Vendor Orientation

City of Boston - BAIS Financials 9.1
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Welcome Vendors!
Introduction

- The City of Boston is introducing new functionality to its prospective and existing vendors that includes some exciting new ways of doing business with the City.

- These changes will make doing business with the City of Boston easier and more efficient than ever before!
  - On-Line Bidding
  - Online Contracts using e-Signatures
  - Elect to Receive Purchase Orders by E-mail
  - Setup ACH payments
What’s in it for me?

Maintain your own profile!

– A registered vendor will now be able to add or change:
  • Contact Names
  • Addresses
  • Phone Numbers
  • Email Addresses
  • ACH information
  • Industry Self-Categorization
What’s in it for me?

Improved access to bid notifications!

– As part of the registration process, suppliers can select ‘Categories’ of goods and/or services your company provides.

– Categorizing your company indicates to the City of Boston those bid events in which you might specifically be interested.

– A supplier who has self-categorized can spend less time monitoring the public bid event postings.

View bid response history!

– Supplierd who use the Supplier Portal will have a historical view of all their bid responses submitted online.
What’s in it for me?

Electronic signature capability on contracts:

– Securely sign documents online using Adobe Reader.
– Access to documents requiring your electronic signature is limited to those within your organization who are given login credentials and registered as a Contract Signer.
– All signed documents are archived within the Supplier Portal
– Electronic documents provide a significant reduction in the environmental impact of paper processes
New Features and Benefits

Feature: On-Line Bidding

Supplier Benefits

• Saves Time
• Your bid information is secure
• Confidence that your bid submission is complete
• Flexibility to save a bid that is in-progress
• City Hall is now as close as the nearest computer!
New Features and Benefits

Feature: “Direct Connect” opportunities

Vendor Benefits

• Indicate to the City of Boston that your company wishes to participate in e-commerce punch-out

• Allow City of Boston Buyers direct access to order selected items from your website
New Features and Benefits

Feature: Electronic Contract Documents

Vendor Benefits

• View contract documents and contract attachments online
• Quickly finalize contract through the use of electronic signature and routing back to the City of Boston
• Securely share documents with authorized parties
New Features and Benefits

Feature: Receive PO’s by E-mail

Vendor Benefits

• Saves time

• Electronic Record of your orders

• Less paper means a ‘greener’ solution for all
New Features and Benefits

Feature: ACH Payments

Vendor Benefits

• Get your money faster through electronic payment

• Eliminate paper checks and misplaced payments

• Receive Payment Advice by E-mail
# Bidder/Vendor Experience

## Supplier Portal Visitors (Public):
- View the City’s publicly advertised events
- Register to create a profile, username, pwd

## Registered Supplier Portal users can:
- View the City’s publicly advertised events
- View events you were invited to
- Submit a bid response
- Review your bid history
- Self-categorize your company
- Maintain company contacts & addresses
- Apply electronic signature to contracts

## A basic lifecycle for a Bidder/Vendor

1. Register as a user
2. Categorize your company
3. Review open events
4. Receive event invitations
5. Submit a bid response
6. Be awarded
7. Sign a contract ($25K+)
8. Receive Purchase Order
What will it look like?

• Navigate to the City of Boston Procurement Page – https://www.cityofboston.gov/Procurement
• From the Procurement Page, click on the ACCESS SUPPLIER PORTAL link
View Events and Place Bids

- From the Main Menu, select Manage Events and Place Bids.
• Next, click the View Events and Place Bids link.
View Events and Place Bids

You can search for Events using one or more different Search Criteria.
Search Criteria can be saved once to use on future searches.

The Search Results area lists the events that match the criteria entered.
To access the Event Details of a listed event, simply click on the Event ID hyperlink.
Click the Discuss link to view important messages posted by the City of Boston Event Coordinator.
Event Details

- The Event Details page allows you to view details of the event such as: Event Name, Start and End dates, Contact Information, and Event Description.
- Click the Bid on Event button to submit a bid response online!
Bid Questions

On the Event Details page, you will be prompted to answer any questions that the bid event requires.

You can also add attachments as necessary to complete your bid response.
Enter Your Price

The Event Details page provides a space for the bidder to enter a Unit Bid Price.

The Total Bid Price for all Line Items is automatically calculated.

Add comments and attachments by clicking on the conversation bubble icon at the end of the Line Item.

Use the Validate Entries button to ensure that all required questions have been answered.
Validate Your Entries and Submit Your Bid

- You will receive a message if you have omitted an answer to any required question.
- Once all of the required information is populated, the bid is submitted to the City of Boston with a click of the Submit Bid button!
The Bid Confirmation page shows the bid details and confirms that the bid was successfully submitted.

The bidder will also receive a confirmation email that includes a copy of the bid package with the bidder’s submitted responses!
How Can I Get More Information?

- **Register** your organization to use the Supplier Portal at:
  - https://www.cityofboston.gov/Procurement

- **Visit** the Procurement website often for more information, recorded tutorials on the new features, and future updates from the City of Boston.

- **Stop By** the Vendor Help Desk located in City of Boston Purchasing Department for help with using the new system.
  - One City Hall Square, Boston MA 02201 Room 808

- **Still have questions?** E-mail us at Vendor.Questions@cityofboston.gov