

## QUICK REFERENCE GUIDE

Updated November 1, 2019

### Create and Use a Bidder Group for Event Invitations

When you create any type of strategic sourcing event, you can invite bidders to view and participate in it. You can save these bidders into a bidder group for use on future events.

- Set up the bidder groups in the Invite Bidders section of an event.
- Find them on the Bidder Group Setup page.

This guide provides the steps to create a new bidder group. It also shows you the steps to find all of your bidder groups and update any as needed.

#### Steps to create a bidder group for event invitations from within an event

- Step 1: Access the Event Summary page
- Step 2: Enter information in the Event Summary page
- Step 3: Select bidders to invite
- Step 4: Save the group of bidders

#### Steps to create a bidder group from the Bidder Group Setup page

- Step 1: Access the Bidder Group Setup page
- Step 2: Create a new bidder group.

#### Steps to find and update your bidder groups

- Step 1: Access the Bidder Group Setup page
- Step 2: See who the bidders are in the bidder group and update as needed

### Steps to create a bidder group for event invitations from within an event

#### Step 1: Access the Event Summary page

1. Navigate to the **Add a New Value** page.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value tab.
<b>Contract/Sourcing WorkCenter</b>	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value tab.

2. On the **Add a New Value** page, enter or confirm the following information: *Business Unit*, *Origin* and *Event Format*. Select **Add**.

## Step 2: Enter information in the Event Summary page

SWIFT will display the **Event Summary** page.

1. Enter information on the header of the **Event Summary** page.
2. Enter information on the **Define Event Basics** section of the **Event Summary** page.
3. Enter information on the **Configure Line Items** section of the **Event Summary** page.
4. Save the event.

## Step 3: Select bidders to invite

1. To create a bidder group, select the **Bidder Invitations** link on the **Event Summary** page.

**Step 3: Select Bidders to Invite**  
Send out targeted invitations to this event, designate it as a public event, or both.

\* Bidder Invitations

- SWIFT displays the **Invite Bidders** page.

**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	Status	Location	Bidder Company	*Dispatch Method	Contact Details icon
<input type="checkbox"/>	PUBLIC_AUC	Public		1	This is a Public Event	Email	<span style="border: 1px solid red; padding: 2px;">📄</span>

Search for Bidders    Dispatch Lines    Save Bidders as Group

### Fields on the Invite Bidder page

Field	Field Description
<b>Public Event check box</b>	Select the checkbox to mark the event as public.
<b>Contact Details icon</b>	After adding bidders, press this icon to view or update contact information about invited bidders. You can also use this field to send invitations to individuals or organizations that are not yet bidders or registered suppliers
<b>Search for Bidders link</b>	Press this link to access a searchable list of bidders to use for sending invitations.

2. Make sure the event is public event by checking the **Public Event** box.
3. Search for bidders to create a bidder group.
  - To locate specific bidders to invite, select the **Search for Bidders** link.
4. SWIFT displays the **Bidder Search** page.
  - Enter the desired search information.
  - Select the **Show More** link to open more search fields.

## Fields on the Bidder Search page

Field	Field Description
<b>Bidder Type</b>	Use the Bidder and Supplier option in the dropdown menu.
<b>Name/Company</b>	Search for an individual supplier by name.
<b>Category Code</b>	Search for suppliers who self-categorized by the selected category code.
<b>ID</b>	Search for an individual supplier by Supplier ID.
<b>TG, ED, VO checkboxes</b>	Select one of these checkboxes at a time to find Targeted (TG), Economically Disadvantaged (ED) or Veteran-Owned (VO) suppliers to invite to bid on your event. Follow the policies by the Office of State Procurement on inviting TG, ED and VO businesses in the Authority for Local Purchase manual.
<b>Group ID</b>	Search for an existing Bidder Group by Bidder Group ID.
<b>Group Name</b>	Search for an existing Bidder Group by Bidder Group Name.

- You can refine the search by using the **Results Option** menu.

## Fields on the Results Option menu

Field	Field Description
<b>Display Bidder/ Company Id Only</b>	Select to show the Bidder or Company ID. The invitation is sent to the primary contact for a company with multiple contacts.
<b>Display All Contacts</b>	This option returns all individual contacts in the search results and allows you to send the event invitation to multiple contacts at the same supplier.

- Once you enter the search criteria, select the **Search** button to display bidders matching your search criteria.
- You can also select the **Recommend Bidders** button to return a list of bidders who have registered for the category codes on the event lines.

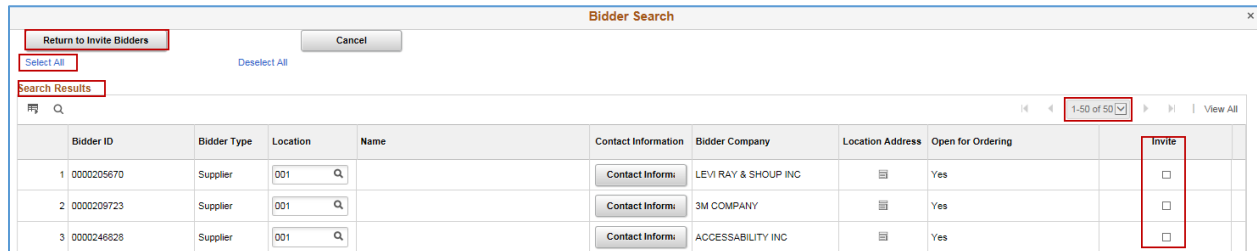
The screenshot shows the 'Bidder Search' interface. At the top, there's a title bar with 'Bidder Search' and a close button. Below it, a 'Search Criteria' section contains several input fields: 'Use Saved Search' (dropdown), 'Bidder Type' (dropdown set to 'Bidder and Supplier'), 'Name/Company' (text input with search icon), 'Category Code' (text input with '81112002' and search icon), 'ID' (text input with search icon), 'State' (text input with search icon), 'TIN' (text input), and 'City' (text input). To the right, there are checkboxes for 'TG', 'ED', and 'VO', and a 'Type of Contractor' dropdown. Below these are expandable sections for 'Category Criteria' and 'Profile Question Criteria'. At the bottom, there's a 'Results Option' dropdown set to 'Display All Contacts', a 'Type' dropdown, and a 'Maximum Rows retrieved' input set to '50'. Two buttons, 'Search' and 'Recommend Bidders', are highlighted with red boxes. At the very bottom, there are links for 'Save Search Criteria' and 'Delete Search Criteria'.

### 5. Invite bidders.

SWIFT returns the list of bidders and contacts that met your selected search criteria. They appear in order of the *Bidder ID*.

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- Locate the desired bidder(s) from the search results.
- You can see how many bidders met the criteria at the top of the **Search Results** section.
- Select the **Invite** checkbox to invite those bidders you want to receive an invite notification for the event when posted.
- You can also press the **Select All** link to invite all bidders on the list.



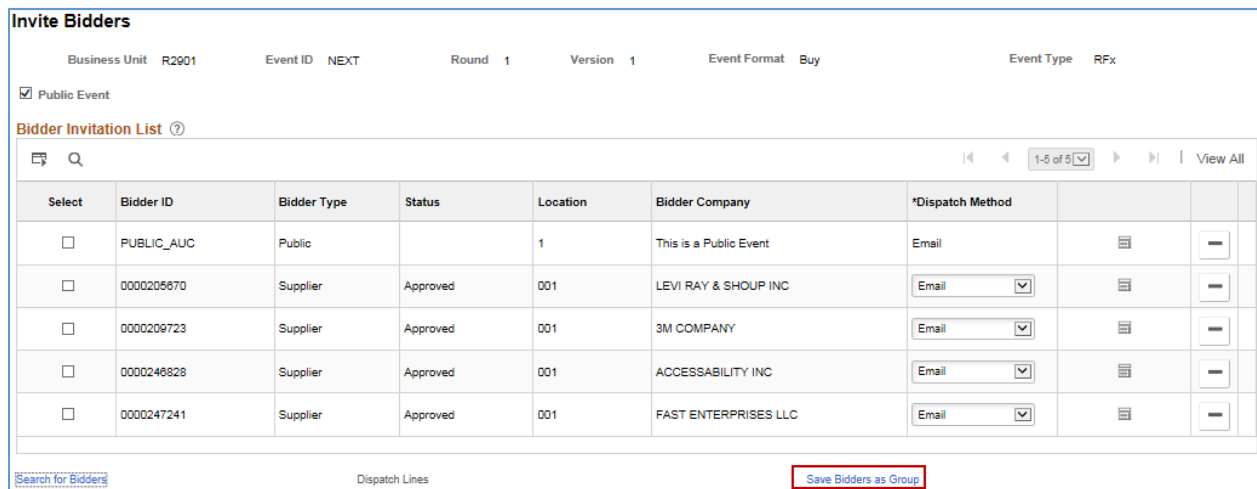
- Select the **Return to Invite Bidders** button located at the top or bottom of the page.

SWIFT returns you to the **Invite Bidders** page.

- You can see the list of bidders that you selected for invitations. SWIFT will send an email invitation to these bidders. It will also post the event to the Supplier Portal for any interested bidder to bid on when you select the **Public Event** checkbox.
- Select the **Save Event Changes** to save any changes made to this page.

## Step 4: Save the group of bidders

1. On the **Bidder Invitation List** section on the **Invite Bidders** page, select the **Save Bidders as Group** link.



2. SWIFT will display all of the invited bidders on the **Bidder Group List** section of the **Invite Bidders>Create Bidder Group** page.
  - Enter information to identify the bidder group.
    - Bidder Group ID
    - Bidder Group Name
  - Uncheck the **Include in Group** box on any bidders you do not want in the bidder group.

- Select **OK** at the bottom of the page.

3. Complete the event as appropriate.
  - Select the **Save Event Changes** link to save any changes made to this page.
  - Select the **Event Overview** link to return to the **Event Summary** page.
  - Save, post and approve the event as required by your agency and SWIFT.

You have successfully created a bidder group from an existing event.

## Steps to create a bidder group from the Bidder Group Setup page

### Step 1: Access the Bidder Group Setup page

1. Navigate to the **Bidder Group Setup** page.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Create Event, Create Events page. Left menu, Bidder Group Setup page.

2. Select the **Add a New Value** tab.
  - On the *Bidder Group ID* field, enter a name for your new group.
  - Select **Add**.

## Step 2: Create a new bidder group.

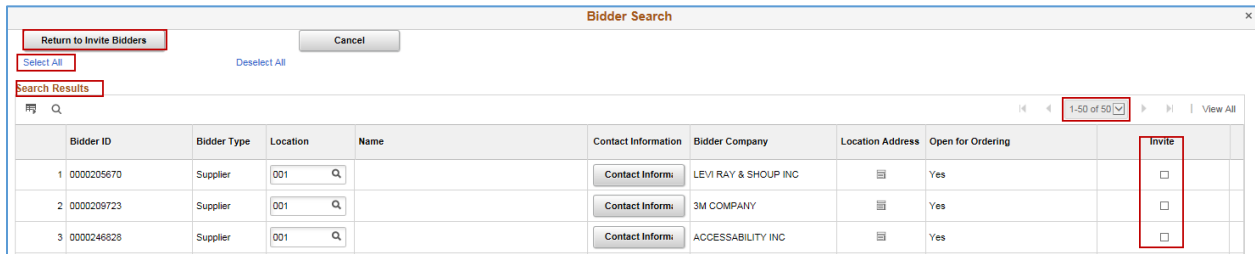
1. SWIFT displays the Bidder Group Details page.
  - Enter a *Bidder Group Name*.
  - Select the **Search for Bidders to Add** link.

2. SWIFT open the Bidder Search page.
  - Enter the desired search information.
  - Once you enter the search criteria, select the **Search** button to display bidders matching your search criteria.

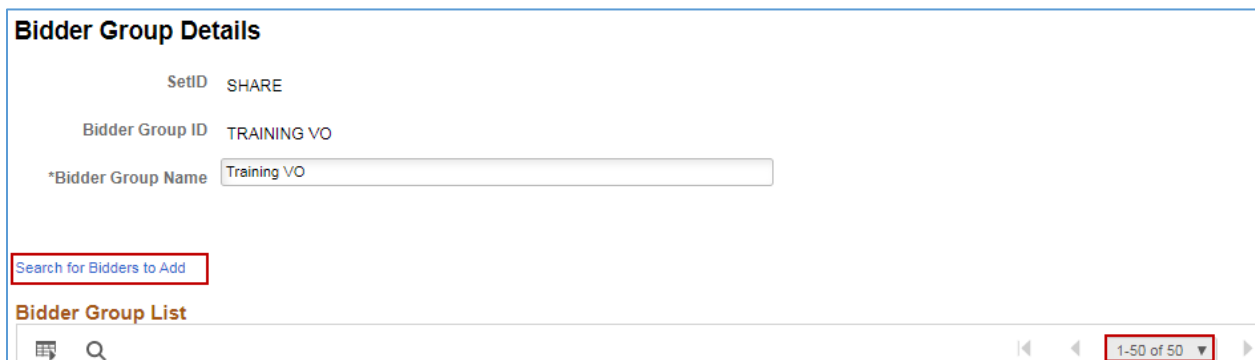
### 3. Invite bidders.

SWIFT returns the list of bidders and contacts that met your selected search criteria. They appear in order of the *Bidder ID*.

- Locate the desired bidder(s) from the search results.
- You can see how many bidders met the criteria at the top of the **Search Results** section.
- Select the **Invite** checkbox to invite those bidders you want to receive an invite notification for the event when posted.
- You can also press the **Select All** link to invite all bidders on the list.



- Press the **OK** button at the bottom of the page.
- SWIFT returns you to the **Bidder Group Details** page. It updates the page with the bidders you selected.
- If you select the **Search for Bidders to Add** link, you can add new bidders to this group.



You have successfully created a bidder group from the Bidder Group Setup page.

## Steps to find and update your bidder groups

### Step 1: Access the Bidder Group Setup page

1. Navigate to the **Bidder Group Setup** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event, Create Events page. Left menu, Bidder Group Setup page.

2. Search for your bidder groups.

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- On the **Bidder Group Setup** page, enter search criteria in the *Bidder Group ID* or *Bidder Group Name* fields and press the **Search** button.

**Bidder Group Setup**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

▼ **Search Criteria**

SetID =

Bidder Group ID begins with

Bidder Group Name begins with

Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

- SWIFT displays the **Search Results** section with your results. Select the *Bidder Group ID* to access the bidder group.

Search Results

View All

SetID	Bidder Group ID	Bidder Group Name	Bidder Group Type
SHARE	KSB_TEST	KSB Test vendors for 10101500	Personal
SHARE	PRINTING	Mississippi River Guide	Personal

## Step 2: See who the bidders are in the bidder group and update as needed

SWIFT displays the **Bidder Group Details** page for that bidder group.

1. You can see the bidders by Bidder Company.
2. Update the list as needed.

There are several actions you can take on the **Bidder Group Details** page.

- You can update the *Bidder Group Name*.
- On the **Grid Action Menu**, you can download an Excel spreadsheet with a list of the bidders on the list.
- You can delete a bidder using the **Delete** icon.
- Use the **Search for Bidders to Add** link to add new bidders to the bidder list.
- If you make changes to the list, select the **Save** button at the bottom of the page.
- Press the **Return to Search** button when you are done.



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**Bidder Group Details**

SetID SHARE

Bidder Group ID TG TRAINING

\*Bidder Group Name TG Training

Search for Bidders to Add

**Bidder Group List**

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	Bidder ID	Bidder Type	Location	Bidder Company	
1	0000192784	Supplier	001	SMART DELIVERY SERVICE INC	

**You have successfully followed the steps to find and update your bidder groups.**