Creating a Requisition

Illustrated User Manual

BIDSYNC
629 East 700 South Ste. 101
American Fork, UT 84003
Phone (801)765-9245 Fax (801)765-9246
Buyer Support: agencysupport@bidsync.com
Supplier Support: support@bidsync.com
Website: http://www.bidsync.com

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 Creating a Requisition.

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 a Requisition

To create a requisition, follow the steps below:

1. Navigate to www.bidsync.com

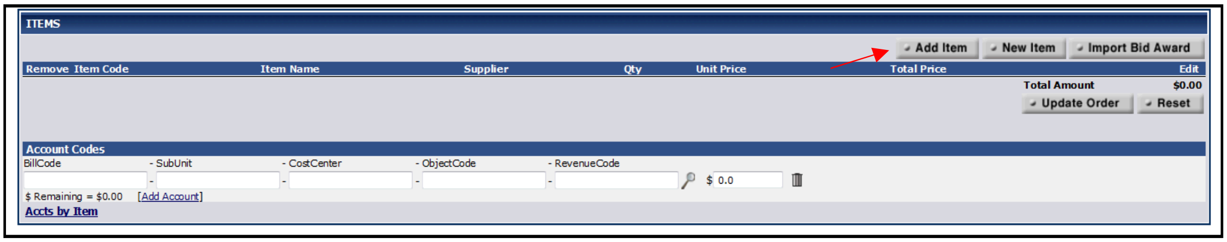
Select the "Purchasing" tab, the "Requisitions" tab, and then click "New Purchase Request" at the right hand side of the screen. (You can also select the "Create a Requisition" link from the Quick Nav box on the home tab and you will be taken to the same location).

2. Enter the following information.

- Requisition Number
- 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 contract type by selecting from the additional drop down menu.)
- Acquisition Method - Select from the available drop down menu.
- Department – Select from the available drop down menu.
- Routing Code - Select from the drop down menu.
- Blanket PO – Indicate if it is a Blanket PO by checking the box.
- Buyer Contact - Click the Search link to the right and select from the listed users.
- Ship to - Enter the shipping destination.
- Requested Delivery Date - Select the date using the calendar.
- Bill to - Indicate using the drop down menu.
- Special Instructions - Enter any special instructions that relate to the requisition.
- Attachments - Upload any pertinent documents by clicking the "Upload Attachment" link and follow the prompts.

3. Add Item Information – Currently under Contract

If the item you wish to add to your requisition is currently under contract, select the button titled "Add Item".

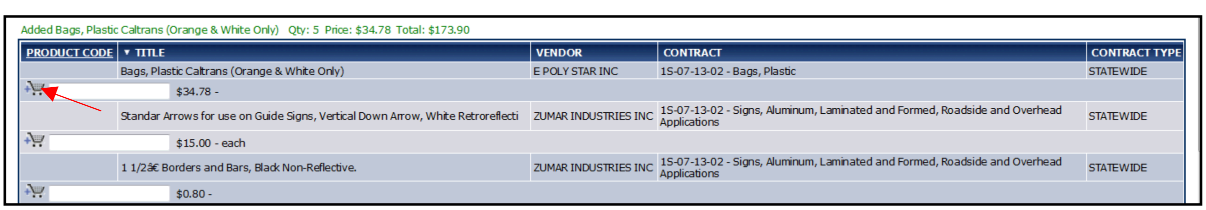


Use the search tool at the top of the page to locate the item of interest. Once you have entered your criteria select the "Find" button.

Search by:

- Title or Product Code - enter key terms and select the proper radio button.
- Supplier - click the link to the right and locate the supplier.
- Contract Type
- UNSPSC Classification - 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 select classification then 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.

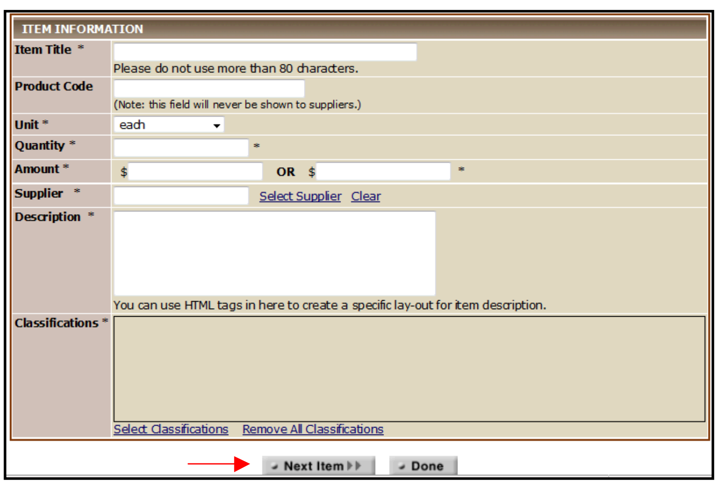
Once you find your item, enter the quantity in the adjacent white box and click on the shopping cart next to it. You will see that your item has been added to your requisition. Repeat this process for each line item until your requisition is complete. Once you have added all necessary items select the box titled "Close" at the bottom of the page.



4. Add Item Information – Not under Contract

   If the item you wish to add to your requisition is currently not under contract, select the link titled "New Item" and enter the following:

   - Item Title
   - Product Code - this is optional
   - Unit of measure, quantity and unit price - Once the quantity and unit price are entered, a total price will automatically be calculated.
   - Supplier - Use the link to the right to select supplier
   - Item Description
   - 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 select classification then 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.
   - Add Additional Items - Once this is complete select either "Next Item" to add additional items, or "Done" if complete.



5. Repeat this process for each line item until all line items have been inserted.

6. Once all line items have been inserted, enter your five-digit Bill Code, your password, and click "Checkout".

Once submitted, your requisition document number will display (the same number you may have entered originally).

If the item is currently under contract a purchase order will be generated, otherwise a solicitation template will be prefilled and kept in the "Held Bids" area. Once it has been released for bid and eventually awarded, a purchase or service order will then be generated automatically.

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.