BIDSYNC

California State Contracts Register (CSCR) – Creating a Solicitation with Electronic Response Quick Reference Guide

1 Navigate to www.bidsync.com

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

2 Complete the Bid Template

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

Bid Characteristics

- **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 foremal 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

- **Standard Bid**
  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 an 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

Note that when the solicitation closes the advertisement will also conclude.

Bid Question & Answer Duration (Optional)

Select a date and time when questions will no longer be accepted on the system.

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 bid number or leave it blank and the system will generate the number.
- **Bid Title**
  Enter a descriptive, yet concise title for your solicitation.
- **Bid Comments**
  Record solicitation details that are necessary for suppliers to understand that have not already been entered.

Additional Offer Fields

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 you item information for single or multiple line items.

Bid Information - Line Item Window

Enter the following information:

- Title
- Product Code
- Pricing Type
- Expected Expenditure
- Unit of Measurement
- Delivery Location and Quantity
- Description of Item
- Additional Offer Fields

Editing Line Items

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

Upload Documents

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.

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. Select correct entry and click Add Classification.

Suppliers

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 are automatically notified.

- **Private**
  Only invited suppliers can participate in and receive notifications. 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. This is used for contracts exempt from advertising, such as NCBs, expert witness contracts, etc. Only NCB's are made public after award.

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

- **Suggested Supplier**
  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.

Bid Contact

Designate the bid 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.

3 Send Solicitation Through Approval Workflow

Select the Bids tab, then the View Bids sub-tab. Select the Held Bids link and locate your solicitation.

- **Ready For Approval**
  Select the check box next to the solicitation and then the button at the bottom of the page titled Ready for Approval. On the next page, enter your password and click Ready Bids. Your solicitation will now enter the approval workflow process. Once your solicitation is approved or denied it will be returned to the Held Bids section.

- **Ready For Release**
  To release the solicitation, find it in the held bids section. Check the box in the release bid column. Select the Release Bids button at the bottom of the page.

- **Enter Password and Release**
  Enter your password and select Ready Bids. Once your solicitation is released it will be available on the BidSync site to the general public or as otherwise indicated.

4 Close Bid

After 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.