



# BIDS SYNC

## California State Contracts Register (CSCR)

Creating a Solicitation with  
Electronic Response

Illustrated User Manual

**BIDSYNC**

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## Introduction

BidSync is a powerful e-procurement system designed to save you time and money in preparing and managing all phases of the acquisition process. This manual will walk you through the process of posting your solicitation/CSCR advertisements.

At the BidSync homepage [www.bidsync.com](http://www.bidsync.com), you will need to enter your unique username and password, which must be obtained from your department system administrator. This will give you access to your account including the ability to post solicitations. If at any time you have questions contact the BidSync Agency Support Team at 1-800-990-9339 ext 1. For further information about this or any other topic, please visit our website at [www.bidsync.com](http://www.bidsync.com) or DGS's e-procurement site at [www.eprocure.dgs.ca.gov](http://www.eprocure.dgs.ca.gov).

## Creating and Advertising a Solicitation

To create and advertise a solicitation follow the steps listed below:

Navigate to [www.bidsync.com](http://www.bidsync.com), and login using your username and password.



Select the Bids tab, and then the Create Bid tab in the upper left corner of the page. (You can also select the Create Bid link from the Quick Nav box on the home tab, and you will be taken to the same location.)

BID	DESCRIPTION	TIME LEFT	BIDS	PACKET	CONTACT	REVISE	COPY	CANCEL
0901-164	adef	8 days, 23 hrs	0	✉	Bob S	Revise	📄	🛑
0901-161	fdhghsfdh	14 days, 23 hrs	0	✉	Bob S	Revise	📄	🛑
123456789	Event Planning Service RFP	34 days, 22 hrs		✉	Karl W	Revise	📄	🛑

## Bid Characteristics (Page 1)

Complete the Bid Template by entering the correct data into the following fields:

- Acquisition Classification - Select from IT Goods and Services, or Non-IT Goods and Services. (If you select Non-IT Services, you must further qualify the acquisition classification by selecting from the additional drop down menu.)
- Acquisition Method - Select from the available drop down menu (most solicitations will likely be formal competitive).
- Bid Type - Based on the entries for the previous two fields, the related bid types will display, select the appropriate type.
- Department - Select the relevant department.
- Budgeted Amount - As indicated, this will not be shown to suppliers. This property relates to your delegated purchasing authority, or DPA (you will not be able to exceed your DPA when creating a solicitation). Amounts must be at least \$.01.
- Bid Response Model - Until the entire state is utilizing the complete paperless system, Pilot Departments can select either Paper or Electronic Response, whereas Non-Pilot Departments will only have the option for a Paper Response.

**Bid Creation**

**BID CHARACTERISTICS**

Acquisition Classification: NON-IT Services  
Public Works

Acquisition Method: Formal Competitive

Bid Type:  RFP  Reverse Auction  IFB

Department: Aging, California Commission on

Budgeted Amount: 1500 (Note: This amount will never be shown to suppliers.)

Bid Response Model:  Electronic Response  Paper Response

Next Page >> Cancel

## Bid Layout Type (Page 2)

Select the layout type for your solicitation and select Next Page.

- Standard – The most common layout type, accepts single or multiple line items.
- Array Bid – Suppliers enter their pricing into a spreadsheet-type template.
- Mixed Bid – Items can be arranged into groups or lots. This option allows for line items and arrays.

The screenshot shows the 'Bid Creation' form with the 'BID LAYOUT TYPE' section. The 'Layout Type' is set to 'Standard'. Below the selection are three radio buttons: 'Standard', 'Array Bid', and 'Mixed Bid'. Each option has a brief description. At the bottom of the form are 'Next Page >>' and 'Cancel' buttons.

## Bid Characteristics

- Bid Participation - Select Agency Only, unless creating a coop bid. Selecting a Tentative Release Date is optional but offers the flexibility of having the system automatically release the bid at a later date.
- Bid Visibility - This property allows you to select what and when bid information is released to suppliers and users inside the agency.

The screenshot shows the 'Bid Creation' form with the 'BID CHARACTERISTICS' section. The 'Bid Type' is 'RFP'. The 'Department' is 'Aging, California Commission on'. The 'Bid Participation' is set to 'Agency Only'. The 'Sealed' checkbox is checked. The 'Prebid Duration' is '0'. The 'Bid Visibility' section contains several dropdown menus and checkboxes for controlling bid information release.

## Bid Duration

Select a date and time for the solicitation to close. Please note that when the solicitation closes the "advertisement" will also conclude.

## Bid Question & Answer Duration (Optional)

You may select a date and time when questions will no longer be accepted on the system. If this field is left blank, the Q&A period will conclude when the solicitation closes.

## Pre-Bid Conference

Click the Add button to schedule a pre-bid conference. Select either Online Conference or At the Following Location. For on-site conferences enter the address. For both options, select the time and date and indicate whether attendance will be optional or mandatory.

## Contract Duration

To determine the contract duration, click on the drop down menu. If there will be options for annual renewals, select from the drop-down menu. In the Prices Good For menu, select the best option for your solicitation. Under Contract Renewal, select Not Applicable for contracts that are one time purchases. Next, select the number of days pricing will be good for. The Budgeted Amount is prefilled from the previous page, but the Expected Expenditure is optional, and will not be viewable by vendors. This gives the supplier an estimation of the amount to be spent.

<b>BID DURATION</b>	
Please select the end date and time for the bid:	
Date: Apr 10, 2009	Time: 5:00 pm Pacific Daylight Time
<small>(Please enter date as Feb 23, 2003 or 02/23/2003)</small>	
<b>BID QUESTION &amp; ANSWER DURATION (OPTIONAL)</b>	
Please select the end date and time for questions and answers:	
Date:	Time: 7:00 am Pacific Daylight Time
<small>(Please enter date as Feb 23, 2003 or 02/23/2003)</small>	
<b>PRE-BID CONFERENCE</b>	
Pre-Bid Conference(s) <input type="button" value="Add"/>	
<b>CONTRACT DURATION</b>	
Contract Duration	90 days <small>(Note: If you select "One Time Purchase" a requisition will be created once the bid is awarded.)</small>
Contract Renewal	Not Applicable
Prices Good for	30 days
Budgeted Amount	\$1,500.00 <small>(Note: This amount will never be shown to suppliers.)</small>
Expected Expenditure	<small>(Note: This amount will be shown to suppliers.)</small>

## Bill Code /Account Codes

Enter the relevant account codes as they relate to the entity, center, account, etc. Only the 5 digit department bill code is required.

## Construction License Type

This property allows you to indicate what license(s) you are requiring qualified vendors to hold. Select the Edit link, and then check the required license types.

## Bid Information

- **Bid Number** – Enter a bid number using your departments' current numbering system.
- **Bid Title**- Create a descriptive, yet concise title for your solicitation. This title should give suppliers a good indication of what you are specifically looking for.
- **Bid Comments** – In this field you can include any solicitation details that are necessary for suppliers to understand that have not been entered already. Use this field as generously as you would like.

<b>BILL CODE</b>														
<b>Account Codes</b>	BillCode	- SubUnit	- CostCenter	- ObjectCode	- RevenueCode									
<table border="1"> <tr> <td colspan="5"><b>CONSTRUCTION LICENSE TYPE</b></td> </tr> <tr> <td colspan="5">Construction License Type <a href="#">Edit</a></td> </tr> </table>					<b>CONSTRUCTION LICENSE TYPE</b>					Construction License Type <a href="#">Edit</a>				
<b>CONSTRUCTION LICENSE TYPE</b>														
Construction License Type <a href="#">Edit</a>														
<b>BID INFORMATION</b>														
<b>Bid Number</b>	(optional)													
If no bid number is entered, the system will automatically assign the bid a unique value.														
<b>Bid Title</b>	Please do not use more than 80 characters.													
<b>Bid Comments</b>	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>													
You can use HTML tags in here to create a specific lay-out for item description.														

## Additional Offer Fields

Often, the need to obtain additional information such as manufacturer, Brand, Part #, etc. for each individual item will arise. Additional offer fields allow the buyer to request this information on a multi-line item bid. Click on the Edit link in this section to create a field for the vendor to input this information. A window will appear where you can enter the fields you would like vendors to fill out for each line item. By clicking the Add button after each entry your additional offer filed will be saved.

## Line Item

To begin adding your line items, click on the Add Line Item button. This is where you will add your item information for single or multiple line items.

## Bid Information - Line Item Window

Enter the line item Title. The title gives the supplier an idea of what is being requested without seeing the description. Enter the Product Code (optional) and select a pricing type. The expected expenditure is optional and will be viewable by the supplier. Next, select a unit of measurement. To select a Delivery Location, click the Here link and choose from a list of your agency's locations. Click Select next to the location(s) you want to use. To add an additional location to the list, click on New Location. After a delivery location has been selected, enter the Quantity you would like delivered to that location. You can have multiple delivery locations and quantities per line item. Next, enter a brief description of your item. You will see your additional offer fields here as well. Check the related box to apply them to the line item. To add multiple items, click Next Item. When you are finished entering item information, click Done. Your item information will be saved and displayed in the bid information section.

## Editing Line Items

To edit line item information, click Edit. To delete line item information, click Delete.

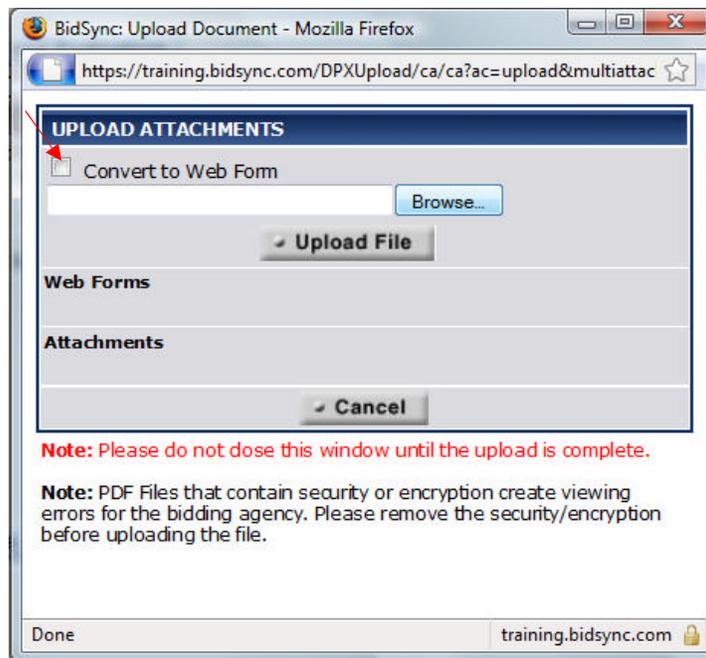
## Upload Documents

In this section you will attach your documents to your solicitation. There is no limit to the file type, size or number of attachments. Attach the files by clicking the Upload Document button, selecting the Browse button, finding your file, and then attaching it.



## Web Forms

You can request BidSync to convert a Word or Excel file to an online web form. Select the Upload Document button, and check the box next to Convert to Web Form in the window that appears. Click on Browse, select the document you want converted, and click Open. Write any instructions you have for the BidSync IT member converting the document in the box provided, then click submit. The documents can also be reordered. You will receive an email confirmation when your document(s) have been converted to a Web Form.



## UNSPSC Classification Code

Find the code for your solicitation's line items by entering keywords, or the specific UNSPSC code into the search field and click search. Once search results display, you can click the Hints button to display further details of the search results. When you have found the correct classification code highlight it and click the Add Classifications button. Add as many codes as necessary to cover all line items in the solicitation.

**CLASSIFICATION** ⓘ

Type in what classification or UNSPSC number you would like to search for. Select the sub-classifications you would like to use from the results box and click "Add" to move it to the bottom box. You can list your bid in as many classifications as you would like (hold the Control key to select more than one classification at a time). If you need to remove a classification from your "Added" menu, click on the classification name and then click on "Remove." Use commas for multiple codes.  
(UNSPSC Code 10.0501)

Search Results

Search >> (Search by Keyword or UNSPSC Code) [View All](#)

Select All Add Classifications Hints

Your item has been added to these Classifications

Remove Classifications Hints

**CLASSIFICATION** ⓘ

Type in what classification or UNSPSC number you would like to search for. Select the sub-classifications you would like to use from the results box and click "Add" to move it to the bottom box. You can list your bid in as many classifications as you would like (hold the Control key to select more than one classification at a time). If you need to remove a classification from your "Added" menu, click on the classification name and then click on "Remove." Use commas for multiple codes.  
(UNSPSC Code 10.0501)

telephone Search >> (Search by Keyword or UNSPSC Code) [View All](#)

**Search Results**

- [141115] Printing and writing paper
- [831116] Telecommunications services
- [431916] Personal communications device accessories or parts
- [432022] Sub assemblies for electronic devices
- [432215] Call management systems or accessories
- [422117] Communication aids for the physically challenged
- [421817] Electrocardiography EKG units and related products
- [432216] Digital subscriber loop DSL access equipment and components and accessories
- [432228] Telephony equipment
- [302222] Utilities structures

Select All Add Classifications Hints

Your item has been added to these Classifications

Remove Classifications Hints

**BidSync: Hint List - Mozilla Firefox**

https://training.bidsync.com/DPX/ca/ca?acc=cathints&catid=58155

(UNSPSC Code 10.0501)

**CLASSIFICATION HINTS**

Public Utilities and Public Sector Related Services

- [831100] Telecommunications media services
- [831116] Mobile communications services
- [8311601] Telecommunication signal enhancement network services
- [8311602] Satellite or earth communication systems services
- [8311603] Cellular telephone services
- [8311604] Paging services
- [8311605] Spaceselement leasing

Close Window

Done training.bidsync.com

## Suppliers

In this section determine who can view and receive notifications of the solicitation by selecting from the following:

- Public - All suppliers will be able to view; those matching the selected classification codes will be notified.
- Private - Only invited suppliers can participate in and receive notifications about the solicitation. The results are not made public, for example this would be used to solicit CMAS vendors to participate on an RFO.
- Exempt - Only invited suppliers can participate. Only NCB's are made public after the solicitation is awarded.
- Regional - All suppliers will be able to view; only those with in the indicated region will be notified.
- Suggested Suppliers - If you would like to see a list of suppliers that will automatically be notified, click the Suggested Suppliers button. These are suppliers already in the system that has registered to be notified about bids within the classifications you have selected. By checking the box next to a suggested supplier's name and clicking SAVE, they will be added to the Invited Suppliers list. If you do NOT want to notify suggested vendors of your bid, un-check the box next to Notify Suggested Suppliers. If there are additional suppliers that you would like to add to this list, click Invite Suppliers. A new window will pop up with a supplier search field.

The screenshot shows the 'SUPPLIERS' interface. At the top, there are radio buttons for 'Public', 'Exempt', 'Private', and 'Regional'. Below this, there are instructions for 'Invite Suppliers' and 'Suggested Suppliers'. A red arrow points to the 'Invite Suppliers' button. Below the instructions, there is a checkbox labeled 'Notify Suggested Suppliers' which is checked. At the bottom, there is a table titled 'INVITED SUPPLIERS' with columns for 'Remove', 'Supplier', 'City', and 'State'. Below the table are links for 'Remove Selected' and 'Remove All'.

## Search for Suppliers

Search for your supplier by entering information into any of the given fields. Click the Search button. To add a supplier from the generated list, check the box next to their name and then click on the Add button at the bottom of the screen.

**SEARCH FOR SUPPLIERS**

Search ONLY Agency Suppliers  Search ALL Suppliers

**COMPANY NAME SEARCH**

Company Name:   
 FEIN:   
 Keywords:   
 Location:

**QUALIFICATIONS SEARCH**

Qualifications:  CA-DVBE  CA-NP  CA-NVSA  CA-SB  
 UNSPSC Code:  (Use commas for multiple codes) [Select UNSPSC Codes](#)  
 Location:  All  Suppliers located  miles from zip code

**INVITED SUPPLIERS**

<input type="checkbox"/>	SUPPLIER NAME	PRIMARY CONTACT	QUALIFICATIONS	LOCATION	BLOCK
<input type="checkbox"/>	21ST CENTURY CONSULTANTS	HERBERT LOCKE <locke4195@global.net>	CA-DVBE CA-SB	CA	<input type="button" value="BLOCK"/>
<input type="checkbox"/>	HERBERT LOCKE <locke4195@global.net>				
<input type="checkbox"/>	3N INTERPRETING	SALVADOR RAMIREZ <unhibrido@yahoo.com>	CA-DVBE CA-SB	CA	<input type="button" value="BLOCK"/>
<input type="checkbox"/>	SALVADOR RAMIREZ <unhibrido@yahoo.com>				
<input type="checkbox"/>	49ER PRESSURE WASH & WATER SERVICE INC	-- <gasser@starband.net>	CA-DVBE CA-SB	CA	<input type="button" value="BLOCK"/>
<input type="checkbox"/>	-- <gasser@starband.net>				
<input type="checkbox"/>	4GRANITE INC	EARL ALLEN <info@4graniteinc.com>	CA-DVBE CA-SB	CA	<input type="button" value="BLOCK"/>

If the supplier you want to add isn't found after searching the supplier database, click Quick Add Supplier. Fill in the pertinent Supplier Information and click Save at the bottom of the page. This supplier will automatically be added to the notification.

**New Supplier**

**GENERAL INFORMATION**

Supplier Name:  \*

Address:  \*

City:  \*

State:  \*

Zip Code:  \*

Main Phone Number:  \* example: 555-123-4567

Main Fax Number:  example: 555-123-4567

Federal Tax Number:  (or Social Security Number)

Contact First Name:  \* MI

Contact Last Name:  \*

Contact Email Address:

Agency Supplier:  Yes  No

**CLASSIFICATION**

Type in what classification or number you would like to search for. Select the sub-classifications you would like to use from the results box and click "Add" to move it to the bottom box. You can list your bid in as many classifications as you would like (hold the Control key to select more than one classification at a time). If you need to remove a classification from your "Added" menu, click on the classification name and then click on "Remove."

(Search by Keyword or Code)

Search Results

Done training.bidsync.com

Once you have finished adding your suppliers click on the Return to Editing button.

## Bid Contact

In this section you will assign the Bid contact. If the contact for the solicitation will be someone other than the author, select the search link to the right of the contact field and find the new contact. Also indicate the preferred contact method from the available check boxes.

## Save Bid

Enter your password, click Save; the solicitation will then be placed in the Held Bids area under the View Bids tab.

To send the bid through approval workflow, complete the following steps:

## Held Bids

1. Select the Bids tab, and then the View Bids sub-tab. In the upper right-hand side of the page, select the Held Bids link and locate your solicitation.
2. Select the check box next to the bid, then the button at the bottom of the page titled Ready for Approval.

The screenshot shows the 'Held Bids' page in the BidSync system. At the top, there are navigation tabs: Home, Search, Bids, Purchasing, BIS, Progress Payments, Tools, CRM, Help, and Logout. Below these are sub-tabs: Create Bid, View Bids, History, Calendar, and RFP Eval. The user is identified as 'kevinca - State of California'. The main heading is 'Held Bids' with links for 'Held Bids', 'Current Bids', and 'To Be Awarded Bids'. A search bar contains 'paper' and options for 'Title' and 'Bid Number'. A 'Department' dropdown is set to 'All Departments'. There are filter options: 'View bids related to me' and 'View bids awaiting my approval'. A 'Submit' button is present. Below this is a table of bids:

RELEASE	READY	BID	DESCRIPTION	END DATE	PACKET	CONTACT	REVISE	COPY	DELETE
		0901-132	paper goods sc-G RFP	Feb 12, 2009		User T			
		RFQ-FTB-518	Copy paper sc-G RFP	Feb 14, 2009		User T			
		123456	specialty paper sc-G RFP	Feb 15, 2009		User 2			
		0901-174	20 lb paper RFP	Feb 17, 2009		User 2			
		0901-097	RFQ for Paper sc-G RFP	Feb 21, 2009		User 2			
		0803-001	Copy Paper	Apr 22, 2009		Kevin D	Revise		

At the bottom of the table, there are buttons: 'Select All', 'De-select All', 'Release Bids', and 'Ready For Approval'. A red arrow points to the 'Ready For Approval' button.

3. An approval screen will now display. Enter your password and click Ready Bids. Your solicitation will now enter the approval workflow, and once approved will be released on the BidSync site to the general public or as otherwise indicated by the UNSPSC classification code assigned.

The screenshot shows the 'Mark Bids as Ready For Release' page. At the top, there are navigation tabs: Home, Search, Bids, Purchasing, BIS, Progress Payments, Tools, CRM, Help, and Logout. Below these are sub-tabs: Create Bid, View Bids, History, Calendar, and RFP Eval. The user is identified as 'kevinca - State of California'. The main heading is 'Mark Bids as Ready For Release'. Below this is a table:

BID	TITLE	END DATE	REVISE	RELEASE STATUS
Bid123	Muld RFP	Apr 22, 2009 4:15:00 PM PDT	Revise	READY

Below the table is a 'USER INFORMATION' section with fields for 'User Id' (kevinca - State of California) and 'Password'. A red arrow points to the 'Password' field. At the bottom, there are buttons: 'Ready Bids' and 'Close'.

Once your solicitation has been submitted, you can select the Close button to return to Held Bids, or use the tabs across the top to be directed elsewhere.

Thank you for choosing BidSync for your business needs, we look forward to serving you in the future. For further information please contact the BidSync Agency Support Team at 1-800-990-9339 ext 1, or visit our website at [www.bidsync.com](http://www.bidsync.com) or DGS's website at [www.eprocure.dgs.ca.gov](http://www.eprocure.dgs.ca.gov).