BIDSYNC

California State Contracts Register (CSCR) – Creating a Solicitation with Paper 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

Bid (Solicitation) Characteristics (Page 1)

- **Acquisition Classification**
  Select IT Goods and Services, or Non-IT Goods and Services.
- **Acquisition Method**
  Select from drop down menu.
- **Bid Type**
  Select the appropriate bid type.
- **Department**
  Select relevant department.
- **Budgeted Amount**
  Enter the budgeted amount for this solicitation. (Must be at least $.01)
- **Bid Response Model**
  Pilot Departments can select either Paper or Electronic Response, whereas Non-Pilot Departments will only have the option for a Paper Response.

Bid (Solicitation) Characteristics (Page 2)

- **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 (Optional)**
  Click the "Add" button, record the meeting address, date and time, and indicate that the meeting is optional.
- **Budgeted Amount & Expected Expenditure**
  Enter the expected expenditure. This is optional and gives the supplier an estimate of the amount to be spent.
- **Bill Code**
  Enter the 5 digit department bill code.
- **Account Codes (Optional)**
  Enter the relavent account codes as they relate to the entity, center, account, etc.
- **Construction License Type**
  Indicate what contractor license classification(s) you are requiring qualified vendors to hold. Select the "edit" link, then check the required license classification(s).
- **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.
- **Upload Documents**
  Attach necessary documents to your solicitation. Click the "Upload Document" button, select the "Browse" button, find your file, and then upload it.
- **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.
- **Invite Suppliers**
- **Search for Suppliers**
- **Assign a 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 Checked Bids**
  Select the check box next to the bid, then the button at the bottom of the page titled "Ready Checked Bids".
- **Enter password**
  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.

4 Close Bid

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.