



BIDSYNC

California State
Contracts Register
(CSCR)

Creating a Solicitation with
Paper Response

Illustrated User Manual

BIDSYNC

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Website: <http://www.bidsync.com>

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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

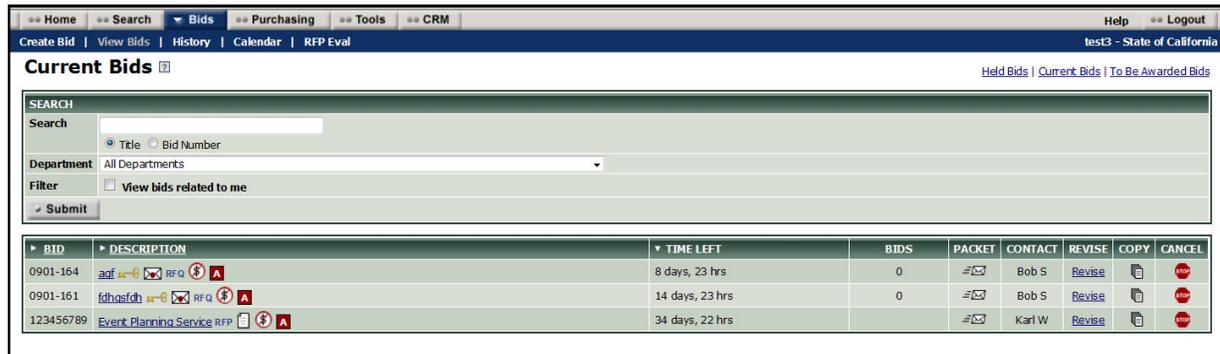
To create and advertise a solicitation follow the steps listed below:

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.”



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

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	
Acquisition Classification	NON-IT Services Agreements with other governmental entities and public universities
Acquisition Method	Formal Competitive
Bid Type	<input type="radio"/> RFP <input checked="" type="radio"/> IFB
Department	Fleet
Budgeted Amount	25000 (Note: This amount will never be shown to suppliers.)
Bid Response Model	<input type="radio"/> Electronic Response <input checked="" type="radio"/> 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 CHARACTERISTICS	
Bid Type	IFB <input checked="" type="checkbox"/>
Department	Fleet
Bid Participation	<input type="checkbox"/> Add end date and pre-bid conference date to Agency Calendar
BID DURATION	
Please select the end date and time for the bid:	
Date	Mar 24, 2009 <input type="text"/>
Time	2:00 pm <input type="text"/> Pacific Standard Time
<small>(Please enter date as Feb 23, 2003 or 02/23/2003)</small>	
BID QUESTION & ANSWER DURATION (OPTIONAL)	
Please select the end date and time for questions and answers:	
Date	<input type="text"/>
Time	7:00 am <input type="text"/> Pacific Standard Time
<small>(Please enter date as Feb 23, 2003 or 02/23/2003)</small>	
PRE-BID CONFERENCE	
Pre-Bid Conference(s)	<input type="button" value="Add"/>
Budgeted Amount	\$25,000.00 <small>(Note: This amount will never be shown to suppliers.)</small>
Expected Expenditure	<input type="text"/> <small>(Note: This amount will be shown to suppliers.)</small>
ACQUISITION CLASSIFICATION AND ACQUISITION METHOD	
Acquisition Classification	NON-IT Services
Acquisition Method	Agreements with other governmental entities and public universities Formal Competitive
BILL CODE	
Bill Code	<input type="text"/>
Account Codes	Entity - Center - Account - Project - Function - Optional
CONSTRUCTION LICENSE TYPE	
Construction License Type	<input type="button" value="Edit"/>

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.

- **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.

The screenshot shows the 'BID INFORMATION' section of a web application. It contains three main input fields: 'Bid Number' (with a note that it's optional and the system will assign a unique value if none is entered), 'Bid Title' (with a note to use no more than 80 characters), and 'Bid Comments' (a large text area with a note that HTML tags can be used). Below these fields is a 'DOCUMENTS' section with 'Upload Document' and 'Add Folder' buttons, and a 'Reorder' button on the right.

- **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.

Note: Secure documents are now allowable for upload.

Classification

- **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.

The screenshot shows the 'CLASSIFICATION' section. It features a search input field with a 'Search >>' button and a 'View All' link. Below the search field is a 'Search Results' area. At the bottom of the results area, there are buttons for 'Select All', 'Add Classifications', and 'Hints'. A message states 'Your item has been added to these Classifications'. At the very bottom, there are buttons for 'Remove Classifications' and 'Hints'. Red arrows point to the 'Search >>' button and the bottom 'Hints' button.

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 within the indicated region will be notified.

The screenshot shows the 'SUPPLIERS' management 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 checkbox labeled 'Notify Suggested Suppliers' is checked. Below the instructions is a table titled 'INVITED SUPPLIERS' with columns for 'Remove', 'Supplier', 'City', and 'State'. At the bottom, there is a 'BID CONTACT' section with a search field containing 'Kevin Dodge' and three checked checkboxes: 'Show Contact Email', 'Show Contact Phone', and 'Show Contact Fax'. Buttons for 'Save Bid' and 'Cancel' are at the bottom left.

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.

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

Carlson Lucas

Carlson Lucas Incorporated

General Construction Vendor

General Corp

general fence, inc.

Jimbo

	SUPPLIER NAME	PRIMARY CONTACT	QUALIFICATIONS	LOCATION	BLOCK
<input type="checkbox"/>	21ST CENTURY CONSULTANTS	HERBERT LOCKE <locke4195@sbccolbal.net>	CA-DVBE CA-SB	CA	<input type="button" value="↑"/>
<input type="checkbox"/>	HERBERT LOCKE <locke4195@sbccolbal.net>				
<input type="checkbox"/>	3N INTERPRETING	SALVADOR RAMIREZ <unhibrido@yahoo.com>	CA-DVBE CA-SB	CA	<input type="button" value="↑"/>
<input type="checkbox"/>	SALVADOR RAMIREZ <unhibrido@yahoo.com>				
<input type="checkbox"/>	99ER PRESSURE WASH & WATER SERVICE INC	-- <gasser@starband.net>	CA-DVBE CA-SB	CA	<input type="button" value="↑"/>
<input type="checkbox"/>	-- <gasser@starband.net>				
<input type="checkbox"/>	4GRANITE INC	EARL ALLEN <info@4granite.com>	CA-DVBE CA-SB	CA	<input type="button" value="↑"/>

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.



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Rev. 5/5/09

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.

RELEASE	READY	BID	DESCRIPTION	END DATE	PACKET	CONTACT	REVISE	COPY	DELETE
		0901-132	paper goods	Feb 12, 2009		User T			
		RFQ-FTB-518	copy paper	Feb 14, 2009		User T			
		123456	specialty paper	Feb 15, 2009		User 2			
		0901-174	20 lb paper RFP	Feb 17, 2009		User 2			
	<input checked="" type="checkbox"/>	0901-097	RFQ for Paper	Feb 21, 2009		User 2			
		0803-001	Copy Paper	Apr 22, 2009		Kevin D	Revise		

- 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 BidSync web application interface. At the top, there is a navigation menu with links: Home, Search, Bids, Purchasing, BIS, Progress Payments, Tools, CRM, Help, and Logout. The user is logged in as 'kevinca - State of California'. The main heading is 'Mark Bids as Ready For Release'. Below this is a table with the following data:

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

Below the table is a 'USER INFORMATION' section with the following fields:

User Id: kevinca - State of California
 Password:

At the bottom, there are two buttons: 'Ready Bids' and 'Close'. A red arrow points to the 'Close' button.

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.