

QUICK REFERENCE GUIDE

February 20, 2024

Create and Use a Bidder Group

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

This guide provides the for several ways to create and use a bidder group.

- 1. Steps to create a bidder group for event invitations from within an event
- 2. Steps to create a bidder group from the Bidder Group Setup page
- 3. Steps to find and update your bidder group

If you have questions about creating an event, review the <u>Create an Event</u> Quick Reference Guide.

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 |
|-----------------------|--|
| Navigation Collection | Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value page defaults. |
| WorkCenter | Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left menu, Sourcing, Create Events page, Add a New Value page defaults. |

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 displays 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

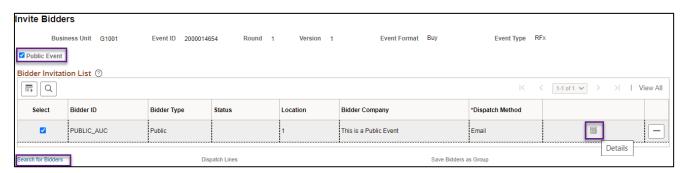
1. To create a bidder group, select the **Bidder Invitations** link on the Event Summary page.



- 2. SWIFT displays the Invite Bidders page.
 - a. Make sure the event is public event by checking the **Public Event** box.
 - b. Search for bidders to create a bidder group. To locate specific bidders to invite, select the **Search for Bidders** link.

Fields on the Invite Bidder page.

| Field Name | Field Description |
|-------------------------|--|
| Public Event checkbox | Select the checkbox to mark the event as public. |
| Contact Details icon | 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. |
| Search for Bidders link | Press this link to access a searchable list of bidders to use for sending invitations. |



- 3. SWIFT displays the Bidder Search window.
 - a. Enter the desired search information.
 - b. Select the **Show More** link to open more search fields.



Fields on the Bidder Search page.

| Field Name | Field Description |
|-----------------------|---|
| Bidder Type | Use the Bidder and Supplier option in the dropdown menu. |
| Name/Company | Search for an individual supplier by name. |
| Category Code | Search for suppliers who self-categorized by the selected category code. |
| ID | Search for an individual supplier by Supplier ID. |
| TG, ED, VO checkboxes | 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. |
| Group ID | Search for an existing Bidder Group by Bidder Group ID. |
| Group Name | Search for an existing Bidder Group by Bidder Group Name. |

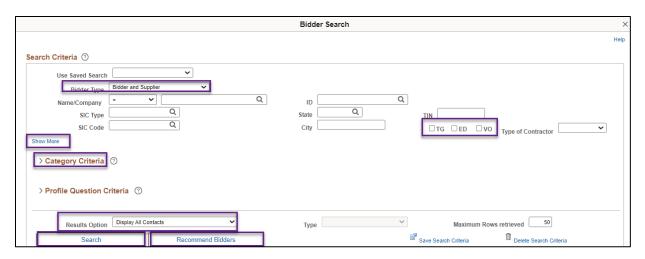
c. You can refine the search by using the **Results Option** menu.

Fields in the Results Option menu.

| Field Name | Field Description |
|------------------------------------|--|
| Display Bidder/ Company Id Only | Select to show the Bidder or Company ID. The invitation is sent to the primary contact for a company with multiple contacts. |
| Display All Contacts | 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. |

- d. Once you enter the search criteria, select the **Search** button to display bidders matching your search criteria.
- e. 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.





Step 4: Invite bidders

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

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

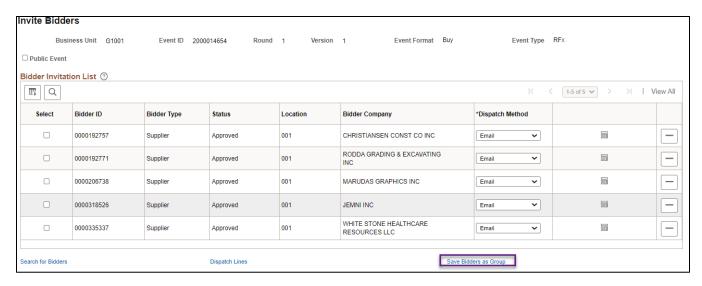


- 2. SWIFT returns you to the Invite Bidders page.
 - a. You can see the list of bidders that you selected for invitations.
 - b. SWIFT will send an email invitation to these bidders.
 - c. It will also post the event to the Supplier Portal for any interested bidder to bid on when you select the **Public Event** checkbox.
- 3. At the bottom of the list, select the **Save Event Changes** to save any changes made to this page.

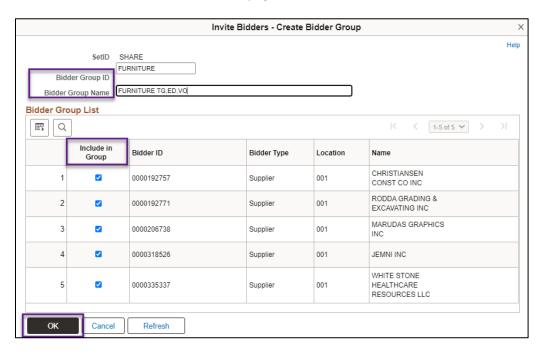
Step 5: Save the group of bidders

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





- 2. SWIFT displays all the invited bidders on the Bidder Group List section of the Invite Bidders-Create Bidder Group page. Enter information to identify the bidder group.
 - a. Bidder Group ID
 - b. Bidder Group Name
- 3. Uncheck the Include in Group box on any bidders you do not want in the bidder group.
- 4. Select **OK** at the bottom of the page.



Step 6: Complete the event as appropriate

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



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

2. Select the Add a New Value button.



3. SWIFT displays the Add a New Value page. In the Bidder Group ID field, enter a name for your new group. Select **Add**.



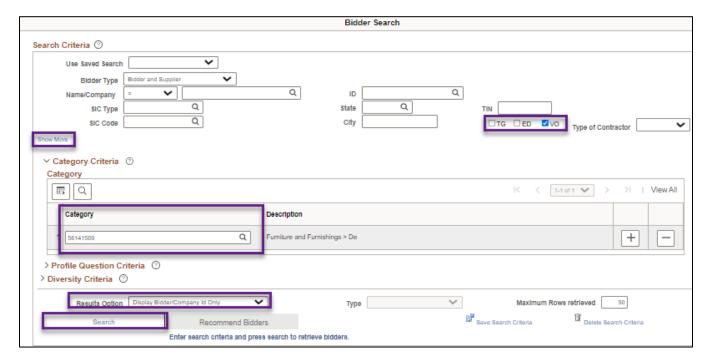
Step 2: Create a new bidder group

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





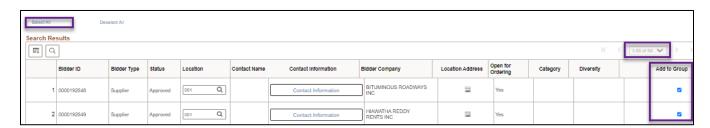
- 2. SWIFT opens the Bidder Search page.
 - a. Enter the desired search information.
 - b. Once you enter the search criteria, select the **Search** button to display bidders matching your search criteria.



Step 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.

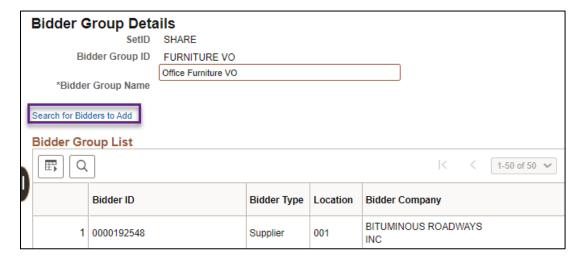
- 1. Locate the desired bidder(s) from the search results.
- 2. You can see how many bidders met the criteria at the top of the Search Results section.
- 3. Select the **Add to Group** checkbox to invite those bidders you want to receive an invite notification for the event when posted.
- 4. You can also press the **Select All** link to invite all bidders on the list.
- 5. When you are done, press the **OK** button at the bottom of the page.



- 6. SWIFT returns you to the Bidder Group Details page. It updates the page with the bidders you selected
 - a. If you select the Search for Bidders to Add link, you can add new bidders to this group.



b. Select **Save** at the bottom of the page.



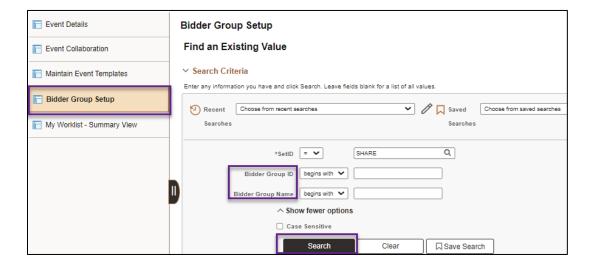
Steps to find and update your bidder groups

Step 1: Access the Bidder Group Setup page

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

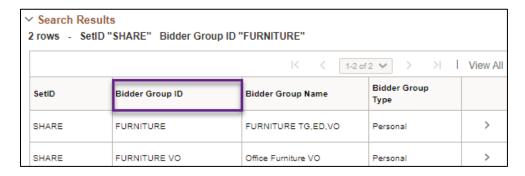
| Navigation Option | Navigation Path |
|-----------------------|--|
| Navigation Collection | Procurement, Strategic Sourcing, Create Event, Create Events page. Left menu, Bidder Group Setup page. |

- 2. SWIFT defaults to the **Find an Existing Value** page. Search for your bidder groups.
 - a. On the Bidder Group Setup page, enter search criteria in the Bidder Group ID or Bidder Group Name fields.
 - b. Press the Search button.





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



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

- 1. SWIFT displays the Bidder Group Details page for that bidder group.
 - a. You can see the bidders by Bidder Company.
 - b. Update the list as needed.
- 2. There are several actions you can take on the Bidder Group Details page.
 - a. You can update the **Bidder Group Name**.
 - b. On the **Grid Action Menu**, you can download an Excel spreadsheet with a list of the bidders on the list.
 - c. You can delete a bidder using the **Delete** icon.
 - d. Use the Search for Bidders to Add link to add new bidders to the bidder list.
 - e. If you make changes to the list, select the **Save** button at the bottom of the page.
 - f. Press the **Return to Search** button when you are done.

