STAARS

State of Alabama Accounting and Resource System

Vendor Self Service (VSS) Account Activation/Registration Step-by-Step Guide

May 2016

Table of Contents

Tips for using this guide

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

This guide covers the two possible registration scenarios: activating an account that has been migrated to VSS and registering a new account in VSS. These scenarios are color-coded. Check the colors at the side of the step-by-step table to make sure you are following the right one.

All additional documents noted in this guide are italicized. The documents are hyperlinked; however, if you are viewing a printed copy of this guide, you can access VSS documents from the **How to Use VSS** or **Help** links on the VSS home page. Once you open the VSS help, click the **Training and Reference Guides** topic for a list of documents.

BEFORE YOU BEGIN

STAARS Vendor Self Service (VSS) allows you, as a vendor, to manage your own account information, track payments, access bids and proposals, and perform other financial transactions from one location.

This guide provides help for the steps to set up your company (or individual) VSS account. Depending on your status as a vendor to the State of Alabama, you will either have to (1) activate an existing account OR (2) register for a new account. This guide will help you determine which steps you need to follow.

PLEASE ALLOW 30-40 MINUTES TO COMPLETE YOUR ACCOUNT SETUP. You may save your entries and resume later, as long as you save your username and password to log in again later.

Before you begin, have the following information on hand:

- Legal (1099) information for each company location (the first one entered will be the Headquarters)
- Tax ID Number (this is your SSN if you register as an individual)
- Legal Business Name
- Contact Information (name, address, email, phone and fax) for the following:
  - Account Administrator
  - Ordering
  - Payment
- If you want notifications of solicitations, list your products and services. For a list of available codes, see *Products and Services Commodity Codes* and *Professional Services Products and Services Codes*.

Legal Name, Legal (1099) Address, 1099 TIN Supporting Documentation

If you register for a new account or update Legal Name, Legal (1099) Address, or 1099 TIN information on an existing account, you will be required to submit **one** of the following supporting documents:

- Letter on your company letterhead showing Legal Name, 1099 TIN, and Legal (1099) Address

OR

- Documentation confirming Legal Name, 1099 TIN, and Legal (1099) Address such as IRS Form 147c

EFT Supporting Documentation

To sign up for electronic funds transfer (EFT), you need the name of your banking institution, its ABA (routing) number, and your account number. You are also required to submit one of the following documents:

- A voided check for the bank account with your organization's name pre-printed on it.

OR

- A letter (on letterhead) from your financial institution verifying the bank account ownership. The letter must include the vendor name, account number, and bank routing (ABA) number.

OR

- An account statement for the bank account indicated on the application.

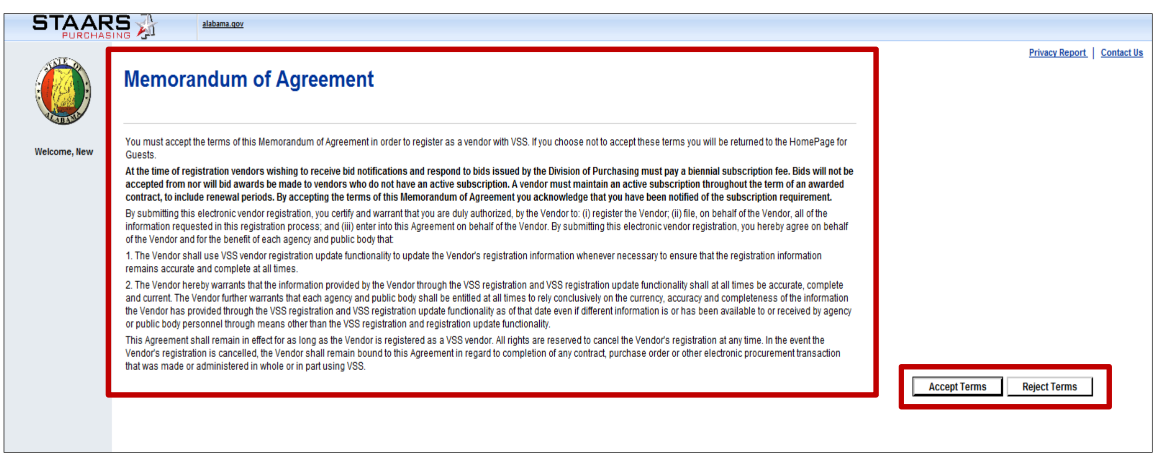
SEARCH FOR AN ACCOUNT

Whether you are activating an existing account or registering a new account, you must first search for your Taxpayer ID Number in the database.

1. Click the link below, or copy and paste it into your browser: https://procurement.staars.alabama.gov.

2. Click **Register** on the left-hand side of the screen.

3. Read the **Memorandum of Agreement**. This information, from the State of Alabama Division of Purchasing, contains key information about subscriptions and subscription fees. Once you have read the MOA, click **Accept Terms** to continue. (If you click **Reject Terms**, the registration process is terminated.)



4. The next page displays registration tips. Ensure that you have gathered together the items specified on page 1 of this guide. When you have them available, click **Next** to continue.

5. Use either the *Company Search* or *Individual Search* section to find a matching account:

- Use *Company Search* fields using your Taxpayer ID Number (TIN) OR Legal Business Name.
- Use the *Individual Search* fields to search using your Last Name AND the last four digits of your Social Security Number (SSN).

If a "Results Found" message is displayed, continue to the green-shaded Activate an Existing Account steps, starting on page 5.

If your search did not yield a match, you will see a "No results have been found" message with a New Registration button:

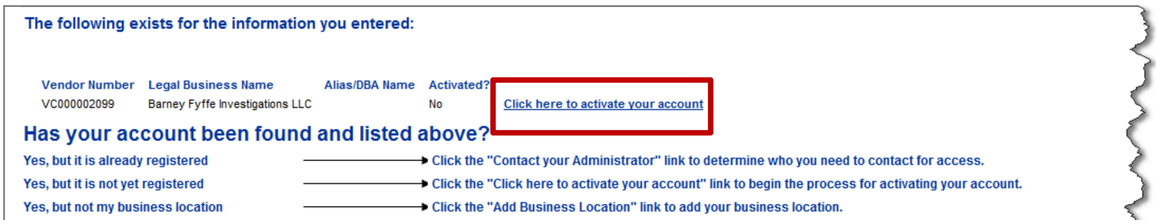
No results have been found for your account. Please perform further research or select the New Registration button to create a new account. | New Registration

Continue to the orange-shaded Register for a New VSS Account steps, starting on page 12.

ACTIVATE AN EXISTING ACCOUNT

Steps to Activate an Existing Account

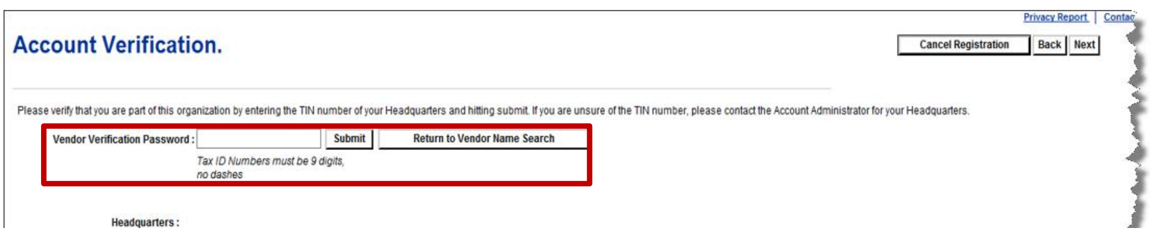
1 Click the **Click here to activate your account** link.



If your account has already been activated, you will see links to **Contact Administrator** (to find the person who activated the account) and **Add Business Location** (for adding new locations to an existing account).

2 On the **Account Verification** page, enter your Taxpayer ID Number as the Vendor Verification Password. For a company, it is your Employer ID Number; for an individual, it is your Social Security Number. You will also set up Security Questions and Answers; answers are case-sensitive.

Click **Submit**.

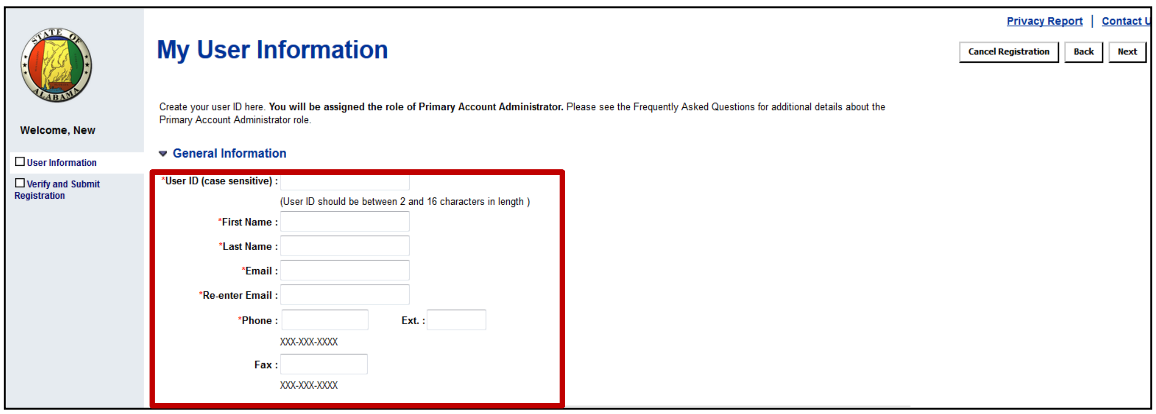


Steps to Activate an Existing Account

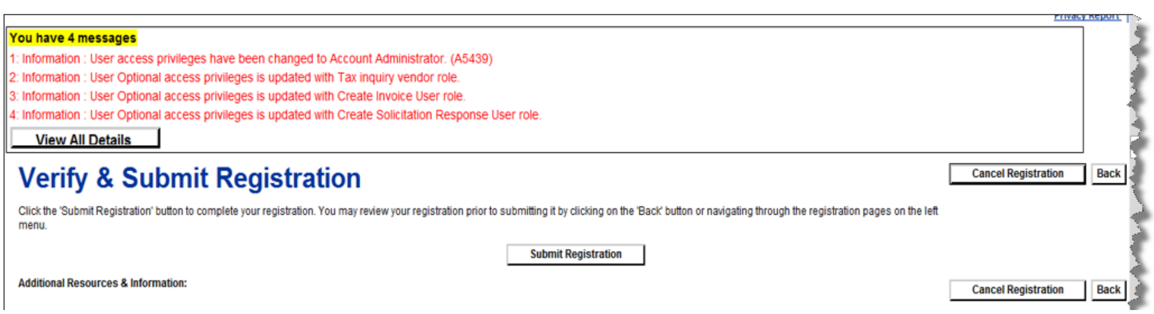
3 On the **My User Information** page, complete the fields that apply to you.

- Required fields (where you must enter information) are identified by a red asterisk.
- Write down your User ID. You will need it to continue with account activation.
- Use a valid email address. The State of Alabama uses email to communicate with vendors.
- Passwords must be at least 8 characters long and include at least 1 capital letter and at least 1 number. **You must remember your password to complete registration**.

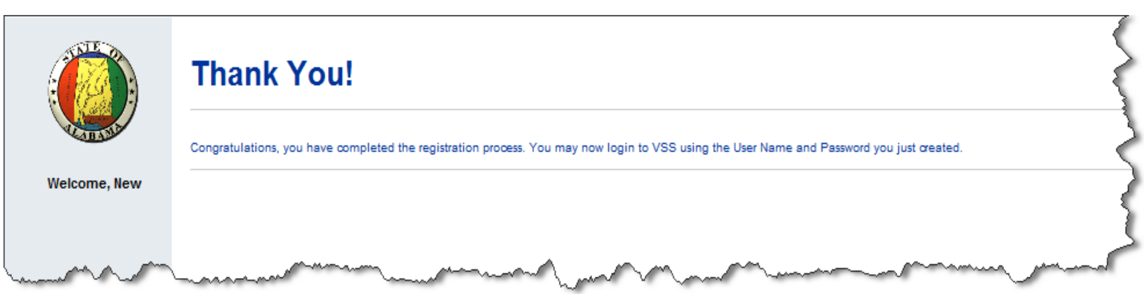
After you have entered your user information, click **Next**.



4 On the **Verify & Submit Registration** page, click **Submit Registration**.



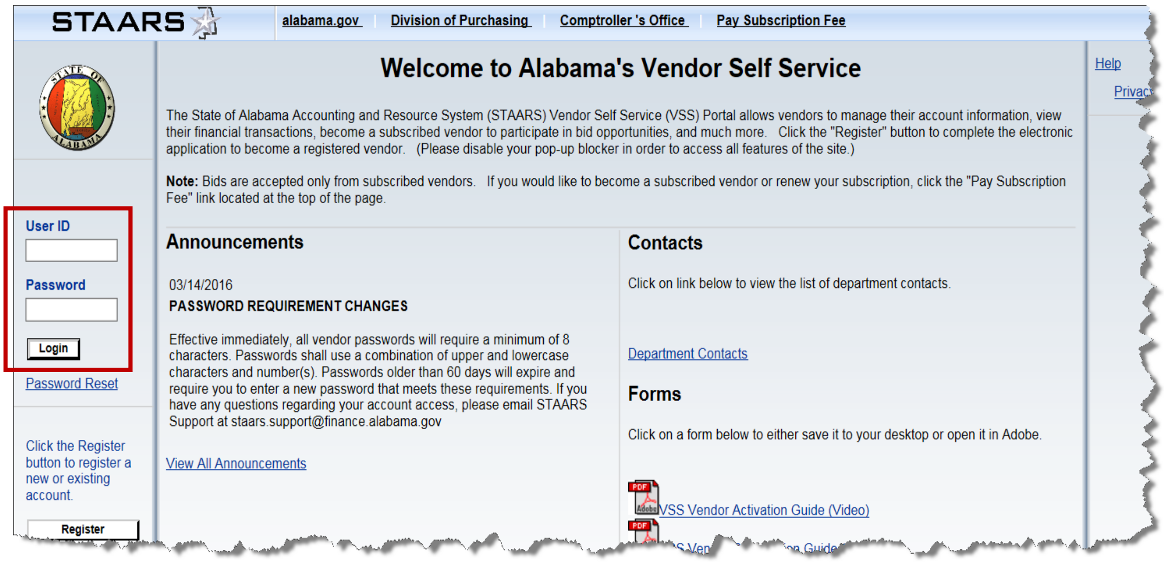
5 The message indicates that the registration process is complete. Close the VSS page.



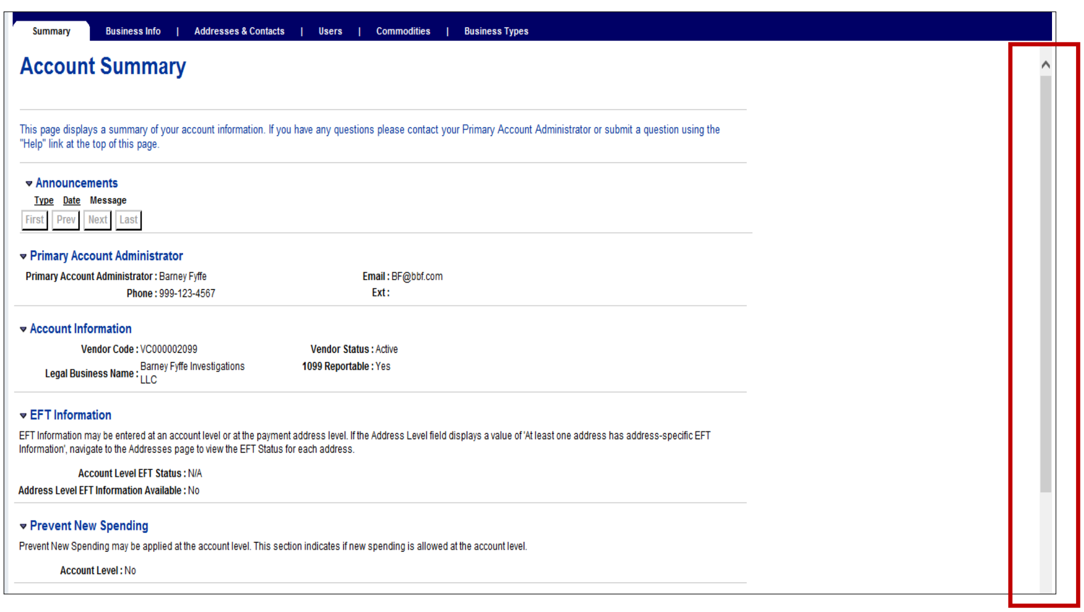
Continue to the next section to review and verify your account information.

Steps to Activate an Existing Account

6 Navigate back to the VSS home page (https://procurement.staars.alabama.gov) and log in using the user ID and password you just created.

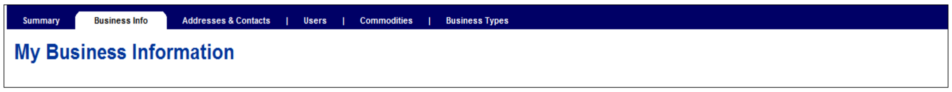


7 The **Account Information, Summary** tab contains Announcements, Primary Account Administrator, EFT information, and more. Use the vertical scroll bar on the right to move through the page.



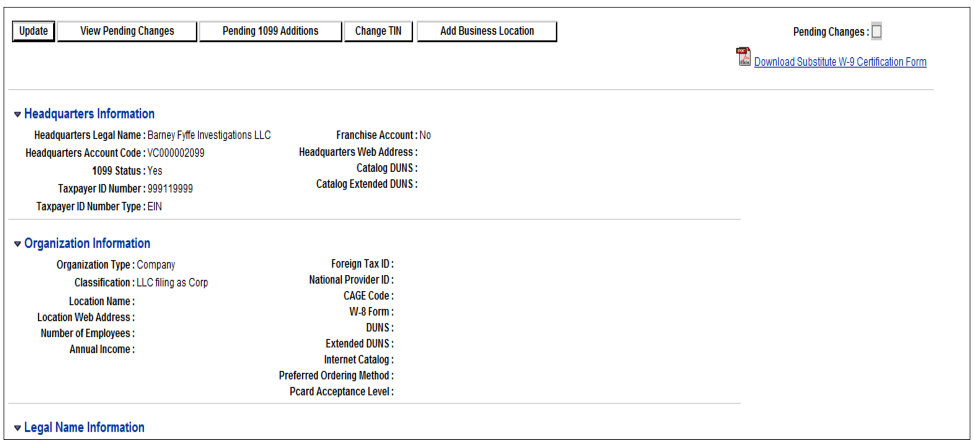
Steps to Activate an Existing Account

8 Click the **Business Info** tab. This tab includes a summary of the business information on your VSS account. Review this and make sure it is accurate.

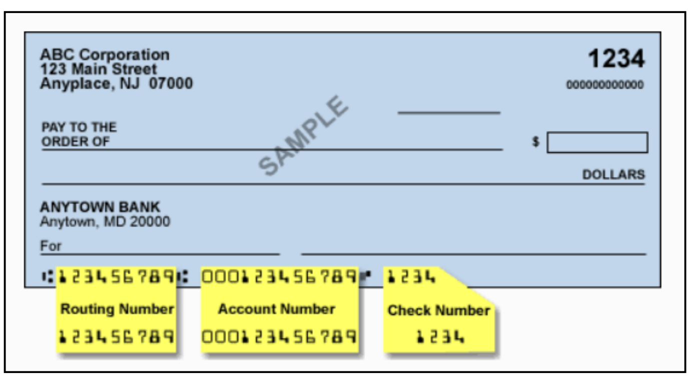


- Your **Legal (1099) Address** must be a physical address.
- If you update **EFT Information**, see *Vendor Supporting Documentation Requirements*.
- If you update **Legal Name, Legal (1099) Address, or 1099 TIN** information**,** you must submit required documentation and a signed Form W-9. Use the *Download Substitute W-9 Certification Form* link to generate a Form W-9 for your account.

Click **Update** if you need to make any changes; make the appropriate updates, and click **Save**.



9 EFT information is required if you want payment by electronic funds transfer. You must know your bank's ABA Number (a 9-digit identifier for US financial institutions) and your account number to complete this step. You can find both numbers on a check (see sample).

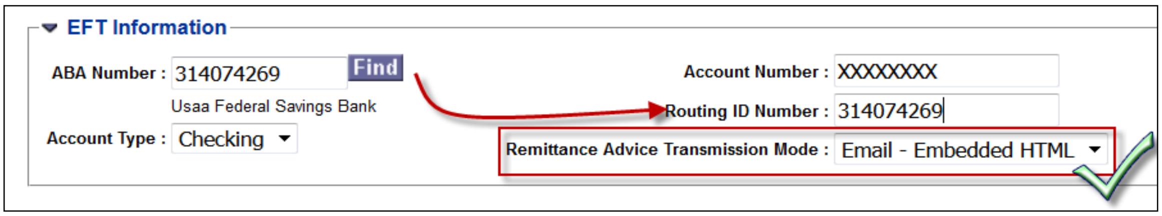


Steps to Activate an Existing Account

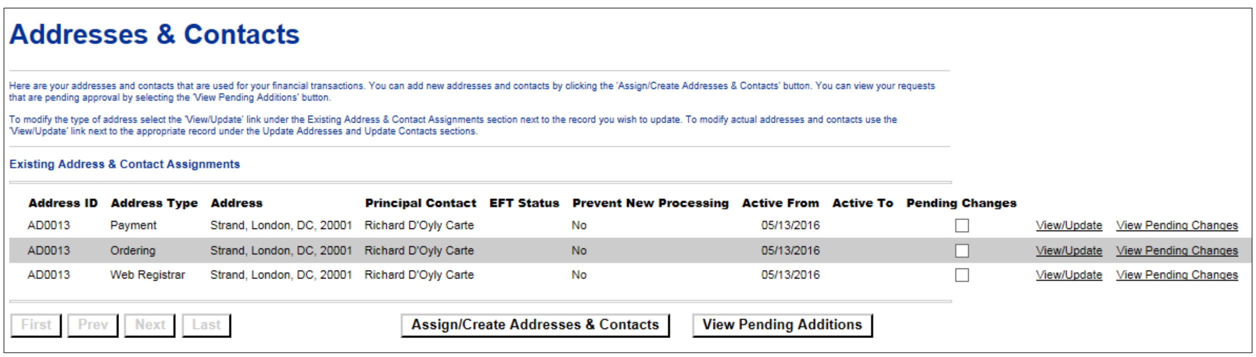
10 The State of Alabama encourages vendors to set up their accounts for EFT payment.

[Optional for EFT] In the **EFT Information** section, type in the **ABA Number**, **Account Number,** and **Routing ID Number** (same as the ABA Number); select the **Account Type**.

- Many banks have multiple ABA Numbers. You must know the correct ABA Number for your account; don't rely on the lookup table at the **Find** button to know your correct number.
- If you select *Email – Embedded HTML*, you must have a valid email address on the Payment Address contact. Otherwise, you will receive an error when your registration is submitted.



11 Click the **Addresses & Contacts** tab. This tab includes a list of addresses and contacts for your VSS account. These addresses are used for Payment, Ordering, and Billing. Review the list to make sure it is accurate.



Use the **Assign/Create Addresses & Contacts** button to enter new addresses or copy them for Billing, Ordering, or Payment purposes.

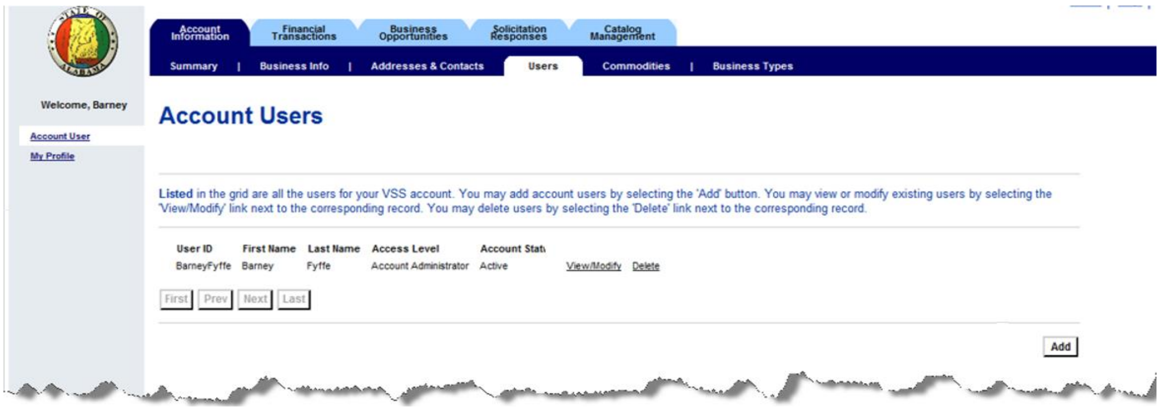
If you need to update a current address, use the **View/Update** link to the right of the address in the **Update Addresses** section. Be sure the address ID you want to update corresponds to the address ID in the existing **Address** and **Contact Assignments** fields.

- If you have moved to a different address, expire the old address with an **Active To** date and add the new address. If you just need to make a minor correction to an address, update the existing address. (Keeping old addresses in place in case STAARS has to locate a payment or order sent to an old address.)
- Contact information is required for each address, including **Principal Contact Name**, **Phone Number**, and **Email Address**.
- Set the Correspondence Type to *Email*.
- The **View Pending Additions** link shows any changes you have requested that have not yet been approved by the State. Therefore, it is advisable to make all known changes at one time.

Steps to Activate an Existing Account

12 Click the **Users** tab to see all users associated with your account. Review the list for to make sure it is accurate. Use the **Add** button to add a new User to the account.

To modify or view an existing user, use the **View/Modify** link displayed next to each user's information.



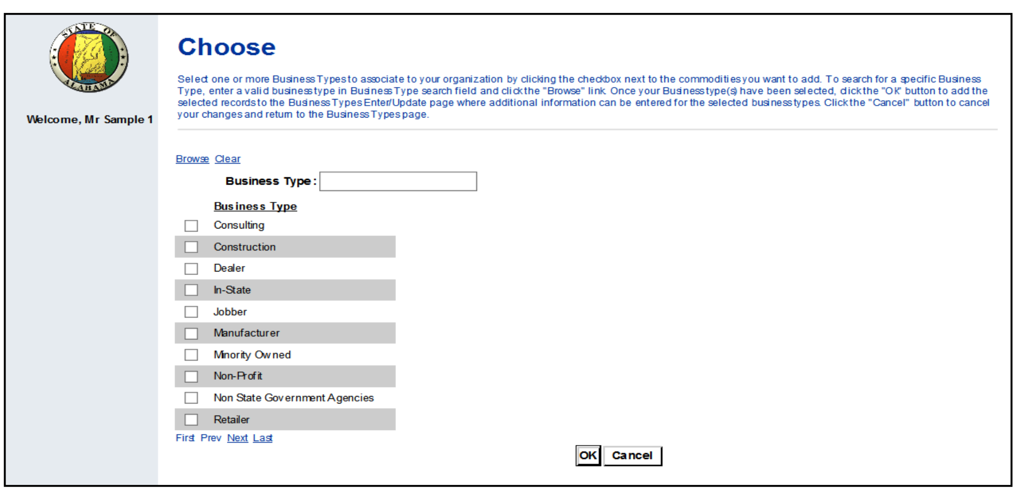
13 Click the **Commodities** tab. This tab shows all commodities listed for this account.

Notes:

- <u>In order to receive email notifications about any bids posted, you must be a paid subscribed vendor and be registered for specific commodity codes</u>. Use this page to browse the commodity codes to add them to your account.
- You will not receive notification of bids unless the commodity codes on the bid are associated with your account *and* your Ordering Address Contact has an email address.
- The State of Alabama uses NIGP commodity codes. See the *Products and Services Commodity Codes* and *Professional Services Commodity Codes* for help finding Commodity Codes to register.

Click the **Add** button to add commodities. Use the asterisk (*) as a wildcard to help you search for codes.

14 Click the **Business Types** tab to see business types associated with your VSS account. Select (check) the check boxes for business types that apply to your account and click **OK**.

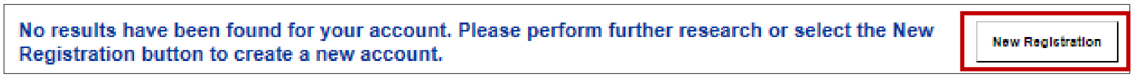


Steps to Activate an Existing Account	
15	Review your account information and confirm its accuracy. You have now completed activation, but you must still submit supporting documentation to the Office of the State Comptroller to be approved. To be approved as an active vendor: ☐ Download the W-9 certification form using the **Download Substitute W-9 Certification Form** link on the Business Info page. Print the form, complete and sign it, and scan it to electronic format. ☐ **If you added or changed Legal Name, Legal (1099) Address or 1099 TIN information,** obtain the supporting documentation needed. **See the** Legal Name, Legal Address, 1099 TIN Supporting Documentation box on page 1. To be approved for added or changed EFT information: ☐ Submit the EFT Supporting Documentation from the box on page 1. To be approved as a foreign vendor: ☐ Download Form W-8BEN from the VSS home page under **Forms**. Print the form, complete and sign it, and scan it to electronic format. **E-mail the supporting documentation as follows:** **TO**: vendors@comptroller.alabama.gov **SUBJECT**: Activate vendor account – [add your Vendor Code from the Account Summary] **Attach** [all required documentation as described above]

Register for a New Account

Steps to Register for a New Account

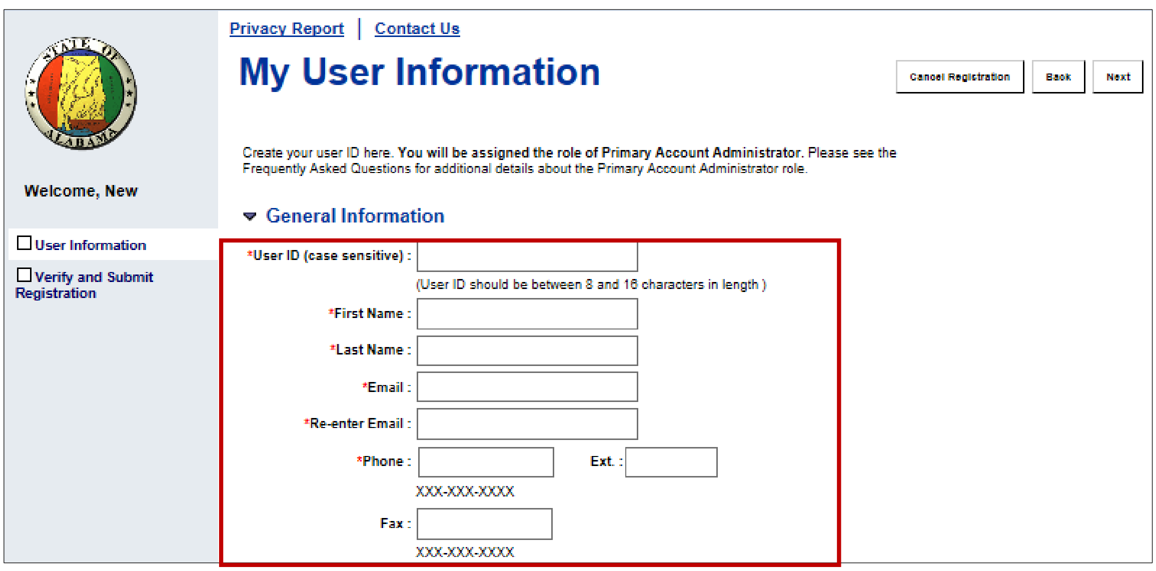
1 From the “No results found” message, click the **New Registration** button.

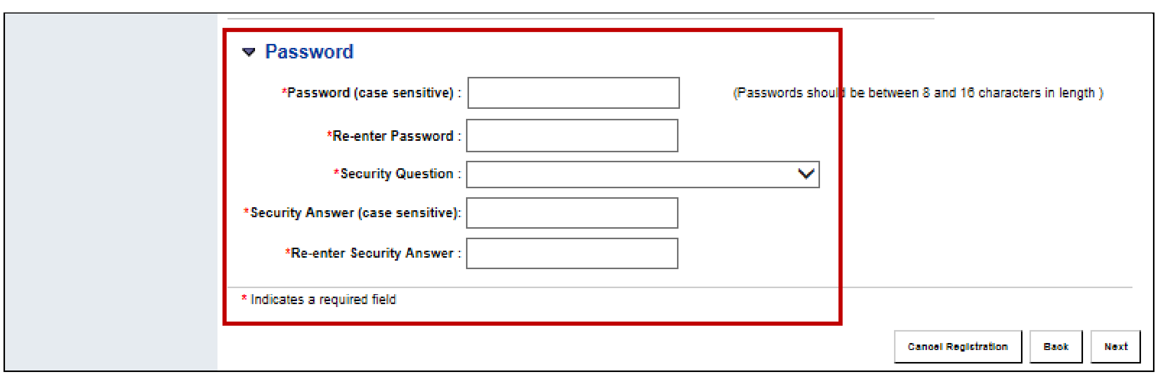


2 The first form is **My User Information**. Required fields have a red asterisk (*)

- You must provide a current and valid e-mail address so you can confirm registration changes and receive notifications of awards and business opportunities.
- *Write down the user ID you create!* You’ll need it again soon.
- Security Answers are *case*-sensitive.

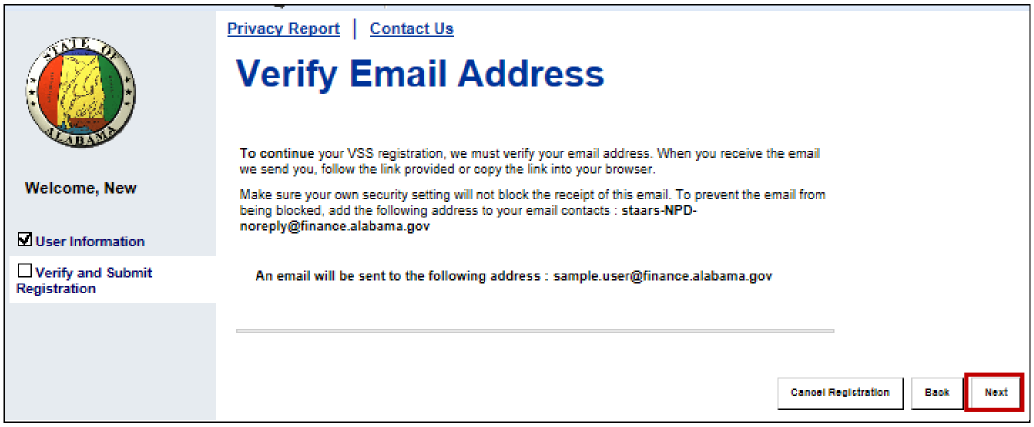
After you have entered user information, select **Next**.



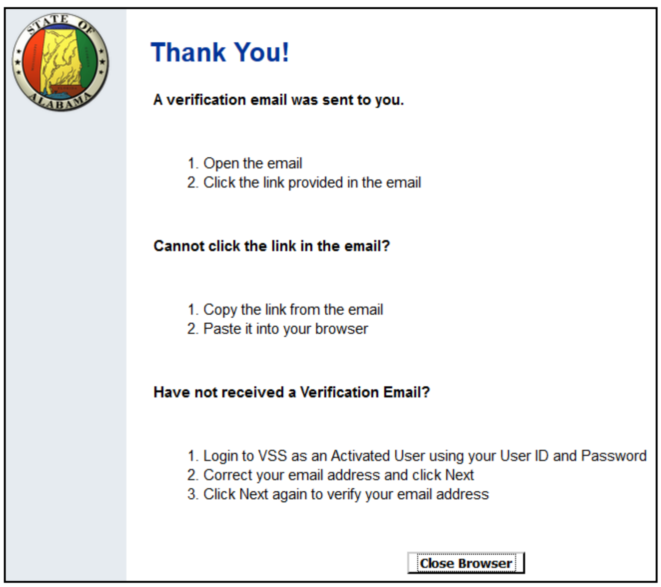


Steps to Register for a New Account

3 The **Verify Email Address** message explains that STAARS will send a verification email test message to your email account. Click **Next** to trigger the verification email.



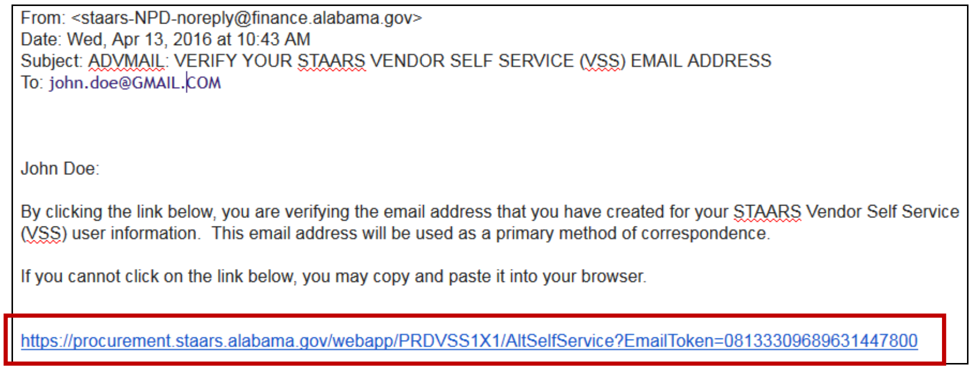
4 Click **Close Browser** to close the browser window.



Steps to Register for a New Account

5 Check your email for a message like the one below. Click the link in the email, or copy and paste it into your browser.

Note: This link can only be used once to verify your e-mail. After certifying your email, use the https://procurement.staars.alabama.gov link to log in to your account.


From: <staars-NPD-noreply@finance.alabama.gov>
Date: Wed, Apr 13, 2016 at 10:43 AM
Subject: ADVMAIL: VERIFY YOUR STAARS VENDOR SELF SERVICE (VSS) EMAIL ADDRESS
To: john.doe@GMAIL.COM

John Doe:

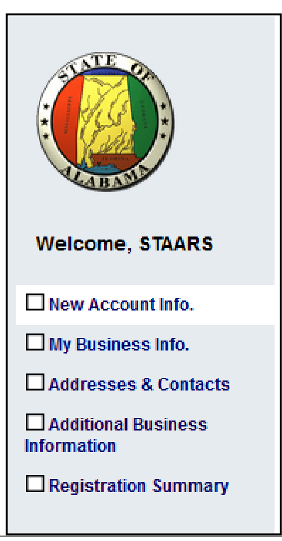
By clicking the link below, you are verifying the email address that you have created for your STAARS Vendor Self Service (VSS) user information. This email address will be used as a primary method of correspondence.

If you cannot click on the link below, you may copy and paste it into your browser.

https://procurement.staars.alabama.gov/webapp/PRDVSS1X1/AltSelfService?EmailToken=08133309689631447800

6 Verification happens quickly and transparently. You will then be asked to log in to VSS.

7 Once in VSS, you are directed automatically to a series of five account information screens. The screen names are listed on the left hand side of the browser.



You will work through each of these sections to complete registration.

If you need to exit before completing your registration, be sure to click **Save** and **Close**.

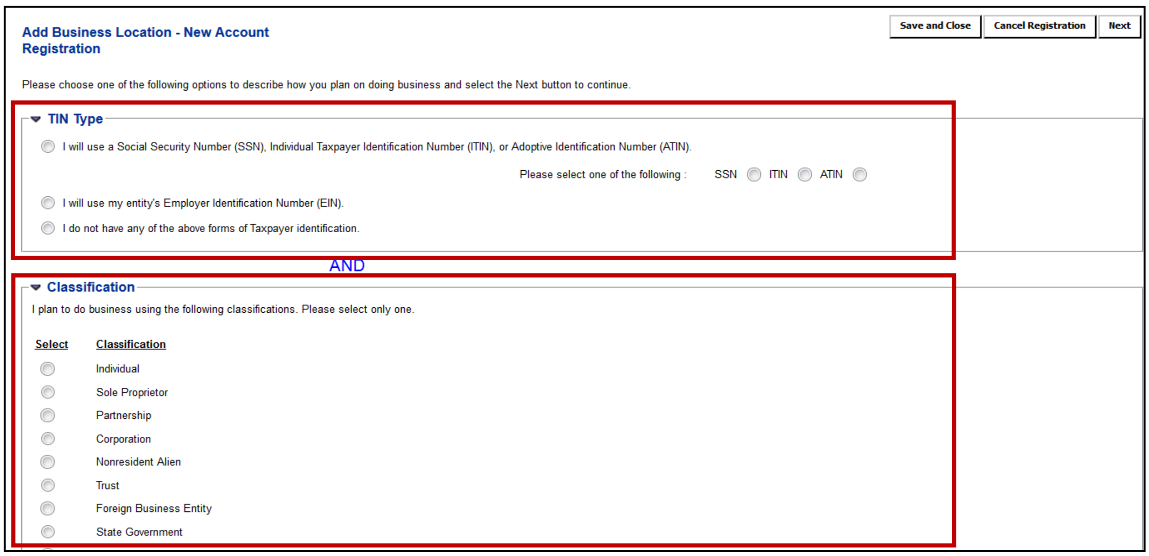
Steps to Register for a New Account

Section: New Account Info

8 The first section is **New Account Info**. Make sure to use the correct **TIN Type.**

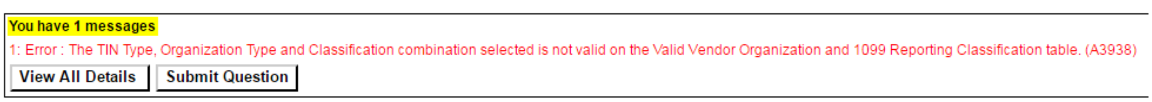
- Use SSN if you are registering as an Individual or Sole Proprietor paying taxes under your SSN.
- Use EIN if you are registering for a company or one of the other business classifications.
- If you are a Foreign vendor without a TIN, select *I do not have any of the above forms of Taxpayer Identification* and select *Foreign Business Entity* under **Classification**.

Select the appropriate **Classification** for your business; it must correspond with the TIN Type you selected. Use the vertical scroll bar on the right to see more classifications.



Once you have entered this information, click **Next** to move to the next section.

9 If your TIN Type does not match the Classification—for example, you select SSN and Corporation—you will see an error message saying that the TIN Type is not valid for the Classification.



Correct the selection and click **Next** to move to the next section.

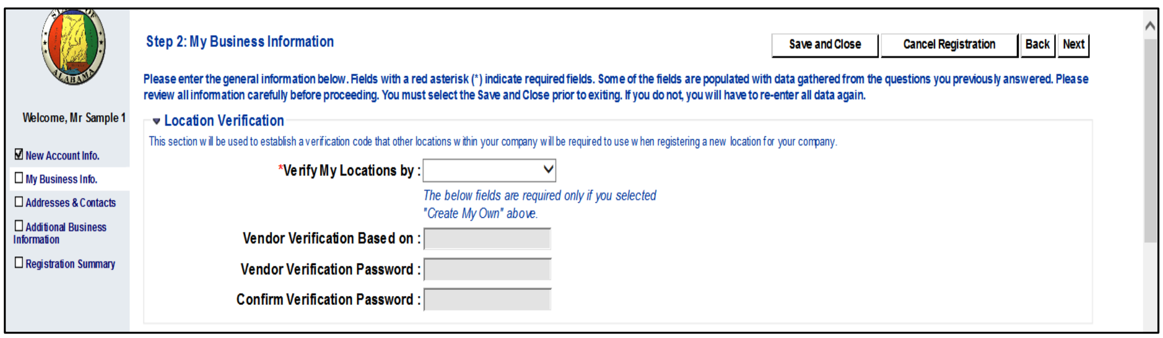
Steps to Register for a New Account

Section: My Business Info

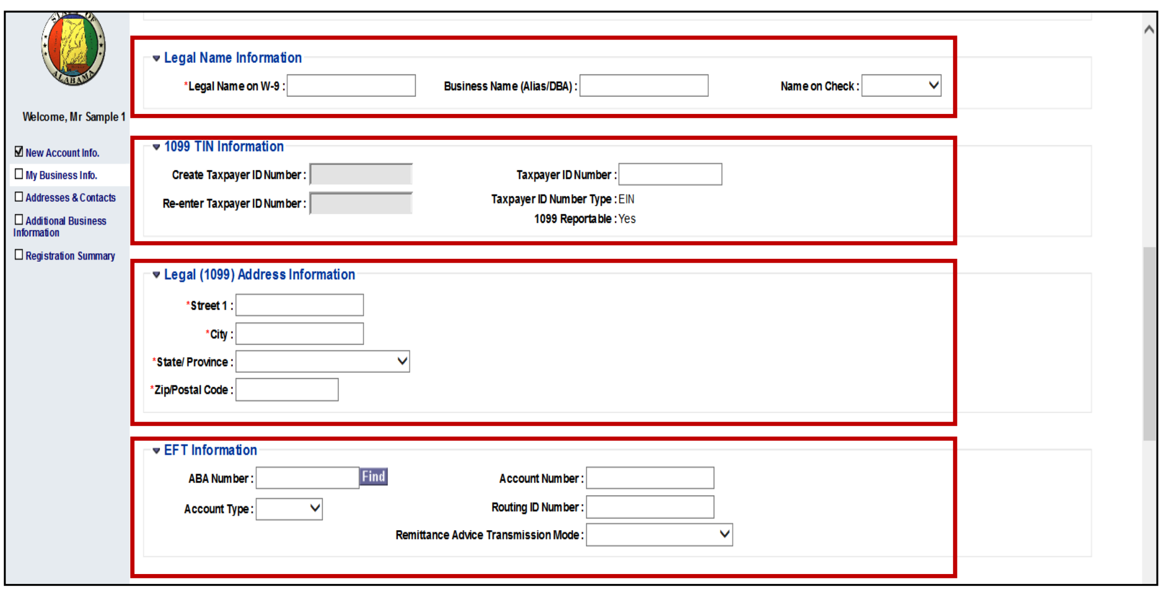
10 The next section is **My Business Info**. First, complete the information in the **Location Verification** and **Organization Information** sections. (Required fields are marked with a red asterisk.)

In the **Location Verification** section, click the arrow to the right of the **Verify My Locations by** field to display a drop-down list.

- If you are a vendor in the United States, select **Use My TIN Number**.
- If you are a foreign vendor, select **Create My Own**. This selection will require you to update the **Vendor Verification Based On** (type a reminder word or phrase for your password), **Vendor Verification Password**, and **Confirm Verification Password** fields.

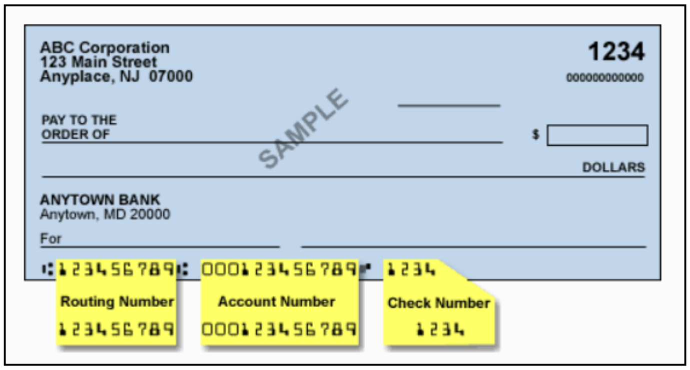


11 Next, enter **Legal Name Information, 1099 TIN Information**, and **Legal (1099) Address Information**. The Legal (1099) Address must be a physical address. The next steps explain EFT Information in greater detail.



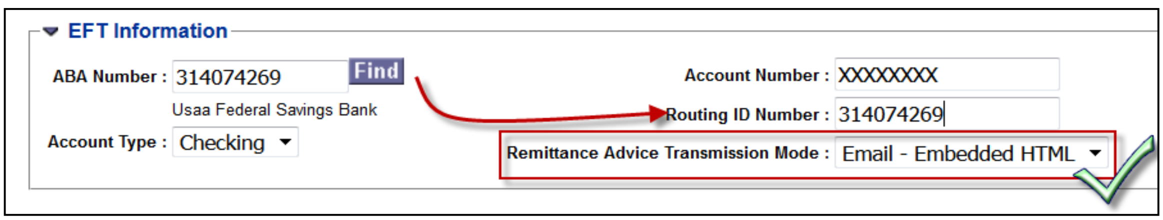
Steps to Register for a New Account

12 EFT information is required if you want payment by electronic funds transfer. You must know your bank's ABA Number (a 9-digit identifier for US financial institutions) and your account number to complete this step. You can find both numbers on a check (see sample).



13 In the **EFT Information** section, type in the **ABA Number**, **Account Number,** and **Routing ID Number** (same as the ABA Number); select the **Account Type**.

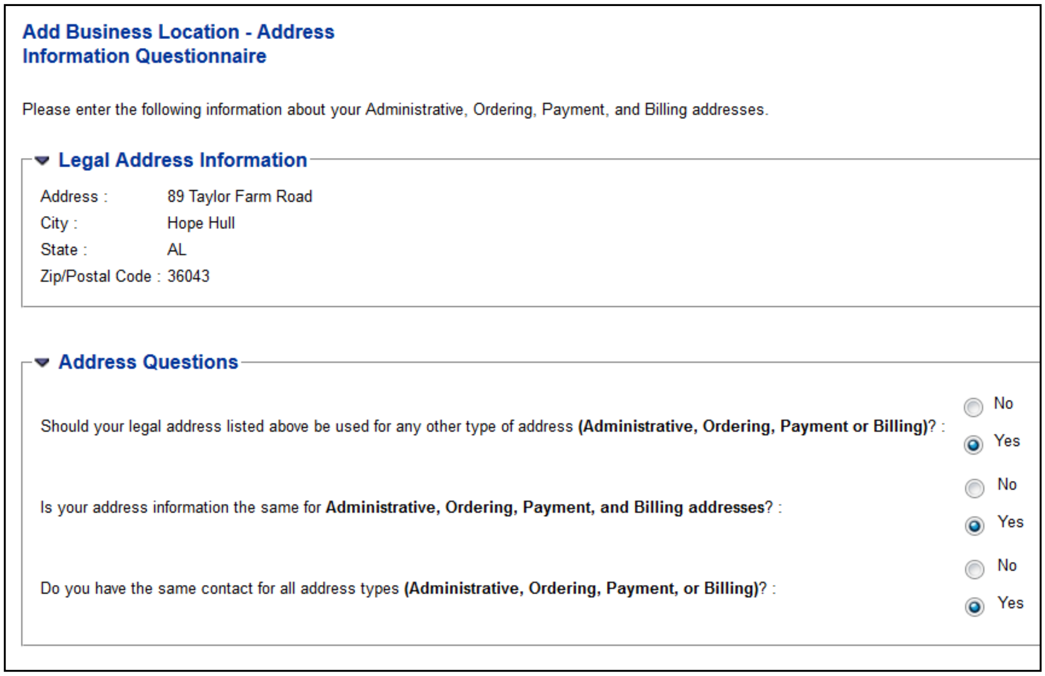
- Many banks have multiple ABA Numbers. You must know the correct ABA Number for your account; don't rely on the lookup table at the **Find** button to know your correct number.
- If you select *Email – Embedded HTML*, you must provide a valid email address on the Payment Address contact. Otherwise, you will receive an error when your registration is submitted.



Steps to Register for a New Account

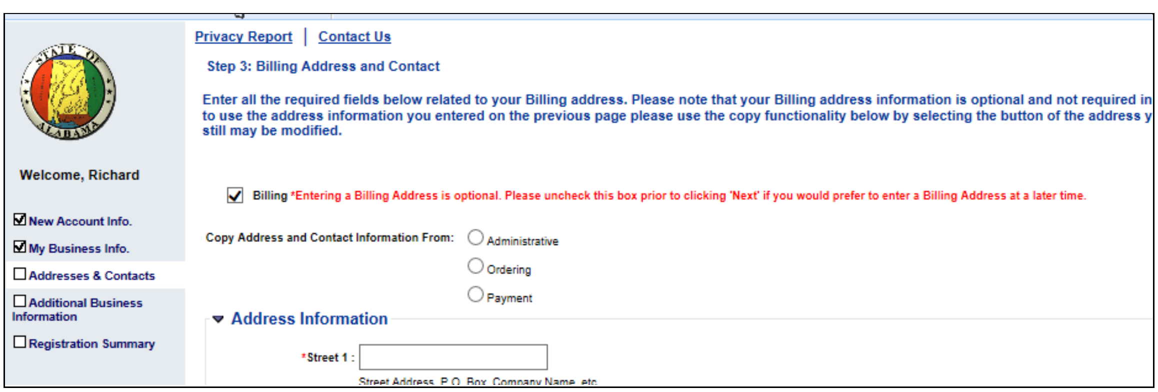
Section: Addresses & Contacts

14 The third section is **Addresses & Contacts**. This section allows you to specify that you want your Legal Address to be used for Administrative, Ordering, Payment, and/or Billing addresses. You can change one, all, or none of them from the Legal Address to a new address, depending upon your organization's needs.



15 Whether you select *Yes* or *No* for the Address Questions, you will still be required to provide the Phone and Contact information that was not already entered for the **Legal (1099) Address**.

- If you select *Yes* for the Address Questions, the Phone and Contact information will be copied to Administrative, Ordering, and Payment Addresses. You will be prompted with the option to create a Billing Address, which is the Invoice Address for Customers that make payments to the State.
- If you select No for any of the Address Questions, you will have options to copy one address (e.g., Administrative) to another (e.g., Ordering).

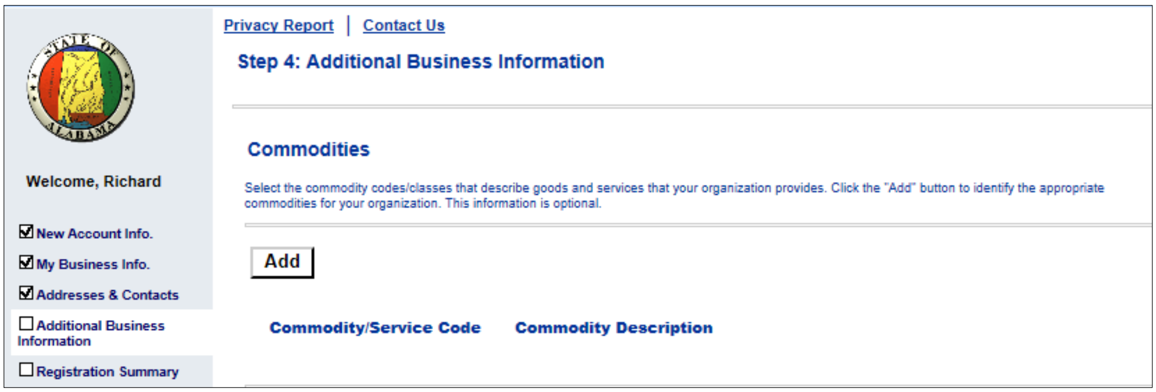


Steps to Register for a New Account

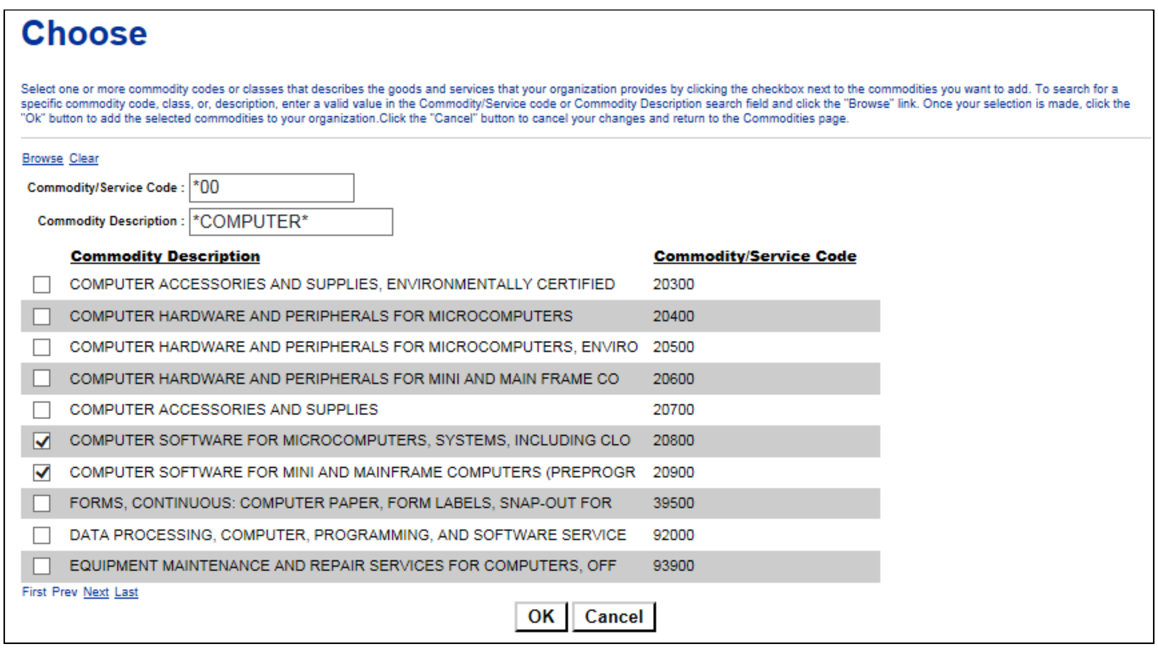
Section: Additional Business Information

16 The next section is **Additional Business Information**, where you register for commodity notifications. STAARS notifies vendors by email about any bids using their registered commodities. You can add or remove commodities as your business changes.

Click **Add** to register commodities; click **OK** to continue.



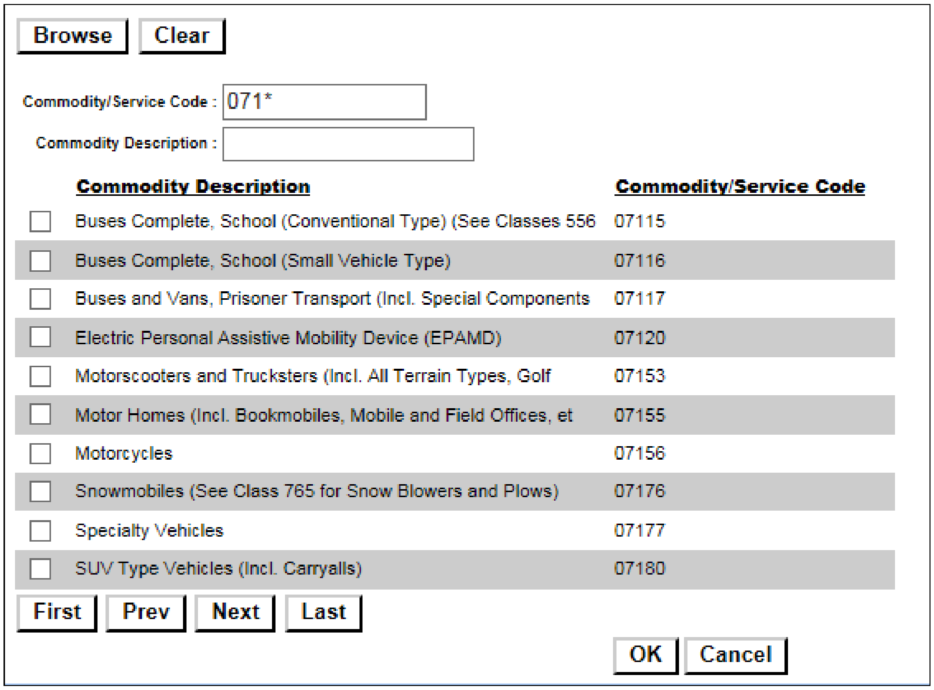
17 Searching for Commodities requires some understanding of the Commodity Code. The first 3 digits of a code describe a Class of goods or services, while the full 5-digit code provides a more detailed description. If you search with **00* in the **Commodity/Service Code** field and a keyword (with wildcards before and after) in the **Commodity Description**, you can limit your results to the higher-level Class in order to find specific items in that class.



Steps to Register for a New Account

18 Once you have found a Class that applies to your business, search it using it in the **Commodity/Service Code** field with a wildcard, such as *206**. Search for Professional Service codes using *PRF**.

- For more information about commodity codes used in the State of Alabama, see *Products and Services Commodity Codes* and *Professional Services Products and Services Codes*.



Browse Clear

Commodity/Service Code : 071*

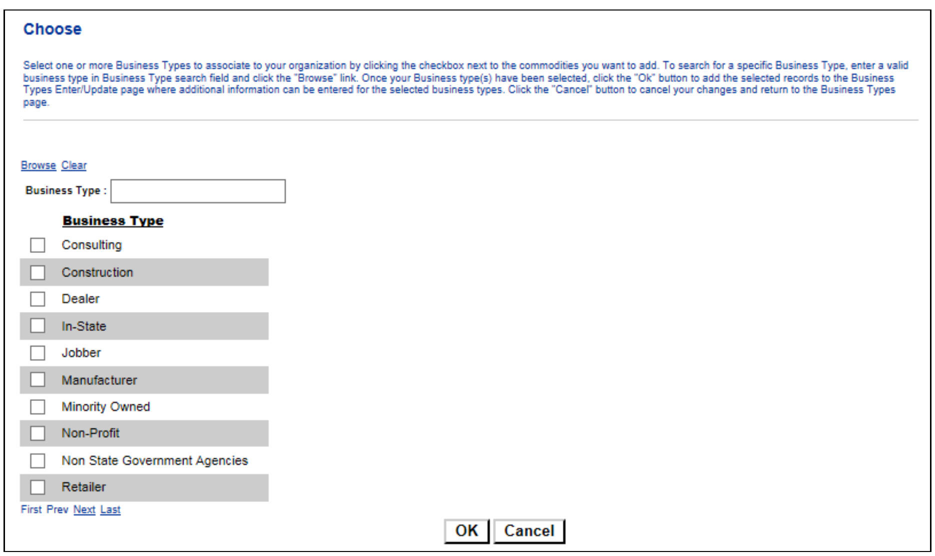
Commodity Description :

Commodity Description	Commodity/Service Code
Buses Complete, School (Conventional Type) (See Classes 556	07115
Buses Complete, School (Small Vehicle Type)	07116
Buses and Vans, Prisoner Transport (Incl. Special Components	07117
Electric Personal Assistive Mobility Device (EPAMD)	07120
Motorscooters and Trucksters (Incl. All Terrain Types, Golf	07153
Motor Homes (Incl. Bookmobiles, Mobile and Field Offices, et	07155
Motorcycles	07156
Snowmobiles (See Class 765 for Snow Blowers and Plows)	07176
Specialty Vehicles	07177
SUV Type Vehicles (Incl. Carryalls)	07180

First Prev Next Last

OK Cancel

19 In the **Business Type** field, select (check) any check boxes that identify your business; click **OK**.



Choose

Select one or more Business Types to associate to your organization by clicking the checkbox next to the commodities you want to add. To search for a specific Business Type, enter a valid business type in Business Type search field and click the "Browse" link. Once your Business type(s) have been selected, click the "Ok" button to add the selected records to the Business Types Enter/Update page where additional information can be entered for the selected business types. Click the "Cancel" button to cancel your changes and return to the Business Types page.

Browse Clear

Business Type :

Business Type
Consulting
Construction
Dealer
In-State
Jobber
Manufacturer
Minority Owned
Non-Profit
Non State Government Agencies
Retailer

First Prev Next Last

OK Cancel

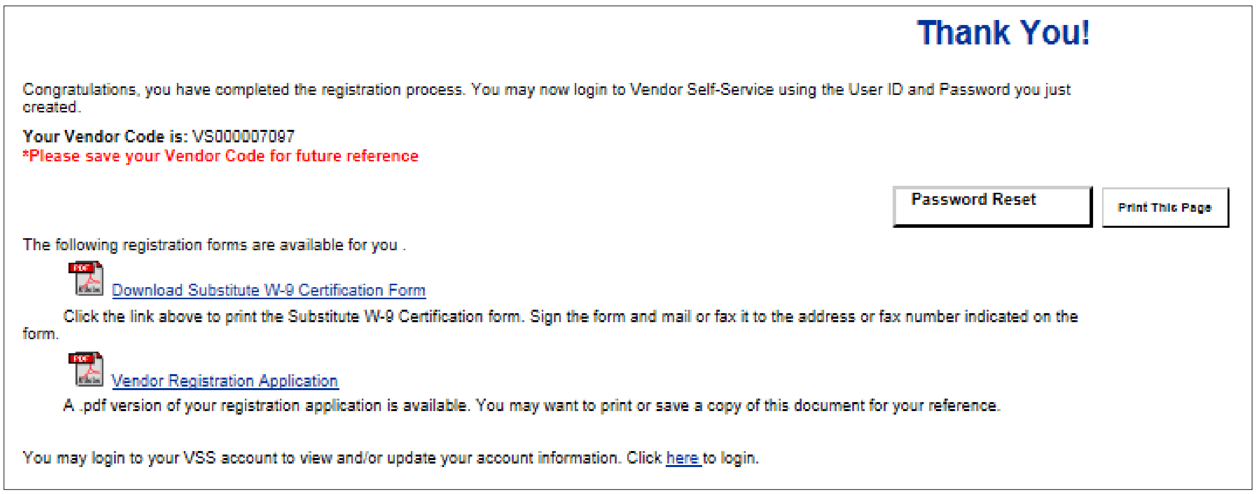
Steps to Register for a New Account

Section: Registration Summary

19 The final section is the **Registration Summary**. Review your entries; click **Update Information** to make any changes. You can print this page.

When you are satisfied with your responses, click **Submit**.

20 You have now completed registration, but you must still submit supporting documentation for approval. If you wish, you can download a PDF version of your Vendor Registration Application for your reference.



To be approved as a vendor:

- Download *Substitute W-9 Certification Form* on the “Thank You!” page that shows your Vendor Code. Print the form, complete and sign it, and **scan it to electronic format.**
- Refer to Legal Name, Legal Address, 1099 TIN Supporting Documentation as shown on page 1.

To be approved for EFT payment:

- Submit EFT Supporting Documentation as described on page 1.

If you are a foreign vendor:

- Download *Form W-8BEN*, available on the VSS home page under **Forms**. Print the form, complete and sign it, and scan it to electronic format.

E-mail the supporting documentation as follows:

TO:	vendors@comptroller.alabama.gov
SUBJECT:	New vendor account – [add your Vendor Code from the Thank You! screen]
Attach	[all required documentation as described above]

Revision History

Date	Section	Change
05/14/2016	N/A	N/A – initial publication