MSBO – Creating A Solicitation
Quick Reference Guide

Navigate to www.bidsync.com

Once at www.bidsync.com, login with your username and password. Select the Bids tab, and then the Create Bid tab in the upper left corner of the page.

Complete the Information Below

- **Bid Characteristics**
  Select Agency Only to release a solicitation for your own agency, or Regional Coop for a coop with other agencies.
- **Bid Duration**
  Indicate when the solicitation closes (date and time).
- **Bid Question & Answer Duration (Optional)**
  Indicate when you would like the Q&A period to close.
- **Pre-Bid Conference (Optional)**
  Click the Add button to schedule a pre-bid conference. Select either Online Conference or At the Following Location. For on-site conferences enter the address. For both options, select the time and date and indicate whether attendance will be optional or mandatory.
- **Contract Duration**
  To determine the contract duration, click on the drop down menu. If there will be options for contract renewals, select from the drop-down menu (select Not Applicable for contracts that are one time purchases). In the Prices Good For menu, select the best option for your solicitation. Next, select the number of days pricing will be good for and the Budgeted Amount (this will not be viewable by suppliers). If you would like to give the supplier an estimate of the amount to be spent, fill in the Expected Expenditure field (viewable by suppliers).
- **Bid Information**
  Enter a bid number or leave it blank and the system will generate one for you. Enter a descriptive, yet concise title for your solicitation. Next, record any solicitation details that are necessary for suppliers to understand that have not already been entered in the bid comments section.
- **Additional Offer Fields**
  Additional Offer Fields represent further information you would like the supplier to disclose (i.e. Color, brand, fuel type, etc.) that may not typically be listed in the bid. Click on the Edit link in this section to create a field for the supplier to input this information. A window will appear where you can enter the fields you would like vendors to fill out for each line item. By clicking the Add button after each entry your additional offer field will be saved.
- **Line Item**
  To begin adding your line items, click on the Add Line Item button. This is where you will add your item information for single or multiple line items.

Bid Information – Line Item Window

Enter the following information for each line item:

- Title
- Product Code
- Pricing Type
- Expected Expenditure (Optional)
- Unit of Measurement
- Delivery Location and Quantity
- Description of Item
- Additional Offer Fields (if required)

- **Editing Line Items**
  To edit line item information, click Edit. To delete line item information, click Delete.
- **Upload Documents**
  Attach the files by clicking the Upload Document button, selecting the Browse button, finding the file on your computer, and then attaching it.
- **Web Forms**
  You can request BidSync to convert a Word or Excel file to an online web form. Select the Upload Document button, and check the box next to Convert to Web Form in the window that appears. Click on Browse, select the document you want converted, and click Open. Write any instructions you have for the BidSync IT member converting the document in the box provided, then click Submit.
- **NIGP Classification Code** (Product or Service Code)
  The classification code matches the solicitation with potential suppliers. You enter a code that is associated with the product or service you are looking for and the solicitation is sent to the suppliers of that good or service. Start by finding the code for your solicitation's line items by entering keywords, or the specific NIGP code into the search field and click Search. Select the correct entry and click Add Classification. NOTE: Please make sure you complete this step correctly or your solicitation may not be sent to the appropriate suppliers.
- **Suppliers**
  Determine who can view and receive notifications of the solicitation by selecting from the following:

  Public - All suppliers will be able to view; those matching the selected classification codes are automatically notified.

  Private - Only invited suppliers can participate in and receive notifications.

  Regional - All suppliers will be able to view; only those within the indicated region will be notified.

  Suggested Supplier – If you would like to see a list of suppliers that will automatically be notified of your solicitation, click the Suggested Suppliers button. These are suppliers already in the system that have registered to be notified about bids within the classifications you have selected. If there are additional suppliers that you would like to add to this list, click Invite Suppliers. A new window will pop up with a supplier search field.
- **Search for Suppliers**
  Search for your supplier by entering information into any of the available fields. Click the Search button. To add a supplier from the generated list, check the box next to their name and then click on the Add button at the bottom of the screen.
- **Bid Contact**
  Designate the bid contact. If you are the author of the solicitatioan you will see your name here. If the contact is to be someone else click the Search button to find the correct person. Also indicate the preferred contact method from the available check boxes.
- **Save Bid**
  Enter your password, click Save; the solicitation will then be placed in the Held Bids area under the View Bids tab waiting to be released.