VENDOR SELF SERVICE:
VENDOR PERSPECTIVE

Presented by: Lisa Comer
wvOASIS Finance Team
Purchasing Agency Conference
October 2023

AGENDA

- ▶ Checklist for Creating a Vendor Account

- ▶ VSS Benefits

- ▶ New Vendor Account Reviews

- ▶ VSS User Roles

- ▶ Demo Vendor VSS Account Set-up

- ▶ Responding to Bids

- ▶ Demo Online Bid Responses

- ▶ Sync Cycle Reminders

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VENDOR ACCOUNT CHECKLIST

- Prior to beginning the process of creating or claiming a vendor account in VSS, a vendor will need the following information:

  - TIN number

  - Address information, such as Ordering and Payment addresses specifically

  - Email address to associate with the various address types (for example, this is used for bid alerts, account maintenance update and payment notifications)

  - A Contact Name, address, phone and email address for each address type (Ordering, Payment, etc)

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VENDOR ACCOUNT CHECKLIST

- ▶ Vendors should also be prepared to provide a W-9 to the Department of Administration Finance/Vendor Administration Division once the account has been created

- ▶ Note that Disclosures for Owner/Officer and banking information are no longer required by the Department of Administration Purchasing Division

    - ▶ Disclosure tab is still available to vendors in VSS

    - ▶ Disclosure records are not required in VSS, but are optional to accommodate any policy requirements for disclosure information

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BENEFITS OF VSS:
ACCOUNT MAINTENANCE

▶ Vendors can update account information directly in VSS

  ▶ Ordering and Payment addresses

  ▶ Contact information

  ▶ Account users

  ▶ Business Types for SWAM Certifications

  ▶ Disclosure information, if required/requested

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Edit My Account

Email: lisa.comer@wvoasis.gov | **Phone Number:** 3049350487 | **Vendor Status:** Active

Account Information	Addresses & Contacts	Users	Commodities	Service Areas	Business Types
	2 Pending				

Addresses   **Contacts**

📋 Pending Update

AD000002
1 COMER WAY

SOUTH CHARLESTON, WV 25309

▶ Show more

Account Information
Addresses & Contacts
Users
Commodities
Service Areas
Business Types
Disclosures

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BENEFITS OF VSS:
BID ALERTS

▶ To receive bid alerts via email, vendors should register for the applicable commodity codes

   ▶ When an agency publishes a bid opportunity to VSS, the vendor will receive an email if the bid opportunity contains the commodity codes for which the vendor signed up to receive alerts

   ▶ The State of WV uses the UNSPSC commodity codes (UNSPSC.org)

   ▶ Bid alerts for registered commodity codes require an email address be included on the vendor account

      ▶ Vendors should NOT select a Postal or Fax Correspondence Type

      ▶ wvOASIS does not generate Postal or Fax notifications, only Email type alerts for accounting maintenance, ordering and payment activity

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Edit My Account

Email: lisa.comer@wvoasis.gov | **Phone Number:** 3049350487 | **Vendor Status:** Active

← Back

Account Information	Addresses & Contacts	Users	Commodities	Service Areas	
	2 Pending 📄				∧

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Add Commodity/Service

ℹ️ Here is the current list of commodity codes/classes that describe the goods and services that your organization provides. You can add new commodity/service codes by clicking the **Add Commodity/Service** button. To delete a commodity/service code, click the **Delete** button next to the record that you wish to delete.

Any request to add a new commodity/service code or delete an existing commodity/service code will be reviewed for approval.

My Commodity List

1 - 1 of 1 Records	View per Page - **20** 50 100		« ‹ Page 1 of 1 › »
***Commodity/Service Code**	**Commodity Description**	**Status**	
70101904	Shrimp farming	-	Delete

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NEW VENDOR ACCOUNT REVIEWS

▶ New vendor accounts created in VSS will generate a certification VCM to be reviewed/processed by the Vendor Admin/Finance Division of Administration

  ▶ Vendors may be placed on *Payment* hold by the Vendor Admin/Finance Division group until the W-9 is provided

  ▶ Vendor *Active* status may be updated after the vendor information is reviewed

    ▶ Does the vendor already have an active/valid vendor account

    ▶ Has there been changes to the original vendor account

    ▶ Vendor accounts may be made *Inactive* or *Discontinued* depending on the review findings by the Vendor Admin/Finance Division

    ▶ Vendors may also be placed in a *Debarred* Active status as determind by the Purchasing Division.

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SIGNING UP FOR EFT

▶ To sign up for ePayments (EFT), go to the State Auditor's Office website at and click on E-Payments ,then click on Company e-Vendor Agreement (Setup) to view the instructions and form to be completed and submitted to the State Auditor's Office ePay Division

▶ VSS provides the option for vendors to sign up for EFT, however the feature is not yet activated

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VSS ACCOUNT USERS

- VSS user accounts can only be added by the vendor account administrator, and only via the vendor's VSS account
  - VSS users cannot be added in the Financial application
  - VSS users are available for viewing on VCUST in the Financial application
- There are various user roles that can be assigned to vendors creating a new vendor account, or claiming an existing account in VSS
  - The individual who creates or claims an existing vendor account in VSS will be the Primary Account Administrator by default

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VSS ACCOUNT USERS

- The account administrator adds other users within the vendor's organization to the account in VSS

  - Account Administrator

  - Full Access

  - Display Only

  - Additional access levels include:

    - Create Invoice (not currently accommodated by the State Auditor's Office)

    - Create Solicitation Response or Grant Funding Application

    - Submit Solicitation Response or Grant Funding Application

    - Query Tax Information

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Edit My Account

Email: lisa.comer@wvoasis.gov | **Phone Number:** 3049350487 | **Vendor Status:** Active

Account Information	Addresses & Contacts	Users	Commodities	Service Areas	Business Types	
	2 Pending					⌄

Add User

ℹ️ Listed in the grid are all the users for your VSS account. You may add account users by selecting the **Add User** button. To edit/delete existing user information choose row level action next to the corresponding record.

ℹ️ **ATTENTION:** Vendor Self Service users within your organization who need the ability to create and submit Grant Funding Applications will require the ***Create Solicitation Response*** and ***Submit Response*** Optional Access Level Roles below checked.

1 - 4 of 4 Records   View per Page - **20**   50   100   « ‹ Page 1 of 1 › »

*User ID	*First Name	*Last Name	Access Level	*Account Status	
▶ COMERTEST	LISA	COMER	Account Administrator	Active	⋮
▶ COMERTEST2	LEISA	TEST USER	Display Only	Active	⋮
▶ DOLINTEST	NORA	DOLIN-TEST	Account Administrator	Active	⋮
▶ HASSIGTEST	Travis	Hassig	Account Administrator	Active	⋮

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Edit User

User Information

| Personal Information | Password Management | Email Notifications | Access Levels | Security Question Management | Dual Factor Authentication |

* User ID (case sensitive)

COMERTEST

* First Name

LISA

* Last Name

COMER

* Email

lisa.comer@wvoasis.gov

* Phone

3049350487

Extension

Fax

☑ Primary Account Administrator

☐ Locked

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Edit User

Save & Close   **Cancel**

User Information

Personal Information   Password Management   Email Notifications   Access Levels   Security Question Management   Dual Factor Authentication

Primary Access Level

● **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.

○ **Full Access**

Full Access users may only update the account Information other than User Information. They will also have the ability to view financial transactions pertaining to the account. Full Access users will only have the ability to update their own profile information.

○ **Display Only**

Display Only users will be able to view the Account Information other than User Information. They will also have the ability to view financial transactions pertaining to the account. Display only users will only have the ability to update their own profile information.

Optional Access Levels

✔ **Create Invoice**

This optional level allows a User to create an invoice. All Users can view invoice information but a User must have this access level to create an invoice.

✔ **Create Solicitation Response/Grant Funding Application**

This optional level allows a User only allow creation and modification of, and not the submission of responses. This applies to both draft and submitted responses.

✔ **Submit Solicitation Response/Grant Funding Application**

This optional level allows a User to allow modification, withdrawal and submission of responses. This applies to both draft and submitted responses.

✔ **Query Tax Information**

Query Tax Information will allow a user to view tax information for their account

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PREVENT NEW ORDERS (PNO) PAYING THE REGISTRATION FEE

▶ The vendor will have the option presented at the end of the VSS registration process to pay the vendor registration fee online at that time, or to pay later

  ▶ Vendors are not required to pay the vendor registration fee prior to bidding on state solicitations

  ▶ However, vendors are placed on Prevent New Orders until they have paid the registration fee as required by the State Purchasing Division

  ▶ Vendors may be required to pay the fee prior to an award being made if there is not an applicable exemption for the purchase

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▶ VENDOR VSS ACCOUNT SET UP

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SETTING UP THE SOLICITATION DOCUMENT: ALERTS AND SEARCHING VSS

- Use the **Commodity Email Push** section to tailor the span of your vendor alerts
  - wvOASIS will automatically insert commodity codes from the hierarchy for the commodity code(s) entered at the **Commodity** line level
  - Commodity codes can be deleted or added to the **Commodity Email Push** section as needed
- Use specific **Solicitation Category** on solicitation documents, avoiding *Miscellaneous* when possible, improves the vendor's search experience

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Published Solicitations

⌄ Search

Show Me

Open

Category

Agricultural
Architect/Engr
Athletic
Audio/Video
Auto Supply
Building Supply
Chemicals
Clothing
Construction
Consulting
Educational
Equip. Rental
Equipment
Financial
Food
Food service
Fuels
Furniture
Highways

Keyword Search

Status

Search   Reset

View per Page - 20   50   100

《   ‹   Page 1 of 1   ›   》

Description   Department / Buyer ⇅   Solicitation Number / Type / Category ⇅   Closing Date and Time/Status ⇅

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▶ SEARCHING FOR BID OPPORTUNITIES

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RESPONDING TO BIDS: HOLDS

▶ Once a vendor has created or claimed an existing account in VSS, they can immediately begin responding to bids (solicitations) or grants

  ▶ *Prevent New Orders* does NOT prevent a vendor from responding online

  ▶ *Payment Hold* does NOT prevent a vendor from responding online

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RESPONDING TO BIDS:
ACTIVE STATUS

- A vendor's Active status also does NOT prevent a vendor from responding online
  - Note a vendor's Active status may however prevent a vendor's online response from being finalized after it syncs to the Financial application. For example, the following vendor Active statuses may impact a Solicitation Response (SR) document in Financials:
    - Discontinued
    - Inactive
    - Debarred
  - The Buyer is typically notified by the wvOASIS team once the team is alerted that a response did not successfully submit to Final in the Financial application
    - Note this does not translate to the vendor's response did not submit successfully in VSS
    - The SR has to submit successfully in VSS before it will sync to Financials. The SR syncs to Financials, where a decision then has to be made if the SR is to be considered and submitted to Final for inclusion on the Evaluation (EV) document

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RESPONDING TO BIDS : PRICING ATTACHMENT ISSUES

▶ Frequent issue/confusion reported by the vendor community:

  ▶ When a solicitation document contains instructions to use attached pricing attachment, the Commodity line(s) still requires an entry by the vendor, even if for $0 and comment "see pricing attachment", for example.

    ▶ VSS requires vendors to enter a response at the Commodity line level.

    ▶ Vendors are confused as to what to enter, the total amount of the bid or zero since pricing attachment is being used for specific pricing.

    ▶ Including specific instructions to vendors as to the required entry at the commodity line level for solicitations requiring a pricing attachment is helpful.

    ▶ The wvOASIS helpdesk or project team members cannot advise vendors what to enter in the commodity line fields in this scenario. We can only advise that an entry is required by the system.

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RESPONDING TO BIDS: COMMODITY LINE TYPES

- Commodity Line types:
  - *Item* Line Type is Quantity-based
  - *Service* Line Type is Dollar-based
- When a commodity Line Type of *Item* is used in conjunction with a quantity of zero, this can result in confusion on vendor responses.
  - The total bid response shows $0 on the vendor's response summary.
  - Zero Quantity x any Unit Price = Zero.

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Agency Request for Quote (ARFQ)

| General Information | **Commodity Lines** | Attachments | Solicitation Instructions | Evaluation Criteria | Terms & |

▼ Group 1 Default

Line Number	Commodity Description	Details		Requested
1	Procurement software	**Specifications** Procuremente software is used for managing contracts and agreements with suppliers, negotiating conditions, and buying products and services. **Commodity Code** 43231503		**Quantity** 0.00000 **Unit of Measure** LS **Delivery Date** -

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Solicitation Response (SR)

SR-0947-ESR08152300000000405

1 Select Lines	2 Respond To Lines	3 Enter Discounts & Comments	4 Add Attachments	5

▼ Group 1 Default

Line Number	Commodity Line Details	My Offer	
1	**Commodity Description** Procurement software **Commodity Specifications** Procurement software is used for managing contracts and agreements with suppliers, negotiating conditions, and buying products and services. **Requested Quantity** 0.00000 Lump Sum	**Response Type** Bid **Total** $0.00 **Alternate Specs Submitted** No **Comments**	**Unit Price** $25,000.00 **Delivery Days** 30

4 Add Attachments	5 Review & Submit

Response ID
ESR08152300000000405

Vendor Customer Code
VS0000040094

Response Total Attachment Count
0

Response Time
03:28 PM

First Name
LISA

Email
lisa.comer@wvoasis.gov

Total Bid
$0.00

Legal Name
LISA TEST COMER

Response Status
Accepted

Response Date
08/15/2023

Responded By User ID
COMERTEST

Last Name
COMER

Phone
3049350487

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RESPONDING TO BIDS: RESPONSE TYPES

▶ Vendors may be responding to only select commodity lines, or choosing to respond to confirm they are not bidding

▶ Response Type Options:

  ▶ Bid:

    ▶ Contract Amount or Unit Price, even if $0 due to Pricing Attachment

    ▶ Delivery Days if *Item* Commodity Line Type (Quantity-based)

  ▶ Bid with Condition:

    ▶ Contract Amount or Unit Price, even if $0

    ▶ Requires a *Comment* field entry

  ▶ No Bid:

    ▶ Requires a *Comment* field entry

  ▶ No Response:

    ▶ No entries required

    ▶ Often used by vendors to notify an agency they are not bidding on a particular solicitation document

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Solicitation Response (SR)

SR-0946-ESR09122300000000413

| ① Select Lines | ② Respond To Lines | ③ Enter Discounts & Comments | ④ Add Attachments | ⑤ Review & Submit |

Previous | **Continue** | **Save & Close** | **Exit**

▼ Group 1   Default

Number of Lines: 1

Line Number	Commodity Line Details	My Offer
1	**Commodity Description** Actuaries **Commodity Specifications**	**Response Type** Bid

Bid
Bid with Condition
No Bid
No Response

Alternate Specs Submitted
No

Contract Amount

Pre Fixed Line Amount
-

Additional Specs

Comments

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RESPONDING TO BIDS: DELIVERY DAYS

- Delivery Days is required on responses to *Item* type commodity lines.

  - Vendors are often confused as to the number of delivery days to enter.

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RESPONDING TO BIDS: MODIFYING A RESPONSE

► Vendors can Withdraw a response submitted online up until the time of the bid closing date/time

  ► The previously submitted response will not sync to Financials if withdrawn by the vendor prior to the bid closing date/time expiring

► Vendors can modify submitted bids up until the date/time the bid closing has expired

  ► If modifying a response already submitted successfully in VSS (held until the bid closing date/time expires), the vendor can modify and submit a new version up until the bid closing date/time has expired

  ► If a vendor creates a new response instead of modifying an existing response to a particular solicitation document, both responses will sync to Financials if the vendor submitted both without errors

  ► Responses created by vendors in VSS but are not submitted and remain in Draft status are not synced to Financials

    ► The Draft responses remain in Draft and can be deleted at any time in VSS by the authorized VSS users on the vendor's account

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RESPONDING TO BIDS: ATTACHMENTS

- ▶ Vendors can include attachments as required, or desired, on the responses
  - ▶ A maximum file size of 50MB per file
  - ▶ A maximum of five attachments per upload session

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My Responses

Search

Show Me

All ▾

Keyword Search

▶ Show More

[Search] [Reset]

Grid Actions ▾

1 - 20 of 20+ Records   View per Page - **20**   50   100   «   ‹   Page 1 of 1+   ›   »

Link to Response ⇕	Response Status ⇕	Response Date ▾	Solicitation ID ⇕	Status ⇕	Closing Date ⇕	Created By ⇕
SR-0310-ESR09122300000000412-2	Accepted	09/12/2023	CRFQ-0310-DNR2400000002-1	Closed	09/12/2023 01:30 PM EDT	COMERTEST
SR-0310-ESR09122300000000412-1	Accepted	09/12/2023	CRFQ-0310-DNR2400000002-1	Closed	09/12/2023 01:30 PM EDT	COMERTEST
SR-0946-ESR09122300000000413-1	Accepted	09/12/2023	ARFP-0946-MPO2400000001-2	Amended	09/14/2023 03:00 AM EDT	COMERTEST
SR-0608-ESR08232300000000408-1	Draft	08/23/2023	ARFQ-0608-DCR2400000013-1	Closed	08/28/2023 10:30 AM EDT	DOLINTEST

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| Continue > | Edit Response | Exit | : |

Related Actions   **Related Pages**

Hide No Bid Lines   View Solicitation

Withdraw

Print Response

mit

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1 - 20 of 20+ Records   View per Page - **20** 50 100   « ‹ Page 1 of 1+ › »

Link to Response ⇕	Response Status ⇕	Response Date ⬇	Solicitation ID ⇕	Status ⇕	Closing Date ⇕	Created By ⇕
SR-0310-ESR09122300000000412-2	Accepted	09/12/2023	CRFQ-0310-DNR2400000002-1	Closed	09/12/2023 01:30 PM EDT	COMERTEST
SR-0310-ESR09122300000000412-1	Accepted	09/12/2023	CRFQ-0310-DNR2400000002-1	Closed	09/12/2023 01:30 PM EDT	COMERTEST
SR-0946-ESR09122300000000413-1	WithDrawn	09/12/2023	ARFP-0946-MPO2400000001-2	Amended	09/14/2023 03:00 AM EDT	COMERTEST
SR-0946-ESR09122300000000413-2	Draft	09/12/2023	ARFP-0946-MPO2400000001-2	Amended	09/14/2023 03:00 AM EDT	COMERTEST

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▶ ONLINE BID RESPONSE

SYNC CYCLE REMINDERS

- FIN/VSS sync cycle runs hourly on the half hour
  - Monday through Friday
  - 8:30am – 5:30pm
- VSS to Financials sync occurs first
  - Online responses from VSS to Financials
  - Vendor account changes made by vendors
- Financial to VSS sync occurs last
  - Recently Let solicitation documents to be published to VSS
  - Modifications/addendum to already published solicitation documents
  - Recent award information
  - Vendor account updates initiated in Financials

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SYNC CYCLE REMINDERS

▶ Allow 10-15 minutes for the wvOASIS Cycle Dashboard to update to Complete prior to contacting wvOASIS.

   ▶ Large bid closing days may take longer given the volume of responses to sync from VSS to Financials

▶ Vendor activity performed after regular business hours in VSS may not sync to Financials until after the first sync cycle the following business day has completed

   ▶ Note the wvOASIS Cycle Dashboard is a tool to confirm the completion of one of multiple jobs that comprise the sync cycle.

   ▶ The dashboard is to confirm when the job loading the Solicitation Responses (SR) from VSS has completed.

   ▶ Additional jobs follow to sync vendor account updates that are processed on VCM documents.

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THANK YOU!

- Contact us at: FinanceTeam@wvOASIS.gov

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