

QUICK REFERENCE GUIDE

Create and Use Vendor Groups for Event Invitations

February 22, 2017

Create and Use a Vendor Group for Event Invitations

Event creators can set up a vendor group for event invitations. When you create any type of strategic sourcing event (e.g., RFB, RFP, or RFI), you can invite vendors to view and participate in it. You can save these vendors into a group for use on future events. Set up vendor groups in the **Invite Bidders** section of an event.

Setting up a vendor group allows you to create a list of vendors that you can use for multiple events. You can use SWIFT to locate and add vendors to a vendor group. You can set up a vendor group for others in your agency to use. You can also remove an individual Vendor ID for one event and still keep it in the vendor group for future events.

This guide provides the steps to create a vendor group. For more information about Strategic Sourcing events in SWIFT, please view the SWIFT Training Reference Guides. <https://mn.gov/mmb/accounting/swift/training-support/reference-guides/strategic-sourcing.jsp>

Steps to Create a Vendor Group

Step 1: Access the Add a New Value page.

- **Navigation:** Sourcing, Create Events, Event Details, Add a New Value.
- On the **Add a New Value** page, enter the required information. Click **Add**.

The screenshot shows the 'Create Events' interface with the 'Add a New Value' tab selected. The form contains the following fields and values:

Business Unit:	<input type="text"/>
Origin:	<input type="text"/>
Event ID:	NEXT
Event Round:	1
Event Version:	1
Event Format:	Buy
Event Type:	RFx
Proxy Bidding (Auctions Only):	<input type="text"/>

An 'Add' button is located at the bottom left of the form area.

Step 2: Enter information on the Create an Event page.

1. **Describe the Event on the Event Summary Page.**
2. **Enter all required information in the Step 1: Define Event Basics section.** Click the **Save Event** button at the bottom of the page once the required fields are populated. SWIFT will assign an Event ID for the new event.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

[Certification Review](#)

NOTE: Click **Save Event** after updating each section.

3. Select Bidders to Invite.

- To create a vendor group, click the **Bidder Invitations** link.

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

- On the **Bidder Invitations** page, click the **Search for Bidders** link.

Invite Bidders

Business Unit: G1001 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type:

Public Event

Bidder Invitation List							Personalize	Find	View All	First	1 of 1	Last
Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method							
1	<input type="checkbox"/>	PUBLIC_AUC	Public	1	This is a Public Event	Email						

[Search for Bidders](#)

Dispatch Lines

[Save Vendors as Group](#)

- On the **Bidder Search** page, enter search criteria. Click **Search**.

Bidder Search

Search Criteria

Bidder Type:

Name:

ID:

Contact:

Group ID:

Group Name:

Category:

State:

City:

Country:

Postal:

Type:

SIC Type:

SIC Code:

Item ID:

TG ED Registered

*** Generic Group Box**

Results Option:

Type:

Maximum Rows retrieved:

- On the **Search Results** section, SWIFT displays a list of bidders that fit your search criteria. Check the **Invite** box for desired vendors to invite. You can also click the **Recommend Bidders** button for options.

Results Option: Type:

Maximum Rows retrieved:

[Select All](#) [Deselect All](#)

Search Results					Personalize	Find	View All	First	1-50 of 50	Last
Bidder ID	Location	Contact Information	Bidder Company	Invite						
1 0000192702	<input type="text" value="001"/>		STRAUSS CONSULTING	<input type="checkbox"/>						
2 0000192855	<input type="text" value="001"/>		MAXIMUS INC S	<input type="checkbox"/>						

- If you used the **Recommend Bidders** feature, check the **Invite** box for desired vendors to invite. Or, click the **Select All** link.
- When you are done inviting vendors, click **OK** at the bottom of the page.

SWIFT returns you to the **Invite Bidder** page. You have now invited the desired vendors to this event.

Step 3: Save the Group of Vendors.

- On the **Invite Bidders** page, select the vendors you want to add to the group.
 - Check the **Select** box at the left of the vendor line for the desired vendors.
 - Click **Save Vendors as Group** link.

Invite Bidders

Business Unit: G1001 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type:

Public Event

Bidder Invitation List								Personalize	Find	View All	First	1-5 of 51	Last
Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method								
<input checked="" type="checkbox"/>	PUBLIC_AUC	Public	1	This is a Public Event	Email								
<input checked="" type="checkbox"/>	0000192702	Vendor	001	STRAUSS CONSULTING	Email								
<input checked="" type="checkbox"/>	0000192855	Vendor	001	MAXIMUS INC S	Email								
<input type="checkbox"/>	0000193087	Vendor	001	DEEP PORTAGE CONSERVATION	Email								
<input type="checkbox"/>	0000193295	Vendor	001	NATIONAL JUDICIAL COLLEGE	Email								

[Search for Bidders](#) [Dispatch Lines](#)

- On the **Vendor Group Details** page, enter information to identify the vendor group. All fields are required.
 - Enter Quote Group ID: Use agency guidelines to create a Group ID up to 10 characters.
 - Enter Short Description: Use agency guidelines to create a Short Description up to 10 characters.
 - Enter Description: Use agency guidelines to create a Description up to 30 characters.
 - Click **OK**.

Vendor Group Details

SetID: SHARE

*Quote Group ID:

*Short Description:

*Description:

Complete the event as appropriate. You have successfully created a vendor group.

Add Vendors to an Event from a Vendor Group

Once a vendor group exists, you can use it for future events. To locate a vendor group, navigate back to the **Bidder Search** page. Search for the *Group ID/Group Name*.

Follow **Steps 1 and 2** highlighted earlier in this guide.

- Step 1: Access the Add a New Value page.
- Step 2: Enter information on the Create an Event page.

Step 3: Invite Vendors.

1. On the **Step 3: Select Bidders to Invite** page, click **Bidder Invitations** link.

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

2. On the **Invite Bidders** page, click the **Search for Bidders** link.

Invite Bidders

Business Unit: G1001 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type:

Public Event

Bidder Invitation List Personalize | Find | View All | First 1 of 1 Last

Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method	
1 <input type="checkbox"/>	PUBLIC_AUC	Public	1	This is a Public Event	Email	

[Search for Bidders](#) Dispatch Lines [Save Vendors as Group](#)

- On the **Bidder Search** page, enter the *Group ID* and/or *Group Name*. Click **Search**.

Bidder Search

Search Criteria

Bidder Type: Vendor

Name:

ID:

Contact:

Group ID: RFB GR1

Group Name: Group 1 for RFB Events

Category:

State:

City:

Country:

Postal:

Type:

SIC Type:

SIC Code:

Item ID:

TG ED Registered **Type of Contractor**

Generic Group Box

Results Option: Display Bidder/Company Id Only

Type:

Search **Recommend Bidders** Maximum Rows retrieved: 50

Enter search criteria and press search to retrieve bidders.

OK Cancel Refresh

- On the **Search Results** section, SWIFT will display all the vendors included in the group. Select **vendors** from the group you want to invite to the event. You can remove individual vendors as needed. Click **OK**.

Bidder Search

Search Criteria

Bidder Type: Vendor

Name:

ID:

Contact:

Group ID: RFB GR1

Group Name: Group 1 for RFB Events

Category:

State:

City:

Country:

Postal:

Type:

SIC Type:

SIC Code:

Item ID:

TG ED Registered **Type of Contractor**

Generic Group Box

Results Option: Display Bidder/Company Id Only

Type:

Search **Recommend Bidders** Maximum Rows retrieved: 50

Select All Deselect All

Search Results

Bidder ID	Location	Contact Information	Bidder Company	Invite
1 0000192548	001		BITUMINOUS ROADWAYS INC	<input type="checkbox"/>
2 0000192549	001		HIAWATHA REDDY RENTS	<input type="checkbox"/>
3 0000192550	001		ASSOC FOR CAREER & TECH EDUC	<input type="checkbox"/>
4 0000192551	001		CLEMENT COMMUNICATIONS INC	<input type="checkbox"/>
5 0000192552	001		FELTON TELEPHONE CO INC	<input type="checkbox"/>

OK Cancel Refresh

You have successfully used an existing vendor group. Complete the event as appropriate.