SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

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 Create an Event 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.

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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.

Invite Bidders

Business Unit G1001   Event ID 2000014654   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		
☐	0000192757	Supplier	Approved	001	CHRISTIANSEN CONST CO INC	Email ▾	🖩	—
☐	0000192771	Supplier	Approved	001	RODDA GRADING & EXCAVATING INC	Email ▾	🖩	—
☐	0000206738	Supplier	Approved	001	MARUDAS GRAPHICS INC	Email ▾	🖩	—
☐	0000318526	Supplier	Approved	001	JEMNI INC	Email ▾	🖩	—
☐	0000335337	Supplier	Approved	001	WHITE STONE HEALTHCARE RESOURCES LLC	Email ▾	🖩	—

Search for Bidders   Dispatch Lines   Save Bidders as Group

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.

Invite Bidders - Create Bidder Group   ✕

                                                                        Help

SetID SHARE
Bidder Group ID FURNITURE
Bidder Group Name FURNITURE TG,ED,VO

Bidder Group List

	Include in Group	Bidder ID	Bidder Type	Location	Name
1	☑	0000192757	Supplier	001	CHRISTIANSEN CONST CO INC
2	☑	0000192771	Supplier	001	RODDA GRADING & EXCAVATING INC
3	☑	0000206738	Supplier	001	MARUDAS GRAPHICS INC
4	☑	0000318526	Supplier	001	JEMNI INC
5	☑	0000335337	Supplier	001	WHITE STONE HEALTHCARE RESOURCES LLC

OK   Cancel   Refresh

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.

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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.