

Office Supplies Statewide Contract 1-10-75-55

# CUSTOMER FORUM WEBINAR

March 2011

Department of General Services  
**PROCUREMENT DIVISION**

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## Welcome and Introductions

- **DGS Procurement Team**
  - Julie Matthews, *State Contract Administrator*
- **National Office Solutions (Contractor) Team**
  - David Keegan, *Contract Manager*

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## Agenda / Purpose

- Resources
- Contract Overview
- Ordering Procedures
- Online Ordering System Demonstration
- Question and Answer Session

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## Submission of Questions

- Please submit questions via the Webinar toolbar (right-hand side of your screen)
- Oral answers will be provided during the Q&A Session at the end of the presentation
- Some questions may need to be deferred for more information
- Written responses will be provided in a FAQ
- All materials reviewed today will be posted on DGS/PD website

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# Resources

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## Resources

### DGS/PD Website

<b>Website:</b>	<a href="http://www.dgs.ca.gov/pd/Programs/contracts/OfficeSuppliesContract.aspx">http://www.dgs.ca.gov/pd/Programs/contracts/OfficeSuppliesContract.aspx</a>
<b>Information Available:</b>	<ul style="list-style-type: none"><li>• Current Contract User Instructions</li><li>• Customer Forum Materials</li><li>• User Account Registration Forms</li><li>• FAQs</li><li>• State Contracting Manual</li><li>• DGS/PD Broadcast Bulletins</li></ul>

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## Resources, *continued*

### National Office Solutions (Contractor) Website

<b>Website:</b>	<a href="http://www.calnosi.com">www.calnosi.com</a>
<b>Information Available:</b>	<ul style="list-style-type: none"><li>• Online Ordering System</li><li>• User Account Registration Forms</li><li>• Training Materials<ul style="list-style-type: none"><li>• Video Tutorials</li><li>• FAQs</li></ul></li><li>• Customer Service Contact Information</li></ul>

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## Points of Contact

- **National Office Solutions Customer Service:**

*Email:* [customercare@nosi.biz](mailto:customercare@nosi.biz)

*Phone:* (800) 573-6674

*Website:* [www.calnosi.com](http://www.calnosi.com)

- **National Office Solutions Contract Manager:**

**David Keegan**

*Phone:* (800) 573-6674

*Email:* [davidk@nosi.biz](mailto:davidk@nosi.biz)

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## Points of Contact, *continued*

- **DGS/PD State Contract Administrator**

**Julie Matthews**

**Phone:** (916) 375-5918

**Email:** [julie.matthews@dgs.ca.gov](mailto:julie.matthews@dgs.ca.gov)

## Contract Overview

## Scope

- **Statewide Contract No.:**
  - 1-10-75-55
- **Terms:**
  - 3 Years, with 2 1-year extension options
- **Contractor:**
  - National Office Solutions
  - Certified Small Business (Micro)

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## SB/DVBE Participation

- **Contract SB Participation:**
  - 100% MB Participation (prime)
  - NOS is a California-certified SB (Micro)
  - All orders receive 100% MB credit
- **Contract DVBE Participation:**
  - 3% DVBE Participation (subcontractor)
  - Items are identified in catalog by  icon
  - DVBE Participation will vary for each order
  - Calculation example provided in User Instructions

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## Usage Rules

- **Participation:**
  - Mandatory (effective March 21, 2011)
- **SB/DVBE Offramp Provision:**
  - Rules exclusive to this contract only
    - 2 Quotes required
    - Equivalent Products
    - Equal to or Better Pricing (for each item)
  - Refer to Contract User Instructions

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## Contract Structure

- **Contract Structure:**
  - 2000+ total line items
  - Items based on previous usage patterns
  - Limited to these items only
- **California Office Supplies Catalog**
  - Custom Catalog specifically for this contract
    - Hard Copy Catalog
    - Online/Electronic Catalog

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## California Office Supplies Catalog (Hard Copy)

- Contains contract items only
- Contains State Contract Prices only
- Available upon written request to Customer Service

*Reminder: Please consider the environment.*

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## California Office Supplies Catalog (Online/Electronic)

- Contains contract items only
- Contains State Contract Prices only
- Most updated information
- Available through online ordering system

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## California Office Supplies Catalog (Online/Electronic), *continued*

### ● Online/Electronic Catalog Access:

#### – Public

- View items without prices

[www.calnosi.com](http://www.calnosi.com)

#### – Guests

- Register as a “Guest” user with Customer Service
- View items with prices
- Create carts

#### – Registered Users (Authorized Buyers)

- Complete User Account Registration Process
- View items with prices
- Create carts
- Create official orders through online ordering system

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## Contract Items

### ● Recycled Products

- Products contain Recycled Content

### ● EPP (Green Bear) Products

- Products containing PCRC that meet or exceed the SABRC minimum percentages:
  - Paper – 30% PCRC
  - Plastics – 10% PCRC

### ● DVBE Products

- Products supplied by DVBE subcontractor

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## Non-Contract Items

- For all items not provided in the contract, departments may use appropriate purchasing vehicles available under delegated purchasing authority including but not limited to:
  - Competitive solicitations
  - SB/DVBE Option
  - Fair and reasonable pricing determination

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## Ordering Procedures

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## User Account Registration

- Account registration is required for all authorized buyers before ordering through this contract
- One-time Registration
- Process takes place within two (2) working days
- **Account Sign-Up Methods:**
  - Online\*\* *Fastest and most secure method*
  - Hard Copy

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## User Account Registration

- **Required Information:**
  - All information is mandatory except where noted
  - Contact, Billing, Shipping, and Verification
  - DGS Billing Code and Purchase Authority # *(required)*
- **Online Registration Demonstration:**

[www.calnosi.com](http://www.calnosi.com)

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## User Account Registration

- **Step 1: Account Sign-Up Form submitted**
  - Via Hard copy or Online
- **Step 2: Verification**
  - Requestor information and purchasing authorization verified by Customer Service
- **Step 3: Account Established**
  - Account information (username and password) provided to buyer via email.
  - Buyer may place orders via ordering methods

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## Ordering Procedure

**Reminder:** *All buyers must establish an account prior to ordering through the contract.*

- **Purchase Execution:**
  - Approved Purchase Documents
    - *Purchasing Authority Purchase Order (STD 65)*
    - *Contractor's Online Ordering System Purchase Order Document*
- **Minimum Order:**
  - None

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## Ordering Procedure, *continued*

- **Ordering Methods:**

- Online
- Fax
- U.S. Mail
- Email



[www.calnosi.com](http://www.calnosi.com)

*Special Note regarding online orders:*

- Online Purchase Order Document must be printed, signed, and retained as the official purchase document
- Signed copy must be provided to the contractor via email, fax, or U.S. Mail

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## Ordering Procedure, *continued*

- **Order Acknowledgement/Shipping Notification**

- Within 24 hours after receipt of order (ARO)
- Identification of out-of-stock (back-order) items
- Anticipated Delivery Date

- **Delivery**

- Within 5 days ARO
- FOB Destination, Freight Prepaid

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## Ordering Procedure, *continued*

- **Invoices**

- Within 7 days from delivery
- Sent via U.S. Mail

- **CAL-Card Use**

- Payment mechanism
- Must follow purchase execution rules
- Invoices
  - Submitted to CAL-Card Holder
  - Reflect \$0 balance due

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## Online Ordering System Demonstration

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## Login to ecommerce site

[www.calnosi.com](http://www.calnosi.com)

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## Additional Training Materials

- **Online** ([www.calnosi.com](http://www.calnosi.com))
  - Video Tutorials
  - FAQs
- **Customer Service**
  - Email:* [customercare@nosi.biz](mailto:customercare@nosi.biz)
  - Phone:* (800) 573-6674

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## Question and Answer Session

*Please submit your questions in writing via the Webinar toolbar.*

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## Important Reminders

- Check with your procurement office or Purchasing Authority Contact (PAC) for internal department policies and procedures
- Establish an account prior to ordering (authorized buyers)
- Follow ordering procedures outlined in Contract User Instructions
- Adhere to all applicable laws, regulations, and policies
- Provide copies of executed purchase documents to DGS/PD

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## Important Reminders, *continued*

- **Direct questions to:**

- **National Office Solutions Customer Service:**

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*Phone:* (800) 573-6674

*Website:* [www.calnosi.com](http://www.calnosi.com)

- **DGS/PD State Contract Administrator:**

**Julie Matthews**

*Phone:* (916) 375-5918

*Email:* [julie.matthews@dgs.ca.gov](mailto:julie.matthews@dgs.ca.gov)

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## Thank you for attending!

*All materials presented today will be posted on  
DGS/PD site.*