

BIDSYNC SUPPLIERS May 2009

Purpose

This document will provide you with tips to selecting the correct supplier in BidSync and how to add a new contact to an existing supplier. There is only one supplier per FEIN; each supplier can have several contacts listed.

Where to Find More Information

- For more information see DGS eProcurement web site <http://www.eprocure.dgs.ca.gov>
- For help contact your System Administrator
<http://www.documents.dgs.ca.gov/eprocure/DeptSysAdmins.pdf>

FAQ's BidSync Supplier List

Q. What are supplier locks?

A. A supplier lock is when a supplier record with unique information is accepted (locked) into the eP system. When a user attempts to add a supplier with duplicate information, the supplier record will be placed in "pending" status and will take at least 24 hours to resolve. To avoid this situation, please always search for a supplier by the Federal Employer Identification Number (FEIN) first. To resolve a pending status, send an email request with the supplier's name, address and FEIN to the System Administrator.

Q. How do I add a supplier?

A. After a thorough search to locate a supplier in eP (by FEIN and variations of the business name) fails to return any results, you may use the "quick add" feature to add a new supplier.

Q. How do I add additional contacts if I found the supplier with the correct FEIN?

A. After locating the supplier, click on the supplier name link to open the supplier profile. Click on the "View" drop down menu in the upper right corner and select "New Contact." Enter in the new contact information and click Save.

Q. How long does it take to take a supplier out of "pending" status?

A. eProcurement or Bidsync are not automatically alerted when a supplier enters pending status. To resolve, email a request with the supplier's name and FEIN to the System Administrator. Please allow a 24-hour turn around once email has been sent to eProcurement.

Q. What if I pull by FEIN and there are multiple companies? How do I choose which one to use?

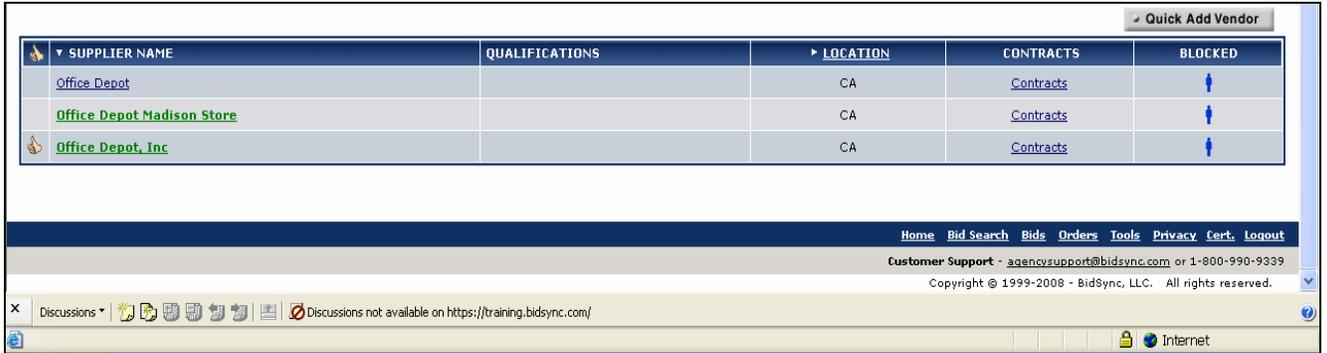
A. Send an email with the supplier's name and FEIN to System Administrator so the eP Team can work with the contractor, BidSync, to merge the multiple supplier records and lock the appropriate record.

Q. What if I don't have the FEIN?

A. Contact the supplier, even if the entity is a State or local government agency. Do not enter invalid or fake data as this will cause errors to your entries once the information is corrected and may impact your eP user privileges.

How to choose the correct supplier:

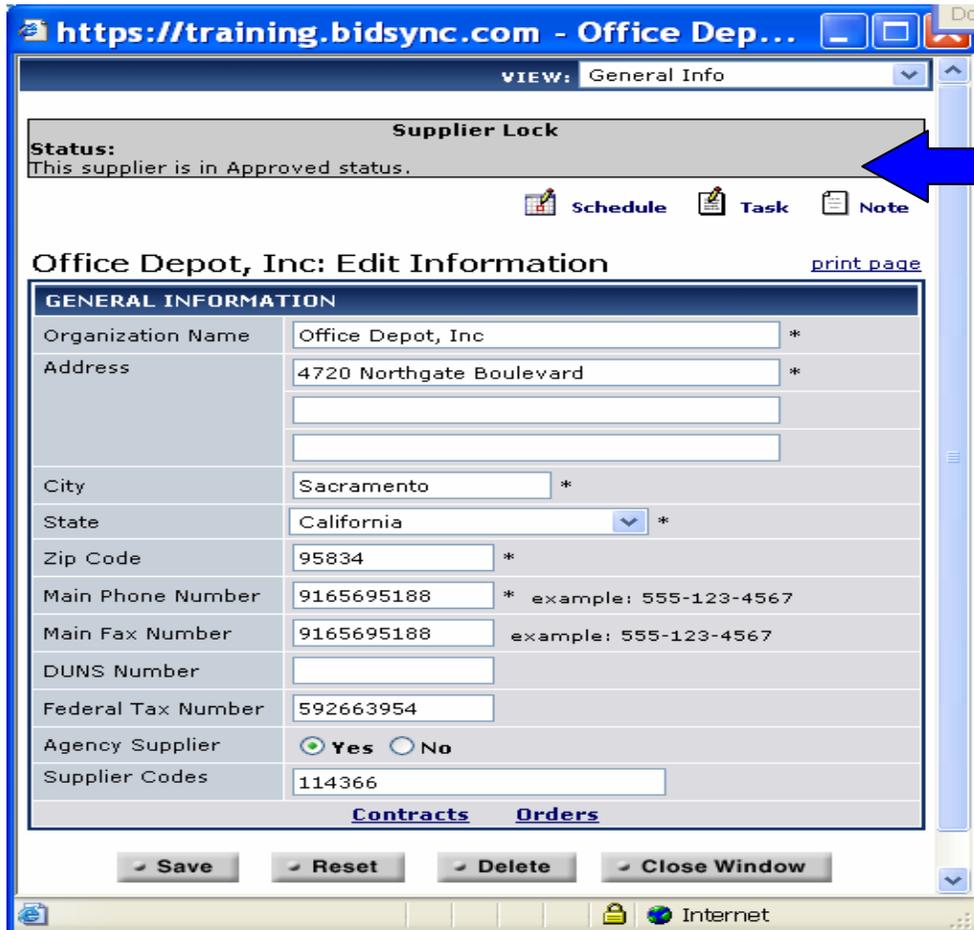
- Suppliers highlighted in green and identified as an Agency supplier, by the “thumbs up” symbol have been approved for use.
- Try searching for suppliers using the FEIN search box (the system is not consistent, you may have to try with a hyphen and without),



SUPPLIER NAME	QUALIFICATIONS	LOCATION	CONTRACTS	BLOCKED
Office Depot		CA	Contracts	
Office Depot Madison Store		CA	Contracts	
Office Depot, Inc		CA	Contracts	

When you click on the supplier name you can verify the supplier has been approved by checking the Supplier Lock Status.

Example #1: If the supplier status indicates “This supplier is in Approved status.” You can use this supplier.



https://training.bidsync.com - Office Dep...

VIEW: General Info

Supplier Lock
Status: This supplier is in Approved status.

[Schedule](#) [Task](#) [Note](#)

Office Depot, Inc: Edit Information [print page](#)

GENERAL INFORMATION	
Organization Name	Office Depot, Inc *
Address	4720 Northgate Boulevard *
City	Sacramento *
State	California *
Zip Code	95834 *
Main Phone Number	9165695188 * example: 555-123-4567
Main Fax Number	9165695188 example: 555-123-4567
DUNS Number	
Federal Tax Number	592663954
Agency Supplier	<input checked="" type="radio"/> Yes <input type="radio"/> No
Supplier Codes	114366

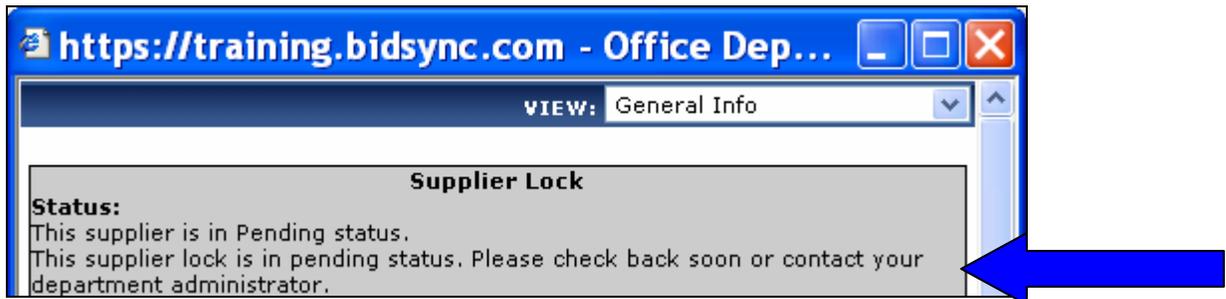
[Contracts](#) [Orders](#)

[Save](#) [Reset](#) [Delete](#) [Close Window](#)

Example #2: If the supplier status indicates “This supplier is currently in unlocked status.” You can not use this supplier. The supplier is missing information and will not be approved.



Example #3: If the supplier status indicates “This supplier is in pending status.” You can not use this supplier. The supplier was created and has all the relevant information; however when it was created another supplier with the same FEIN already existed.



This is why it is very important to search for your supplier by FEIN number before doing a “Quick Add”.

To Enter a New Contact

You have located an Approved Supplier but it is not the location you need. You must enter a New Contact for the supplier. There is one supplier per FEIN; each supplier can have several contacts listed.

1. Select the supplier, in the upper right hand corner of the pop-up click on the VIEW: dropdown and select New Contact

VIEW: General Info

Supplier Lock

Status:
This supplier is in Approved status.

Office Depot, Inc: Edit Information

GENERAL INFORMATION

Organization Name	Office Depot, Inc *
Address	4720 Northgate Boulevard *
City	Sacramento *
State	California *
Zip Code	95834 *
Main Phone Number	9165695188 * example: 555-123-4567
Main Fax Number	9165695188 example: 555-123-4567
DUNS Number	
Federal Tax Number	592663954
Agency Supplier	<input checked="" type="radio"/> Yes <input type="radio"/> No
Supplier Codes	

- 2 Required fields are indicated by an *.

https://training.bidsync.com - Office Dep...   

VIEW: New Contact

Office Depot, Inc: New Contact

CONTACT INFORMATION	
Contact Descr.	<input type="text"/> *
First Name	<input type="text"/> * Middle Initial <input type="text"/>
Last Name	<input type="text"/> *
Job Title	<input type="text"/>
Department	<input type="text"/>
Email	<input type="text"/>
Phone Number	<input type="text" value="9165695188"/> ext <input type="text"/> example: 555-123-4567
Fax Number	<input type="text" value="9165695188"/> example: 555-123-4567
Cell Phone Number	<input type="text"/>
Alt. Phone Number	<input type="text"/>
Address	<input type="text" value="4720 Northgate Boulevard"/> <input type="text"/> <input type="text"/>
City	<input type="text" value="Sacramento"/>
State	<input type="text" value="California"/> 
Zip Code	<input type="text" value="95834"/>

 Done   Internet

- 3 Enter the contacts information. Example below.

https://training.bidsync.com - Office Dep... VIEW: Madison Store

Office Depot, Inc: Madison Store

CONTACT INFORMATION	
Contact Descr.	Madison Store *
First Name	Mike * Middle Initial
Last Name	Bingaman *
Job Title	Sales Person
Department	
Email	mbingaman@officedepot.com
Phone Number	916-338-5988 ext example: 555-123-4567
Fax Number	916-338-1234 example: 555-123-4567
Cell Phone Number	
Alt. Phone Number	
Address	4614 Madison Ave
City	Sacramento
State	California
Zip Code	95841

* Required fields

- 4 Click the button. You have added the contact information.
- 5 To view contacts for a supplier: use the VIEW dropdown, under Contacts there is a list of existing contacts, select the one you want to view. Because there are several people using this system do not delete another user's contact.

https://training.bidsync.com - Office Dep... Do

VIEW: Madison Store

Office Depot, Inc: Madison Store

CONTACT INFORMATION

Contact Descr.	Madison Store	
First Name	Mike *	Midd
Last Name	Bingaman	
Job Title		
Department		
Email	mbingaman@officedepot.com	
Phone Number	916-338-5988	ext <input type="text"/> example: 555-123-4567
Fax Number	916-338-1234	example: 555-123-4567
Cell Phone Number	<input type="text"/>	
Alt. Phone Number	<input type="text"/>	
Address	4614 Madison Ave <input type="text"/> <input type="text"/>	
City	Sacramento	
State	California	
Zip Code	95841	

VIEW: Madison Store

- General Info
- Notes
- Rating
- Contract List
- Qualifications
- Quick Add Classifications
- PO Notification Preferences
- Bid Invitation Email History
- Awarded Bids
- Contacts:
 - Hiroko Kurosawa
 - Madison Store**
 - New Contact

Save **Delete Contact** **Reset** **Close Window**

* Required fields

Internet



Currently when entering transactions you are not able to specify which supplier contact you want to use. DGS is working on a fix and it will be implemented soon so that you can choose your specific contact.