California State Contracts Register (CSCR)

Creating a Solicitation with Paper 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, please contact your administrator. For further information about this or any other topic, please visit our website at www.bidsync.com or the DGS e-procurement site at www.eprocure.dgs.ca.gov.

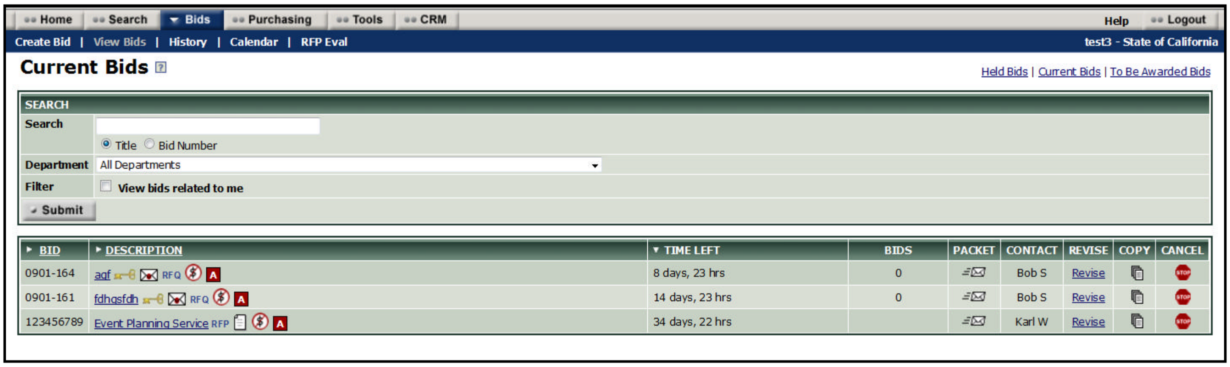
Creating and Advertising a Solicitation

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

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 a Solicitation" link from the Quick Nav box on the Home tab, and you will be taken to the same location.)

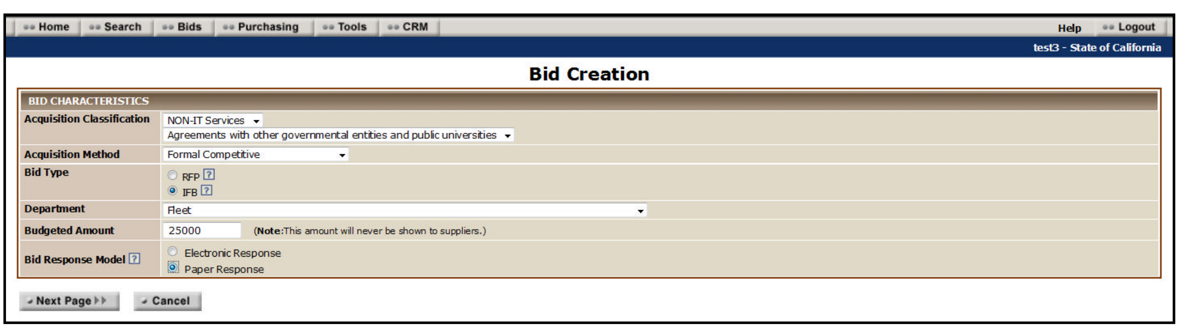
NOTE: In most instances, references to "Bid" in this module are equivalent to California's "Solicitation."



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

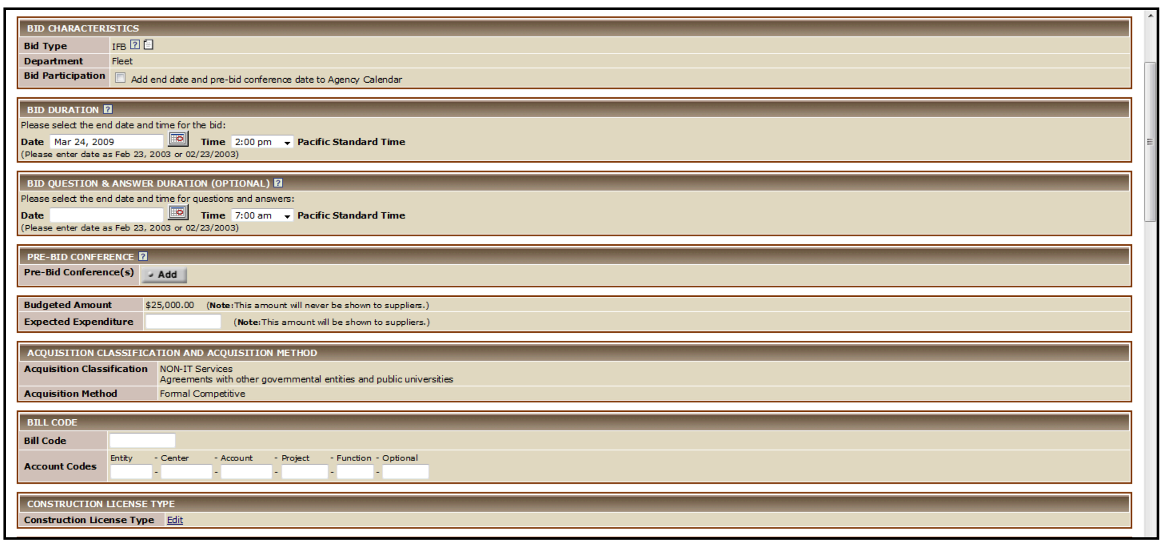
Bid Characteristics (Page 1)

- 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.
- 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 PA (you will not be able to exceed your PA when creating a solicitation). Amounts must be at least $.01.
- Bid Response Model - Pilot Departments can select either Paper or Electronic Response. Non-Pilot Departments will only have the option for a Paper Response.



Bid Characteristics (Page 2)

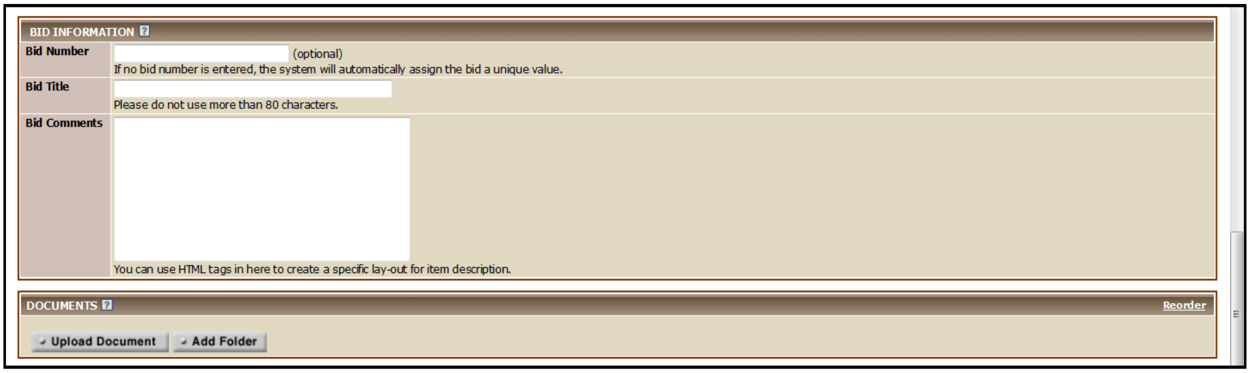
- Bid Duration - Select a date and time for the solicitation to close. Please note that when the solicitation closes the "advertisement" will also conclude.
- Bid Question & Answer Duration (Optional) - You may select a date and time when questions will no longer be accepted on the system. If this field is left blank, the Q&A period will conclude when the solicitation closes.
- Pre-Bid Conference (Optional) - If you would like to hold a Pre-Bid Conference (also known as a walk-through, or an "Onsite"), click the "Add" button, record the meeting address, date and time, and indicate that the meeting is optional.
- Budgeted Amount & Expected Expenditure - The budgeted amount is carried over from the previous screen; the expected expenditure is optional and gives the supplier an estimate of the amount to be spent.
- Bill Code - Enter your 5 digit department bill code.
- Account Codes (Optional) - Enter the relevant account codes as they relate to the entity, center, account, etc.
- Construction License Type - This property allows you to indicate what contractor license classification(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 solicitation 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.

- <u>Bid Comments</u> – 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.



- <u>Upload Documents</u> – 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.

  Note: Secure documents are now allowable for upload.

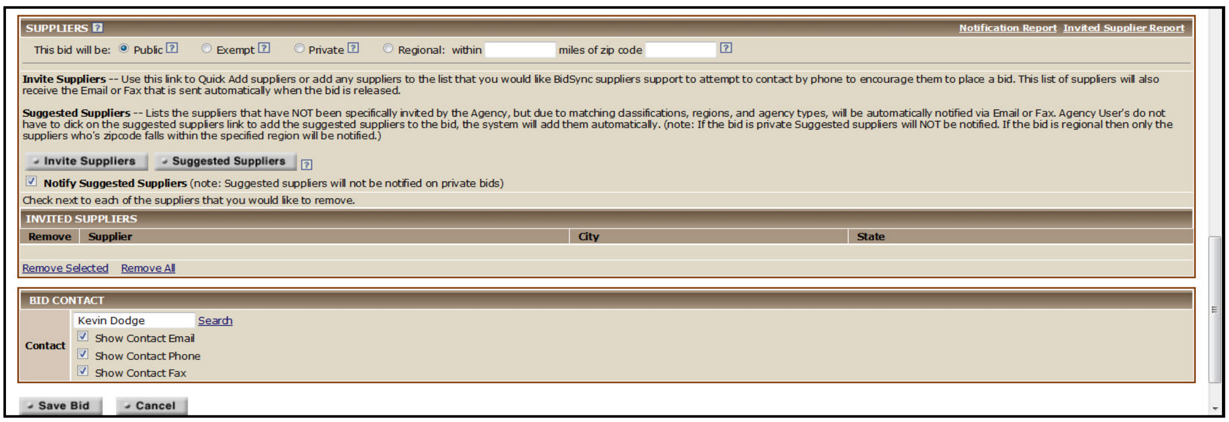
Classification

- <u>UNSPSC Classification Code</u> - 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 by email or fax of the solicitation by selecting from the following:

- Public (CSCR) - 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 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. This method 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 with in the indicated region will be notified.

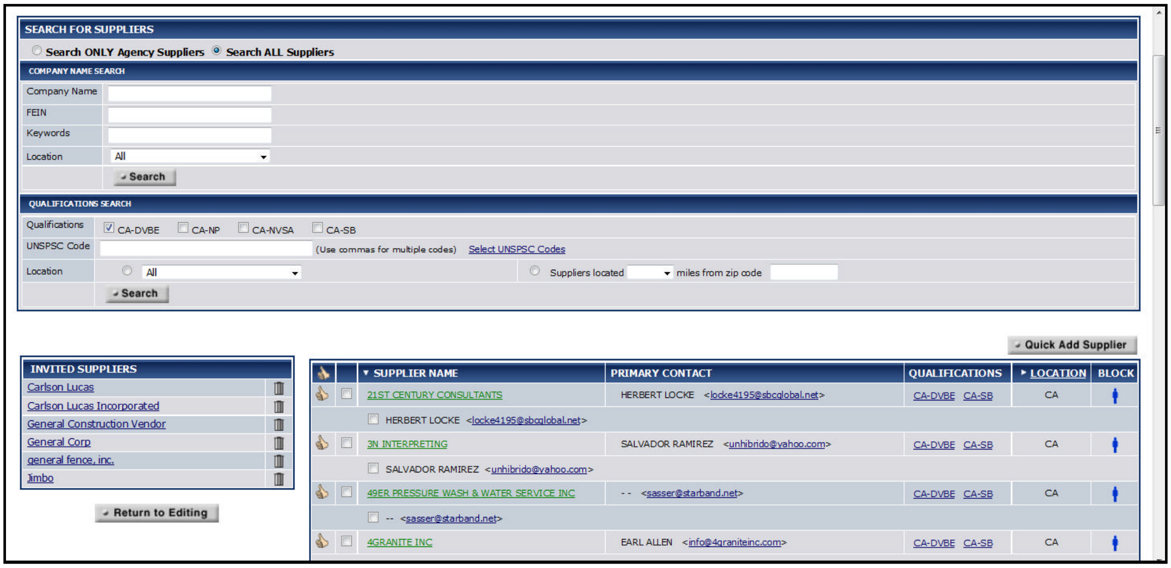


Invite Suppliers

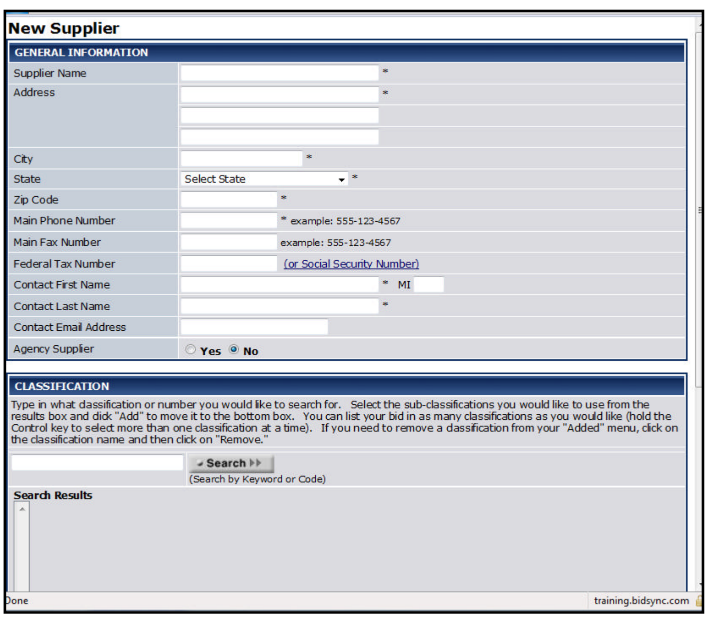
If you would like to see a list of suppliers that will automatically be notified, click the Suggested Suppliers button. These are suppliers already in the system that has registered to be notified about bids within the classifications you have selected. By checking the box next to a suggested supplier's name and clicking ADD, 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.



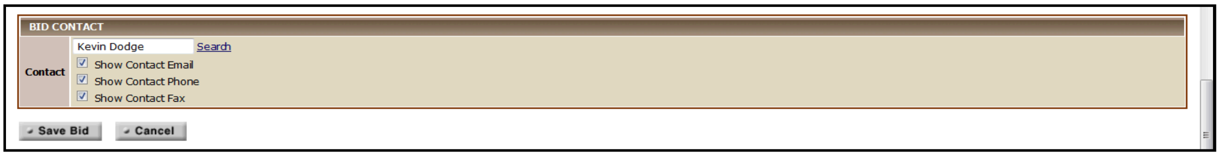
If the supplier you want to add isn't found after searching the supplier database, click "Quick Add Supplier". Fill in the pertinent Supplier Information and click "Save" at the bottom of the page. This supplier will automatically be added to the notification.



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

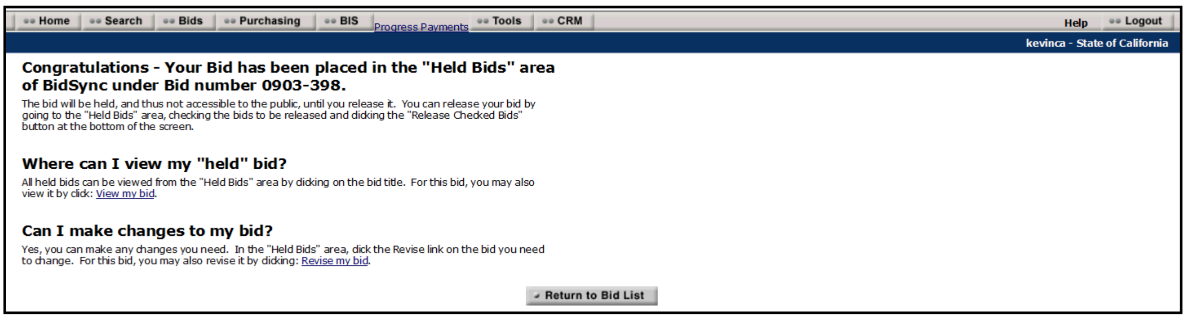
Bid Contact

In this section you will assign the Bid (solicitation) 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 Bid" the will then be placed in the "Held Bids area under the "View Bids" tab.

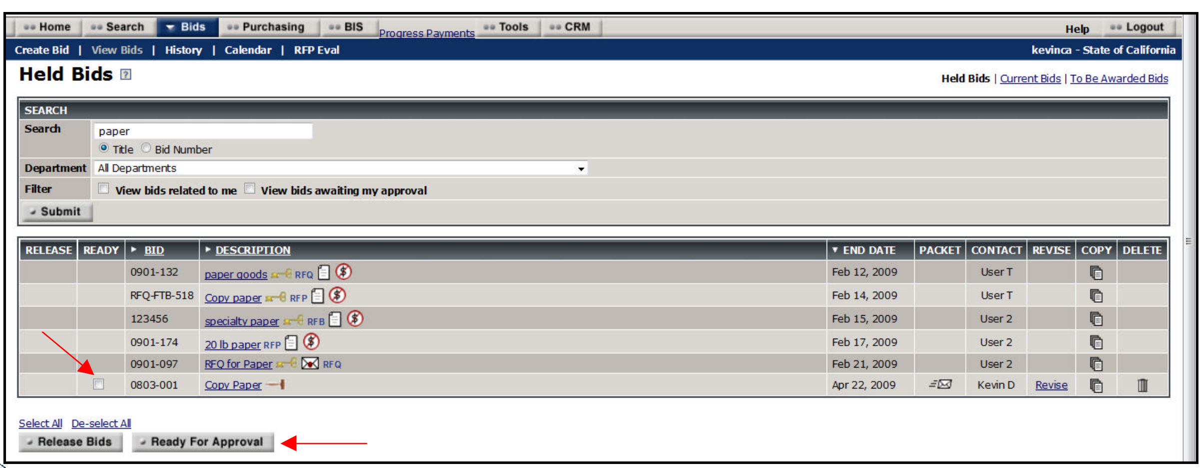


3. To send the solicitation through approval workflow, complete the following steps:

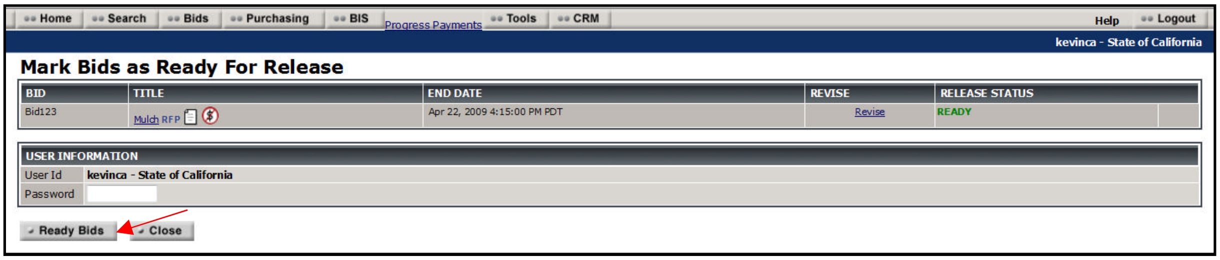
Held Bids

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.

- Select the "Ready" check box next to the solicitation (bid), then the button at the bottom of the page titled "Ready For Approval". The "Mark Bids as Ready for Release" screen will appear.



- 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.



4. Once your solicitation has been submitted, you can select the "Close" button to return to "Held Bids", or use the tabs or links 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 your administrator or visit our website at www.bidsync.com or the DGS website at www.eprocure.dgs.ca.gov.