

QUICK REFERENCE GUIDE

Create a Vendor Group for Strategic Sourcing Events

December 17, 2013

Create a Vendor Group for Event Invitations

Setting up a vendor group is a quick and efficient way to add vendors to the invite list of multiple events. Groups allow multiple vendors to be easily located, and all added at once. It can be done once, and used by not only the group creator, but others as well. If a particular vendor is not needed for an event, they can be removed from that event, but still kept as a part of the group itself for future use.

Create a Vendor Group

When any type of event (RFB, RFP, or RFI) is being created, vendors can be invited to view and participate. These vendors can immediately be saved as a group

1. **Navigate** to Sourcing, Create Events, Event Details
2. Click the **Add a New Value Tab**
3. Enter your event details
 - a. Business Unit
 - b. Origin
 - c. Event Format
 - d. Event
4. Click **Add**
5. Enter Event Summary details
6. Enter Line Items details
7. Enter Define Event Basics details
8. Click **Bidder Invitations** link
9. Click **Search for Bidders** link

Create an Event

Invite Bidders

Business Unit: R2901 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Public Event

Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method
1 <input type="checkbox"/>					Email

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10. Enter search criteria
11. Click **Search**
12. Select desired vendors from search results
13. Click **OK**
14. Repeat steps 9-13 until all desired vendors have been selected

The desired vendors are now invited to this particular event, and can be saved as a group for future use.

Create an Event

Invite Bidders

Business Unit: R2901 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Public Event

Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method
1 <input type="checkbox"/>	0000192548	Vendor	001	BITUMINOUS ROADWAYS INC	Email
2 <input type="checkbox"/>	0000192549	Vendor	001	HIAWATHA REDDY RENTS	Email
3 <input type="checkbox"/>	0000192550	Vendor	001	ASSOC FOR CAREER & TECH EDUC	Email
4 <input type="checkbox"/>	0000192551	Vendor	001	CLEMENT COMMUNICATIONS INC	Email
5 <input type="checkbox"/>	0000192552	Vendor	001	FELTON TELEPHONE CO INC	Email

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15. Select the vendors you want to add to the group by clicking the check box at the left of the vendor line
16. Click **Save Vendors as Group**

Create an Event

Invite Bidders

Business Unit: R2901 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Public Event

Bidder Invitation List Customize | Find | View All | First | 1-5 of 5 | Last

Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method		
<input checked="" type="checkbox"/>	0000192548	Vendor	001	BITUMINOUS ROADWAYS INC	Email		
<input checked="" type="checkbox"/>	0000192549	Vendor	001	HIAWATHA REDDY RENTS	Email		
<input checked="" type="checkbox"/>	0000192550	Vendor	001	ASSOC FOR CAREER & TECH EDUC	Email		
<input type="checkbox"/>	0000192551	Vendor	001	CLEMENT COMMUNICATIONS INC	Email		
<input type="checkbox"/>	0000192552	Vendor	001	FELTON TELEPHONE CO INC	Email		

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17. Enter Quote Group ID
 - a. Enter up to 10 characters
 - b. There are no guidelines for naming conventions, use what is appropriate for your agency
18. Enter Short Description
 - a. Enter up to 10 characters
 - b. There are no guidelines for naming conventions, use what is appropriate for your agency
19. Enter Description
 - a. Enter up to 30 characters
 - b. There are no guidelines for naming conventions, use what is appropriate for your agency
20. Click **OK**

Invite Bidders - Create Vendor Group

Vendor Group Details

SelfID: SHARE

Quote Group ID:

Short Description:

Description:

Vendor Group List Customize | Find | View All | First | 1-5 of 5 | Last

	Include in Group	Vendor ID	Location	Name	DBA Name
1	<input checked="" type="checkbox"/>	0000192548	001	BITUMINOUS ROADWAYS INC	BITUMINOUS ROADWAYS INC
2	<input checked="" type="checkbox"/>	0000192549	001	HIAWATHA REDDY RENTS	HIAWATHA REDDY RENTS
3	<input checked="" type="checkbox"/>	0000192550	001	ASSOC FOR CAREER & TECH EDUC	ASSOC FOR CAREER & TECH EDUC
4	<input checked="" type="checkbox"/>	0000192551	001	CLEMENT COMMUNICATIONS INC	CLEMENT COMMUNICATIONS INC
5	<input checked="" type="checkbox"/>	0000192552	001	FELTON TELEPHONE CO INC	FELTON TELEPHONE CO INC

The vendors are now saved as a group. Complete the event as appropriate.

Add Vendors to an Event from a Vendor Group

Once a vendor group has been created, they can easily be added to future events. Next time an event is being created, and these vendors should be invited, navigate back to the Bidder Search page and search for the Group ID/Group Name.

1. **Navigate** to Sourcing, Create Events, Event Details
2. Click the **Add a New Value** Tab
3. Enter your event details
 - a. Business Unit
 - b. Origin
 - c. Event Format
 - d. Event
4. Click **Add**
5. Enter Event Summary details
6. Enter Line Items details
7. Enter Define Event Basics details
8. Click **Bidder Invitations** link
9. Click **Search** for Bidders link
10. Enter Group ID and/or Group Name
11. Click **Search**

The screenshot shows the 'Bidder Search' interface. The 'Search Criteria' section includes fields for Bidder Type (set to 'Vendor'), Name, ID, Contact, Group ID (containing 'RFB GR1'), Group Name (containing 'Group 1 for RFB Events'), Category, State, City, Country, Postal, Type, SIC Type, SIC Code, Item ID, and checkboxes for TG, ED, and Registered. Below this is a 'Generic Group Box' with a 'Results Option' set to 'Display Bidder/Company Id Only' and a 'Type' dropdown. At the bottom, there are 'Search', 'Recommend Bidders', and 'Maximum Rows retrieved: 50' buttons, along with 'OK', 'Cancel', and 'Refresh' buttons. A red box highlights the 'Group ID' and 'Group Name' fields, and another red box highlights the 'Search' button.

All vendors included in the group will be shown in the search results.

12. Select **vendors** from the group you want to invite to the event
13. 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

Vendors can be added from multiple groups by repeating steps 9-13. Vendors can also be removed individually from the Invite Bidders page as necessary.

Create an Event

Invite Bidders

Business Unit: R2901 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Public Event

Bidder Invitation List

Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method		
<input type="checkbox"/>	0000192548	Vendor	001	BITUMINOUS ROADWAYS INC	Email		
<input type="checkbox"/>	0000192549	Vendor	001	HIAWATHA REDDY RENTS	Email		
<input type="checkbox"/>	0000192550	Vendor	001	ASSOC FOR CAREER & TECH EDUC	Email		

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

Save Event Changes

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Refresh Add Update/Display

Complete your event as appropriate.