

QUICK REFERENCE GUIDE

Updating Contact Details of an Invited Bidder

February 3, 2014

Updating Contact Details of an Invited Bidder

When inviting a vendor to an event, it is important to select the correct contact in order to make sure the correct person receives notification about the event and is able to see the details of the event through the supplier portal.

The following steps detail how you can change the contact when selecting and inviting a vendor to an event.

1. Navigate to Sourcing, Create Events, Event Details
2. Click the *Add a New Value* Tab
3. Enter your event details and click **Add**
4. Enter *Event Summary* details
5. Enter *Line Items* details
6. Enter *Define Event Basics* details
7. Click *Bidder Invitations* link
8. Add vendors you wish to invite to the event and click **OK** to return to the *Invite Bidders* page

The first step in ensuring you have the correct contact listed is to select the correct vendor location. Vendor contacts are associated with a specific location, so you must have the appropriate location in order to choose the correct contact. This must be done on the *Bidder Search* page and cannot be updated after the vendor is selected and listed on the *Invite Bidders* page.

You are also able to view the default contact details for the specified location by clicking the icon in the *Contact Information* column, but the contact cannot be updated from here.

9. Update the vendor location as necessary

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"/>

Once a vendor is listed on the *Invite Bidders* page, you can view and change the contact to which the event notification and details will be sent.

10. Click the *Details* icon  for the vendor whose contact details you wish to update

Modify an Event

Invite Bidders

Business Unit: G0210 Event ID: 2000002165 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Public Event

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	
<input type="checkbox"/>	0000192551	Vendor	001	CLEMENT COMMUNICATIONS INC	Email	
<input type="checkbox"/>	PUBLIC_AUC	Public	1	This is a Public Event	Email	

Search for Bidders Dispatch Lines Save Vendors as Group

Save Event Changes GoTo: Go

The *Bidder Details* page will open and all vendor details can be reviewed. The contact name and address can be seen near the top of the page. By default when the vendor is selected, the contact will populate with the first listing. This can easily be changed as long as the vendor has kept their record updated with the correct names.

11. Click the *Lookup* icon 

Bidder Details

Setid: SHARE Bidder ID: 0000192548
 Bidder Type: Vendor Location: 001

Bidder Contact Info Find | View All First 1 of 1 Last

*Contact Seq Num: 

Name: PAM HAGUE
 Email: Swift.Testing@state.mn.us

*Address: 

Address 1: 1520 COMMERCE DR
 Address 2:
 Address 3:

City: MENDOTA HEIGHTS County: DAKOTA
 State: MN Postal: 55120 Country: USA

OK Cancel Refresh

12. Select the appropriate contact from the list of contacts.

If the contact you would like is not listed, verify you are using the right vendor location. If you still do not see it listed, contact the vendor and instruct them to update their information through the supplier portal. Once that is done, the contact should be available to select.

019:

Look Up ✕

Look Up Contact Seq Num

Bidder Setid: SHARE
 Bidder ID: 0000192548
 Contact Sequence Number: =
 Contact Name: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View 100 First 1-2 of 2 Last

Contact Sequence Number	Contact Name
1	PAM HAGUE
2	TOM ASK

13. Click **OK** to confirm the contact change

Bidder Details

Setid: SHARE Bidder ID: 0000192548
 Bidder Type: Vendor Location: 001

Bidder Contact Info Find | View All First 1 of 1 Last

*Contact Seq Num:

Name: TOM ASK
 Email: Swift.Testing@state.mn.us
 *Address:

Address 1: 1520 COMMERCE DR
 Address 2:
 Address 3:

City: MENDOTA HEIGHTS County: DAKOTA
 State: MN Postal: 55120 Country: USA

OK Cancel Refresh

If the appropriate vendor contact is not listed, there is a temporary alternative available if the event is public.

14. Click the *Details* icon for the *This is a public event* line

Modify an Event

Invite Bidders

Business Unit: G0210 Event ID: 2000002165 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Public Event

Bidder Invitation List								
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"/>	PUBLIC_AUC	Public	1	This is a Public Event	Email		

Search for Bidders Dispatch Lines Save Vendors as Group

Save Event Changes GoTo: Go

15. Enter the desired *Contact Name*
16. Enter the desired *Email ID*
17. Click **OK**

Public Event Contacts

Setid: SHARE Bidder ID: PUBLIC_AUC

Contact	Contact Name	Email ID	Type	Prefix	Telephone	Extension	Mailing Address	
	<input type="text"/>	Mailing Address						

If you choose this option, know that it is only a temporary measure. The name and email address you have listed will receive notifications, but is not officially invited to participate in the event and may not receive all necessary updates about the event nor will they be able to appropriately track the event through the supplier portal.

The contact has now been updated. Complete the event as appropriate.