



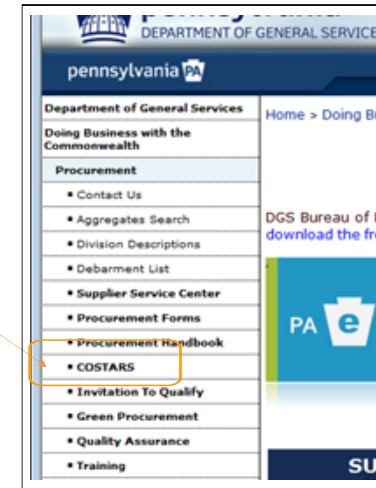
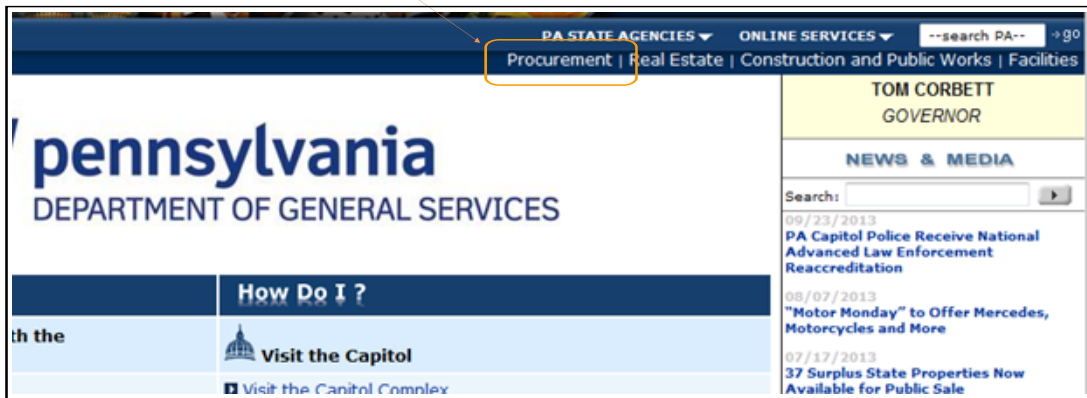
COSTARS Sales Reporting Manual

December 2013

DGS/COSTARS website

Suppliers access the COSTARS website through the DGS website. Follow the steps below to navigate to the COSTARS website.

1. Navigate to the DGS COSTARS page using **Internet Explorer 6.0 through 8.0** only: www.costars.state.pa.us
 - Alternatively, navigate to the DGS home page at www.dgs.state.pa.us, click **Procurement** in the top, right menu, then click **COSTARS** in the left menu



2. Click the **Suppliers** button in the middle of the screen



Login from the PA Supplier Portal

3. Click the [Access the Supplier Gateway](#) link.

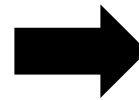
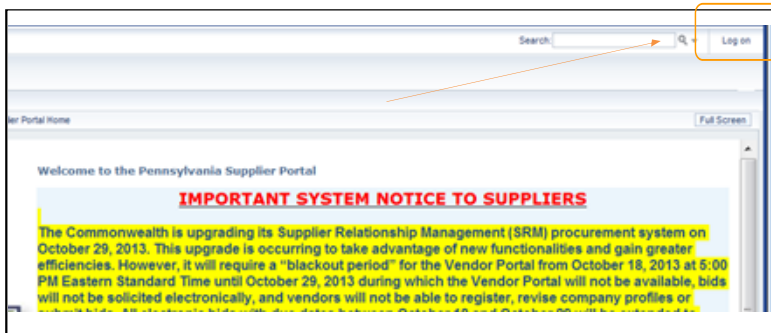
Report Sales/Pay Fee/Edit Profile/
Review Contract Terms and Offerings Instructions

1. Click on the Supplier Gateway button below.
2. Log in to the Supplier Portal.
 - o In the upper right-hand corner select **Log On**.
 - o Enter your User ID and Password.
3. Select the **Bidder** Tab at the top of the page. .
4. Select **Enterprise Applications** on the left side of the page.
5. If a Security Warning pop-up box appears, select **No** or **Show All Content**.
6. Select the **COSTARS** link at the top of the page to access the Vendor Dashboard where you can report sales, pay administrative fees, edit your profile or review contract terms and offerings.

Click here to Access the 


Note: For the most optimal experience, please ensure that you are using **Internet Explorer** versions 6 through 8.

4. Click Log On in the top right side of the screen. Login with your credentials.



Welcome Pennsylvania Suppliers! The Pennsylvania Supplier Portal will be unavailable on **Tuesdays and Thursdays from 8:00 PM - 9:00 PM Eastern Time for regular system maintenance**. During this time, the system is not available for transactions including new registrations, supplier record maintenance, and bidding. Thank you for your patience.

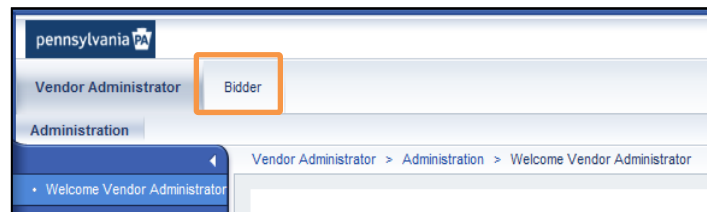
User *
Password *



Logon Problems? [Replace Password](#)
Forgot your User ID? Contact the Payable Service Call Center at 877-435-7363 - option 1 Or email RA-PSCSRMPORTAL@pa.gov

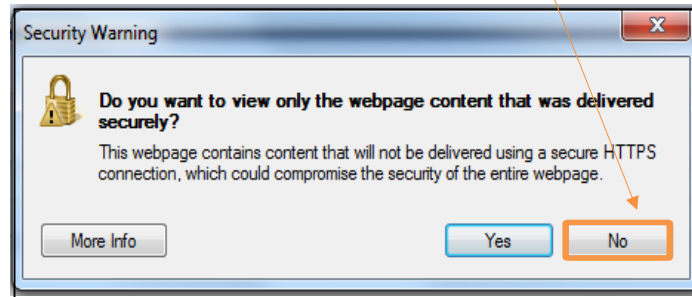
Note: If you forget your User Name or Password, call the Call Center at 1.877.435.7363 Option 1. To Reset your password click on the Replace Password link

5. Click on the Bidder tab at the top of the screen.



Login from the PA Supplier Portal

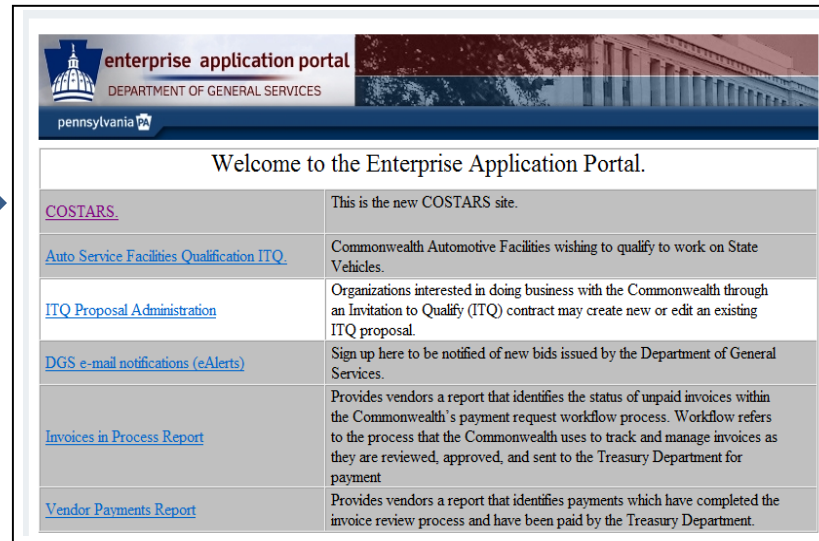
6. Click Enterprise Applications on the left menu. When the Security Warning Pops-up, Click the No. If there is no Security Warning, look on the bottom of the page for the Only Secure Content is displayed error box. Click Show All Content. If you do not see a Security Warning or Error Box and your page is blank with no pop-up, please disable pop-up blockers in your browser. Note: You must use **Internet Explorer 6.0 through 8.0 only**.



Note: If you click Show All Content the Portal will take you back to the Vendor Administrator Tab. Simply Click Bidder and Enterprise Applications again to get to the screen below.



7. Under the Welcome to the Enterprise Application Portal, click the link to the COSTARS system.



8. You will be logged into COSTARS and directed to the *Welcome to COSTARS* screen (shown on next page).

COSTARS SUPPLIER GATEWAY

Welcome to the COSTARS Supplier Gateway area! There are four main sections to the COSTARS home page. Review each box to learn more about these components.

Website Header: The website header identifies the COSTARS system. It includes the vendor's name once logged into the system. A login/logoff button controls security to the site. Remember to logoff after each session in COSTARS.

WELCOME TO COSTARS SUPPLIER GATEWAY!

MY CONTRACTS DUE FOR RENEWAL OR REQUIRE PAYMENT

No Contracts Due For Renewal or Payment.

MY ACTIVE CONTRACTS

Contract #	Contract Description	End Date	
4400010458	Passenger Vehicles Contract - Supplement		Report Sales
013-106	Emergency Responder Vehicles	05/14/2015	Report Sales
4400006415	Police & Specialty Vehicles	09/30/2011	Report Sales

MY CONTRACTS DUE FOR SALES REPORTING

Contract #	Contract Description	End Date	
4400010458	Passenger Vehicles Contract - Supplement		Report Sales
013-106	Emergency Responder Vehicles	05/14/2015	Report Sales
4400006415	Police & Specialty Vehicles	09/30/2011	Report Sales

[Reported Sales Journal](#)

MY CLOSED/REJECTED CONTRACTS

Contract #	Contract Description	End Date	
4400007502	Lt Duty Pickup Trucks and Cargo Vans		Report Sales
4400007630	Passenger Vehicles Contract		Report Sales
4400008610	Passenger Vehicles Contract		Report Sales

Left Navigation Menu:

- Home
- Sales Reporting
- Contract Details
- COSTARS Members

USER MANUAL

VENDOR'S GUIDE

Left Navigation Menu: The left side navigation menu provides links to the system functionality.
Home: Returns you to this screen.
Sales Reporting: Allows you to enter sales data or upload data for each contract.
Contract Details: Review the details and update the contact information for each contract.
COSTARS Members: This is a member search function including export to excel of all member contact information.

Training Materials: The training materials section provides users with information on performing COSTARS system activities.

Dashboard: The vendor dashboard provides quick links to perform the required activities for each contract.

Report Sales Data

Sales information for each contract is required to be reported quarterly in COSTARS. The dashboard provides a quick link to report sales for each contract.



1. Click [Report Sales](#) to add sales information for the contract listed.

Note: To view all sales data that has been reported click [Reported Sales Journal].

MY CONTRACTS DUE FOR SALES REPORTING			
Contract #	Contract Description	End Date	
4400010458	Passenger Vehicles Contract - Supplement		Report Sales
013-106	Emergency Responder Vehicles	05/24/2013	Report Sales
4400006415	Police & Specialty Vehicles	09/30/2011	Report Sales

[Reported Sales Journal](#)

2. The Reported Sales Journal appears, showing all reported sales for the selected contract. Keep Reported Sales Journal Drop Down Menus on All when entering sales. Use No Sales to Report if you have no sales. Use Add New Sale if you have a small number of Sales. Use Upoad Sales Data only if you have a large number of Sales to report. Please only use one method.

1. Click [Add New Sale] to report a new sale.
2. Click [Upload Sales Data] to upload a spreadsheet of sales information.
3. Click [No Sales to Report] to indicate that no sales were made during the quarter.
4. Click Edit  or Delete  next to the line item in the sales journal to edit the sales information or remove the sale from COSTARS.

REPORTED SALES JOURNAL

Vendor










Contract

Selected Contract

Contract

Contract Awarded Date Expiration Date

Reported Sales Reporting Year Reporting Quarter 3 Records Found.

Contract #	Customer Name	County	Category	Sales Date	Entry Date	No. of Sales	Total Amount \$	X
013-106	Athens Township	Bradford	Specialty Response Vehicles...	08/15/2013	10/18/2013	1	42801.00	  
013-106	Athens Township	Bradford	Specialty Response Vehicles...	08/15/2013	10/18/2013	1	49831.00	  
013-106	UPMC	Allegheny	Specialty Response Vehicles...	08/13/2013	10/18/2013	1	30413.00	  

Note:

- Use "Add New Sales" button to report transactions individually
- Use "No Sales to Report" button to indicate no sales
- Use "Upload Sales Data" button to upload a large number of transactions using spreadsheet
- To print sales journal, use "Export to Excel" button, then Print

Add New Sales Record

1. Add a new sales record by clicking the [Add New Sale] button at the bottom of the screen.
2. Start typing the customer's information. Matching COSTARS members will appear. Click the customer's name.
3. Select the product/service bought from the drop-down list
4. Type or choose the sales date from the calendar.
5. Type the total number of sales made to the customer on the selected date. This function allows you to batch similar sales to the same customer within the same reporting period.
6. Type the total sales amount. Do not use commas. Leave the Drop Down Menus in the Reported Sales Journal blank.
7. Click [Save]. The new record will appear in the table of sales in the lower portion of the screen.

REPORTED SALES JOURNAL

Vendor

Contract

Selected Contract

Contract	013-106 - Emergency Responder Vehicles		
Contract Awarded Date	05/24/2012	Expiration Date	05/24/2014

Sales Record Details

* Customer Name

Sale Product/Service Category

* No. of Sales

* Sales Date

* Total Amount \$

Upload Sales Data

Sales information may be uploaded using a standardized spreadsheet template.

1. Click the [Sales Reporting Standard Template](#) link, under **Reporting Tools**, on the right side of the screen to download and open the template. Do not make any changes to this Template.
2. Open the spreadsheet and enter your sales data. You must create a separate spreadsheet for each contract. You will need to know:
 - A. Your six-digit vendor number
 - B. Your six or ten digit contract number for the sale
 - C. The member organization's ID number who purchased your products. You can look this up by downloading the COSTARS Members List spreadsheet and finding the Member ID in Column B. This spreadsheet is available in Reporting Tools.
 - D. The category code number for the product category of the sold product. You can look this up by downloading the COSTARS Product/Service Category List and finding the Category Code in Column C, available in Reporting Tools.
 - E. The sales date
 - F. The total number of sales made to the customer on the date
 - G. The total sales amount
3. Save the spreadsheet on your computer.
4. Go back to the COSTARS screen and choose the Contract # from the drop-down.
5. Click [Select File] to browse your computer and select the spreadsheet you saved in Step 3.
6. Click [Upload] to upload the sales data.

Spreadsheet Template

VendorNumber	ContractNumber	MemberID	CategoryCode	SalesDate	No.of Sales	TotalAmount

SALES DATA UPLOAD

Note: The file can be accepted only if the following criteria is met:

1. The data entered in the spreadsheet is only for the contract selected.
2. The uploaded data is in standard template format. Please use the template (Sales Reporting Standard Template) available under reporting tools.
3. Vendor and Contract Number entered in the file corresponds to the logged in Vendor.
4. Member ID entered in the spreadsheet matches with the record in our database. Please use the (COSTARS Member List) reporting tool to get the exact Member ID.
5. Category Code entered in the spreadsheet matches with the record in our database. Please use the (COSTARS Product/Service Category List) reporting tool to get the exact Category Code.

* Contract #

* File

- Reporting Tools**
- [Sales Reporting Standard Template](#)
 - [COSTARS Member List](#)
 - [COSTARS Product/Service Category List](#)

Links to upload template and supporting documents.

Upload Sales Data

Below are some examples of error messages you may see when uploading a sales data file. Correct all errors in the spreadsheet, then upload the file again.

SALES DATA UPLOAD

Note: The file can be accepted only if the following criteria is met:

- The data entered in the spreadsheet is only for the contract selected.
- The uploaded data is in standard template format. Please use the template (Sales Reporting Standard Template) available under reporting tools.
- Vendor and Contract Number entered in the file corresponds to the logged in Vendor.
- Member ID entered in the spreadsheet matches with the record in our database. Please use the (COSTARS Member List) reporting tool to get the exact Member ID.
- Category Code entered in the spreadsheet matches with the record in our database. Please use the (COSTARS Product/Service Category List) reporting tool to get the exact Category Code.

Reporting Tools

[Sales Reporting Standard Template](#)

[COSTARS Member List](#)

[COSTARS Product/Service Category List](#)

* Contract #

* File

Upload Results

File upload failed because of following records in error. Please correct these records and upload the file again.

Total Number of Errors: 3

Record Number	Vendor Number	Contract Number	Category Code	Member ID	Sales Date	No. of Sales	Total Amount	Error Message
4	998877	002-267	27	12011	2013-04-12	4	473	Invalid Product Category Code
5	998877	003-100	25	11827	2013-05-08	6	366	Invalid Product Category Code
6	998877	002-267	26	4411	2013-05-04	7		Invalid Total Amount

Error messages describe incorrect or missing data.

Example of successful upload:

SALES DATA UPLOAD

Note: The file can be accepted only if the following criteria is met:

- The data entered in the spreadsheet is only for the contract selected.
- The uploaded data is in standard template format. Please use the template (Sales Reporting Standard Template) available under reporting tools.
- Vendor and Contract Number entered in the file corresponds to the logged in Vendor.
- Member ID entered in the spreadsheet matches with the record in our database. Please use the (COSTARS Member List) reporting tool to get the exact Member ID.
- Category Code entered in the spreadsheet matches with the record in our database. Please use the (COSTARS Product/Service Category List) reporting tool to get the exact Category Code.

* Contract #

* File

Records Uploaded Successfully!

Important: COSTARS will notify you if there are errors in the spreadsheet. If there are errors you must fix them and upload the spreadsheet again. When there are errors, **no data will be saved** until the entire spreadsheet is accepted.

No Sales Data to Report

1. Add a record indicating that there are no sales this quarter by clicking the [No Sales to Report] button at the bottom of the screen. The following information will appear on the screen. All fields except the Sales Date will be grayed out.
2. Enter a date for the “sales date.” This date should be any date within the quarter when there were no sales. This date simply functions as a way for the system to know which time period this record is for.
3. Click [Save].

REPORTED SALES JOURNAL

Vendor

Contract

Selected Contract

Contract	013-106 - Emergency Responder Vehicles		
Contract Awarded Date	05/24/2012	Expiration Date	05/24/2014

Sales Record Details

* Customer Name

Sale Product/Service Category

* No. of Sales

* Sales Date

* Total Amount \$