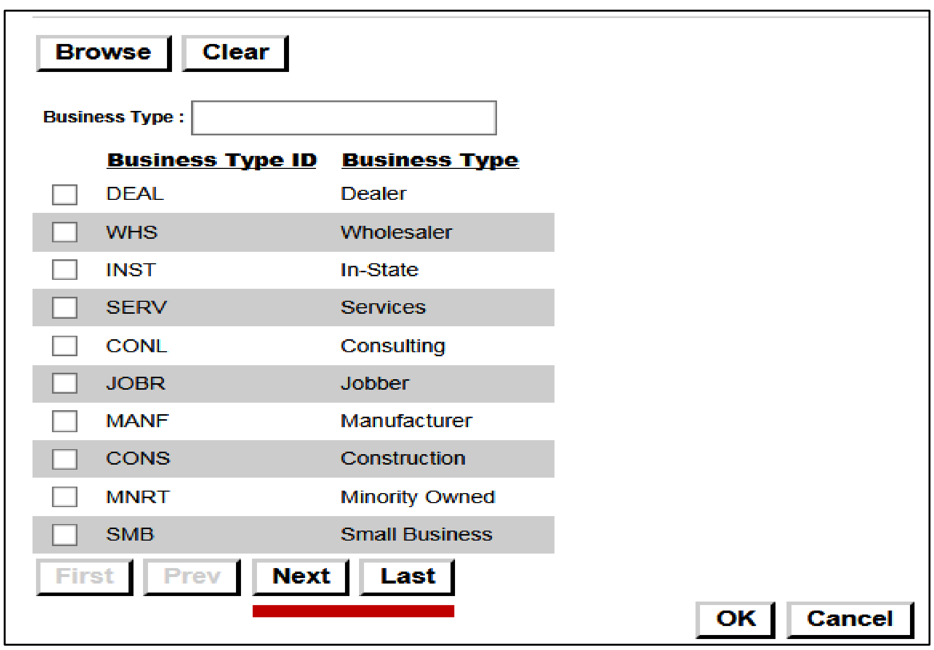


1.6 Business Types

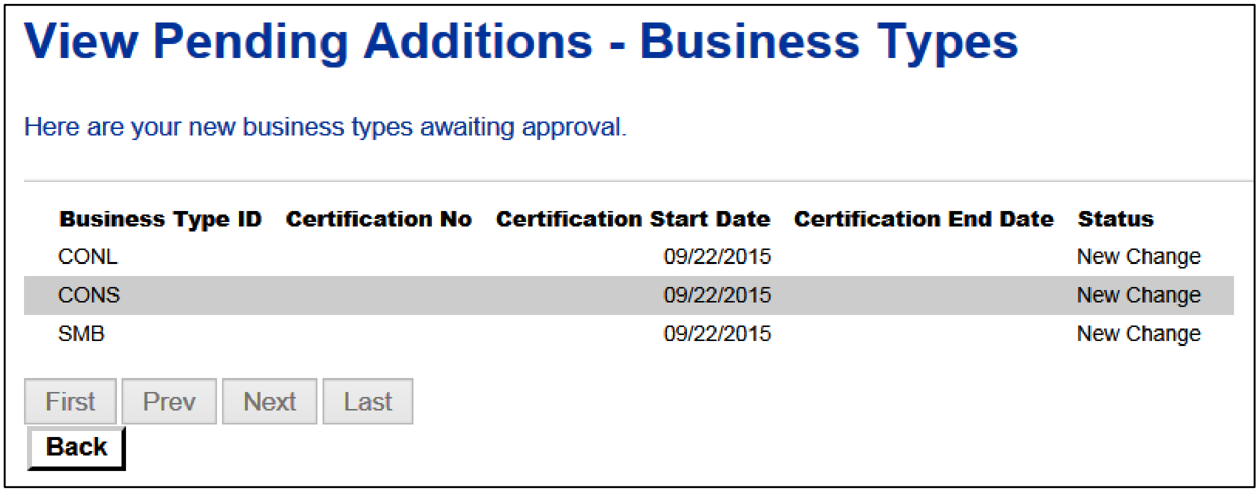
In the **Business Types** area, you will find the current list of business types associated with your organization. You can add a new business type by selecting the **Add Items** button. To modify business type information, select the **View/Update** link under the **Existing Business Types** section next to the record you wish to update. To delete a business type, select the **Delete** link next to the record you wish to delete.



When adding business types, select the box next to the desired record. Use the **Next** or **Last** button to find more to select from. Once complete, select **OK** and the business type will be placed into Pending additions.



Pending Additions will display similar to the sample image below.


View Pending Additions - Business Types

Here are your new business types awaiting approval.

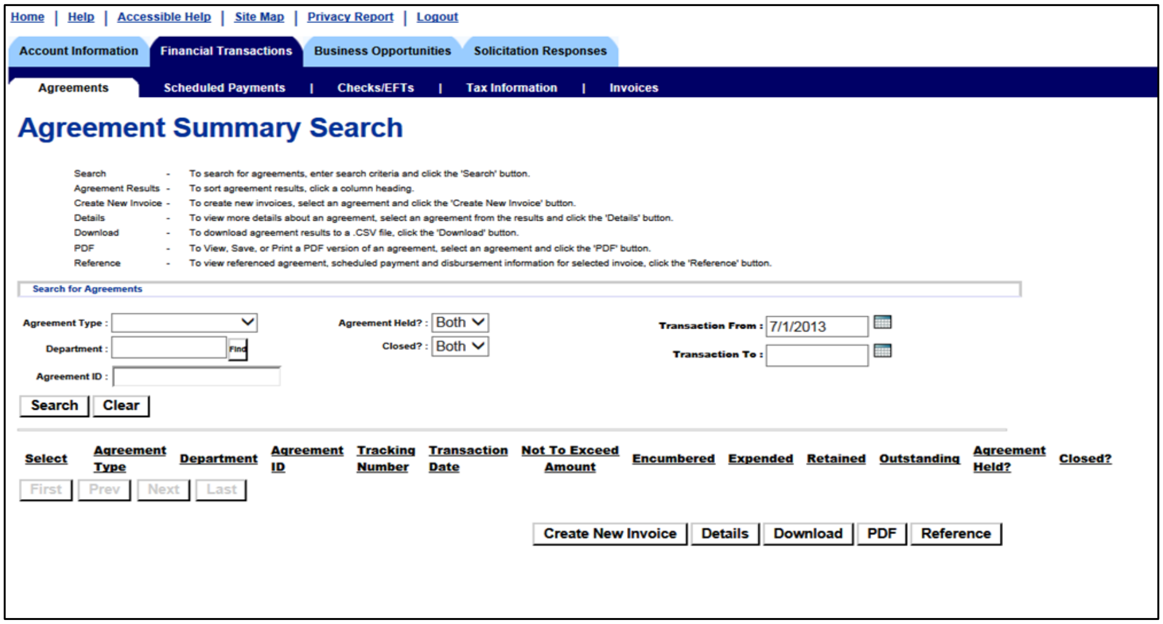
Business Type ID	Certification No	Certification Start Date	Certification End Date	Status
CONL		09/22/2015		New Change
CONS		09/22/2015		New Change
SMB		09/22/2015		New Change

First Prev Next Last
Back

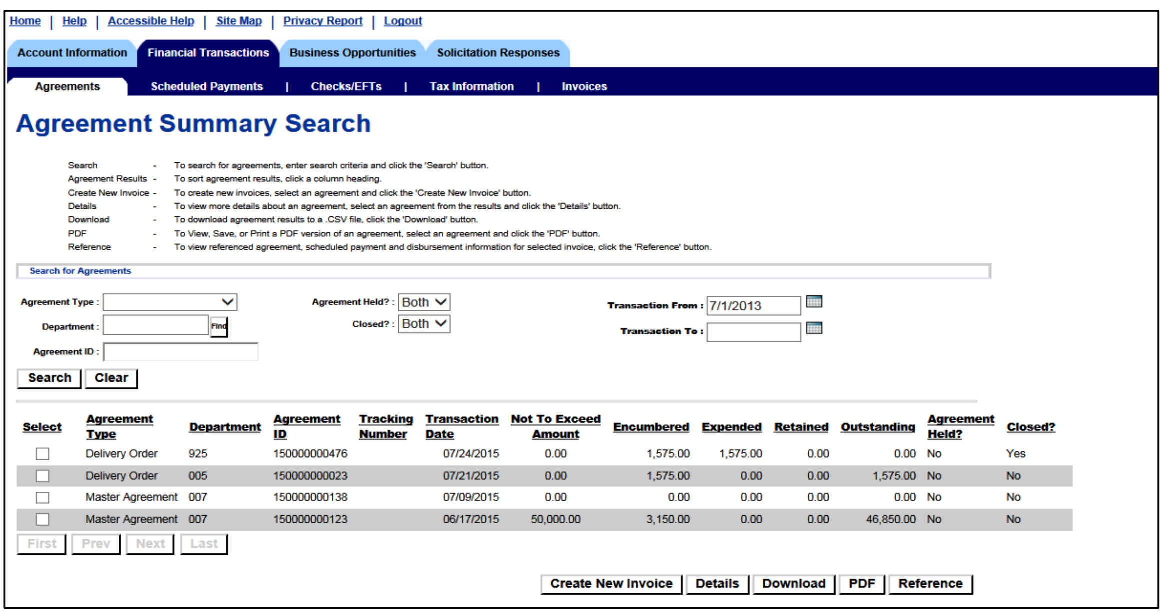
SECTION 2: FINANCIAL TRANSACTIONS

2.1 Agreements

From the **Financial Transactions** tab, you have access to the **Agreements**, **Scheduled Payments**, **Checks/EFTs**, **Tax Information**, and **Invoices** areas. The **Agreements** area stores those agreements held between your company and the State of Alabama. Selecting **Search** will reveal Master Agreements (MA), Purchase Orders (PO), and Delivery Orders (DO) being the most common.



The following image shows an example of what might result from an Agreement Summary Search. In this example, for any document, you can view the detail, download, view in PDF format, and view reference documents. The Agreement Summary Search page also includes a **Create New Invoice** button.



2.2 Invoices

Once a PO or DO has been generated for your company to fill the order, an invoice can be created, increasing timely payments for services or goods once delivered. To create a new invoice, select the check box that coincides with the appropriate DO or PO and then select or click the **Create New Invoice** button. As you can see below, the first step in creating a new invoice is entering the Header Information.

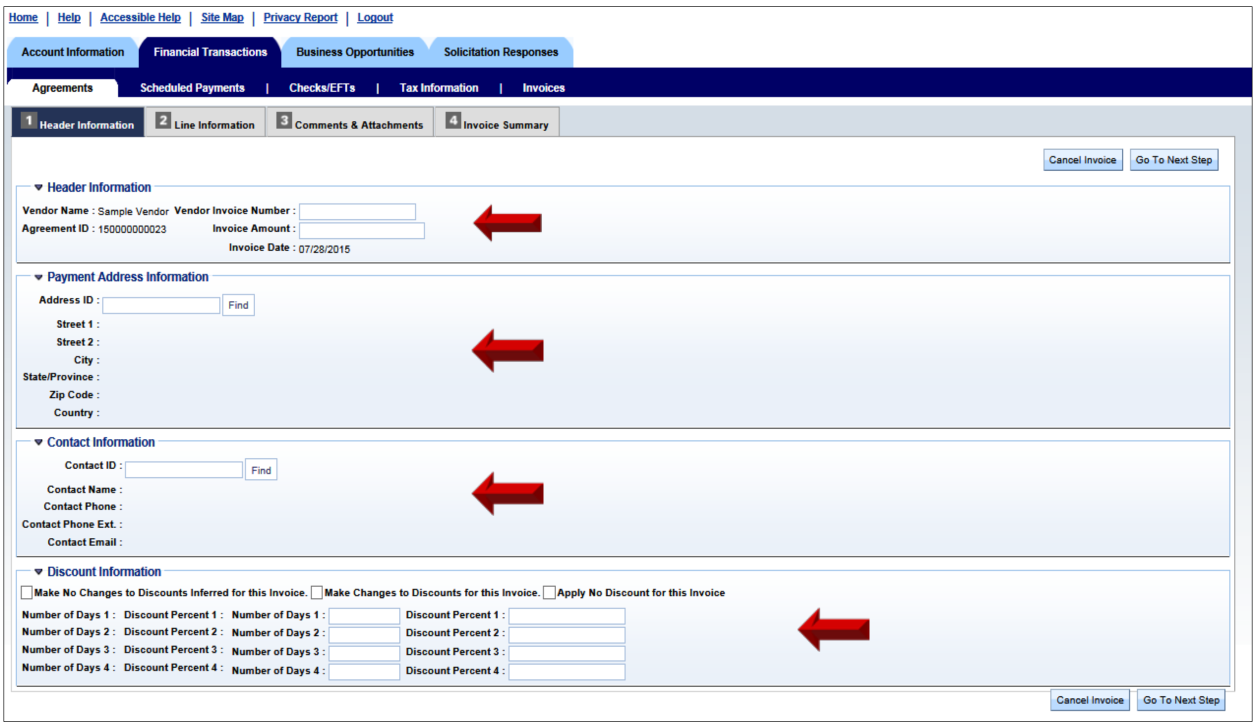
STEP 1 – Header Information

a. The Header Information will include your Vendor Invoice Number and amount.

b. Use the **Find** button to select the appropriate payment address and contact information.

c. Select the appropriate check box for discount information.

d. Select **Go to Next Step**.



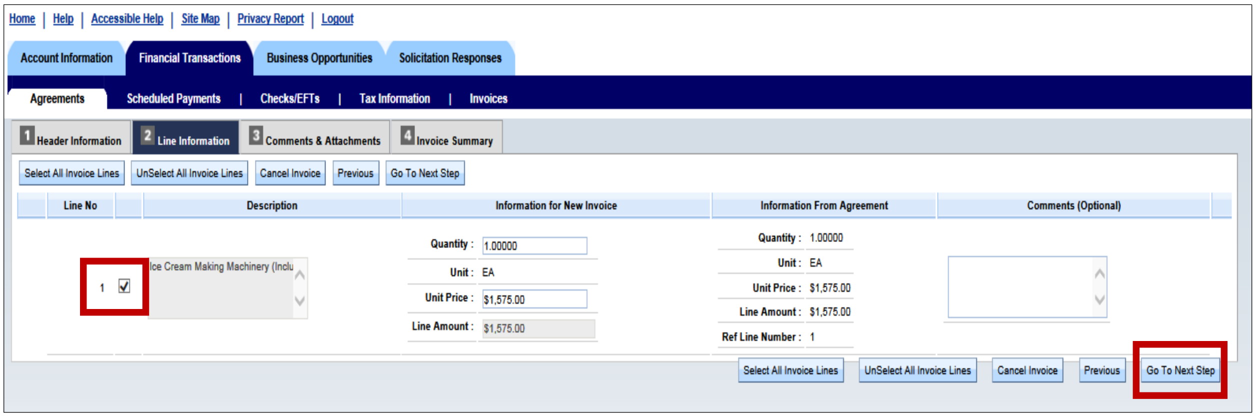
Step 2 – Line Information

The commodity line information identifies the specific commodity and quantity and may have multiple lines.

a. First, select all invoice lines if all commodities have been delivered OR select the appropriate check box next to each line.

b. Enter comments if you wish. These are optional.

c. Select **Go to Next Step**.

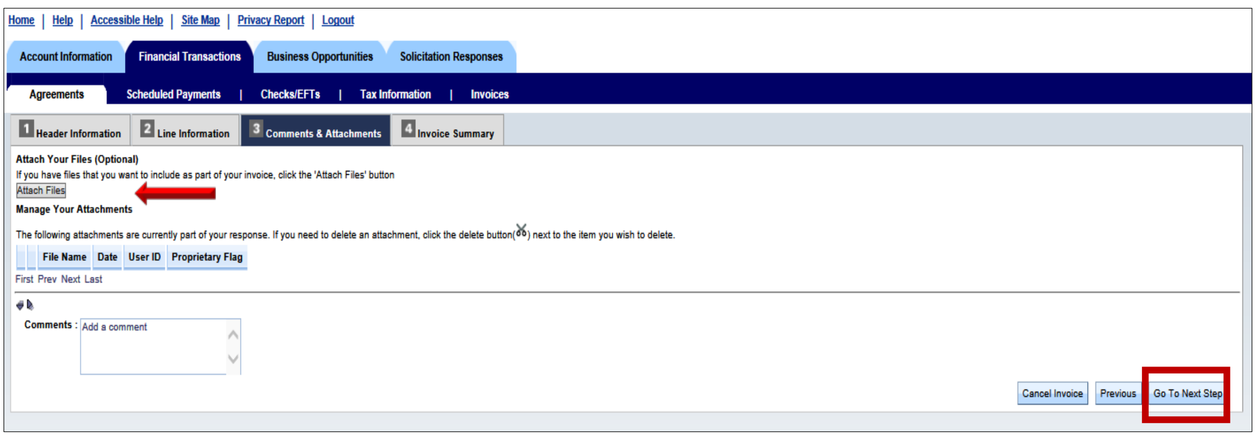


Step 3 – Comments & Attachments

a. ALL vendors **<u>must</u>** attach a company invoice. Select the **Attach Files** button. Acceptable file format is PDF or MS Word.
Payment **<u>will not</u>** be made without an attached invoice.

b. Comments are optional.

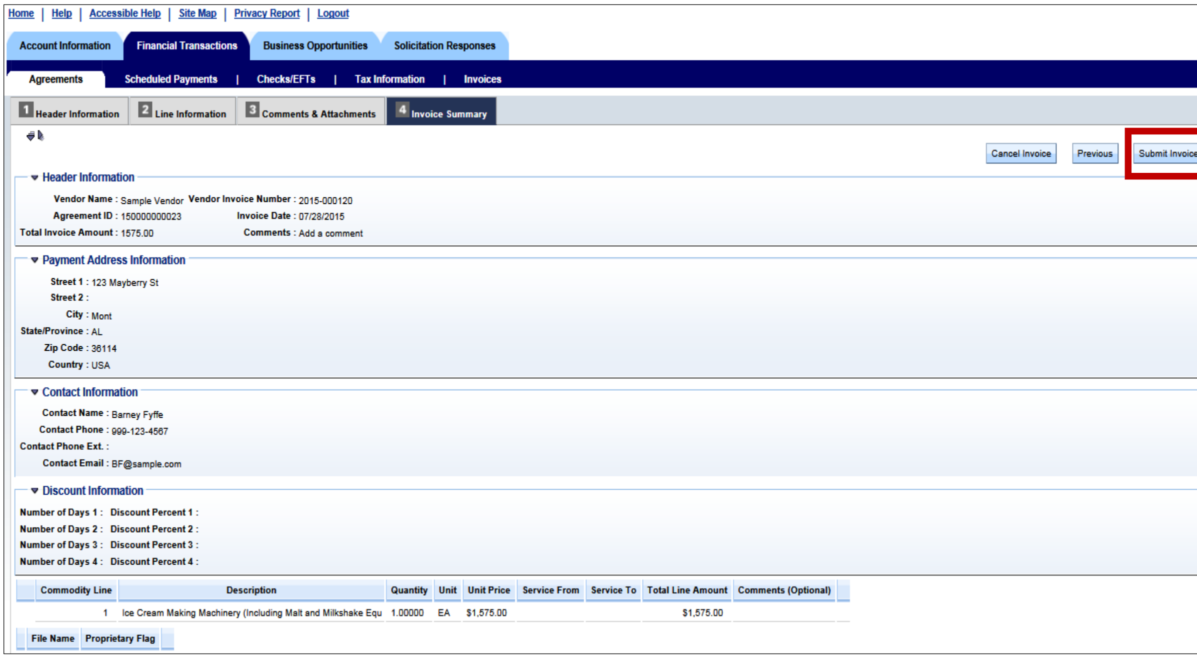
c. Select **Go to Next Step**.



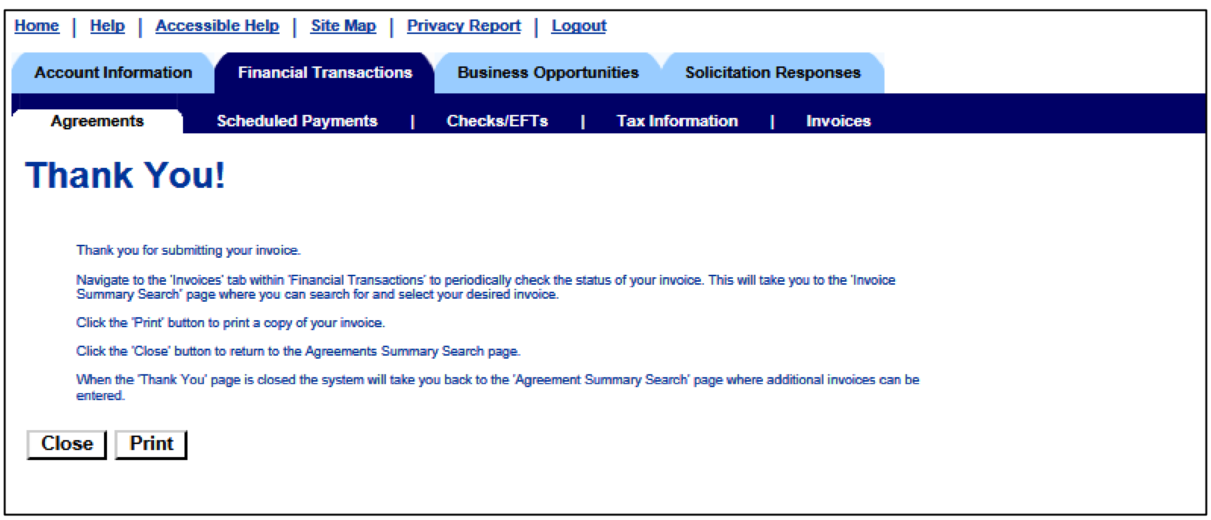
Step 4 – Invoice Summary

a. Check for accuracy and go to the specific sections to make changes as necessary.

b. When finished, select **Submit Invoice**.

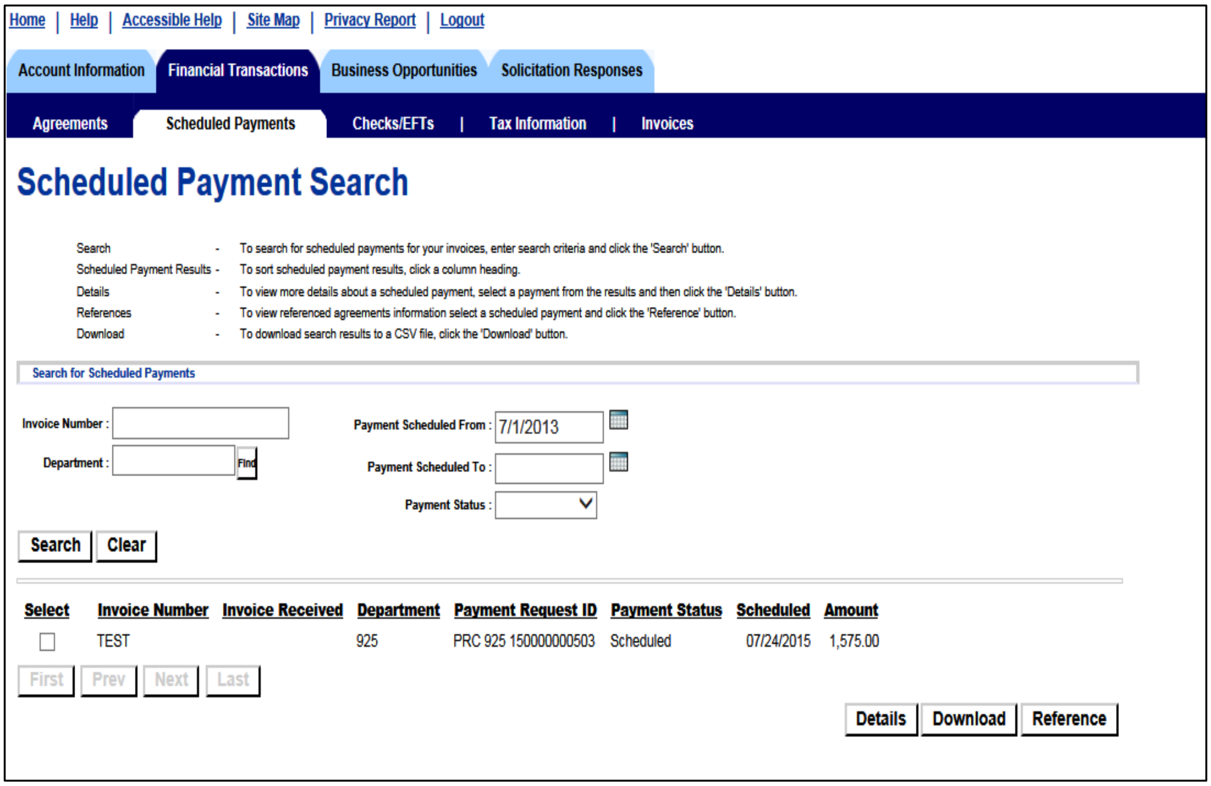


c. Notification of successful submission will be within VSS (see the following image for an example). You will also receive an e-mail indicating the invoice has been submitted.



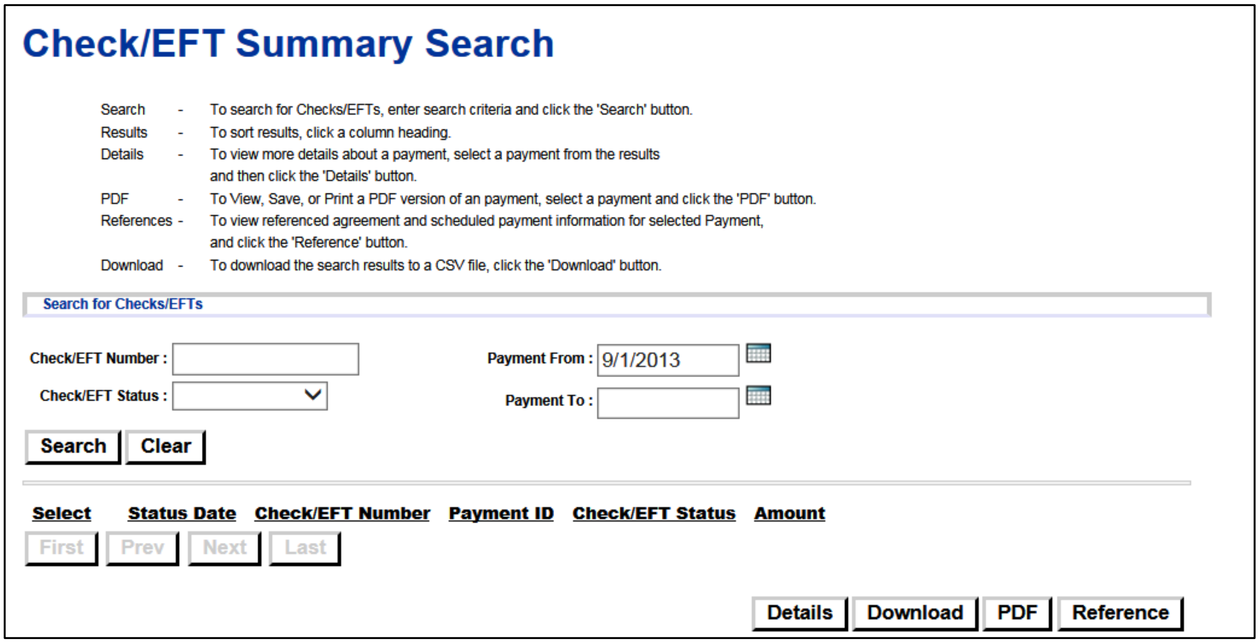
2.3 Scheduled Payments

The Scheduled Payments area allows you to search for state-scheduled payments by several different methods, such as a specific window of time or by department. The following image depicts a search across all departments beginning on July 1, 2013 to the present. Note that the search provides the Department, Payment Request ID, Payment Status, when the payment was scheduled, and the amount. You can select the **Select** check box and then click the **Details**, **Download**, or **Reference** buttons to view more about this payment or download information.



2.4 Checks/EFTs

The Checks/EFTs area allows you to search to verify that a payment has been made to your account.



2.5 Tax Information

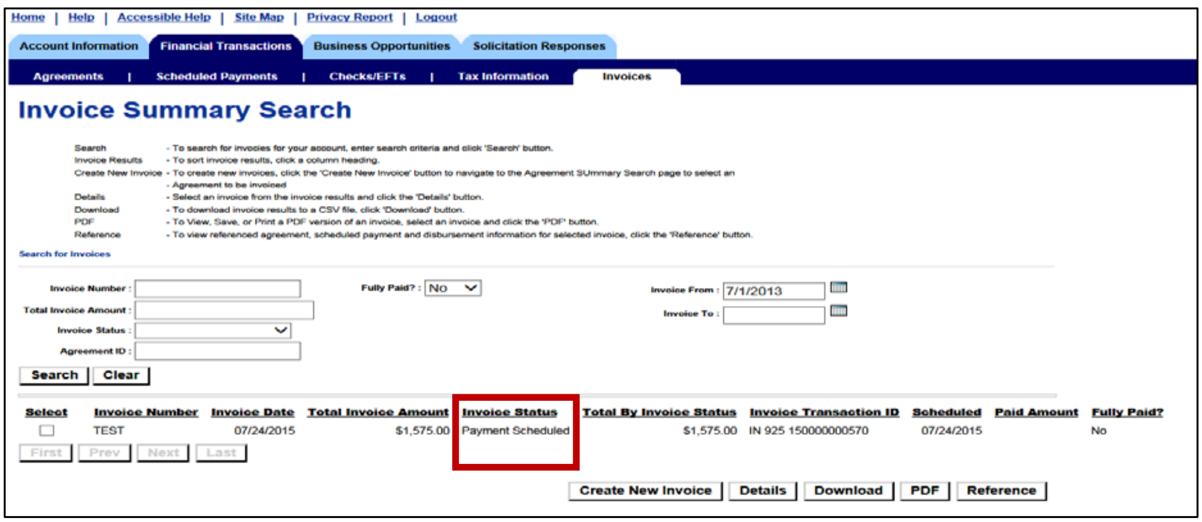
The Tax Information area can be searched for tax forms that have been previously issued to your company.

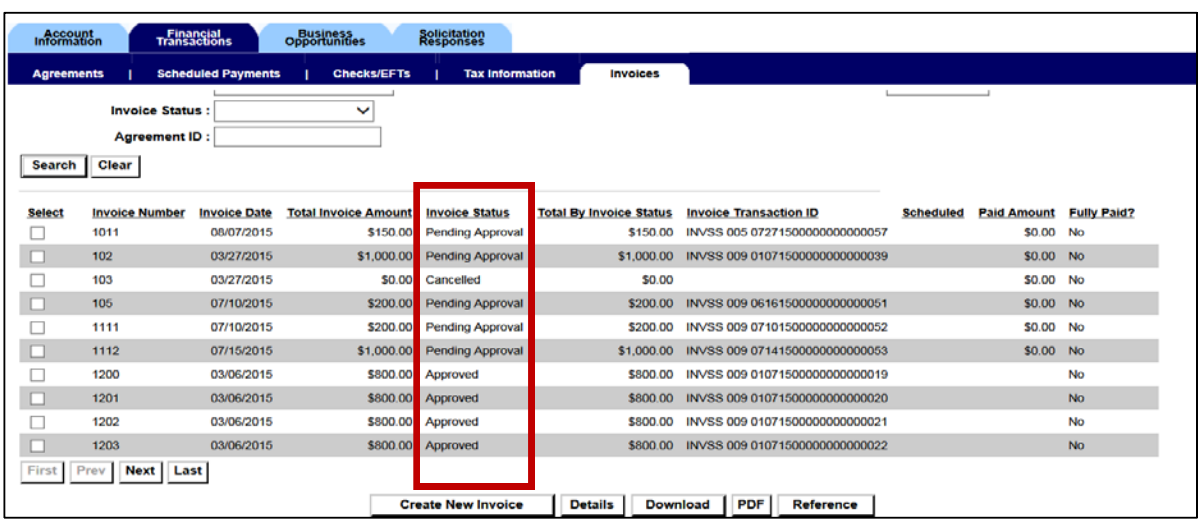
2.6 Invoices

The final area, Invoices, provides you the opportunity to search invoices that you have submitted. You can view by amount, status, Invoice Transaction ID, and if it has been paid. The invoice status column is an important column to review and comprehend. The Details and Reference tabs provide detailed information from the delivery order and reference to the Commodity Payment Request generated by the State.

Note: Invoice Status Column

Pending Approval: Invoice Submitted to State but not processed to final
Payment Scheduled: State has taken action on invoice and payment request submitted to final
Approved: Invoice is final and has an open balance
Payment Held: Invoice that has a referenced payment request and submitted to final but not yet disbursed with payment request as held
Paid: Invoice where one or more lines have been disbursed
Cancelled: If document is cancelled the respective agency should contact the vendor to advise of the reason for cancellation. Vendors at this point will create a new invoice correcting the respective issue.





SECTION 3: BUSINESS OPPORTUNITIES

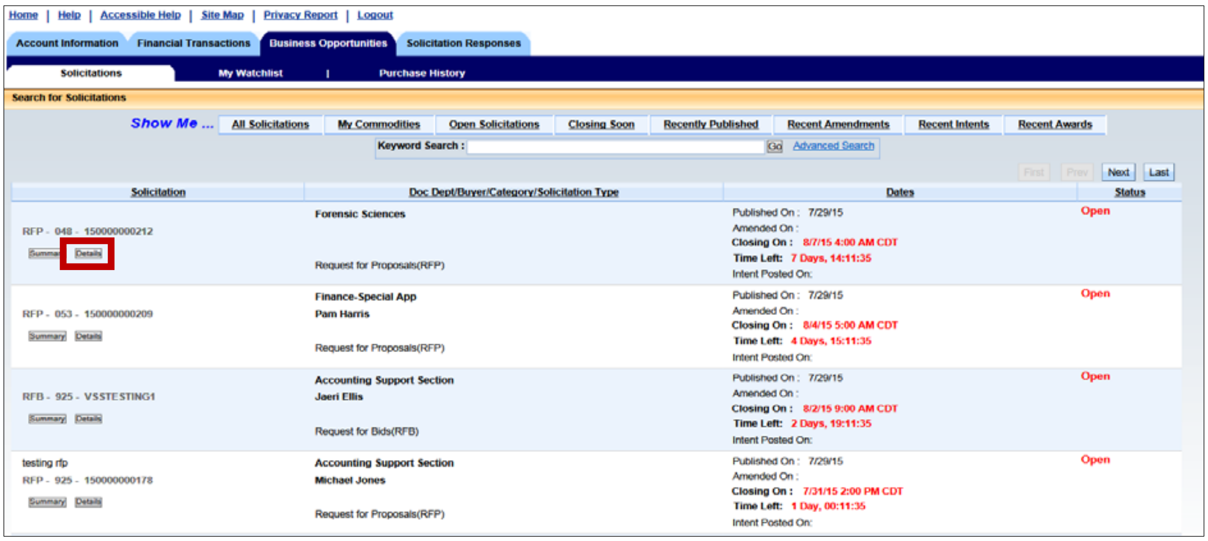
3.1 Solicitations

From the **Business Opportunities** tab, the **Solicitations** area provides you the ability to review and search State solicitations. There are several methods to review the solicitations, as indicated by the **Show Me...** tabs. You also have the ability to conduct a keyword search.

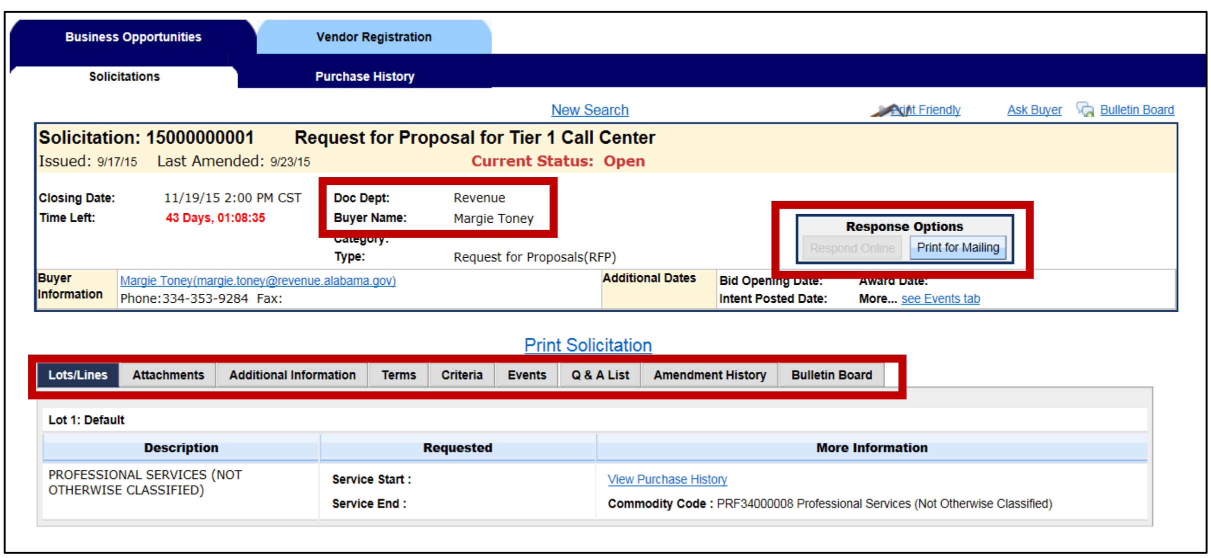
3.1.1 View RFP/RFB Details

Each solicitation has specific details you can view. Select **Details** first.

Note: The images that follow depict sample data; none of these are actual solicitations.

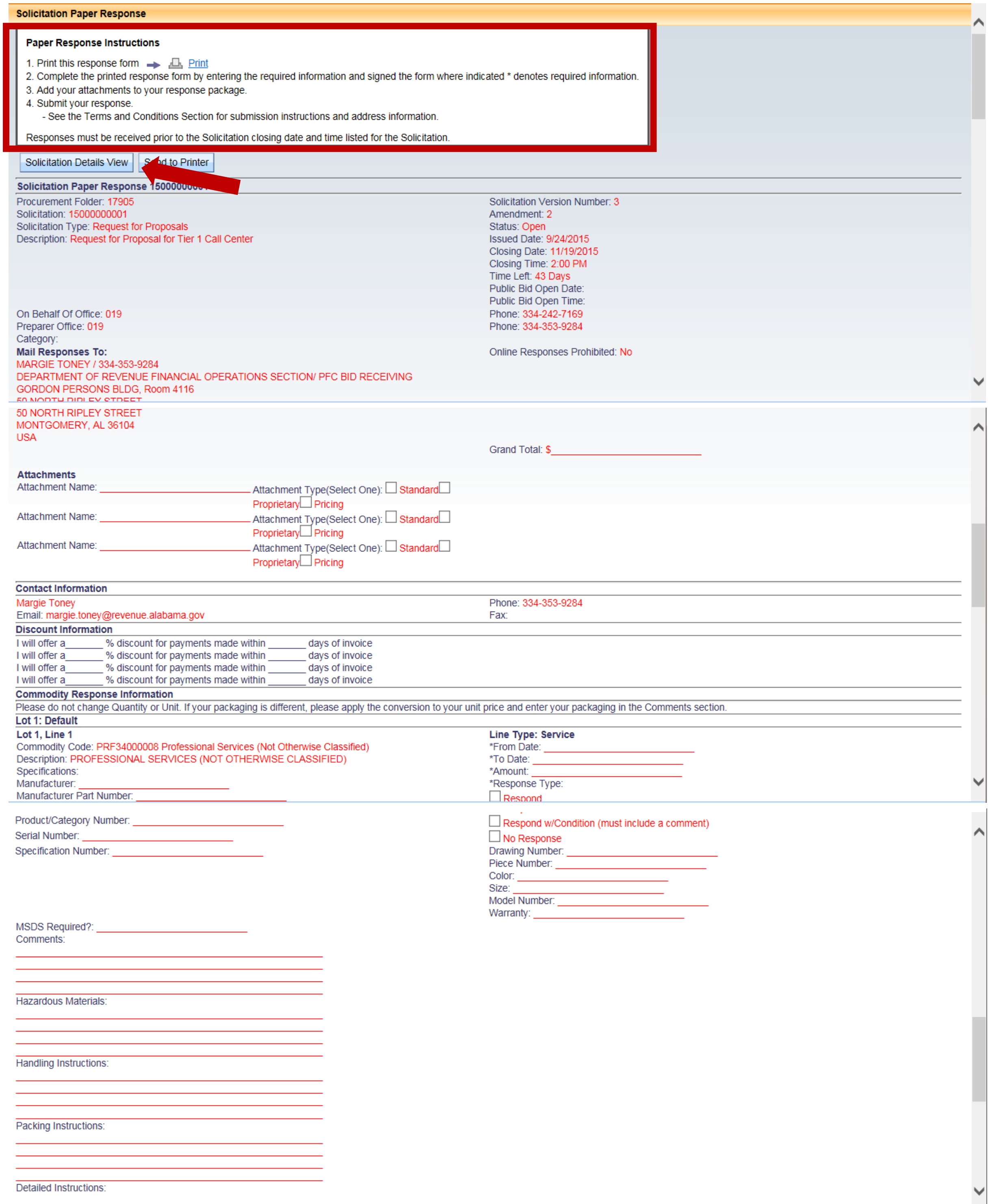


After clicking **Details**, you can see more information on the solicitation such as the **Agency** or **Department** making the request, **Buyer Information**, **Response Options**, **Attachments**, **Additional Information**, etc.



3.1.2 Response Options

In the Response Options area, click on the **Print for Mailing** tab. Follow the instructions at the top of the page. Once finished, click **Solicitation Details View** to return to the solicitation.


Solicitation Paper Response

Paper Response Instructions

1. Print this response form Print
2. Complete the printed response form by entering the required information and signed the form where indicated * denotes required information.
3. Add your attachments to your response package.
4. Submit your response.
   - See the Terms and Conditions Section for submission instructions and address information.

Responses must be received prior to the Solicitation closing date and time listed for the Solicitation.

Solicitation Details View | Send to Printer

Solicitation Paper Response 15000000001

Procurement Folder: 17905
Solicitation: 15000000001
Solicitation Type: Request for Proposals
Description: Request for Proposal for Tier 1 Call Center
Solicitation Version Number: 3
Amendment: 2
Status: Open
Issued Date: 9/24/2015
Closing Date: 11/19/2015
Closing Time: 2:00 PM
Time Left: 43 Days
Public Bid Open Date:
Public Bid Open Time:
On Behalf Of Office: 019
Preparer Office: 019
Category:
Phone: 334-242-7169
Phone: 334-353-9284
Mail Responses To:
MARGIE TONEY / 334-353-9284
DEPARTMENT OF REVENUE FINANCIAL OPERATIONS SECTION/ PFC BID RECEIVING
GORDON PERSONS BLDG, Room 4116
50 NORTH RIPLEY STREET
MONTGOMERY, AL 36104
USA
Online Responses Prohibited: No
Grand Total: $

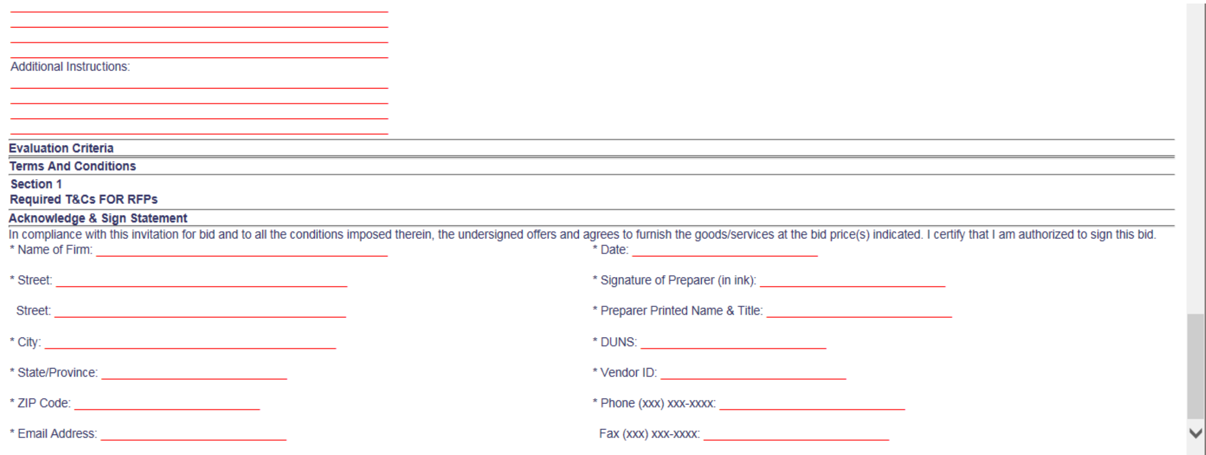
Attachments
Attachment Name: Attachment Type(Select One): Standard Proprietary Pricing
Attachment Name: Attachment Type(Select One): Standard Proprietary Pricing
Attachment Name: Attachment Type(Select One): Standard Proprietary Pricing

Contact Information
Margie Toney
Email: margie.toney@revenue.alabama.gov
Phone: 334-353-9284
Fax:

Discount Information
I will offer a ___ % discount for payments made within ___ days of invoice
I will offer a ___ % discount for payments made within ___ days of invoice
I will offer a ___ % discount for payments made within ___ days of invoice
I will offer a ___ % discount for payments made within ___ days of invoice

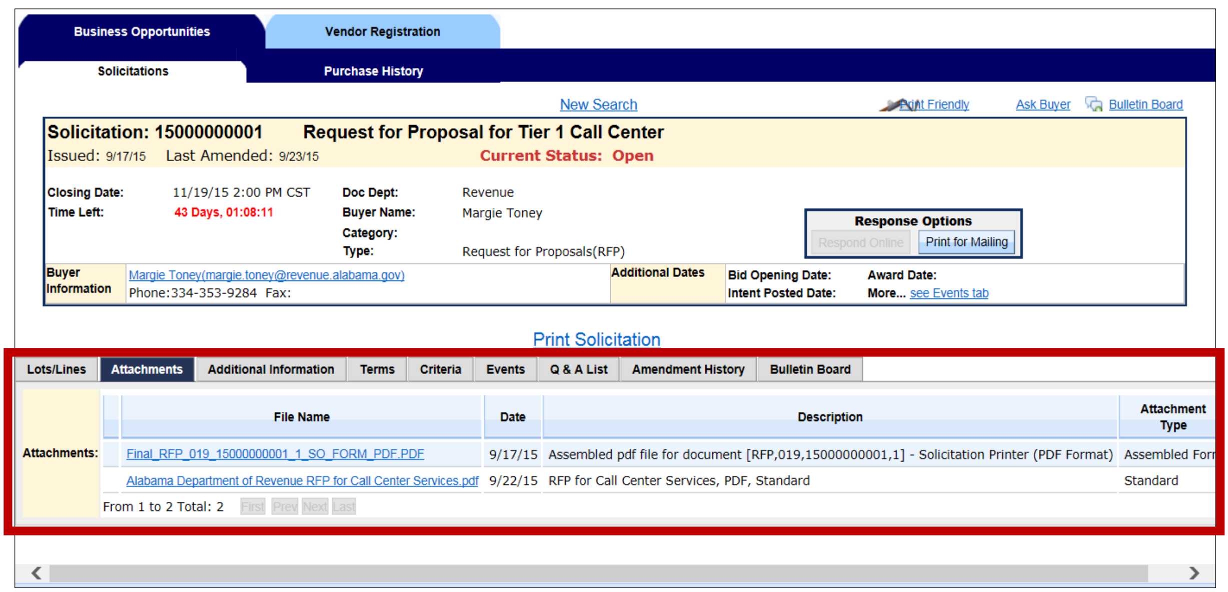
Commodity Response Information
Please do not change Quantity or Unit. If your packaging is different, please apply the conversion to your unit price and enter your packaging in the Comments section.

Lot 1: Default
Lot 1, Line 1
Commodity Code: PRF34000008 Professional Services (Not Otherwise Classified)
Description: PROFESSIONAL SERVICES (NOT OTHERWISE CLASSIFIED)
Specifications:
Manufacturer:
Manufacturer Part Number:
Product/Category Number:
Serial Number:
Specification Number:
Line Type: Service
*From Date:
*To Date:
*Amount:
*Response Type:
Respond
Respond w/Condition (must include a comment)
No Response
Drawing Number:
Piece Number:
Color:
Size:
Model Number:
Warranty:
MSDS Required?:
Comments:
Hazardous Materials:
Handling Instructions:
Packing Instructions:
Detailed Instructions:



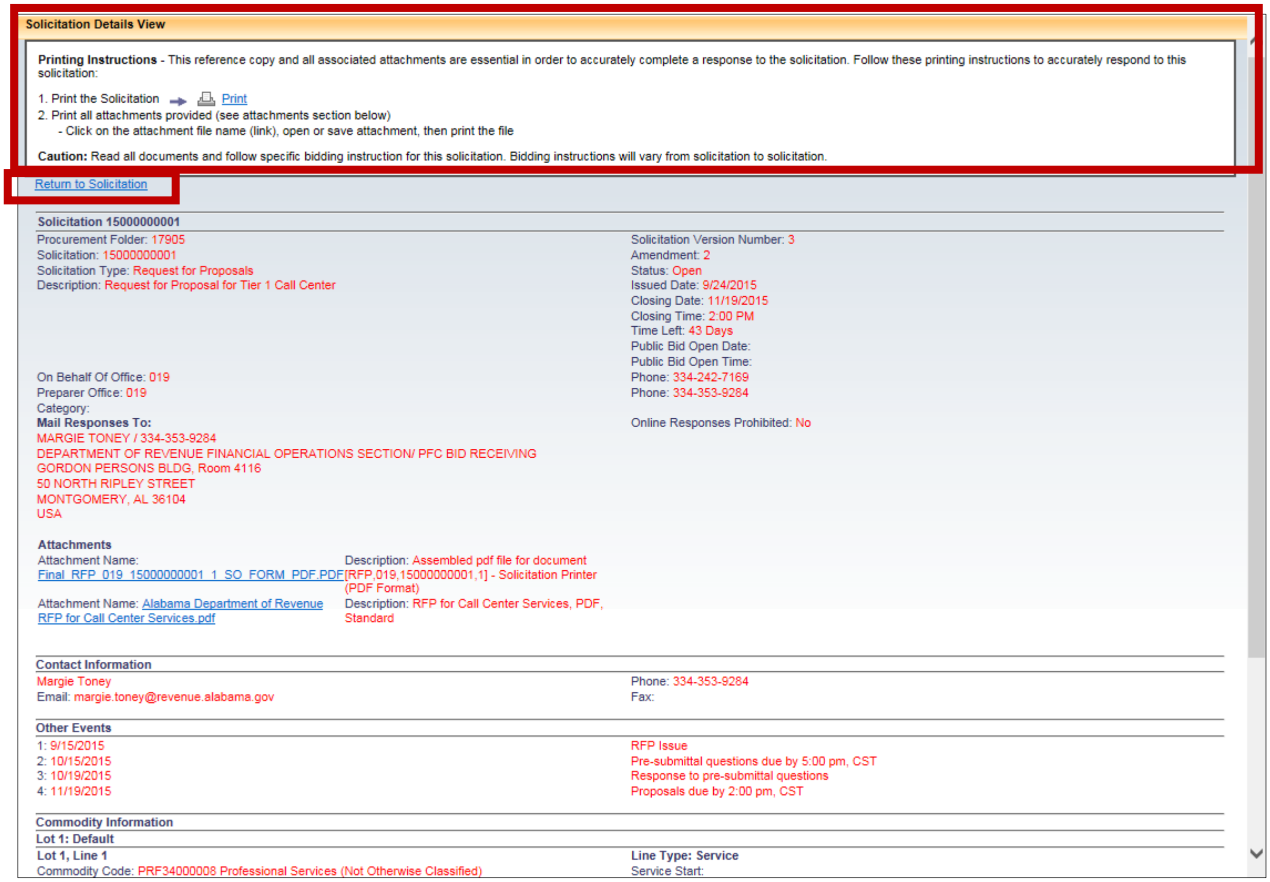
3.1.3 *Solicitation Attachments*

All solicitations will have attachments to provide more detailed information that might be required of the vendor, specifics for a commodity or service, Terms and Conditions, etc. Under the **Attachments** tab, you will see a hyperlink to a PDF file for each attached document. Select each hyperlink for more specific information or requirements. **<u>It is important to read all documents and follow specific bidding instructions for all solicitations. Bidding instructions will vary from solicitation to solicitation</u>**.



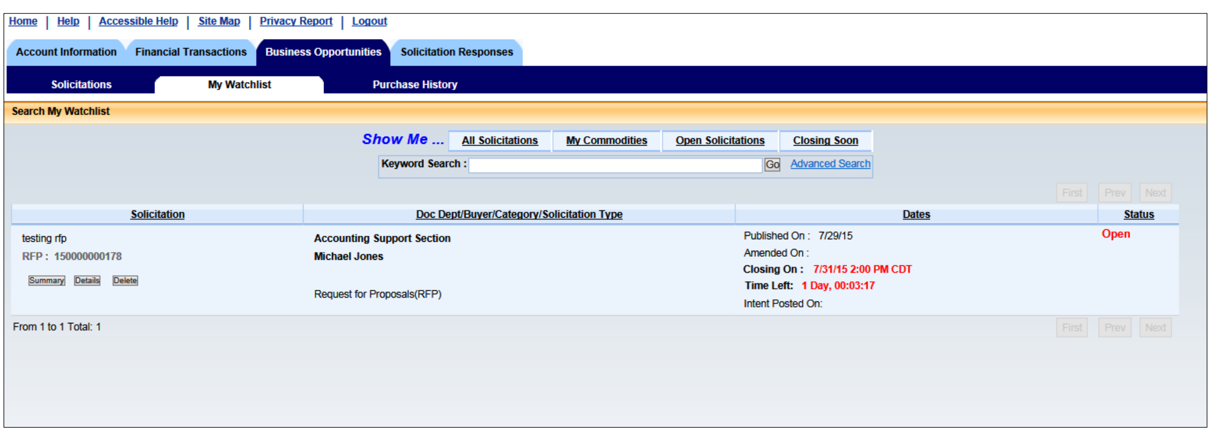
3.1.4 *Print Solicitation*

The **Print Solicitation** hyperlink will open the Solicitation Details View. Follow the **Printing Instructions** at the top of the page. Once finished, click **Return to Solicitation**. Please note that printing the solicitation will NOT print the attachments. Attachments must be printed from the PDF file when open.



3.2 My Watchlist

The **My Watchlist** area allows you to select solicitation documents to monitor and maintain a watchlist. The My Watchlist area consists of the Search My Watchlist page. This page displays only the Solicitation documents that you have selected to monitor. While these documents are also available on the Search for Solicitation and Search for Surplus Auctions pages, the Search My Watchlist page provides a consolidated list of Solicitation documents you have added to the watchlist. This page provides similar searching capabilities as the Search for Solicitation page.



3.3 Purchase History

The **Purchase History** area displays purchases made, the cost, and the vendor providing the commodity.

Note: The images that follow depict sample data; none of these are actual purchase.

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Date	Vendor	CL Description	Commodity Description	Commodity/Service Code	Quantity	Unit	Unit Cost	Contract Amount
09/10/2015	Dept Of Corrections	Ranges, Griddles, Hot Plates, Warmers, etc., Electric and Ga	Ranges, Griddles, H	16573000000	4.00000	EA	5948.60	0.00
09/10/2015	Dept Of Corrections	Ranges, Griddles, Hot Plates, Warmers, etc., Electric and Ga	Ranges, Griddles, H	16573000000	2.00000	EA	5948.60	0.00
09/10/2015	Dept Of Corrections	Deep Fat Fryers	Deep Fat Fryers	16520000000	1.00000	EA	5809.35	0.00
09/10/2015	Dept Of Corrections	Deep Fat Fryers	Deep Fat Fryers	16520000000	1.00000	EA	5809.35	0.00
09/10/2015	Dept Of Corrections	Ovens, Convection and Microwave (Commercial)	Ovens, Convection a	16560000000	1.00000	EA	14036.62	0.00
09/10/2015	Dept Of Corrections	Ovens, Convection and Microwave (Commercial)	Ovens, Convection a	16560000000	1.00000	EA	14036.62	0.00
09/10/2015	Dept Of Corrections	Ovens, Convection and Microwave (Commercial)	Ovens, Convection a	16560000000	2.00000	EA	14036.62	0.00
09/10/2015	Dept Of Corrections	Ovens, Convection and Microwave (Commercial)	Ovens, Convection a	16560000000	1.00000	EA	14036.62	0.00
09/10/2015	Dept Of Corrections	Ranges, Griddles, Hot Plates, Warmers, etc., Electric and Ga	Ranges, Griddles, H	16573000000	1.00000	EA	7876.94	0.00
09/10/2015	Dept Of Corrections	Ovens, Convection and Microwave (Commercial)	Ovens, Convection a	16560000000	1.00000	EA	14036.62	0.00

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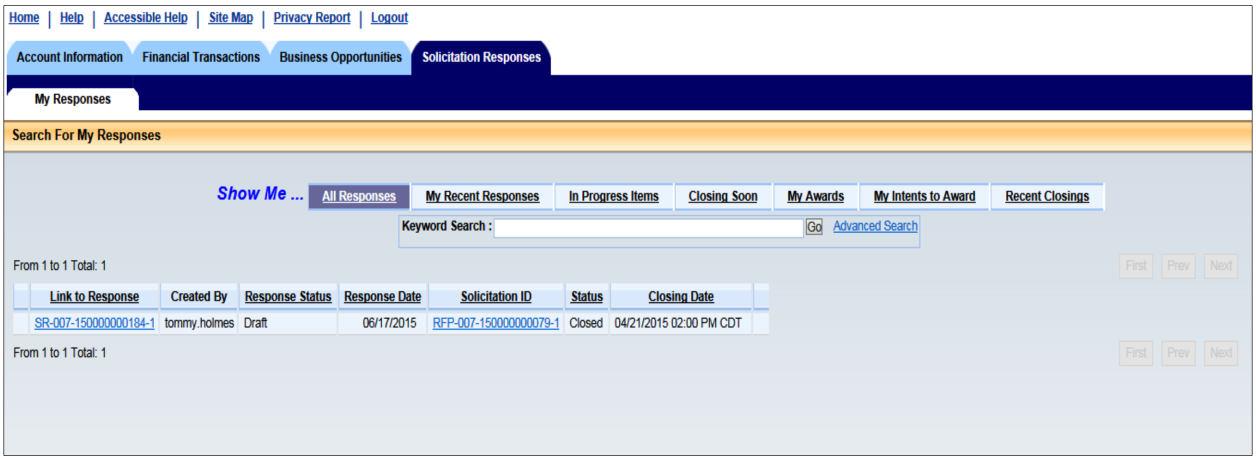
SECTION 4: SOLICITATION RESPONSES

4.1 My Responses

Solicitation Responses (SR) are a reflection of your bid or response to solicitations the State has issued. These responses are still mailed to the State, where your bid or response will be recorded. In the **My Responses** area, the **Show Me** section provides several links to use for searching, or you can conduct a Keyword Search to quickly navigate to a particular response. In the example below, both the **Link to Response** and **Solicitation** fields are hyperlinks to more details on the SR and the Request for Bid (RFB) or the Request for Proposal (RFP).



www.Alabama.gov/VSS

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Current revisions to this guide are made available at www.Alabama.gov/VSS.