CENTRAL SUSQUEHANNA INTERMEDIATE UNIT
Application: Bidding

Vendor Portal Instructions for Vendors

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Vendor Portal Overview

The Vendor Portal allows you to enter Bid Responses online for each Major Category listed on a Bid Worksheet you have received. During the bidding cycle, you can use the Vendor Portal to:

- Log In to the Vendor Portal
- Update your Vendor information
- Update your Vendor Portal Password
- Update your Secure Authentication Information
- Record a Bid Response
- Enter an Alternate Item
- Submit a recorded Bid Response
- Retract a submitted Bid Response
- Generate a Bid Worksheet / Bid Worksheet Proof report

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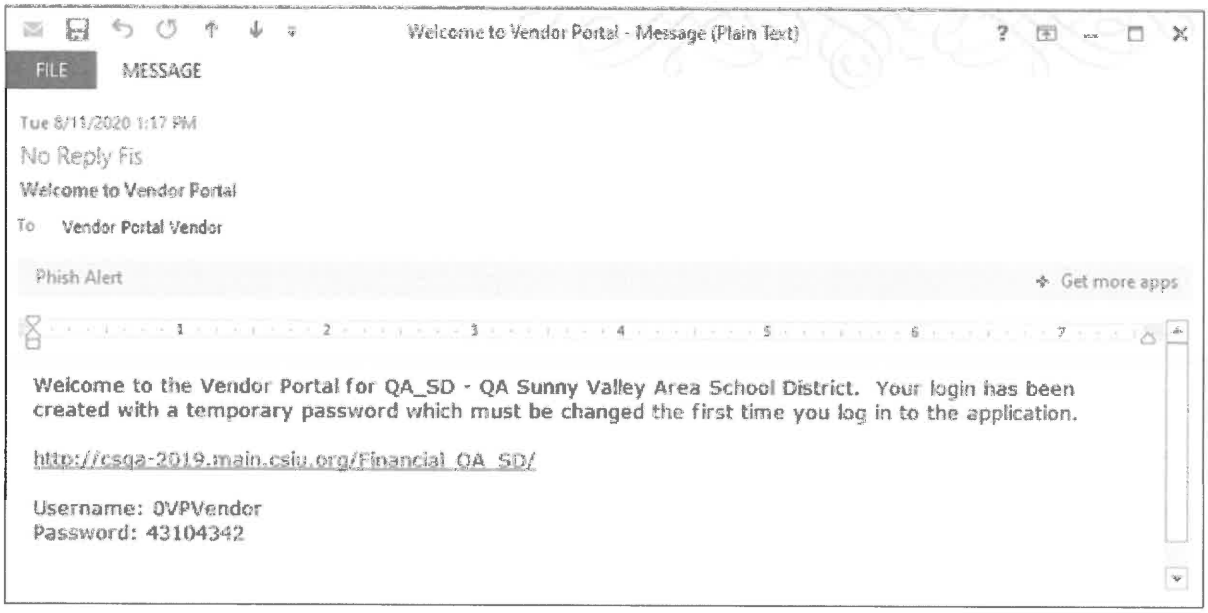
Logging In to the Vendor Portal

When the bid is opened to vendors, you will receive an email message containing your temporary password.

If it is your first time using the Vendor Portal, the email's subject line will be "Welcome to Vendor Portal". If you had previously received the Welcome message, you will instead receive an email message with the subject line, "Vendor Portal - Account Reset". Either email message contains a temporary password you must use to Log In. Then, you will need to change the temporary password for system security purposes.

Your vendor code in the district's Financial Information System is the Username you must use to Log In to the Vendor Portal. If it is not within the body of the email message, contact the district to receive that Vendor Code - Username information.



Steps To Log In to the Vendor Portal:

1. Click on the link in the Email message you received when the Major Category bid cycle began.

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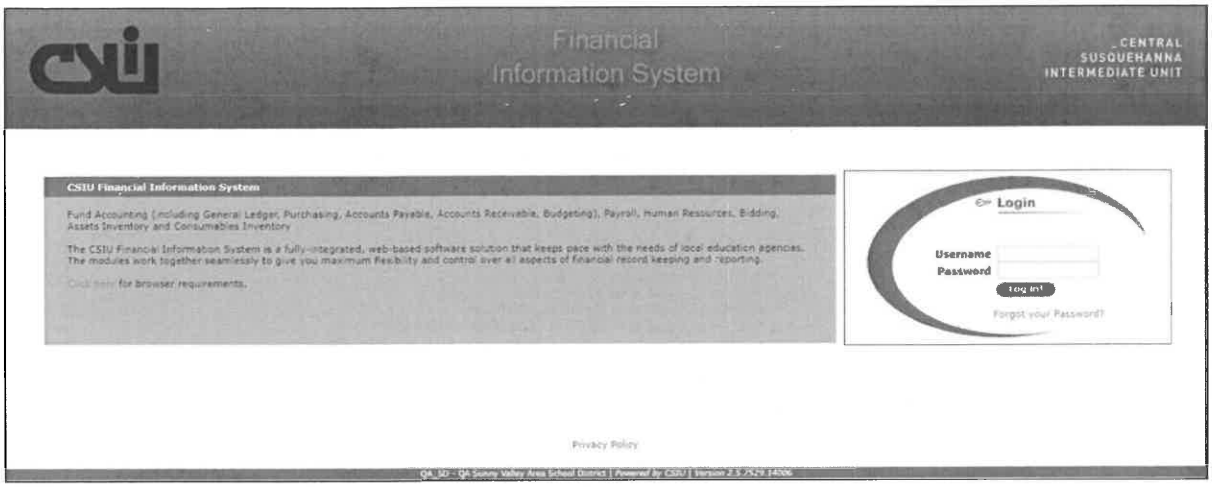
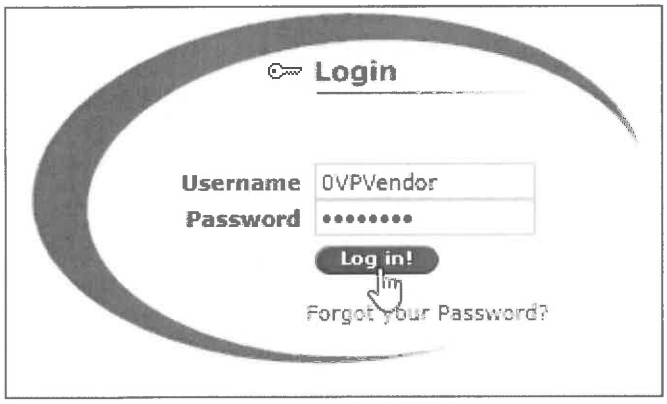


The Login Page for the Vendor Portal displays in your Web browser.

2. In the **Username** field on the Log In page for the Vendor Portal, enter your Username provided to you in the *Welcome to Vendor Portal* email message or in the *Vendor Portal - Account Reset* email message. Tip: Your Vendor ID in the district's system is your Vendor Portal **Username**.



3. Copy the **Password** from your Vendor Portal email message.
4. Paste the Password you copied into the **Password** field.
5. Select the **Log In** button.

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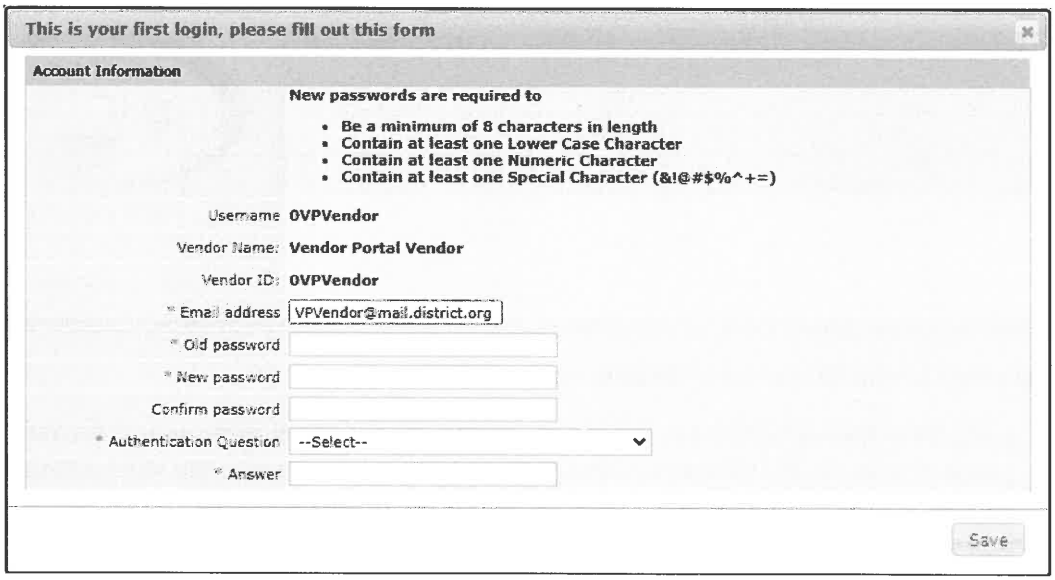
First Time Accessing the Vendor Portal

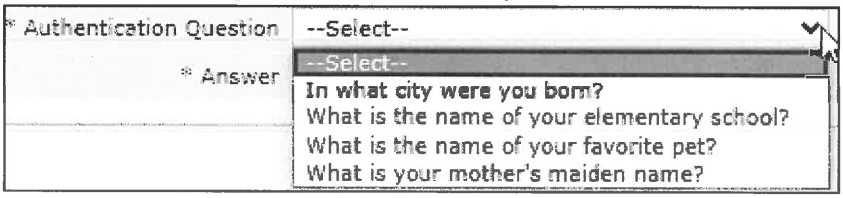
The first time you access the Vendor Portal (from the Welcome to the Vendor Portal email), you will need to provide a few additional pieces of information, to secure your Vendor Portal account.



Steps for First Time Access

Enter/Select data for all required fields, designated with a red asterisk *.

1. Your **Email address** is automatically entered for you. You can change that email address if you want, and the district's records will be updated to include that new information when you **Save** the form.
2. Copy the Password from your Vendor Portal email message.
3. In the **Old password** field, paste the Password you copied.
4. In the **New password** field, type a new password that meets the requirements listed at the top of the entry form. **New passwords are required to:** Be a minimum of 8 characters in length; Contain at least one Lower Case Character; Contain at least one Numeric Character; and Contain at least one Special Character (&!@#$%^+=).
5. In the **Confirm password** field, repeat the new password you just constructed.
   NOTE: Store your password in a secure location. We strongly urge you to use a password that you will remember easily. The district staff ***do not have access*** to your password, and cannot assign a specific password to you if you forget it; Vendor Portal security is applicable.
6. Select an **Authentication Question** from the list provided.



7. In the **Answer** field Type the answer to the selected Authentication Question.

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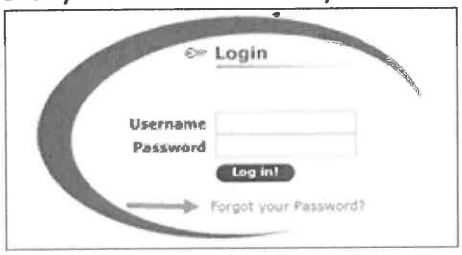
8. Select the **Save** button to store your entries in the Vendor Portal securty system.
   NOTE: District staff have no access to the security system for the Vendor Portal, so cannot retrieve your security information for you. We suggest you store the security information you provide in a safe place and do not share this information with others.
9. You will be returned to the Log In page, where you can enter the data you just provided to gain access to the Vendor Portal

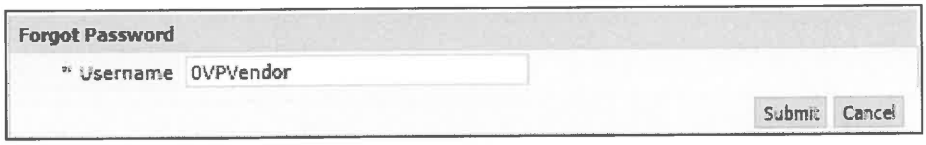
What to Do if You Forget Your Password

If you forget your password, the district staff cannot retrieve it for you. You can use the link in the last email message you received from the Vendor Portal to access the Log In page.

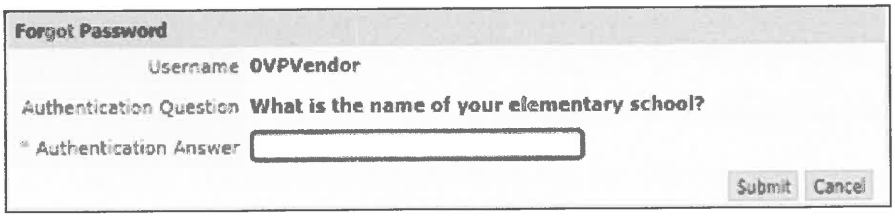
1. Select the *Forgot your Password?* Link on the Log In page to get a new system-generated temporary password sent by the Vendor Portal to your email address.



2. When you select the *Forgot your Password?* Link, security features of the Vendor Portal present you with a short series of entry fields for your authentication information that you entered when you first logged in to the Vendor Portal.



3. Enter your Username in the **Username** field (tip: your Vendor ID).
4. Select the **Submit** button.



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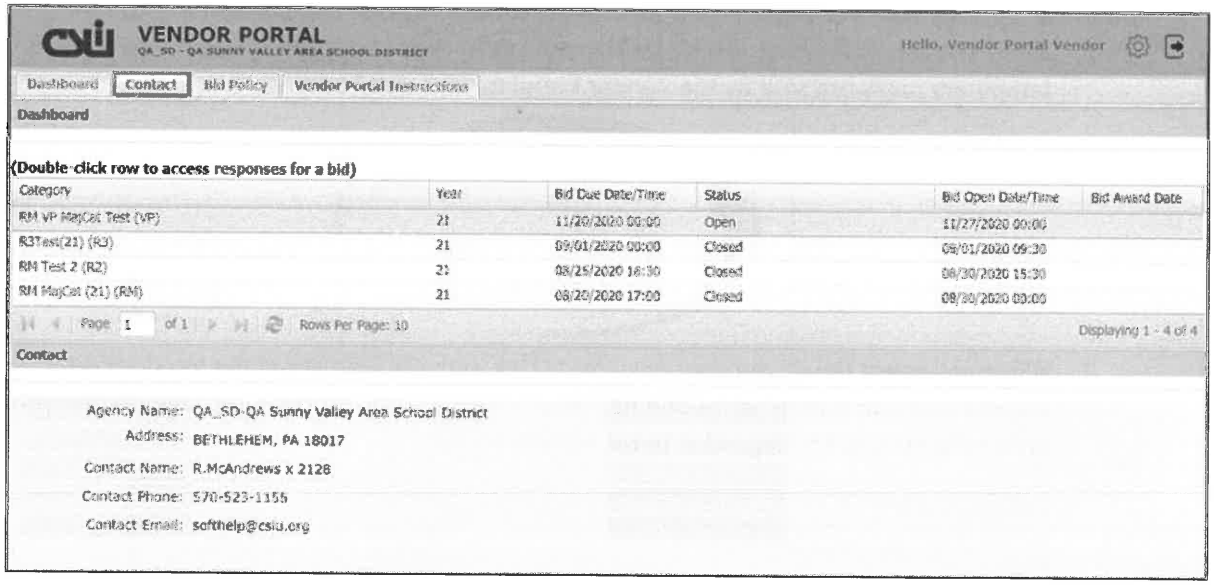
5. Type the **Authentication Answer** to your Authentication Question.
6. Select the **Submit** button.
   A new Temorary password will be sent to the email address you provided for the Vendor Portal. Use that temporary password to Log In with the link provided in the email message. You will need to change it to one that fits the criteria, and use that password the next time you log in. Refer to the criteria in Steps for First Time Access.

District Contact Information

If you need to contact the specified Bid Administrator at the district, select the **CONTACT** tab.



Provided below the Dashboard grid for your reference, you will find the district's established contact information, including the **Agency Name** and **Address**, the district's Bidding **Contact Name**, **Contact Phone** number, and **Contact Email** address.

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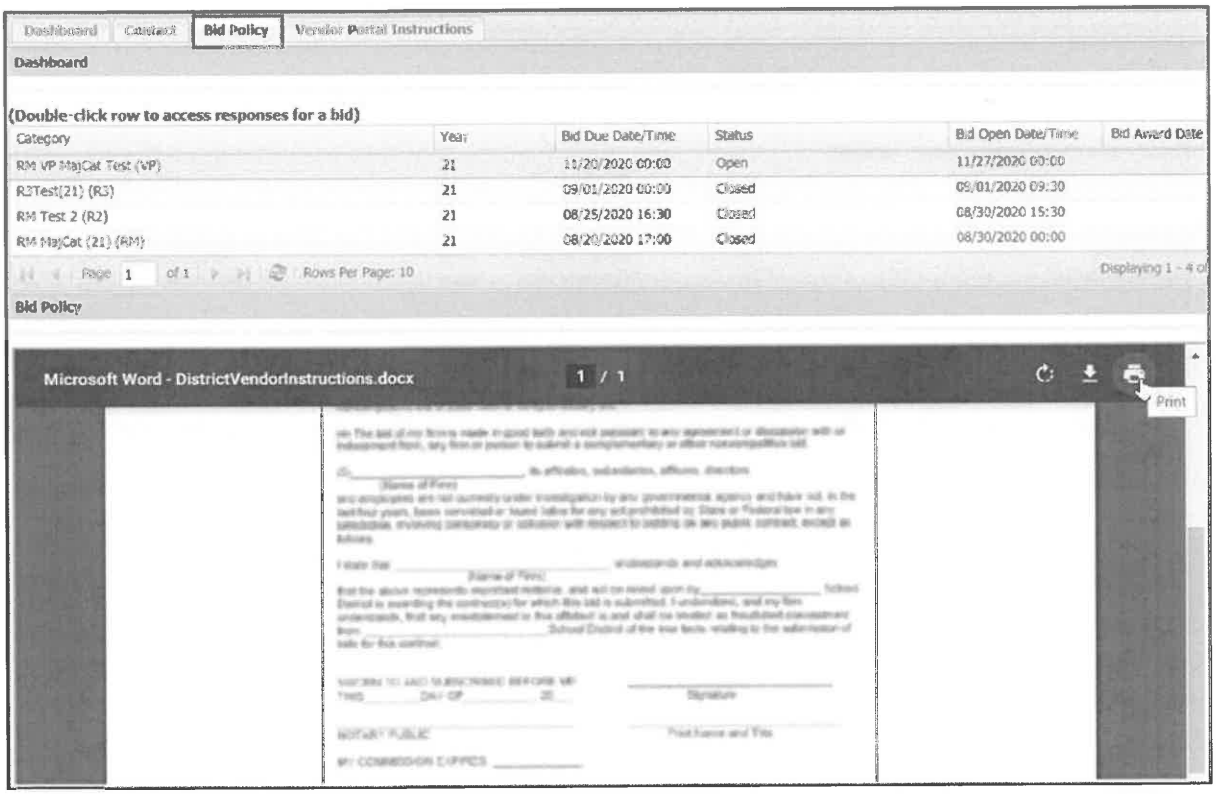
Bid Policy

If the district supplies them, select the **BID POLICY** tab to display the district's bid policy document below the Dashboard grid.



The Bid Policy document displays in a view area that allows you to download and print the document.

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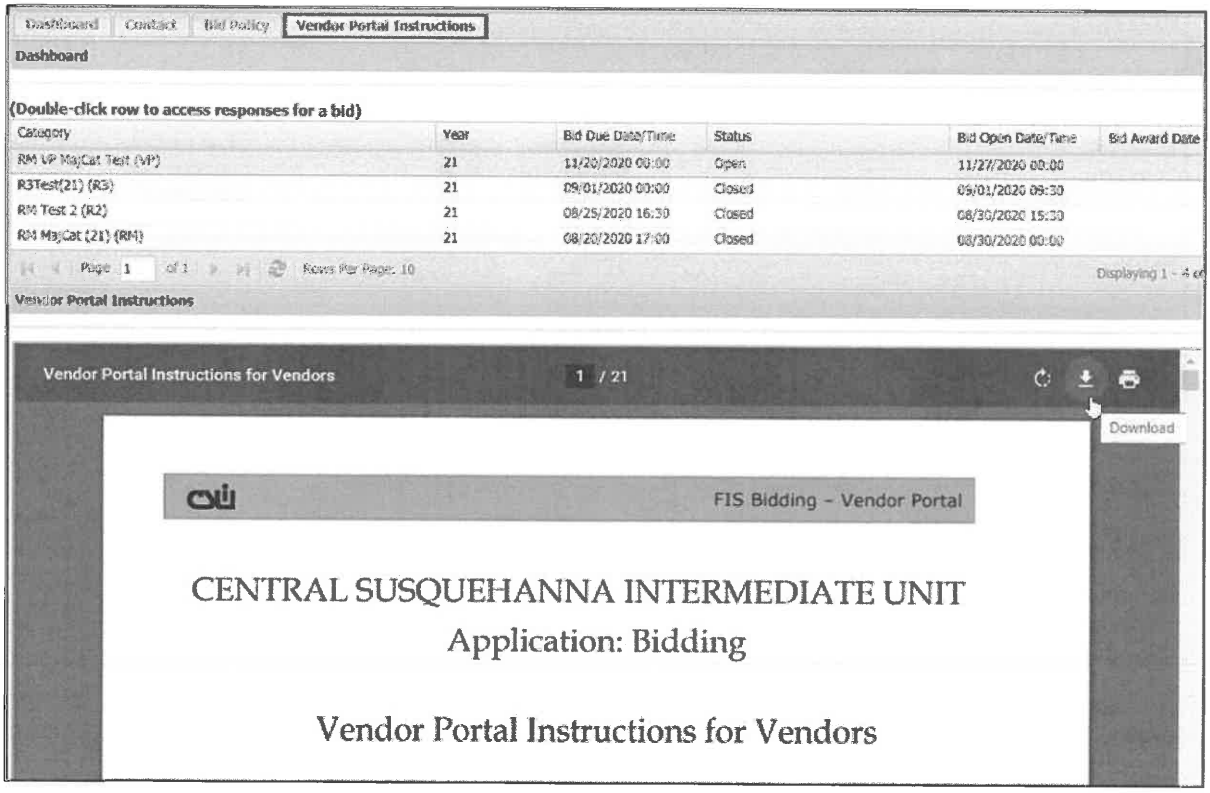
Vendor Portal Instructions

This instructional document is available within the Vendor Portal. As needed, select the tab labeled **VENDOR PORTAL INSTRUCTIONS** to reference this document (also available from a link in the Welcome and Account Reset email you receive from the Vendor Portal).



In a view area below the Dashboard grid, you can download or print the document, as needed.

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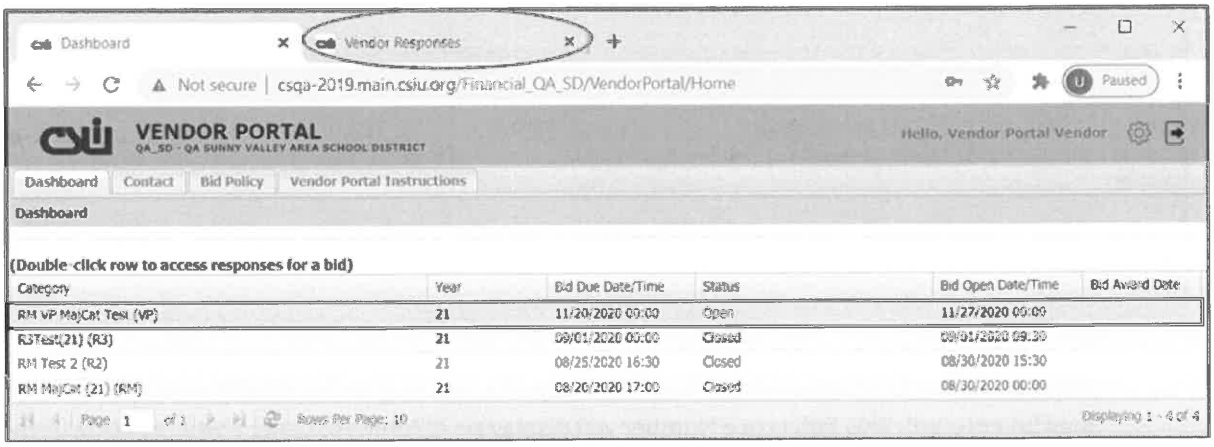
How to Enter Your Bid Prices

After Logging In to the Vendor Portal is complete, the **Dashboard** displays categories available to enter your bid prices.

1. Double-click the row in the Dashboard grid for the Category for which you will enter your bid prices. A new tab in your browser is opened, providing the fields for your bid responses.



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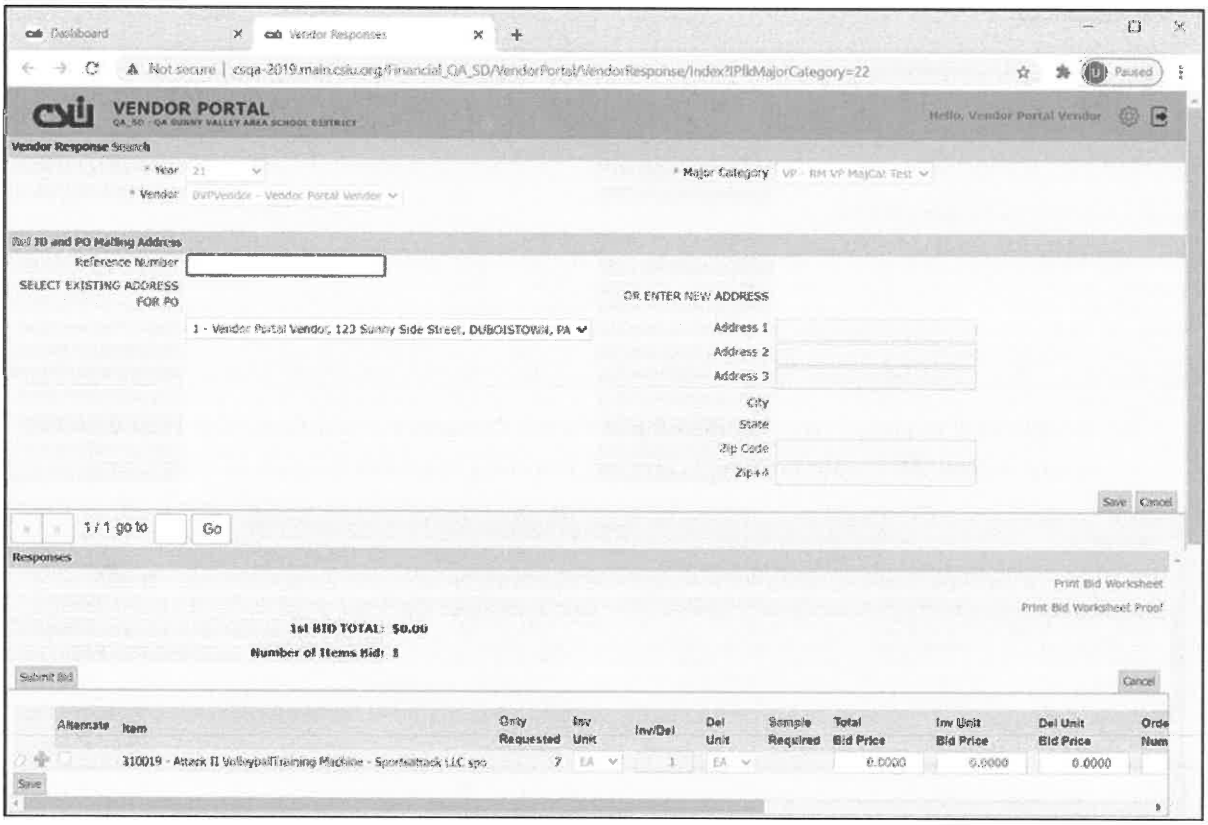
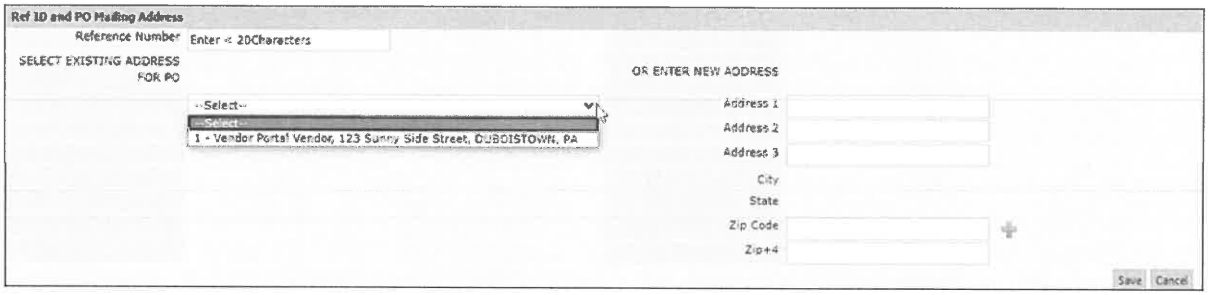
2. Select the **Vendor Responses** tab in your browser. Several display-only fields are provided at the top of the page based on the category you selected, including the Year and Major Category, as well as your Vendor ID & Vendor Name.



3. Optionally, any **Reference Number** already stored in your vendor bidding information displays. You can add a Reference Number, or update one that is displayed (up to 20 characters may be entered). This Reference Number will display on a Purchase Order Form resulting from a winning/awarded bid.

4. The Order Identification from your vendor record displays the address stored in the district's FIS. The address shown here is where any Purchase Order form for a winning/awarded bid will be sent. You may select a different address already on file with the district. OR, you can use the small drop-down arrow to select the "—Select—" option which opens up the address fields listed under the "Or Enter New Address" area of the page.



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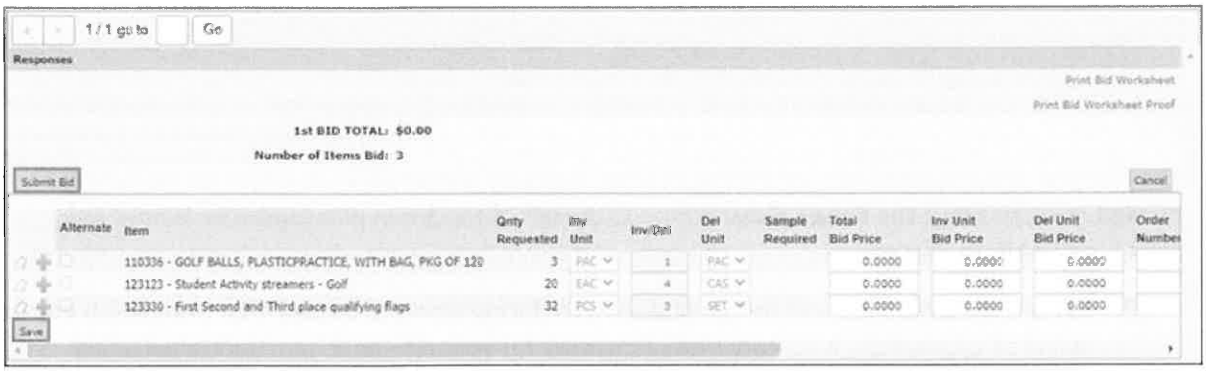
5. Using the open address fields, you can optionally enter a new address not already on file with the district to which you want any resulting purchase order to be sent. The **Address 1** and **ZIP Code** fields are required to save the record. **TIP**: Entering a ZIP Code automatically completes the **City** and **State** fields.
   NOTE: An address is required, either one already displayed, one you select, or one you enter manually.

6. Select the **Save** button to store your changes.

Below this area is where you will enter your Bid Responses. You might need to use your browser's vertical scroll bar to display the area where for the total Quantities shown on the Bid Worksheet(s) you received, you can enter your bid prices. You can use the Tab key on your keyboard to move to the next open field for your data entry.



7. Place your cursor in the **Total Bid Price** field and key in your bid price for the total **Qnty Requested**.
   Or, place your cursor in the **Inv Unit Bid Price** field and key in your bid price for ONE inventory unit.
   Or, place your cursor in the **Del Unit Bid Price field**, and key in your bid price for ONE delivery Unit.
   NOTE: The rest of the price fields are calculated automatically when you press the TAB key on your keyboard to leave the Price field in which you have entered data.

8. Select the **Save** button in the lower left of the page to store your entries.

9. Review the entries you made, and if you are satisfied with your data entry, select the **Submit Bid** button to submit your bid. An email message will be sent from the Vendor Portal to the Bid Administrator at the district, alerting her/him that your bid has been submitted.

How to Add an Alternate Item for Response Entry

Use the following steps to add an alternate item, when the units of measure you can supply differ from those already specified on the Bid Worksheet you received. You will be able to enter bid prices for an alternate item you add in the Vendor Portal. The Bid Administrator at the district will be able to review your alternate item bid response when the Major Category's Opening Date/time has passed. If your

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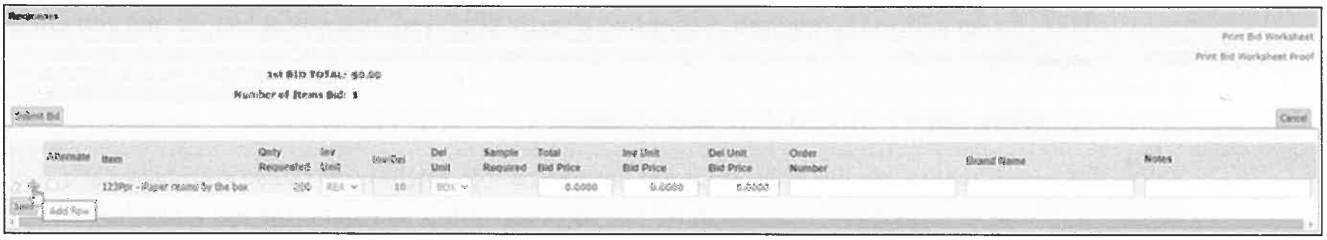
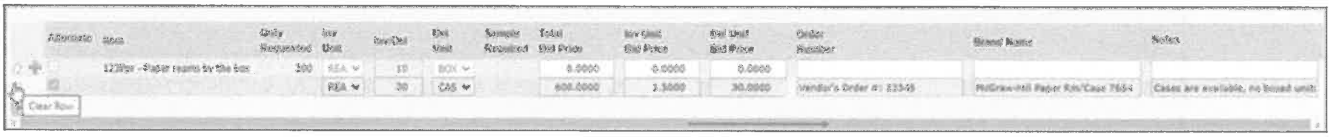
alternate is awarded the bid, an item will be added to the district's Bidding system (referencing the original item) if Purchase Orders are created for awarded alternate items.

Steps to Add an Alternate Item



1. Select the **green plus** button to add a new row for your bid response. This record is referenced as an Alternate Item.



The row you added is automatically indicated as an alternate (**Alternate** checkbox is selected). If needed, you can select the **Clear Row** button to the left of the green plus button to *remove* any entries you make in that row.

2. In the **Inv Unit** field, use the small downward facing arrow to display a list from which you can select an appropriate Inventory Unit of measure for your alternate item (individual units).
3. In the **Inv/Del** field, type the quantity of inventory units contained within the unit of measure to be delivered to the district.
4. In the **Del Unit** field, use the small downward facing arrow to display a list from which you can select an appropriate Delivery Unit of measure (the unit you can deliver to the district).
   NOTE: If your alternate item has identical inventory and delivery units, be sure to select each unit and type a '1' in the Inv/Del field to indicate a 1 to 1 ratio of inventory to delivery unit.
5. Select the **Save** button to store this data entry.

Continue with steps 7 – 9 of How to Enter Your Bid Prices.

Be sure to **SAVE** and then select the **Submit Bid** button when you are satisfied with your Vendor Responses.

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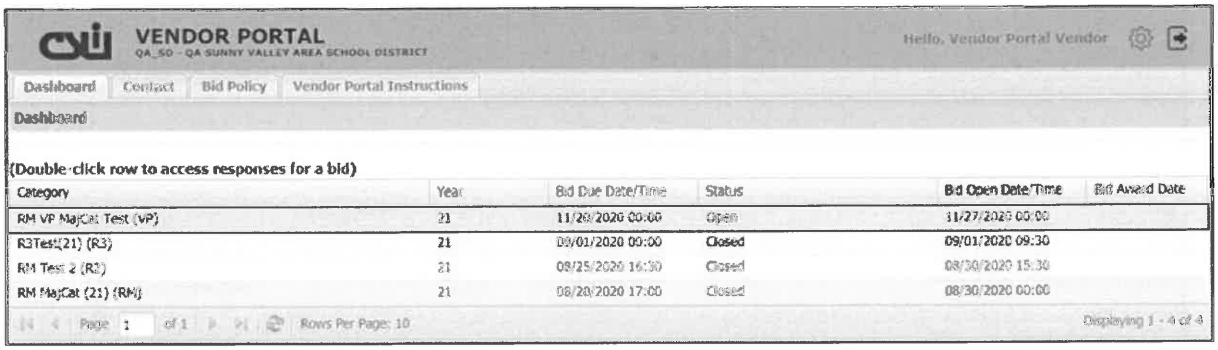
How to Submit Your Bid Responses

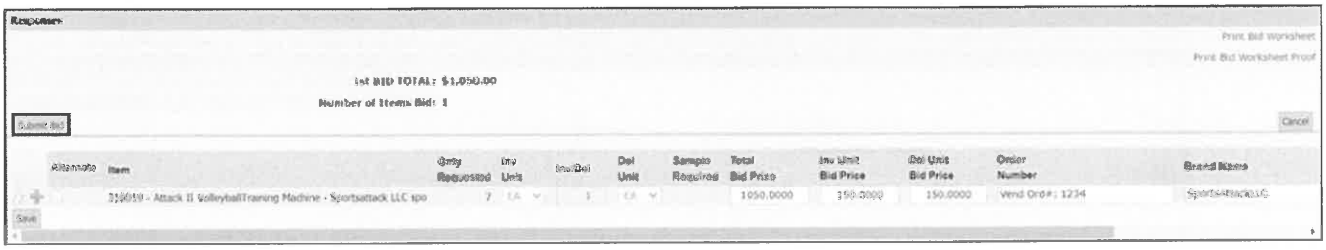
In the Vendor Portal, on any Open Bid (Bid Due Date/Time has not yet arrived) for which you have entered and saved bid prices, you can submit your Bid.

Steps to Submit a Bid

After you have entered, reviewed, and saved your Bid Responses, the final data entry phase is to submit your bid. Use the following steps to submit a Bid.



1. Double-click a Category in the Dashboard with an Open Status to display the detail for that record. Your ***saved*** bid prices display in the Responses detail.



2. Select the **Submit Bid** button.
   A pop-up message displays the terms and expectations for a submitted bid.

3. Select the **I agree** button (or select **Cancel** to cancel your bid submission).

When you select the **I agree** button, to agree to the stated terms and conditions, your Vendor Portal response entry is stored in the district's database. The system sends an alert the district's Bid Administrator. The data entry fields are disabled upon your bid submission.

NOTE: Staff at the district have ***no access*** to Vendor Responses until the Category's Bid Opening Date. Upon the Bid Opening Date/Time, all submitted bids are included in calculations of winning bid prices.

If needed, you can still **Retract** a submitted bid ***prior to*** the Category's Bid Due Date/Time.

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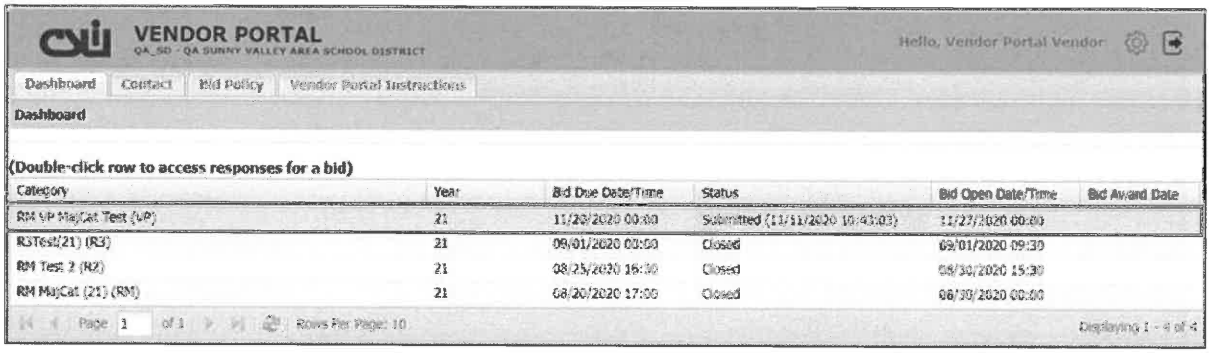
How to Retract a Bid You Submitted

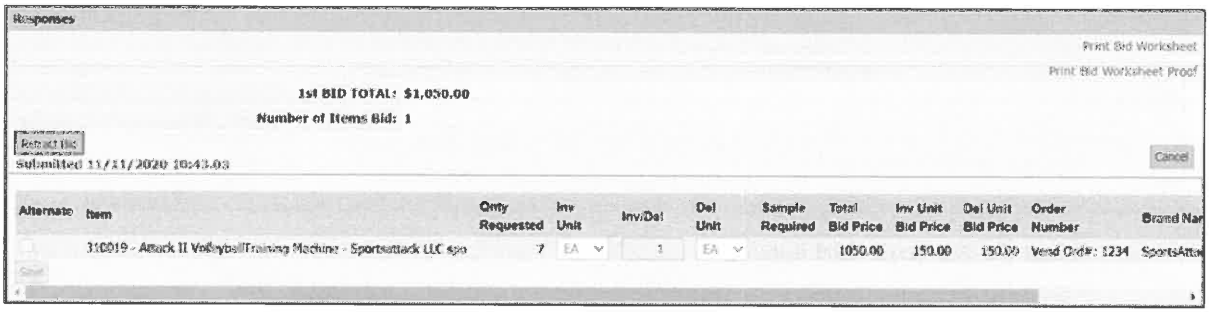
Occasionally, you might make a mistake in data entry when you enter your bid prices. If PRIOR to the Category's Bid Due Date/Time you realize a bid you submitted is not the pricing you intended to submit, you can use the Vendor Portal to retract your bid.

Steps to Retract a Submitted Bid

Use the following steps to retract a Bid you have submitted.

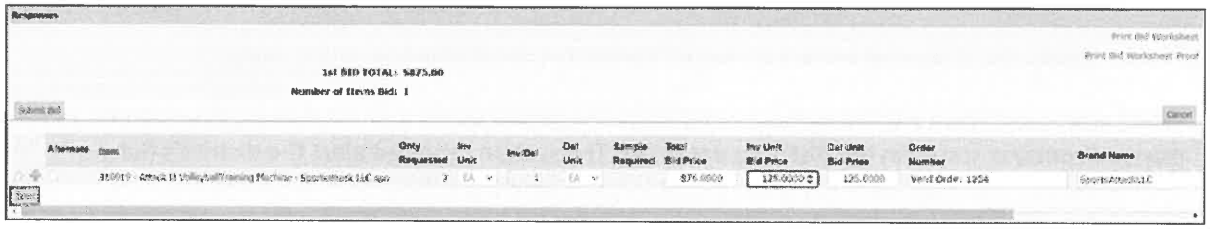


1. Double-click a Category in the Dashboard with a Submitted Status to display the detail for that record. Your submitted bid prices display in the Responses detail, along with the date/time of bid submission. Notice that the data entry fields were disabled upon your bid submission.



2. Select the **Retract Bid** button. As the system prepares your request to retract the bid, you might notice a "Please Wait..." message that displays for a brief duration.

3. The data entry fields are enabled for you to enter your bid prices, and the **Retract Bid** button is replaced by a **Submit Bid** button. Make any changes to your previous bid response entry.



4. Be sure to **Save** your changes to your bid Response data entry.

5. To submit this current bid, complete the needed Steps to Submit Your Bid Responses.

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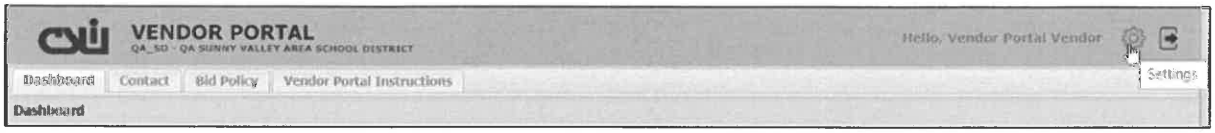
Update your Vendor Information in the Vendor Portal

While you are logged in to the Vendor Portal, you can adjust your individual settings.



1. Select the gear icon in upper right corner of the page, above the Dashboard. An Edit Preferences tab opens in your web browser, where your current information displays.

2. Select the **EDIT PREFERENCES** tab. Your Vendor Portal **Username** displays for informational purposes, but cannot be changed.

Using the open fields on the page, you can edit the currently displayed information. Retain or supply edited data in all required fields, designated with a red asterisk *.

3. You can edit your **First name, Middle name, Last Name**, and **Email address**.
4. The default **Application Theme** is 'Blue'. Select the small downward facing arrow to display a list of other choices. Retain or select Blue, Green, Purple, Brown, Gray, or Burgundy, as the color to be applied to ALL pages of your vendor portal.
5. **Save** your data to apply any changes you made.

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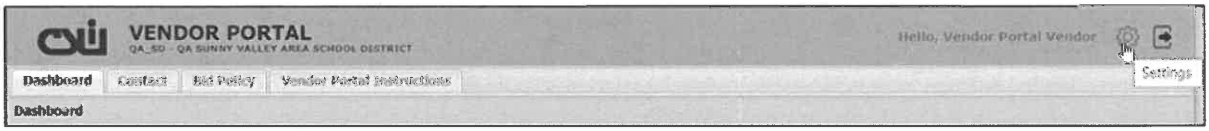
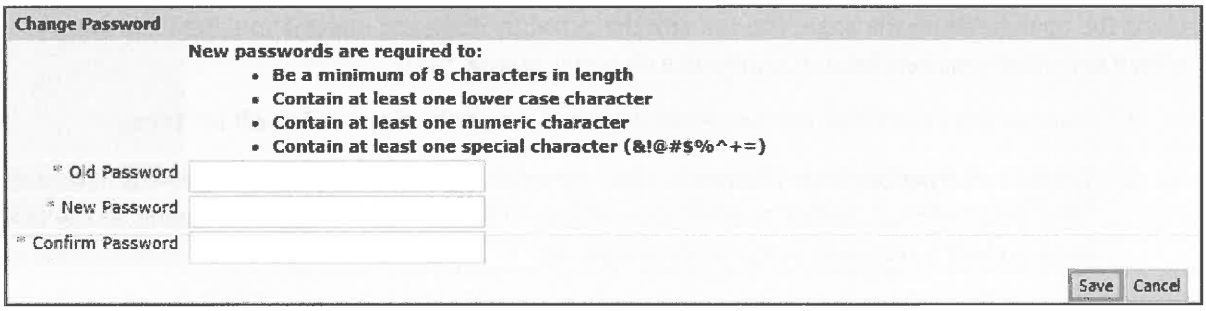
Change Password

If you need to change your password, you can do so with your Vendor Portal Settings.



1. Select the gear icon in upper right corner of the page, above the Dashboard. The **EDIT PREFERENCES** page opens in a new tab in your web browser.

2. To change your password, select the **Change Password** button. The password complexity requirements are listed at the top of the **CHANGE PASSWORD** page.



3. In the **Old Password** field, type your current password.
4. In the **New Password** field, type a new password that meets the requirements listed at the top of the data entry form.
5. In the **Confirm Password** field, repeat the new password you just constructed.
6. To apply your changed password, select the **Save** button. The next time you log in to the Vendor portal, your new password will be needed.

NOTE: Store your password in a secure location. We strongly urge you to use a password that you will remember easily. The district staff ***do not have access*** to your password, and cannot assign a specific password to you if you forget it. If needed, the Bid Administrator can reset your access to the Vendor Portal, then the system will send you an email message with a temporary password that must be changed when you use it to log in.

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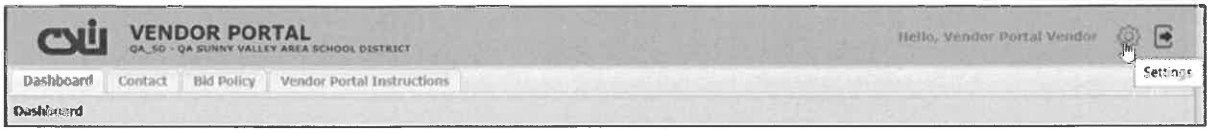
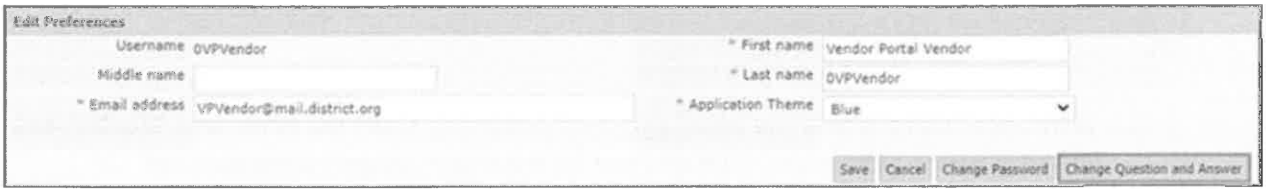
Change Authentication Question and Answer

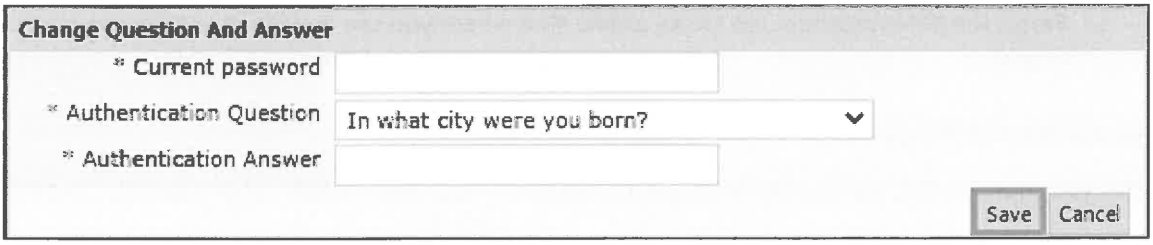
If you need to change your security authentication question and answer, you can do so with your Vendor Portal Settings.



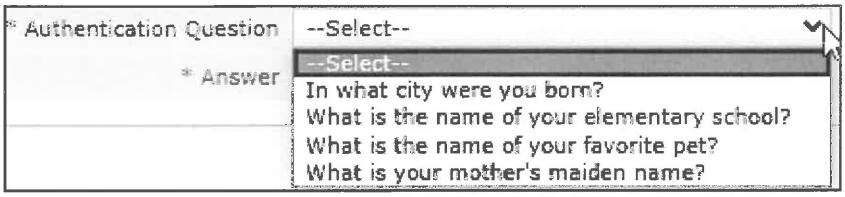
1. Select the gear icon in upper right corner of the page, above the Dashboard. The **EDIT PREFERENCES** page opens in a new tab in your web browser.



2. Select the **Change Question and Answer** button.



3. In the **Current Password** field, type or paste your current password.
4. Using the small downward facing arrow, select a security **Authentication Question**.



5. In the **Authentication Answer** field, type the answer to the question you selected.
6. Select the **Save** button to store your security authentication information.

NOTE: The Vendor Portal system will use your authentication information to confirm your identity in the event you forgot your password and need to establish a new one.

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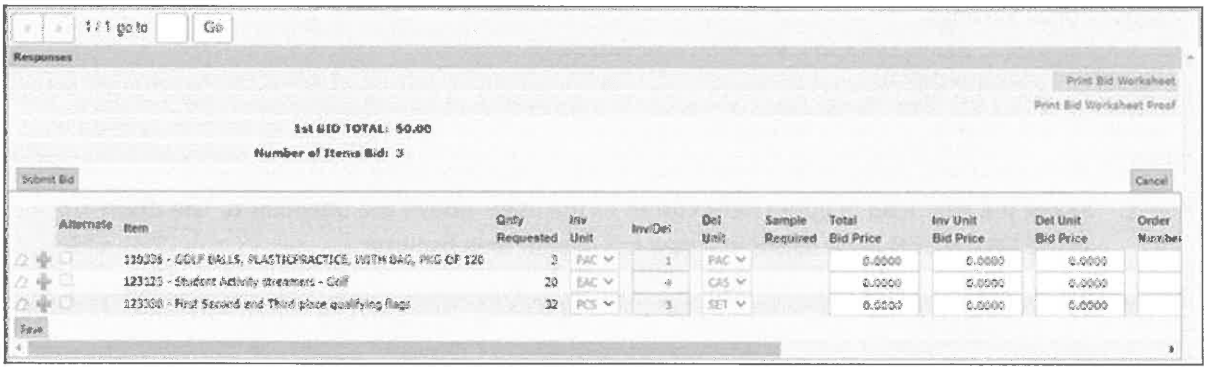
Generate a Bid Report

The Bid Worksheet report is available in the Vendor Portal.

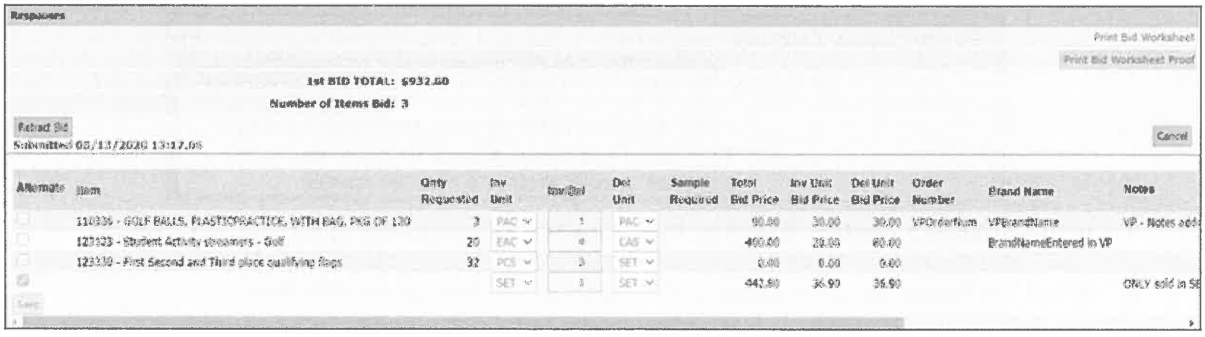


1. In an open record, where you would enter your bid prices, select the **Print Bid Worksheet** link to generate a PDF of the Bid Worksheet for the Major Category being accessed.
2. A new tab is opened in your web browser where the Bid Worksheet is automatically generated.
3. Select the Bid Worksheet tab to see a view area where you can download or print the generated report.

Generate a Report of Your Submitted Bid

After you submit a bid, you can generate a Bid Worksheet Proof that includes your submitted bid Prices.

ONLY your bid prices will be included on the report, and you alone can access this information prior to the Bid Opening Date. After the Bid Opening date has passed, district personnel with Bid Administrator permissions can see your bid responses that you entered in the Vendor Portal.



1. In a submitted record, select the **Print Bid Worksheet Proof** link to generate a PDF of the Bid Worksheet Proof, that includes your bid prices for the Major Category being accessed.
2. A new tab is opened in your web browser where the Bid Worksheet Proof is automatically generated.
3. Select the Bid Worksheet tab to see a view area where you can download or print the generated report.

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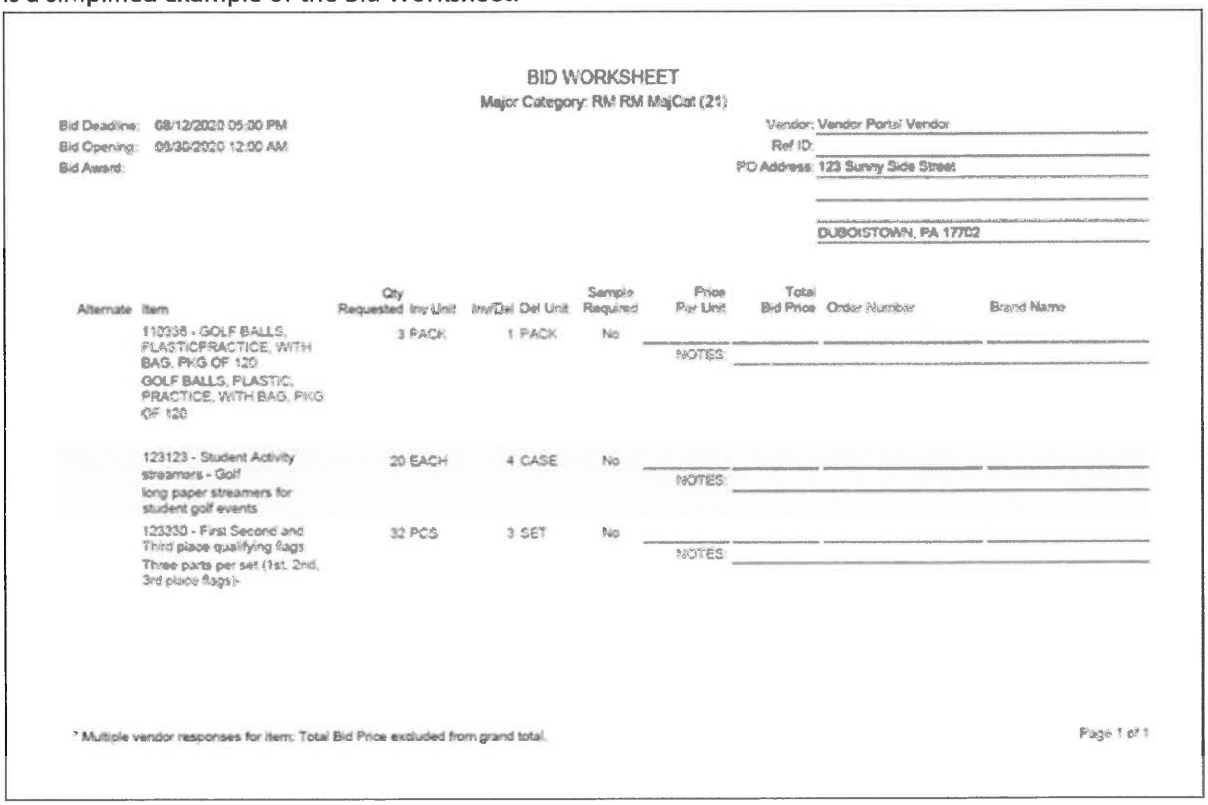
Example of Bid Worksheet

For each Major Category for which you are permitted to submit a bid, a Bid Worksheet will be provided to you (mailed to you, or attached as a Portable Document Format (PDF) file in an email message).

The Bid Worksheet(s) you received can be used to prepare your bid responses. Within the Vendor Portal you can generate a Bid Worksheet/Bid Worksheet Proof (includes your own ***submitted*** bid prices). Here is a simplified example of the Bid Worksheet:



BID WORKSHEET

Major Category: RM RM MajCat (21)

Bid Deadline: 08/12/2020 05:00 PM
Bid Opening: 08/30/2020 12:00 AM
Bid Award:

Vendor: Vendor Portal Vendor
Ref ID:
PO Address: 123 Sunny Side Street
DUBOISTOWN, PA 17702

Alternate	Item	Qty Requested	Inv Unit	Inv/Del	Del Unit	Sample Required	Price Per Unit	Total Bid Price	Order Number	Brand Name
	110338 - GOLF BALLS, PLASTICPRACTICE, WITH BAG, PKG OF 120 GOLF BALLS, PLASTIC, PRACTICE, WITH BAG, PKG OF 120	3 PACK		1 PACK		No				
							NOTES:			
	123123 - Student Activity streamers - Golf long paper streamers for student golf events	20 EACH		4 CASE		No				
							NOTES:			
	123330 - First Second and Third place qualifying flags Three parts per set (1st, 2nd, 3rd place flags)-	32 PCS		3 SET		No				
							NOTES:			

* Multiple vendor responses for item: Total Bid Price excluded from grand total.

Page 1 of 1

Note the **Qty Requested** to determine how many units of each item (total quantity) are to be bid upon. The total is given in **Inv Units** (Inventory Units). Within the Vendor Portal, the total quantity to be bid upon is also displayed in Inventory Units of Measure. When you enter your Bid Prices, we suggest you enter the Inventory Unit price, to follow this same pattern.

In the example, above, Item 110338 has a total Quantity Requested of 3 PACKS. Item 123123 has a total Quantity Requested of 20 EACH (a CASE contains 4 EACH, so in Del Units = 5 CASEs), and Item 123330 has a total Quantity Requested of 32 PCS (a SET contains 3 PCS, so in Del Units = 8 SETs).

How to End Your Vendor Portal Session

To end your Vendor Portal session, select the Logoff arrow at the top right of the Dashboard page, or close your web browser.

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