California State Contracts Register (CSCR)

Creating a Solicitation with Electronic Response

Illustrated User Manual

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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.

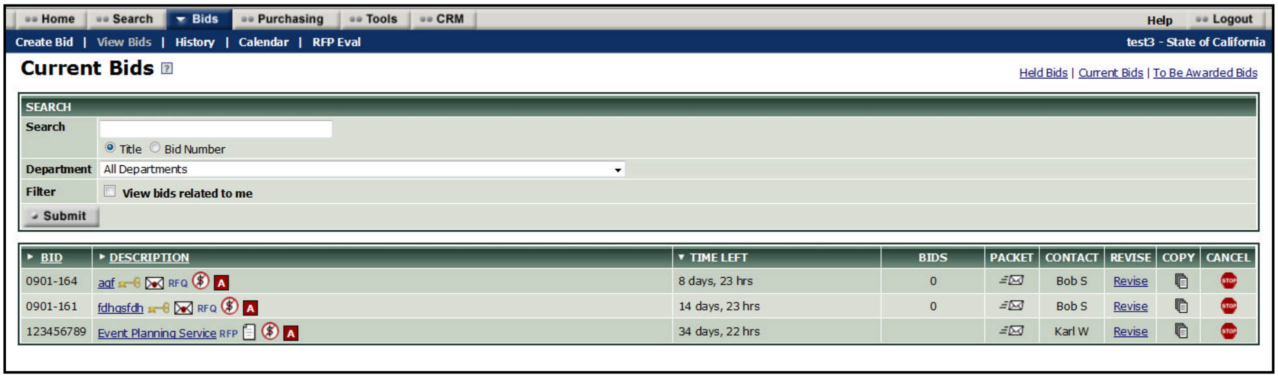
At the BidSync homepage www.bidsync.com, you will need to enter your unique username and password, which must be obtained from your department system administrator. This will give you access to your account including the ability to post solicitations. If at any time you have questions contact the BidSync 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 or DGS's e-procurement site at 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, 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 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.)

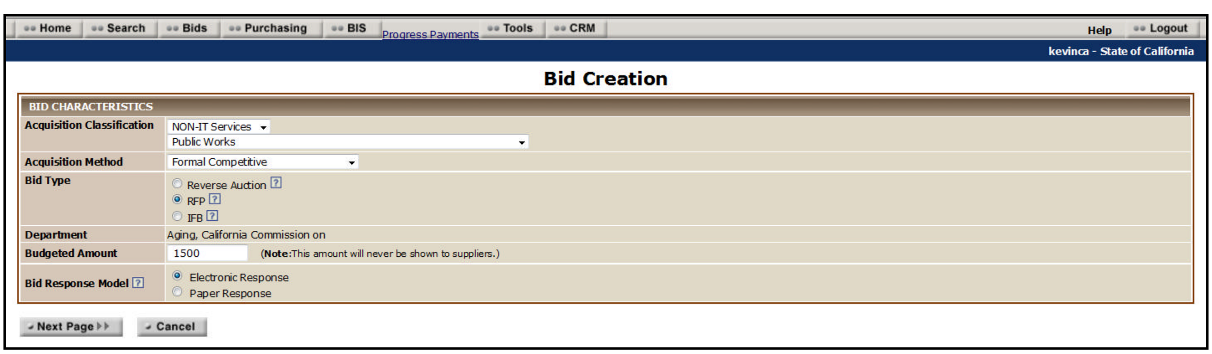
- Acquisition Method - Select from the available drop down menu (most solicitations will likely be formal competitive).

- 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.

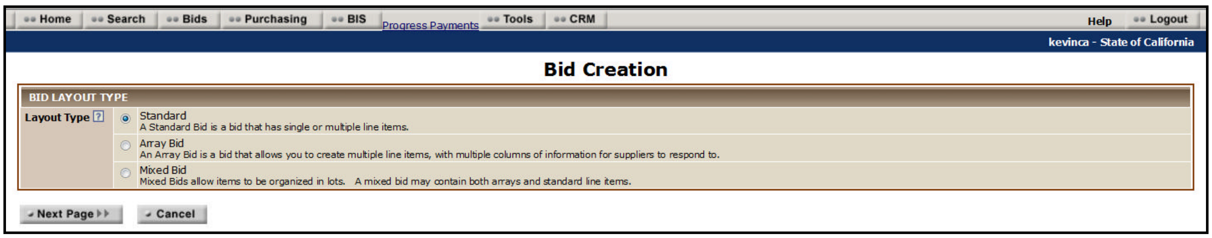
- Bid Response Model - Until the entire state is utilizing the complete paperless system, Pilot Departments can select either Paper or Electronic Response, whereas Non-Pilot Departments will only have the option for a Paper Response.



Bid 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.



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.

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)

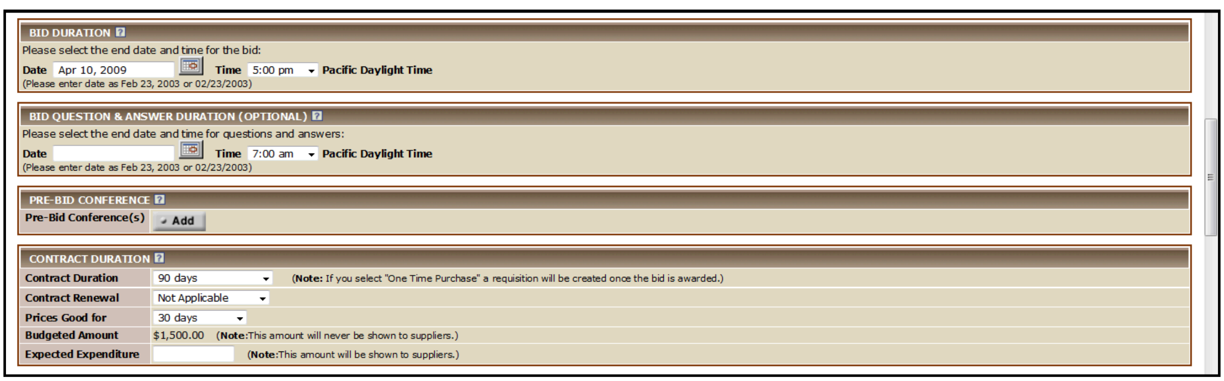
You may select a date and time when questions will no longer be accepted on the system. If this field is left blank, the Q&A period will conclude when the solicitation closes.

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.



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

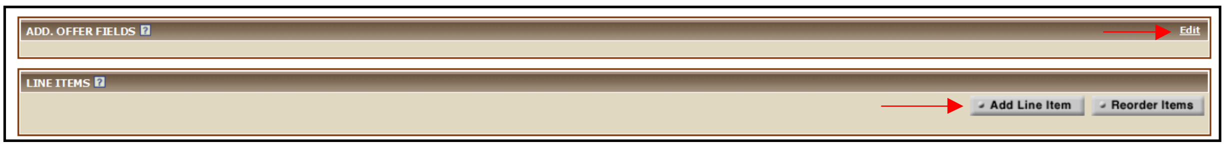
- Bid Number – Enter a bid number using your departments' current numbering system.
- Bid Title- Create a descriptive, yet concise title for your solicitation. This title should give suppliers a good indication of what you are specifically looking for.
- Bid Comments – In this field you can include any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

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.

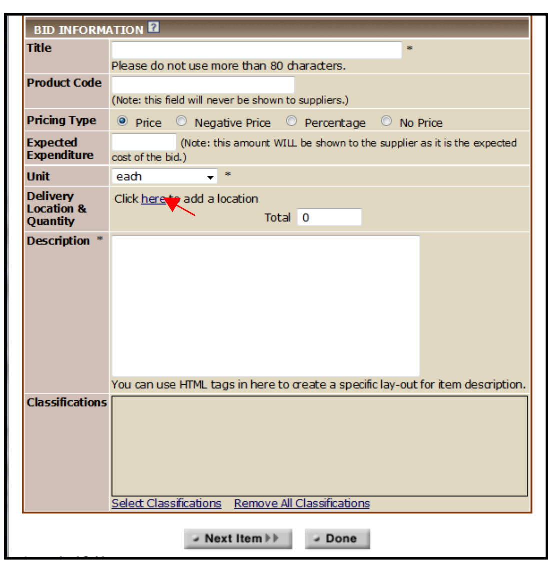
Line Item

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

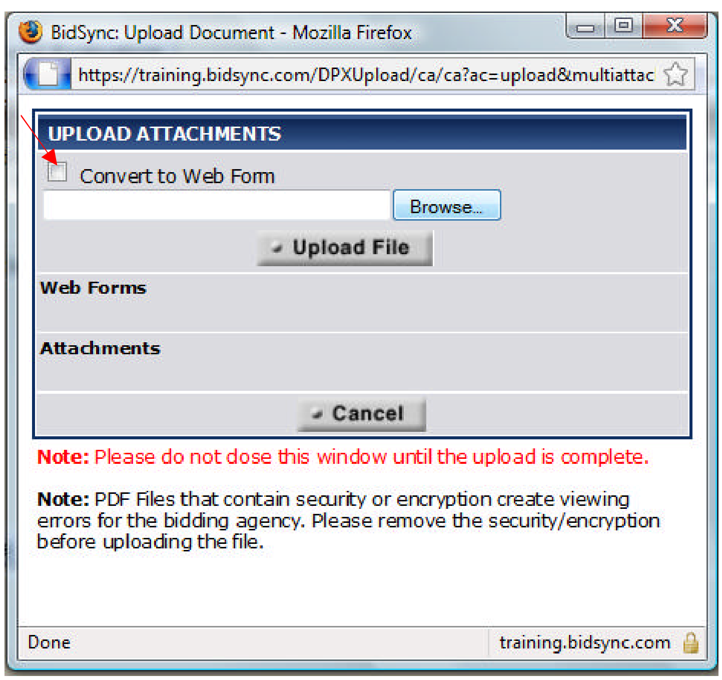
To edit line item information, click Edit. To delete line item information, click Delete.

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.

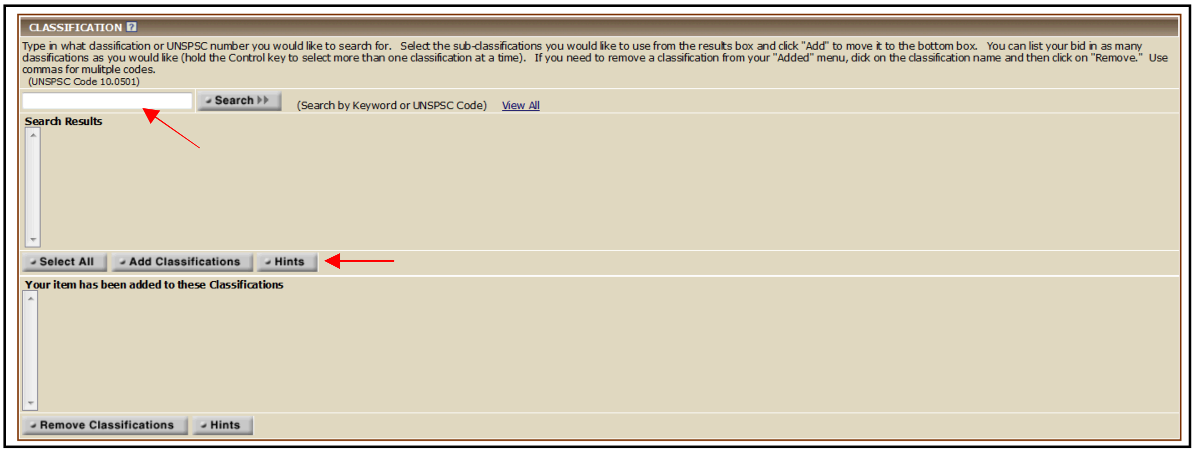
Web Forms

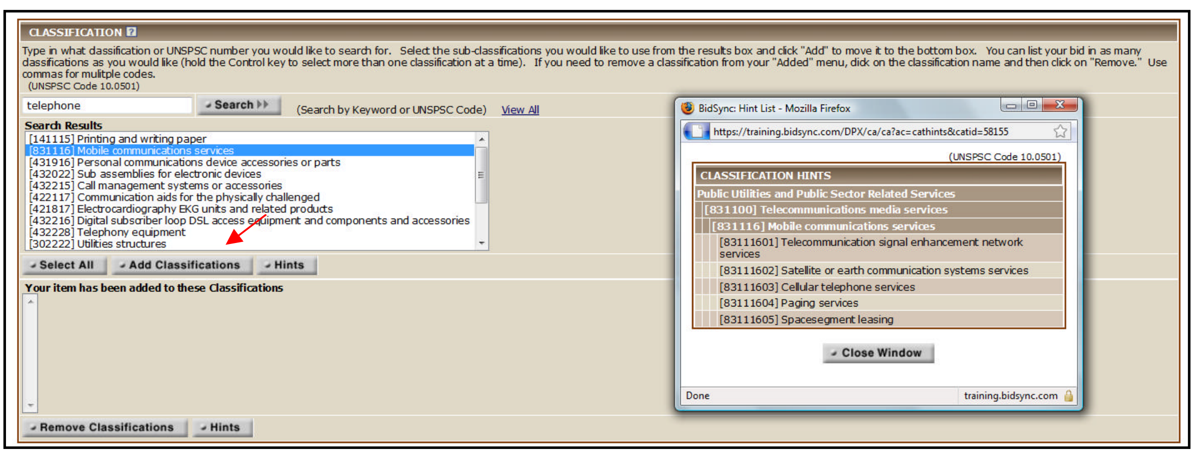
You can request BidSync to convert a Word or Excel file to an online web form. Select the Upload Document button, and check the box next to Convert to Web Form in the window that appears. Click on Browse, select the document you want converted, and click Open. Write any instructions you have for the 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.





Suppliers

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

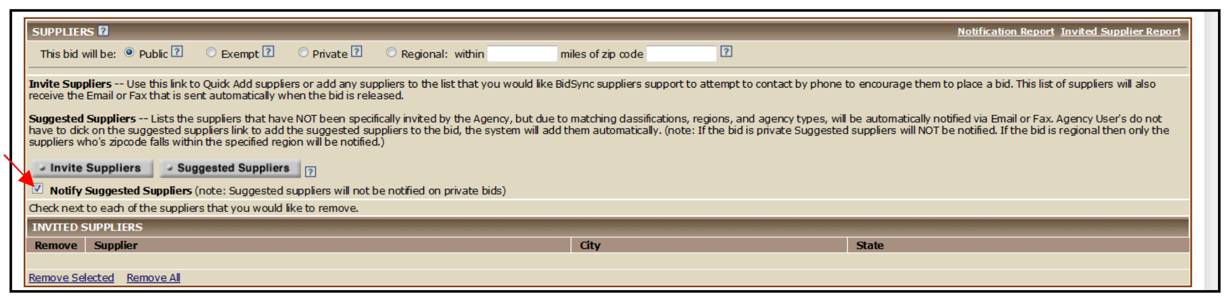
- Public - All suppliers will be able to view; those matching the selected classification codes will be notified.

- 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.

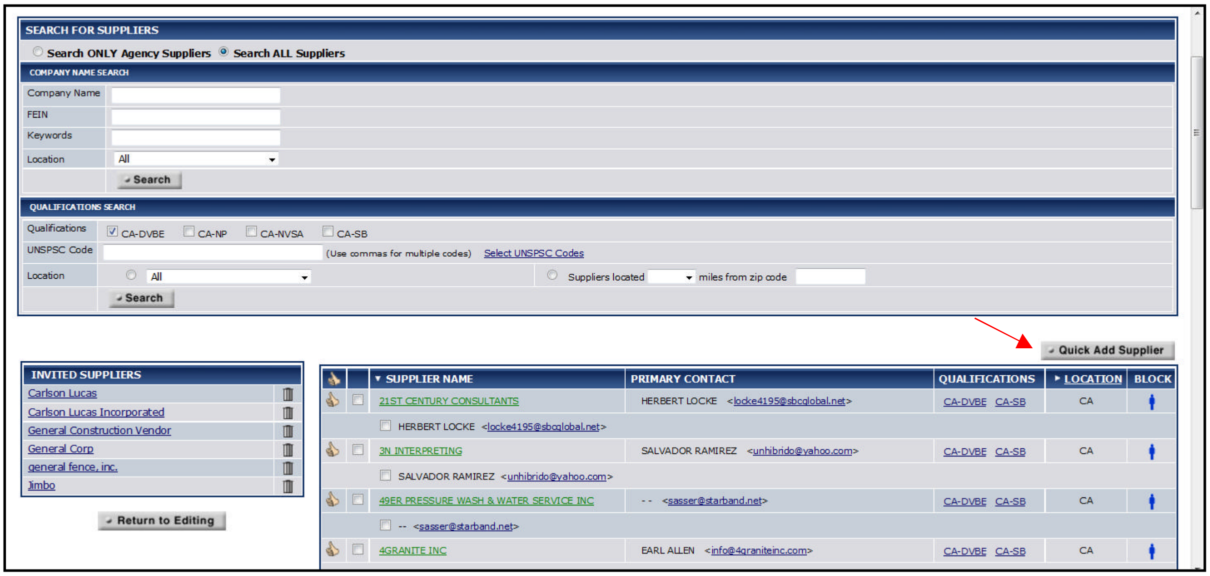
- Regional - All suppliers will be able to view; only those with in the indicated region will be notified.

- 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.

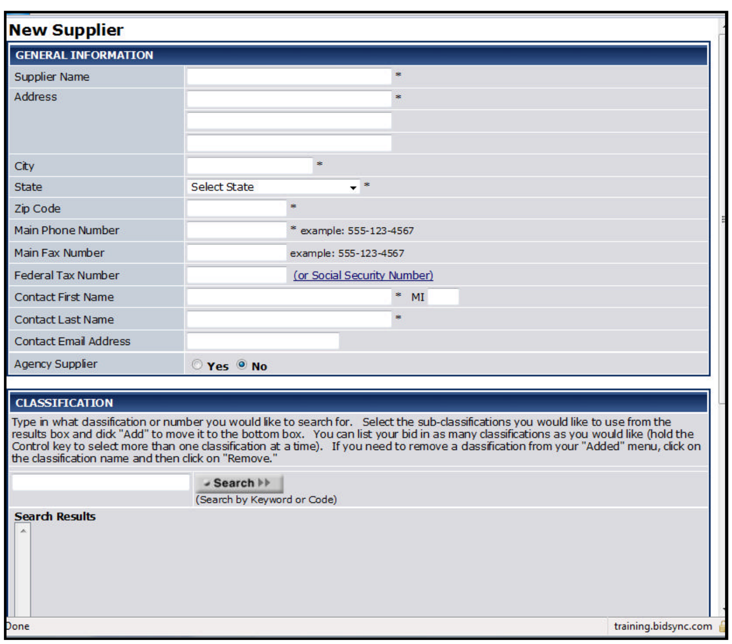


Search for Suppliers

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.



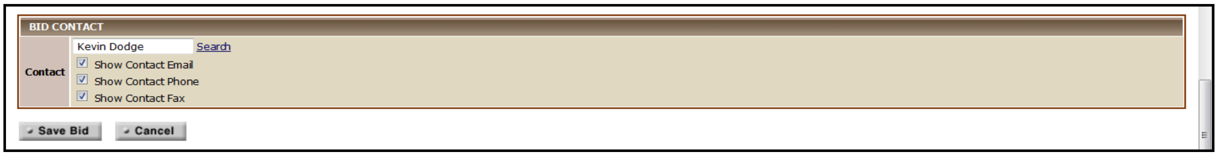
If the supplier you want to add isn't found after searching the supplier database, click Quick Add Supplier. Fill in the pertinent Supplier Information and click Save at the bottom of the page. This supplier will automatically be added to the notification.



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

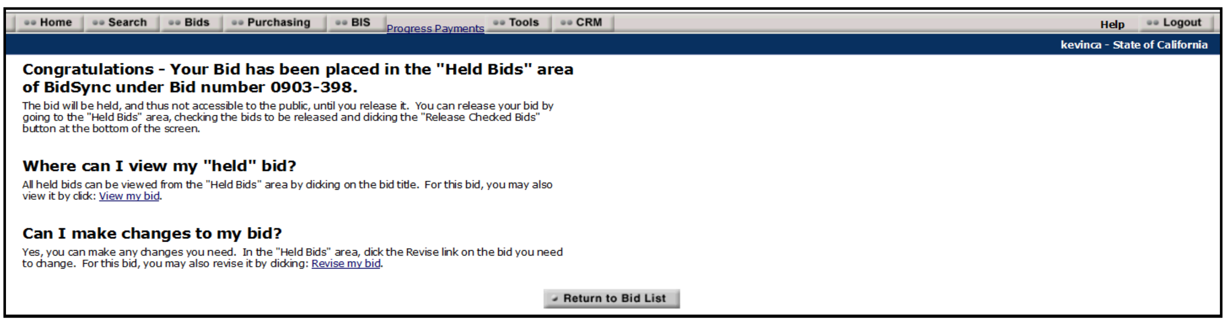
Bid Contact

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.

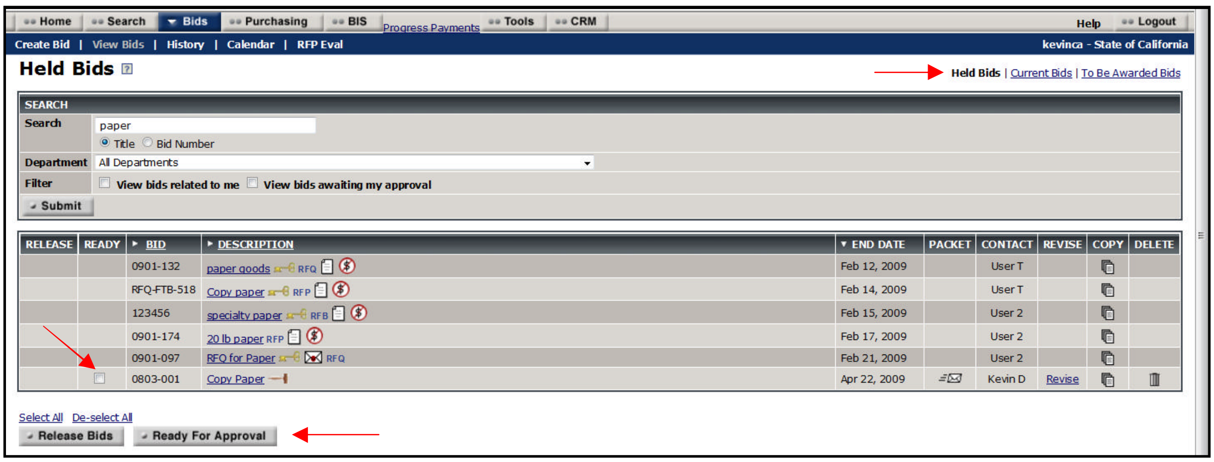


To send the bid through approval workflow, complete the following steps:

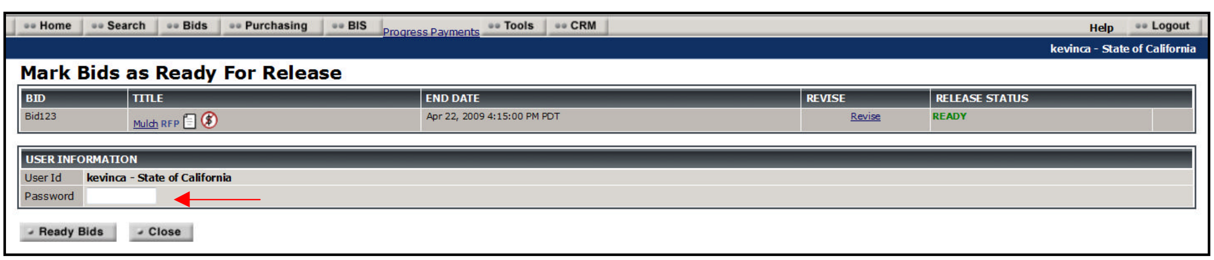
Held Bids

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.



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.



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 or DGS's website at www.eprocure.dgs.ca.gov.