Client Enrichment Series

Welcome to today’s presentation on an Introduction to the Vendor and Customer Self Service (VCSS) Web Site

The presentation will start at 2:00 p.m. EST

Note: Phones are automatically muted during the presentation. You have the ability to send questions to the host and presenters through your questions pane. They will answer as many of the questions as possible throughout and at the end of the presentation. All questions will be captured, and answers sent to all participants prior to the next presentation.
Introduction to the Vendor and Customer Self Service (VCSS) Web Site

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GSA’s Vendor and Customer Self Service (VCSS)
Vendor and Customer Self Service Overview

GSA Vendor and Customer Self Service Overview

Home | Training | Contact Us | System Requirements

- **Year-end Support**: The Financial Systems Service Desk will be available to help you on an extended schedule during year-end closing.
- **FLEET**: An important fiscal year-end reminder for SpeedPay and Mileage Express Users.
- **RWA**: October 2014 RWA billing statements are now available to be viewed.
- **GSA Fleet Customers**: AVF (Alternative Fuel Vehicle) surcharges have been turned off for the remainder of FY 2014.
- **VCSS** will only display 999 search results on its web pages.

If you do not do business with GSA as either a vendor or customer, please do not contact GSA to register in VCSS and do not attempt to log in.

System Login

Use this button if you’ve already registered for access to use VCSS.

Tips: Be sure to never use the "back" button of your browser while using VCSS.

Registrations & Access Requests

Use this button if you are a new user to VCSS and need to:

- Register new accounts
- Gain access to existing accounts

Support Request

Use this button to create a request that you be removed from an account, or from VCSS. You can also change account administrator status.

The General Services Administration (GSA) has implemented a Vendor and Customer Self Service (VCSS) system which can be used by both vendors and customers to manage their accounts.
VCSS Online Help - Table of Contents

• Segment 1: Introduction
• Segment 2: VCSS Account Registration & Requesting Access
• Segment 3: Basic Navigation
• Segment 4: Account Information
• Segment 5: Statement and Dispute Information
• Segment 6: Customer Payment Information
• Segment 7: Correspondence Information
• Segment 8: External Applications Information

https://vcss.ocfo.gsa.gov/
The General Services Administration (GSA) has implemented a Vendor and Customer Self Service (VCSS) system which can be used by both vendors and customers of GSA.

https://vcss.ocfo.gsa.gov/
Vendor and Customer Self Service Overview

- Vendor and Customer Self Service (VCSS) is a web application that allows users to quickly and efficiently access information concerning their accounts.
  
  - VCSS provides a single location for GSA customers to do the following:
    
    - View account information
    - Submit correspondence
    - Submit a dispute request
  
  - There are two types of Customer registration:
    
    1. VCSS account (BOAC)
    2. User ID (Individual)
Vendor and Customer Self Service Overview

https://vcss.ocfo.gsa.gov/
Support Request Overview

• Support requests can be created from the GSA Launch Page.

• The following types of support requests can be created:

  1. Change Account Administrator
  2. Remove Account
  3. Remove from VCSS
  4. Update User Profile

https://vcss.ocfo.gsa.gov/
Vendor and Customer Self Service Overview

General System/Login ID/ Password Assistance:

GSA Financial Systems Service Desk
Phone: 866-450-6588
Email: OCFOServiceDesk@gsa.gov

https://vcss.ocfo.gsa.gov/
Menu Bar

• Use the menu bar to navigate through your account and access account information.

• Accounts (segment 4)
• Statements (segment 5)
• Payments (segment 6)
• Correspondence (segment 7)
• External Applications (segment 8)

Vendor and Customer Self Service

Welcome Demo User | June 21, 2011 | Sign Out | Contact Us

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Accounts Menu

• **Account Information or Account Search**
  – If you have access to only one account, then the Account Information menu option displays. This will review general information of your account.
  – If you have access to more than one account, then the Account Search menu option displays. You can search for the account you would like to review information on.

• **Account Summary**
  – Review balances for your accounts.

• **Outstanding Balances by Account**
  – Review a list of outstanding balances for your accounts. (This page is the same as the home page).

• **Business Line Summary**
  – Review account balances sorted by GSA business line (i.e. Rent and Fleet).

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The Account Information page is used to display your account information details.

- If you have access to only one account, your account information automatically displays.

- To access the Account Information page, from the menu bar select **Accounts > Account Information**.

Note: If you have access to more than one account, there is an extra step to search for an account first which is covered on the next slide.
The Account Search page is used to search for a list of your accounts.

- If you have access to more than one account, you must first search for your accounts, and then select a specific account to view account information details.

- To access the Account Search page, from the menu bar select Accounts > Account Search.
Account Search (Cont’d)

- **Account Search page**
  - The Account Search page displays with a search criteria area to search for your accounts.
  - Select the [Search] button without entering search criteria.
    - If you have access to a large number of accounts, you may want to enter search criteria and select the [Search] button to limit the search results to a manageable number.
    - If you have access to a single account, you will see the Account Information page rather than the Account Search Page.

![Account Search Page](https://vcss.ocfo.gsa.gov/)

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The Outstanding Balances by Account page is used to review outstanding balances for your accounts.

- View outstanding balances, such as chargeback amounts and credit amounts.
- View outstanding statements.
  - “Outstanding statements” are statements with an outstanding or unpaid balance greater than $0.
- View recent statements.
  - “Recent statements” are statements from within the last three months.
- Also, create account correspondence to send to GSA.
  - Account correspondence are messages regarding a general issue or question on your account. This correspondence should not be related to a specific statement, refund or payment on your account because there are specific types of correspondence that should be created for these.

To access the Outstanding Balances by Account page, from the menu bar select **Accounts > Outstanding Balances by Account**.
Outstanding Balances by Account page

- To view outstanding statements on your account, select an account record and then select the [View Outstanding Statements] button.

```
VCSS > Accounts > Outstanding Balances By Account

Outstanding Balances By Account

View Outstanding Statements  View Recent Statements (3 Months)  Send Correspondence  Sort...  View as CSV

<table>
<thead>
<tr>
<th>Summary</th>
<th>Account Code</th>
<th>Account Name</th>
<th>Outstanding Amount</th>
<th>Outstanding Chargeback Amount</th>
<th>Outstanding Credit Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td>$1,900,729,883.37</td>
<td>$0.00</td>
<td>($265,042.78)</td>
</tr>
<tr>
<td>897009</td>
<td>Demo VCSS Vendor</td>
<td>$1,900,729,883.37</td>
<td>$0.00</td>
<td>($265,042.78)</td>
<td></td>
</tr>
</tbody>
</table>
Outstanding Balances by Account (Cont’d)

- **Statement Search page**
  - The Statement Search page displays with outstanding statement records already shown in the search results.
  - From this page you can select a **statement record** and then:
    - Select the **[View]** button to view the statement details, or
    - Select the **[View PDF]** button to view a PDF version of the statement.
Outstanding Balances by Account (Cont’d)

- Outstanding Balances by Account page
  - To create correspondence to send to GSA, in the search results select an account record and then select the [Send Correspondence] button.

![Outstanding Balances by Account page](https://vcss.ocfo.gsa.gov/)
Send Correspondence page

- The Send Correspondence page displays. To send correspondence to GSA, fill out the following information:
  - Your contact, account, and correspondence information.
  - Add an attachment, if needed (file types supported are text, PDF, Microsoft Excel and Word documents).
  - Select the [Submit Correspondence] button to send the correspondence to GSA. Once submitted, GSA will receive and review this correspondence.

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The Business Line Summary page is used to search for and view balances for your accounts, with data grouped by the business lines in GSA.

- View business line balances, such as total statement amounts, paid amounts, outstanding amounts, and credit amounts.
- Also, view statements and payments associated with a business line summary record.

To access the Business Line Summary page, from the menu bar select Accounts > Business Line Summary.
Business Line Summary (Cont’d)

- **Business Line Summary page**
  - The Business Line Summary page displays with a search criteria area to search for account records sorted by business line.
  - Enter search criteria and select the **[Search]** button.
Business Line Summary page

- In the search results, review the list of business line summary records.
• **Statement Search page**
  – The Statement Search page displays with statement records in the search results.
  – From this page you can select a **statement record** and then select the [View] button to view the statement details or select the [View PDF] button to view a PDF version of the statement.

![Statement Search](image-url)
Statements Menu

• View and Print Statements
  – View and print statements for your accounts.

• Statement Search by Agreement
  – Search for and view statements by your GSA agreement number.

• View Details
  – View details for statements on your accounts.

• Dispute Statement/Details
  – Dispute a statement that you think might be in error (for non-IPAC statements only).
  – Disputes of IPAC bills should be performed via Treasury IPAC guidelines using the chargeback process.

• View Dispute Requests
  – View dispute requests and status of your disputes.

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The Statement Search page is used to search for, view, and print statements for your accounts.

- View statements as Portable Document Format (PDF) files to print.
- Create and view statement correspondence to send to GSA.
  - Statement correspondence are messages regarding a specific statement on your account.
  - This correspondence should not be related to a general account issue or question, or a specific refund or payment on your account because there are specific types of correspondence that should be created for these.
- Dispute a statement that you think might be in error.
- View dispute requests and status associated with a statement.

To access the Statement Search page, from the menu bar select **Statements > View and Print Statements**.
View and Print Statements (Cont’d)

- **Statement Search page**
  - The Statement Search page displays with a search criteria area to search for statements associated with your account.
  - Enter search criteria and select the [Search] button.

![Statement Search page screenshot](image-url)
- **Statement Search page**
  - To view detailed information associated with a statement, select a **statement record** and then select the [View] button.

<table>
<thead>
<tr>
<th>Statement Numbe</th>
<th>Statement Date</th>
<th>Business Line</th>
<th>Account Code</th>
<th>Account Name</th>
<th>Total Billed</th>
<th>Paid</th>
<th>Adjusted</th>
<th>Applied Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>E0000094</td>
<td>01/28/2013</td>
<td>Supply</td>
<td>C-123604</td>
<td>VCSS Demo Vendor</td>
<td>$5,486.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
• **Statement Record**
  - The statement record opens and displays in a tab-like format. The first tab is the **Statement Information** tab and contains detailed information about the statement, including amounts.

![Image of Statement Record](https://vcss.ocfo.gsa.gov/)

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• **Statement Record**
  
  – Within the statement record, select the **Detail Billing Records** tab to review the details associated with the statement in the search results.
  
  • **Note:** Statement details are only available for customers doing business with GSA's Fleet, Rent, Global Supply, and Automotive Purchases business lines.

  – If you have access to a large number of detail records, you may want to enter search criteria and select the [Search] button to limit the search results to a manageable number.
• **Statement Record**
  – Within the statement record’s Details tab, to view more detailed information for a statement detail record, select a detail record and then select the [Detail] button.

  – **Note:** Statement details are only available for customers doing business with GSA’s Fleet, Rent, Global Supply, and Automotive Purchases business lines.
• **Detail Record**
  - The detail record opens and displays with detail record information.
  - **Note:** Statement details are only available for customers doing business with GSA's Fleet, Rent, Global Supply, and Automotive Purchases business lines.

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![View and Print Statements (Cont’d)](image-url)

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**View and Print Statements (Cont’d)**

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**https://vcss.ocfo.gsa.gov/**
View and Print Statements (Cont’d)

- **Statement Record**
  - Within the statement record, select the **Attachments** tab to review supporting documentation associated with this statement.
  - Select an attachment record and then select the [**View**] button to open an attachment.

<table>
<thead>
<tr>
<th>Summary</th>
<th>Title</th>
<th>Size (bytes)</th>
<th>Content Type</th>
<th>Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>BillingStatement_490003R005134.pdf</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

[https://vcss.ocfo.gsa.gov/](https://vcss.ocfo.gsa.gov/)
View and Print Statements (Cont’d)

- **Statement Record**
  - Within the statement record, select the **Review Correspondence** tab to review correspondence associated with this statement in the search results.
• **Statement Record**
  - To review the details of a statement correspondence record, select the **correspondence record** and then review the details that display below the search results.
The Statement Search by Agreement page is used to search for statements by your GSA Agreement Number.

- Provides the ability to search for Statements using Agreement Number (for RWA/HOTD customers, this would be the “RWA Number”).
- Search criteria includes:
  - Agreement Number
  - IPAC Information (Funding Document, Purchase Order Number, etc.)
  - Account Information (Account Code, Agency, Bureau, etc.)
- Provides the ability to view the Statement by launching the Statement Query pre-searched by the selected number.
- To access the Statement Search by Agreement page, from the menu bar select Statements > Statement Search by Agreement.
Statement Search by Agreement Page

- The Statement Search by Agreement page displays with a search criteria area to search for statements associated with your account.
- Enter search criteria and select the [Search] button.
Statement Search by Agreement (Cont’d)

- **Statement Search by Agreement Page**
  - In the search results, review the statement records.

![Image of statement search page](image-url)
The Detail Record Search page is used to search for and view details for statements associated with your accounts.

- View details for a statement that display as separate records referred to as “detail records”.
  - Detail records identify the goods/services billed, the statement they are associated with, the business line, and statement dates.
  - View more detailed information for each statement detail record.
  - **Note:** Statement details are only available for customers doing business with GSA's Fleet, Rent, Global Supply, and Automotive Purchases business lines.

- Also, export the detail records to a CSV file to view and sort through the records.

- To access the Detail Record Search page, from the menu bar select **Statements > View Details**.

[Link to VCSS website](https://vcss.ocfo.gsa.gov/)
View Details (Cont’d)

- **Detail Record Search page**
  - The Detail Record Search page displays with a search criteria area to search for details on statements.
  - Enter search criteria and select the [Search] button.
  - You can search by business line and can additionally search by specific fields related to the GSA business lines.

- **Note:** Statement details are only available for customers doing business with GSA's Fleet, Rent, Global Supply, and Automotive Purchases business lines.

https://vcss.ocfo.gsa.gov/
Dispute Statement/Details

- The Dispute Statement/Details process is used to dispute an entire statement or specific details of a statement (detail records).
  - Submit a dispute request if you find the statement might be in error or contain inaccurate information.
  - To dispute a statement or details associated with a statement, VCSS has a dispute wizard that walks you step-by-step through the dispute submission process.
    - If you would like to dispute details of a statement, there is an additional step to search for and select the specific detail records you would like to dispute.
    - **Note:** Statement details are only available for customers doing business with GSA’s Fleet, Rent, Global Supply, and Automotive Purchases business lines.

- To access the dispute wizard, from the menu bar select **Statements > Dispute Statement/Details**.

![Dispute Statement/Details Menu](https://vcss.ocfo.gsa.gov/)

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*https://vcss.ocfo.gsa.gov/*
Dispute a Statement

- **Enter Statement Number to Dispute page**
  - The first page of the dispute wizard displays where you identify the statement you would like to dispute.
  - Enter the **Statement Number** and select the [Next] button.
    - If the statement is associated with more than one account, you must also enter the **Account Code**.

![Image of Enter Statement Number to Dispute page]

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Dispute a Statement (Cont’d)

• Select Dispute Type page
  – To dispute details of a statement, select **Choose Which Detail Records to Dispute** and then select the **[Next]** button.
    - When selecting this option, there is an additional step to search for and select the specific detail billing records to dispute.
  – **Note:** Statement details are only available for customers doing business with GSA's Fleet, Rent, Global Supply, and Automotive Purchases business lines.

![Vendor and Customer Self Service](https://vcss.ocfo.gsa.gov/)
View Dispute Requests

- The Dispute Requests Search Page is used to search for dispute requests.
  - Ability to search for dispute status using general, customer, and dispute criteria.
  - View specific information for each dispute such as the submitted date, the dispute reason, dispute explanation, last action date, and dispute resolution.
  - Provides dispute request status updates and GSA dispute resolution information.
  - To access the Dispute Requests Search page, from the menu bar select **Statements > View Dispute Requests**.
View Dispute Requests (Cont’d)

- **Dispute Requests Search page**
  - The Dispute Requests Search page displays with a search criteria area to search for dispute requests.
  - Enter search criteria and select the [Search] button.

![Dispute Requests Search page](https://vcss.ocfo.gsa.gov/)

https://vcss.ocfo.gsa.gov/
View Dispute Requests (Cont’d)

- Dispute Requests Search page
  - Provides the ability to view specific information for each dispute, including:
    - Statement Number
    - Original Dispute Amount
    - Dispute Submitted Date
    - Dispute Status
    - Dispute Reason
    - Last Action Date
    - Dispute Explanation
    - Dispute Resolution

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• **View Customer Payments**
  - Search for and view payments made to GSA for your accounts.

• **View Refunds**
  - Search for and view refunds received from GSA for your accounts.

https://vcss.ocfo.gsa.gov/
Correspondence Menu

• View Account or Statement Correspondence
  – Select the View Account Correspondence option to search for and view account correspondence.
  – Select the View Statement Correspondence option to search for and view correspondence for a specific statement on your account.

• Create Account or Statement Correspondence
  – Select the Create Account Correspondence option to create account correspondence.
  – Select the Create Statement Correspondence option to create correspondence for a specific statement on your account.

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External Applications Menu

- If you need to access an application outside of VCSS, select one of these External Applications menu options.
  - From the menu bar, select External Applications > [application].

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BAAR-VCSS Navigation Questions
Contact us at bar@gsa.gov
Find out more at www.gsa.gov/baar

eRETA Questions
Contact us at eRETA@gsa.gov
Find out more at www.gsa.gov/ereta
Questions?
• Thank you for joining us today for a discussion on an Introduction to the Vendor and Customer Self Service (VCSS) Web Site

• Future sessions
  – December 11, 2014: Introduction to PBS Property Management and Lease Administration
  – January 15, 2015: Introduction to the PBS Pricing Policy

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Thank you!