Job Aid

Vendor Self Service (VSS) Create a New Account

IRIS

Integrated Resource Information System

Intentionally Left Blank

Contents

Prior to Beginning This Job Aid

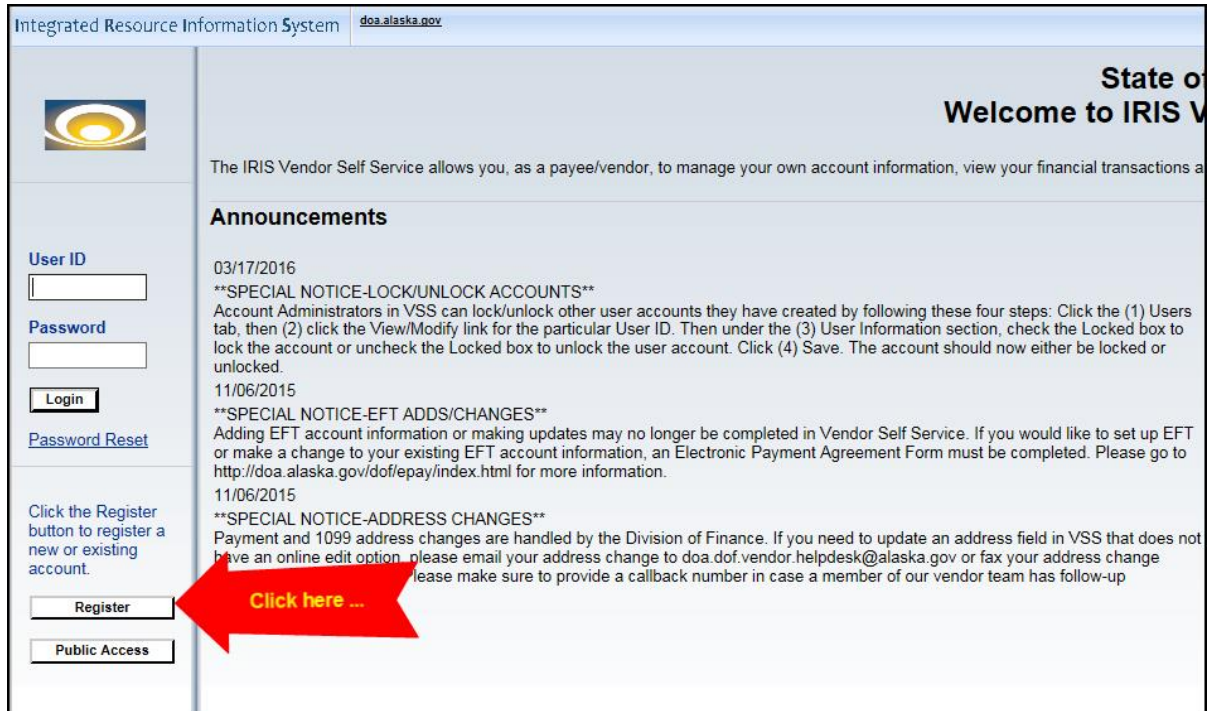This document provides the instructions for how to create a new account.

The individual you chose to go through this process will become the primary account administrator. Account Administrator users have the ability to add account users and assign access levels to each user. They may also update the Account Information and User's information. They will also have the ability to view financial transactions pertaining to the account. Account Administrator users will also be capable of updating their own profile information.

If you are unable to create a new account or need any other assistance, please contact the Vendor Help Desk at 907-465-5555 or email us at doa.dof.vendor.helpdesk@alaska.gov .

Create a New Account Procedures

VSS Home Page/Register Button

1. Make sure to bookmark the home page of VSS. On the home page of VSS, select the "Register" button.

Memorandum of Agreement Page

2. The Memorandum of Agreement Page appears. You must accept the terms of the agreement in order to activate your account. Click "Accept Terms" if you accept the terms of the agreement.

. The Vendor hereby warrants that the security role

he event the Vendor's registration is cancelled, the Vendor
in whole or in part using VSS.

ccount if the account entered through the registration process.
e the fund transfer is completed. The Vendor understands the
he duration of this agreement.

ectronically until the pre-note process is complete,

e State includes on each payment. Any banking charge to
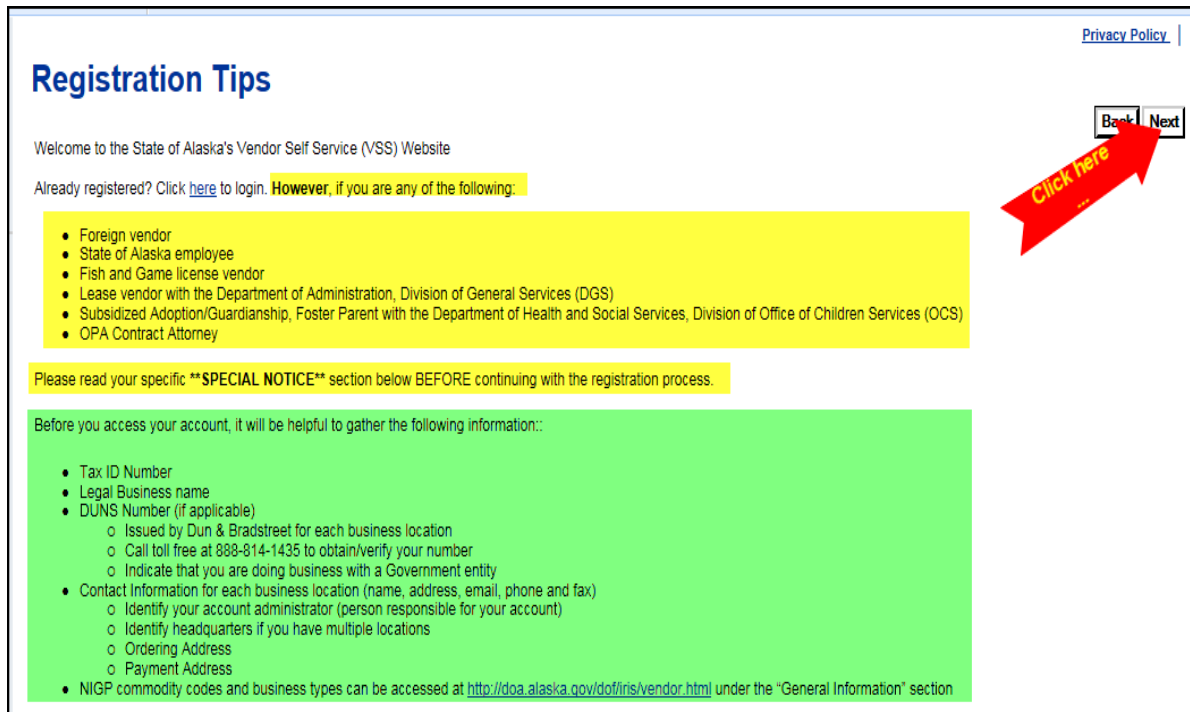
eposit is not being forwarded to a bank in another country and
e State of Alaska immediately. If the State discovers that the

meanor.

Click here ... → | Accept Terms | | Reject Terms |

Registration Tips Page

3. The Registration Tips page appears. In the screen shot below, note the areas highlighted in yellow and green. Please pay special attention to these two areas. Click the "Next" button if applicable.

Search for an Existing Account/Results Found Page

4. The Search for an Existing Account/Results Found page appears. Depending how you filed your vendor information with the IRS, you will search for your vendor by doing a Company Search or an Individual Search.

   Note that when searching by Taxpayer Identification Number under Company Search, you do not need to enter a dash—just enter the full nine digit number.

   Once you enter your search criteria, the results appear underneath "Individual Search" area. **Depending on your search results, you will get one of two messages:**

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

b. "The following exists for the information you entered:" The search results will show your:

- Vendor Name
- Legal Business Name
- Alias/DBA Name (If applicable)
- Whether or not the account has already been activated (i.e., Activated? field)

If there is a legitimate business need to create a new account for the existing vendor that came up in the Search results, click the **New Registration** button.

Note: If there isn't a legitimate business need to create a new account for the existing vendor, you can activate the existing account by clicking the "Click here to activate your account" link. To activate an existing account, please follow our Job Aid, "Vendor Self Service (VSS)—Activate an Existing Account" on the home page of VSS.

My User Information Page

5. The My User Information page appears. Here you will be creating your User ID under the General Information section and your password under the Password section in order to access your VSS account. **It is encouraged that you write down your User ID first prior to entering the information into VSS.**

   a. Under General Information, the following required (red asterisked) fields must be entered:
      i. User ID (This field is case sensitive and should be between 2 and 16 characters).
      ii. First Name
      iii. Last Name
      iv. Email
      v. Re-enter Email
      vi. Phone

My User Information

Create your user ID here. **You will be assigned the role of Primary Account Administrator.** Please see the Frequently Asked Questions for additional details about the Primary Account Administrator role.

▾ **General Information**

*User ID (case sensitive) : [   ]

(User ID should be between 2 and 16 characters in length)

*First Name : [   ]

*Last Name : [   ]

*Email : [   ]

*Re-enter Email : [   ]

*Phone : [   ]   Ext. : [   ]
XXX-XXX-XXXX

Fax : [   ]
XXX-XXX-XXXX

b. When creating a password under the Password section, it is critical that you meet the following password requirements:

- Should be between 8 and 16 characters in length
- Must have at least one numeric character between 0 thru 9
- Must have at least one upper case letter between A thru Z
- Must have at least one lower case letter between a thru z
- Must have one of the following symbols:
    - @
    - .
    - – (i.e., dash)
    - $
    - #
    - %
- It can't contain your User ID
- It can't contain the word "password".

It is encouraged that you write down your password first prior to entering the information into VSS.

The following required (red asterisked) fields must be entered:

i.   Password (Enter your password in this field and note that it must meet the requirements as mentioned earlier and it is case sensitive).
ii.   Re-enter Password
iii. Security Question
iv.   Security Answer (This field is case sensitive)
v.   Re-enter Security Answer

Password

Password requirements when setting up your password:
- Should be between 8 and 16 characters in length
- Must have at least one numeric character (0-9)
- Must have at least one upper case letter (A-Z)
- Must have at least one lower case letter (a-z)
- Must have at least one symbol flag (@.-$#%)
- Can't contain your User ID
- Can't contain the word "password"

*Password (case sensitive) :

*Re-enter Password :

*Security Question :

*Security Answer (case sensitive):

*Re-enter Security Answer :

Note: Failure to meet the password requirements will result in an "Unable to add new user" error message followed by another error listing out which password requirements were not met:

Privacy Policy

You have 2 messages

1: Error : Unable to add new user

2: Error : Password change failed. Password length cannot be less than 8 characters. Password must contain at least one character in the range A-Z. Password must contain at least one character in the range a-z. Password must contain at least one of these characters: .-$#%
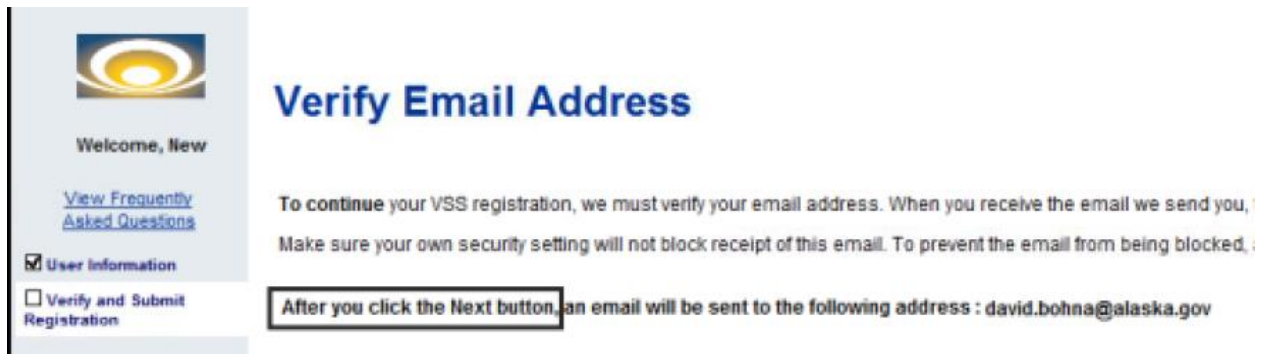
View All Details

c. Click **Next** after you have created your User ID and password.

Cancel Registration | Back | Next

click here
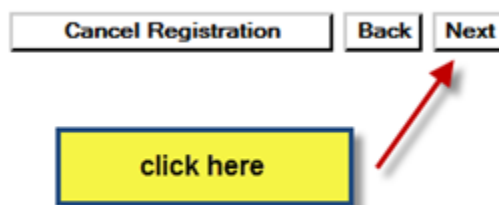
Verify Email Address

6. The Verify Email Address page appears. To continue your VSS registration, we must verify your email address. Click the **Next** button to send the confirmation email.
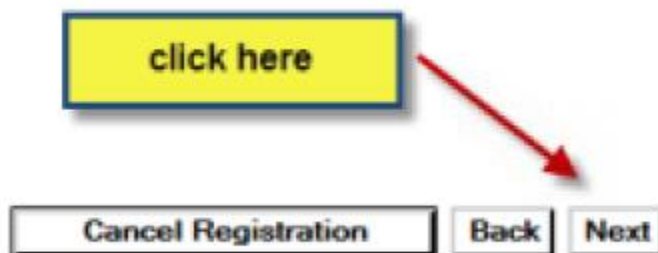
Thank You! Page

7. The Thank You! page appears. This page is notifying you that a verification email was sent. Click the **Close Browser** button.
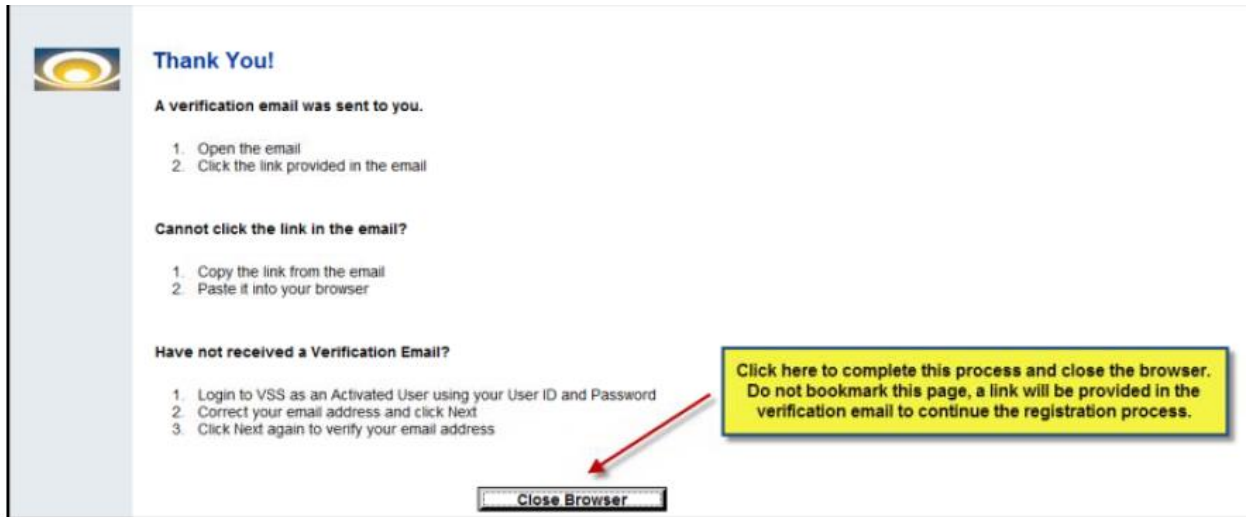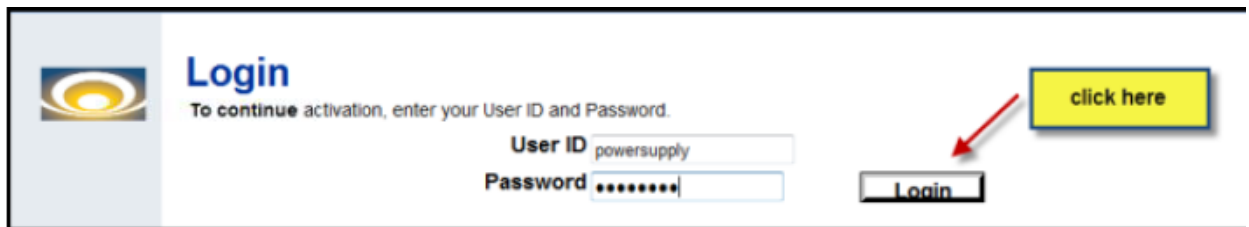
Confirmation Email

8. Soon after you should receive a confirmation email as shown below. It may take a few minutes for the email to come into your inbox. Check your SPAM/Junk email folder in case the email went to that folder instead of your inbox. Click the link in the email to continue VSS registration.
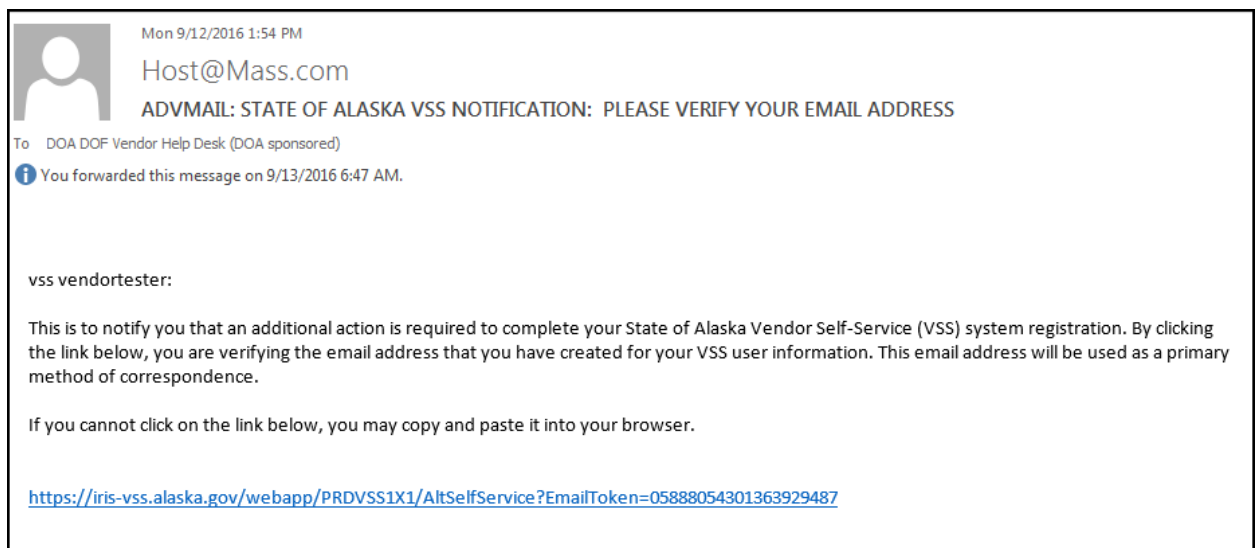
Log In
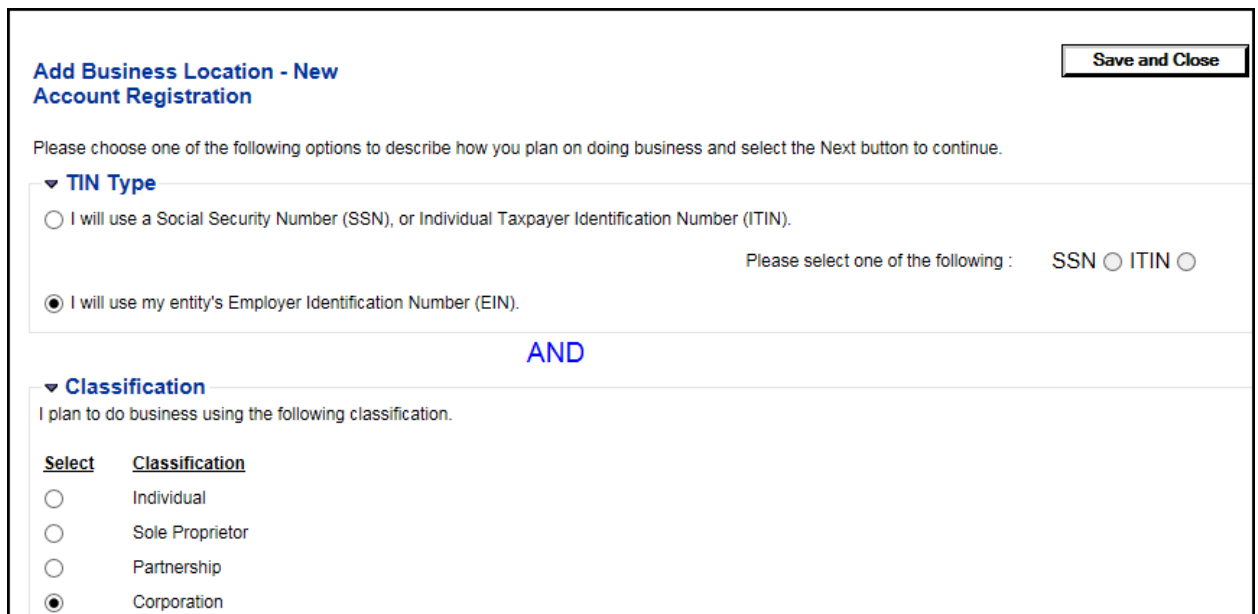
9. You are on the Login page. Enter the User ID and Password you created at Step 5 of the registration process. Click **Login**.

Note: If you forgot your User ID and password, you will have to start the registration process over. VSS will not be able to log your User ID and password into the database until you have successfully completed the registration process.

Add Business Location – New Account Registration

10. You will land on the Add Business Location – New Account Registration page. Choose the appropriate TIN Type and Classification based on how you filed your business information with the IRS.

Click the **Next** button.

Privacy Policy |

| Save and Close | Cancel Registration | Next |

click here
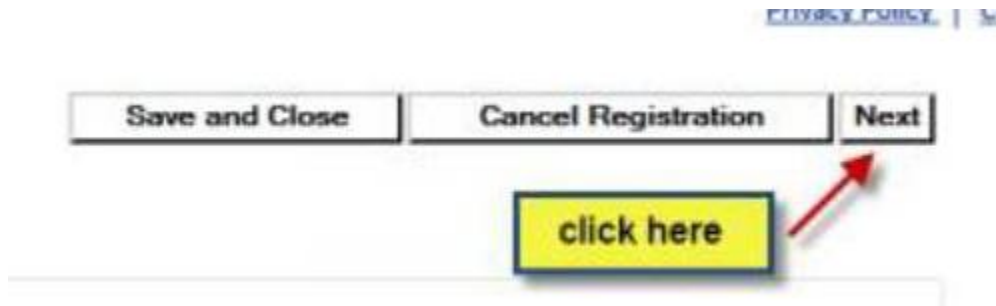
My Business Information

11. You will land on the My Business Information page, where you will be entering information about your business. The following sections are listed below. Note that in each section some fields are **required,** while some are optional.

Step 2: My Business Information

Please enter the general information below. Fields with a red asterisk (*) indicate required fields that must be answered. Please review all information carefully before proceeding. You must select the S

▼ **Location Verification**

This section will be used to establish the verification code that other locations within your company will be

*Verify My Locations by : Create My Own

The below fields are required of

a. Location Verification

▼ **Location Verification**

This section will be used to establish the verification code that other locations within your company will be required to use when registering a new location for your company.

*Verify My Locations by : Create My Own

The below fields are required only if you selected "Create My Own" above.

*Vendor Verification Based on :

*Vendor Verification Password :

*Confirm Verification Password :

Due to a system configuration, Location Verification is a one-time situation and actually won't be used anywhere else by VSS when creating a new account. This portion is for existing vendors who are activating an existing account. But because Location Verification is hard coded into the system, vendors who are creating a new account must go through this step as well.

The following fields are **required**:

- **Verify My Locations by**: Defaults to Create My Own. This can't be changed.
- **Vendor Verification Based on**: Enter anything.

- **Vendor Verification Password**: Enter anything. There are no password requirements.
- **Confirm Verification Password**: This entry must match the entry made in the Vendor Verification Password field.

b. Organization Information

The following fields are **required:**

- **Organization Type**: Pre-populates based on the TIN Type and Classification chosen on the Add Business Location – New Account Registration page.
- **Classification**: Pre-populates based on the Classification chosen on the Add Business Location – New Account Registration page.

The following fields are **optional**:

- **Location Name:** Enter the physical location associated with your business location.
- **Location Web Address:** Enter the web address associated with the current business location. You must add ".com", ".org", etc. to your web address (e.g., www.google**.com**). Failure to add this piece to your web address will result in error code A2465, Invalid Web Address.
- **Number of Employees:** How many employee do you have? Choices are <50, 51-100, 101-250, 251-500, 501-750, 751-1000, and >1000.
- **Annual Income:** How much income does your business bring in? Choices are <1 million, 1-2 million, 3-5 million, 5-10 million, 10-20 million, >20 million.This field can only be entered if the Organization Type field is Company.
- **Foreign Tax ID:** Not applicable
- **Ordering DUNS:** The Dun and Bradstreet account number assigned to the vendor.
- **Internet Catalog:** The web address for the record's online catalog.
- **Preferred Ordering Method:** Indicates the preferred ordering method for your business. Valid values are Paper or Electronic. Note that if you select Electronic, the Ordering DUNS field is required. Error code A2396, Ordering DUNS required,

will generate if you proceed in the registration process. If you do not have a DUNS number, clear out the entry in the Preferred Ordering Method field.

- **Pcard Acceptance Level:** Indicates if you accept procurement cards, and if so, what level of data exchange you use. Choices are No PCARD, Amount, Amount + Order Number, and Amount + Order Number + Line Detail.

c. Legal Name Information

The following field is **required:**

- **Legal Name on W-9**: The legal name of your business. This should match the information filed with the IRS when you obtained your Taxpayer ID Number [i.e., either an EIN (i.e., Employer Identification Number) or SSN (Social Security Number]. The Vendor Help Desk will perform an IRS TIN Match between your legal name and your Taxpayer ID Number to ensure accurate 1099 reporting information so it is critical that your legal name is entered correctly.

The following fields are **optional:**

- **Business Name (Alias/DBA):** If you have a doing business as (DBA), enter that information here.
- **Name on Check:** If you receive payments via check, this determines what name you want printed on the check. Choices are Alias/DBA, Legal Name, or Both. If you have a Legal Name and Alias/DBA, or even if you just have a Legal Name, State of Alaska recommends to choose **Both**.

d. 1099 TIN Information

The following field is only available and **required:**

- **Taxpayer ID Number:** Enter either your EIN or SSN for your business. This should match the information filed with the IRS when you obtained your Taxpayer ID Number [i.e., either an EIN (i.e., Employer Identification Number) or SSN (Social Security Number]. The Vendor Help Desk will perform an IRS TIN Match between your legal name and your Taxpayer ID Number to ensure accurate 1099 reporting information so it is critical that your legal name is entered correctly.

Note: The Vendor Help Desk will update the **1099 Reportable** field if your organization is not 1099 Reportable.

e. Legal (1099) Address Information

Enter the primary address for your business.

The following fields are **required:**
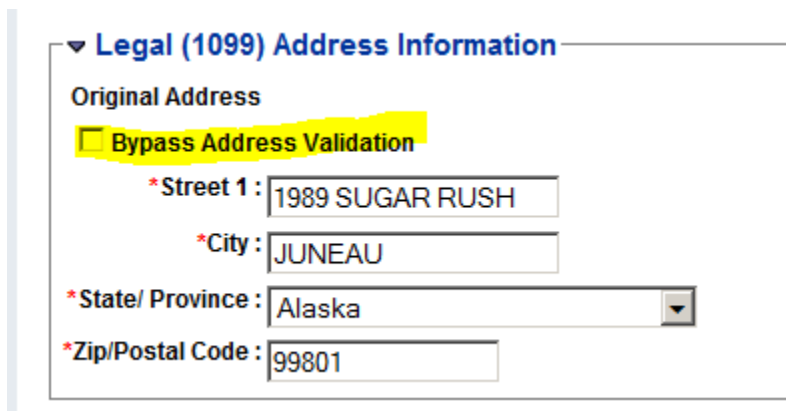
- **Street 1**
- **City**
- **State/Province**
- **Zip/Postal Code**

Note: You may receive error code A5448 (shown below) where it says VSS was unable to validate the address against postal standards:

You can bypass this error message by click the Bypass Address Validation checkbox that appears in the Legal (1099) Address Information section, highlighted in yellow below:

f. Discount Information

Enter any discount terms that you may offer to the State of AK for prompt payment of invoices. This section is **optional**.

The **Number of Days** fields: Enter the maximum number of days that can elapse between the voucher date and check date and still have the discount apply.

The **Discount Percent** fields: Enter the percentage of credit received when payment is received within the specified number of days in the corresponding **Number of Days** field.

For example, if your business offers a 2% discount for payments within 10 days and 1% discount for payments within 15 days, you would enter:

12. Once all fields have been entered. Click the **Next** button.

Add Business Location – Address Information Questionnaire

13. You will land on the Add Business Location – Address Information Questionnaire page, where you will be answering questions about your Administrative, Ordering, Payment, and Billing addresses as it relates to the Legal (1099) Address you entered on the My Business Information page.

Add Business Location - Address Information Questionnaire

Please enter the following information about your Administrative, Ordering, Payment, and Billing addresses.

▼ **Legal Address Information**

Address :	1989 SUGAR RUSH
City :	JUNEAU
State :	AK
Zip/Postal Code :	99801

Make sure to read **all three Address Questions** below as shown below:

▼ **Address Questions**

Should your legal address listed above be used for any other type of address (**Administrative, Ordering, Payment or Billing**)? :	○ No ⦿ Yes
Is your address information the same for **Administrative, Ordering, Payment, and Billing addresses**? :	○ No ⦿ Yes
Do you have the same contact for all address types (**Administrative, Ordering, Payment, or Billing**)? :	○ No ⦿ Yes

NOTE: You have the option to **create a separate Administrative, Ordering, Payment, or Billing address type**. Or, the **Legal Address could be used for each of the address types**. If you answer **No** to any of the questions, additional pages will need to be completed during registration in order to collect information for each address type.

You must always have at least an active <u>payment</u> address type and an active <u>ordering</u> address type.

Click **Next** once you have answered all three questions.

Step 3: Addresses and Contacts

14. You will land on the Address and Contacts page. Based on your answers to the Address Questions, you have the option to create a separate Administrative, Ordering, Payment or Billing address. Or, the Legal Address is used for all four address types. **By default, your Legal Address information pre-populates, the Street 1, City, State/Province, Zip/Postal Code, and Country fields.** Note that entering a Billing Address is **optional**.

a. Address Information

The following fields are **required:**

- Street 1
- City
- State/Province
- Zip/Postal Code
- Country
- Phone

Note: If you decide to enter different addresses for each of the address types, you may receive error code A5448 (shown below) where it says VSS was unable to validate the address against postal standards:

You have 1 messages
1: Error : The system was unable to validate the address against postal standards. Please correct the address entry or select the Bypass indicator to continue. (A5448)

View All Details   Submit Question

You can bypass this error message by clicking the Bypass Address Validation checkbox that appears in the Address Information section, highlighted in green below:

You have 1 messages
1: Error : The system was unable to validate the address against postal standards. Please correct the address entry or select the Bypass indicator to continue. (A5448)

View All Details   Submit Question

Step 3: Administrative Address and Contact   Save and Close   Cancel Registration   Back

Based on the answers you provided on the previous page, additional information is required to capture address and contact details for each of your different address type wish to enter a different address and contact combination for each type, enter all of the required fields below related to your Administrative address and select the Next bu proceed to Ordering. If you do have the same address and contact combinations for each address type, you may go back to the previous page and change the answers yo provided in order to fill out all the address and contact information on one consolidated page.

☑ *Administrative
▾ **Address Information**
Original Address
☐ Bypass Address Validation
*Street 1 : 2011 SPACE ODYSSE'
Street Address, P.O. Box, Company Name, etc.

The following fields are **optional**:

- County, Ext., Additional Address Info, Division/Department

b. Contact Information

▾ **Contact Information**
For the address type shown above, please enter a contact person.

*Principal Contact : JOHN DOE   Fax :
*Phone : 907-111-1111   Fax Extension :
Phone Extension :   Alternate Fax :
Alternate Phone :   Alternate Fax Extension :
Alternate Phone Extension :   Email :
English Spoken : ☐   Correspondence Type : ▾

You could designate contact information for each address type or one contact for all address types.

The following fields are **required:**

- Principal Contact and Phone
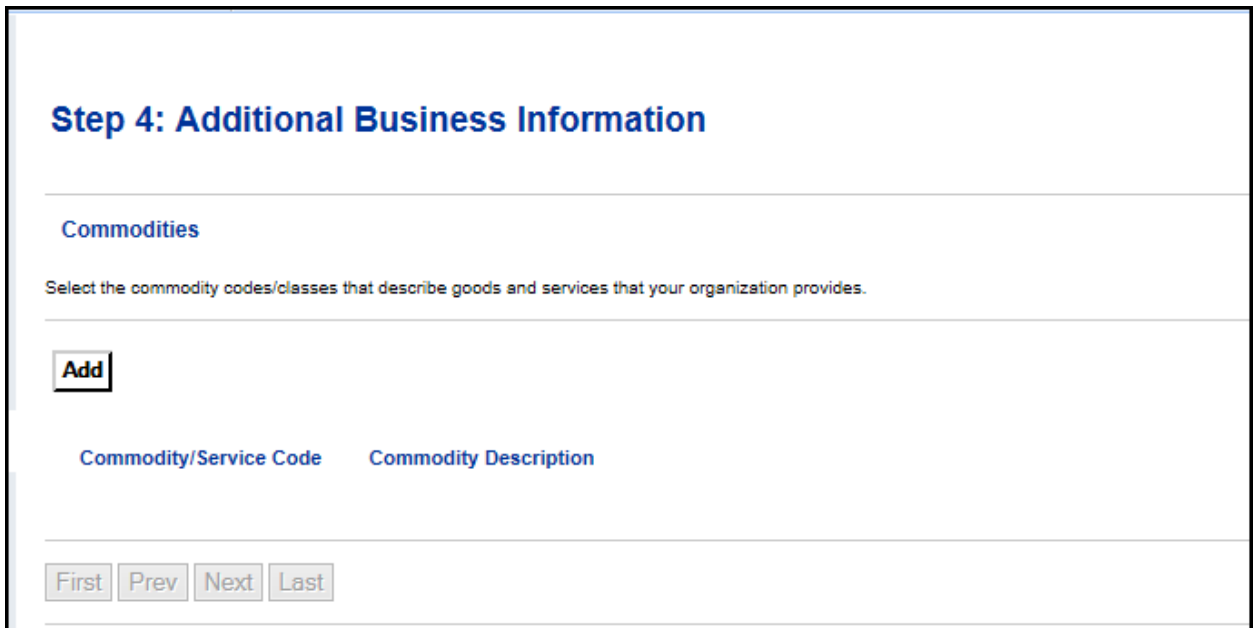
The following fields are **optional**:

- Phone Extension, Alternate Phone, Alternate Phone Extension, English Spoken, Fax, Fax Extension, Alternate Fax, Alternate Fax Extension, Email, Correspondence Type.

Click **Next** once you have completed this section.

Step 4: Additional Business Information

15. You will land on the Additional Business Information page. Here you have the opportunity to add commodities and business types to your vendor information.

a. Commodities

Selecting a commodity/service code is **optional.** By selecting commodity/service codes, you will be able to receive email notifications for solicitations published in VSS based on those codes.

If you decide to select commodity/service codes, click the **Add** button as shown in the screen shot above. The Choose screen appears.

Note: We have a PDF copy of NIGP Commodity Codes on the home page of VSS. Look for the PDF Link that says *NIGP Commodity Codes*.

You can either search by the three digit commodity/service code by entering the code in the **Commodity/Service Code** field or by **Commodity Description**. If you search by **Commodity Description**, make sure you enter wildcard characters (i.e., asterisks *) before and after each key word. For example:

- *obsolete*

- *surplus*obsolete*

Make sure to click **Browse** after entering your search criteria.

Click the **white checkbox** next to the code you want to add. Click the **OK** button to add the codes to your vendor information:

Choose

Select one or more commodity codes or classes that describes the goods and services that your org
want to add. To search for a specific commodity code, class, or, description, enter a valid value in the
the "Browse" link. Once your selection is made, click the "Ok" button to add the selected commoditie
return to the Commodities page.

Browse Clear

Commodity/Service Code : [   ]

Commodity Description : [*SURPLUS*OBSOLETE]

Commodity Description	**Commodity/Service Code**
☑ SALE OF SURPLUS AND OBSOLETE ITEMS	998

First Prev Next Last

[OK] [Cancel]

Step 4: Additional Business Information

Commodities

Select the commodity codes/classes that describe goods and services that your organization provides.

[Add]

Commodity/Service Code	**Commodity Description**	
998	SALE OF SURPLUS AND OBSOLETE ITEMS	Delete

[First] [Prev] [Next] [Last]

If you want to remove a code, click the **Delete** link as shown in the above screen print.

b. Business Types

Business Types

Click the "Add" button to identify the appropriate business types for your organization. This information is optional except for the following business types:
Select "Adopt/Guardian&FosterParent" as a business type if you receive foster care, subsidized adoption or guardianship payments from the State of Alaska.
Select "General Svcs Lease Vendor" if you have a lease agreement on file with Division of General Services.
After selecting a Business Type, the Certification Number, Certification Start Date and Certification End Date are displayed and disabled. The State of Alaska is not requesting this information here at this time.

Add

| Business Type ID | Certification Number | Certification Start Date | Certification End Date |

First Prev Next Last

Buyers may choose to notify all vendors registered for a specific business type about a solicitation being published. Selecting a business type is **optional unless you fall under one of the following:**

- You receive foster care, subsidized adoption, or guardianship payments from the State of Alaska. In this case, you must select the Business Type **Adopt/Guardian&Foster Parent**.This is for reporting tracking purposes by the Dept. of Health & Social Services, Division of Office of Children Services.

- You have a lease agreement on file with the Dept. of Administration, Div. of General Services. In this case, you must select the Business Type **General Svcs Lease Vendor**. This is for reporting tracking purposes by the Dept. of Administration, Division of General Services.

If you decide to select business types, click the **Add** button as shown in the screen shot above. The Choose screen appears.

Note: We have a PDF copy of Business Types, and their descriptions on the home page of VSS. Look for the PDF Link that says *Business Types*.

Choose

Select one or more Business Types to associate to your organization by clicking the checkbox next to the Business Type you want to add.
Select 'Adopt/Guardian&FosterParent' as a business type if you receive foster care, subsidized adoption, or guardianship payments from the State of Alaska.
Select 'General Svcs Lease Vendor' if you have a lease agreement on file with Division of General Services.

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 be
records to the Business Types Enter/Update page where additional information can be entered for the selected business types. Click the "Cancel" button to cance
page.

Browse Clear

Business Type : [_____]

Business Type

- ☐ Alaska Bidder Preference
- ☐ Alaskans w/Disabilities Pref
- ☐ Alaska Employment Program Pref
- ☐ Alaska Domestic Insurer Pref
- ☐ Alaska Local Ag & Fish Pref
- ☐ Alaska Products Pref Class I
- ☐ Alaska Products Pref Class II
- ☐ Alaska Products Pref Class III
- ☐ Alaska Product/Recycled Pref
- ☐ Alaska Veteran Preference

First Prev Next Last

[OK] [Cancel]

You can search for business types by entering search criteria in the **Business Type** field. Make sure you enter wildcard characters (i.e., asterisks *) before and after each key word. For example:

- *employment*

- *employment*program*

Make sure to click **Browse** after entering your search criteria.

Click the **white checkbox** next to the code you want to add. Click the **OK** button to add the business types to your vendor information:

Business Types

Click the "Add" button to identify the appropriate business types for your organization. This information is optional except for the following business types:
Select "Adopt/Guardian&FosterParent" as a business type if you receive foster care, subsidized adoption or guardianship payments from the State of Alaska.
Select "General Svcs Lease Vendor" if you have a lease agreement on file with Division of General Services.
After selecting a Business Type, the Certification Number, Certification Start Date and Certification End Date are displayed and disabled.
The State of Alaska is not requesting this information here at this time.

Add

Business Type ID	Certification Number	Certification Start Date	Certification End Date	
Alaska Employment Program Pref				Delete

If you want to remove a business type, click the **Delete** link as shown in the above screen print. Note that Certification fields are displayed after adding a business type. State of Alaska is not requesting this information at this time, so they are greyed out.

Once you have finished selecting commodity codes and/or business types, if applicable, click the **Next** button.

Registration Summary

16. You will land on the Registration Summary page. This is a summary of all the information entered during VSS registration. Please review this information. If everything is accurate, click the **Submit Registration** button.

Registration Summary   Save and Close   Cancel Registration   Back   Submit Registration

The summary below is based on the information you entered. If changes are needed, please select the Update Information link. This will navigate you back screen for you to make your change.

▼ Location Verification
   Verify My Locations by : Create My Own
Vendor Verification Based on : DISNEY

▼ Organization Information
   Organization Type : Company   Foreign Tax ID :
   1099 Classification : Corporation   Ordering DUNS :
   Location Name :   Internet Catalog :
   Location Web Address :   Preferred Ordering Method :

Thank You! Page

17. You will land on the Thank You! page. This page indicates that you have **successfully** completed the VSS registration process. You can now access your VSS account. Note that a vendor number has been automatically assigned.

Next Steps

You should receive a confirmation email regarding the submission of your VSS registration:

> Tue 9/13/2016 8:22 AM
>
> Host@Mass.com
>
> **ADVMAIL: DO NOT REPLY STATE OF ALASKA VSS NOTIFICATION: YOUR REQUEST FOR VSS REGISTRATION WAS RECEIVED**
>
> To   DOA DOF Vendor Help Desk (DOA sponsored)
>
> ⓘ We removed extra line breaks from this message.
>
> vss vendortester:
>
> Congratulations, you successfully submitted a request for registration in the State of Alaska Vendor Self-Service (VSS) system.
>
> Here are some details about your VSS account:
>
> Your User ID is: vssvendortester
> Your Legal Business Name is: VSSVENDORTESTER Your Vendor Number is: VS003378
>
> If you have questions, please contact the State of Alaska Vendor Service Team at doa.dof.vendor.helpdesk@alaska.gov or 907-465-5555, Press Option 1 for Vendors.

After an hourly synchronization process between VSS and our financial/procurement system, your registration information will come into our Help Desk for review. In addition, a vendor record will be created in our financial system with that vendor code. The status of your vendor record will be **Inactive**.

Our help desk will review your registration information, performing an IRS TIN Match between the Legal Name and Taxpayer ID Number. If there is a match, and all other information is validated, your registration information will be approved and your vendor record will be **Active**. You should receive the following email:

Tue 9/13/2016 11:20 AM

HOST@MASS.COM

ADVMAIL: STATE OF ALASKA VSS NOTIFICATION: WELCOME TO VSS

To   DOA DOF Vendor Help Desk (DOA sponsored)

vss vendortester:

Congratulations, you are now a certified user of the State of Alaska Vendor Self-Service (VSS) system.

Here are some details about your VSS account:

Your User ID (case sensitive) is: vssvendortester

Your Headquarters Account Legal Name is: VSSVENDORTESTER

Your Headquarters Account Code is: VS003378

Your Vendor/Customer is: VS003378

Once you receive this email, you may provide your vendor code to state agencies indicating that your vendor record is ready to receive award documents (i.e., Purchase Orders, Delivery Orders, etc.) and/or payments. But keep in mind that you will not be able to receive award documents (i.e., Purchase Orders, Delivery Orders, etc.) or receive payments until your vendor record has been approved in our system.