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**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/webapp/PRDVSS1X1/AltSelfService 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.

<table>
<thead>
<tr>
<th>#</th>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Request for Bid (RFB)</td>
<td>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.</td>
</tr>
<tr>
<td>2</td>
<td>Request for Proposal (RFP)</td>
<td>Document that enables an agency to establish a request for a professional service that will result in an encumbering master agreement or contract.</td>
</tr>
<tr>
<td>3</td>
<td>Master Agreement (MA)</td>
<td>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.</td>
</tr>
<tr>
<td>4</td>
<td>Delivery Order (DO)</td>
<td>Orders made against an approved MA. A DO is a type of Purchase Order.</td>
</tr>
<tr>
<td>5</td>
<td>Purchase Order (PO)</td>
<td>Document used to encumber funds to be used to procure goods.</td>
</tr>
<tr>
<td>6</td>
<td>Invoice (IN)</td>
<td>Document used to record a vendor’s invoice for the shipment of goods or the dollar amount of services rendered.</td>
</tr>
<tr>
<td>7</td>
<td>Payment Request Commodity-based (PRC)</td>
<td>Document created manually to make payments to a vendor for commodity-based expenditures.</td>
</tr>
</tbody>
</table>
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 new requested updates will be approved only after the changes that are currently pending. It is highly recommended that you make as many changes as possible at one time rather than multiple small changes. 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 must include e-mail address, phone number and correspondence type must reflect e-mail for the principal contact. 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.

![Legal (1099) Address Information](image)

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.

![EFT Information](image)

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.
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.
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.

<table>
<thead>
<tr>
<th>Business Type ID</th>
<th>Certification No</th>
<th>Certification Start Date</th>
<th>Certification End Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONL</td>
<td></td>
<td>09/22/2015</td>
<td></td>
<td>New Change</td>
</tr>
<tr>
<td>CONS</td>
<td></td>
<td>09/22/2015</td>
<td></td>
<td>New Change</td>
</tr>
<tr>
<td>SMB</td>
<td></td>
<td>09/22/2015</td>
<td></td>
<td>New Change</td>
</tr>
</tbody>
</table>

[Link to previous page] [Link to next page]
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 must attach a company invoice. Select the Attach Files button. Acceptable file format is PDF or MS Word. Payment will not 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.

Check/EFT Summary Search

Search - To search for Checks/EFTs, enter search criteria and click the 'Search' button.
Results - To sort results, click a column heading.
Details - To view more details about a payment, select a payment from the results and then click the 'Details' button.
PDF - To View, Save, or Print a PDF version of an payment, select a payment and click the 'PDF' button.
References - To view referenced agreement and scheduled payment information for selected Payment, and click the 'Reference' button.
Download - To download the search results to a CSV file, click the 'Download' button.

[Search for Checks/EFTs]

Check/EFT Number: [Field]
Check/EFT Status: [Field]
Payment From: [Date]
Payment To: [Field]

[Search, Clear]

Select | Status Date | Check/EFT Number | Payment ID | Check/EFT Status | Amount
-------|-------------|-----------------|------------|-----------------|------
First   | Prev        | Next            | Last       | Details         | Download | PDF | Reference

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.
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. It is important to read all documents and follow specific bidding instructions for all solicitations. Bidding instructions will vary from solicitation to solicitation.

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.*
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).