

# Vendor Portal

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## User Guide

**PlanetBids, Inc.**



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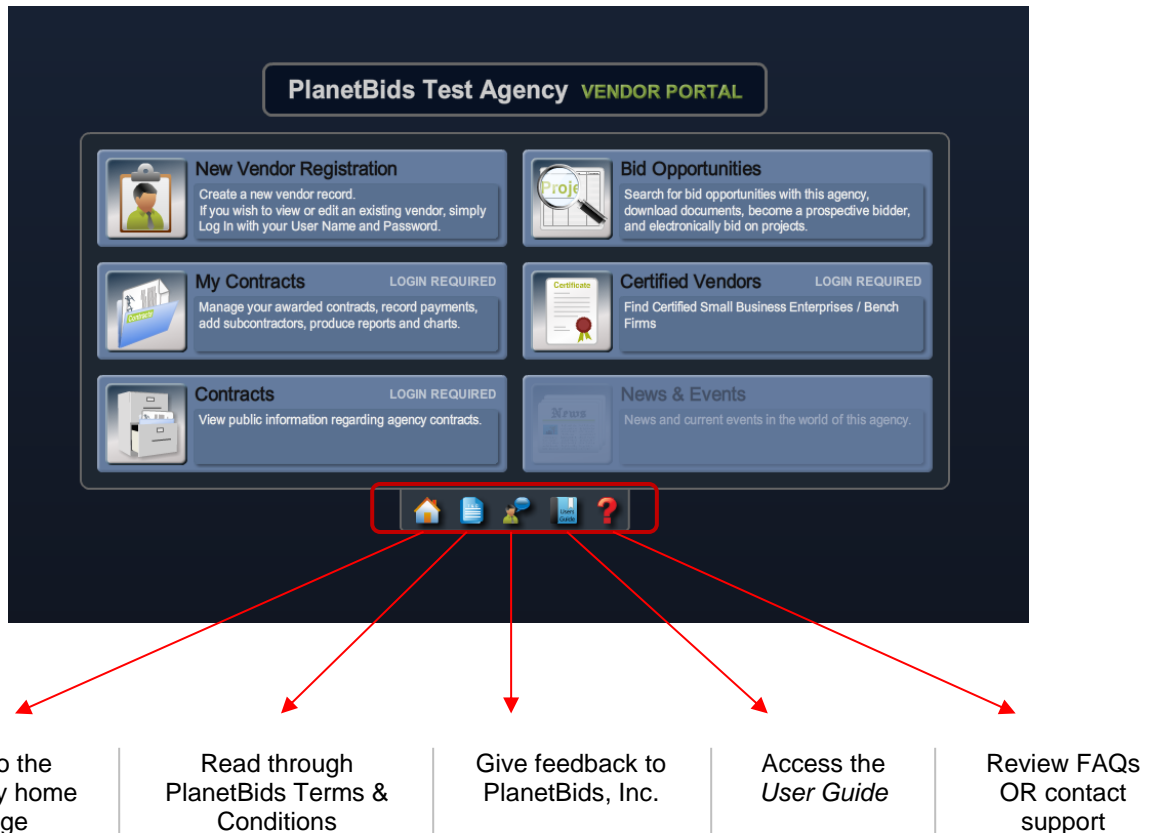
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## Vendor Portal

The *Vendor Portal* menu is an entry to *New Vendor Registration/Vendor Profile*, *Bid Opportunities*, *My Contracts* (if applicable), *Certified Vendors* (if applicable), *Contracts*, and *News and Events*.

The *Vendor Portal* tray allows you to:



## Vendor Registration

If you are interested in doing business with an Agency, the first step is to register online as a vendor. Registered vendors are able to maintain their profile online 24/7 and receive email bid alert notifications, as well as other communications from the Agency.

To register:

1. Select *New Vendor Registration* from the main *vendor portal*.  
**Note:** Every Agency has its own database of vendors and, therefore, its own *vendor portal*. You must register with each Agency individually.

2. Complete the information in each of the tabs.

**Note:** Fields marked with “\*” (a red asterisk) are mandatory. Some agencies may have fewer or more tabs than provided here, depending on the requirements of each individual Agency. Some may also require/request more information to be inputted.

a. **Company Info:**

- Select a user name and password (user names/passwords must be between 6-10 characters).

**Note:** Write your user name and password information down and keep it somewhere safe. If you are registered with multiple Agencies, note which user name and password combination is signed up with which Agency.

- Complete company information.
- Enter contact information (verify email address is entered correctly).
- In addition to a primary email, an alternate email may be added. Alternate emails are secondary emails that get copied on the vendor registration confirmation, user name and password requests, *Vendor Profile* edits, and new bid alert email messages.
- Enter payment information (if applicable) or check off the box labeled “Same As Main Contact” if the information is the same for both. Some agencies require a contact for payment, should you be awarded a bid.

- b. **Additional Addresses:** If your company has multiple addresses you may enter them here.

1. Click “Add”.
2. Choose the address type.
  - *Remit:* Address that the Agency should use to mail payments or invoice inquiries.
  - *Order:* Address that the Agency should use for purchase orders.
3. Complete the form and click “Submit”.

c. **Classifications/Licenses:**

- Select the classifications that are applicable to the business owner.
- Select all contractor licenses that apply. License number and expiration date are mandatory if a license type is selected.

- d. **Other Business Info:** Additional information that the Agency would like to know.

- Exempt from *Federal Backup Withholding* - please contact the Agency if you do not know if your company is exempt.
- *Purchasing Cards (PCards)* - credit cards issued to the buyer by the Agency.

e. **Category/Description:**

- *Company Classes* (if applicable): Enables you to select the classes that apply to your business.
- *Business Description*: Optional area for you to describe additional information about your company to the Agency. Bid notices are not generated by information submitted in the description box.
- *Categories*: Bid alert notifications are sent based on the categories selected. To select the categories applicable to your business:
  1. Click "Add".
  2. Select categories. You can search for a category in numeric or alphabetical order, sort by clicking on the column header or you can type in a key word or code in the box above, to narrow search results.
  3. Double click on the category you wish to add, or click once to select and then click "Add".
  4. Click "Done" once you are done selecting categories.

f. **Emergency Operations:** This tab will only be available if the Agency has the *Emergency Operations Module*.

1. Choose "Yes" if you are able to assist the Agency in an emergency; if not, select "No".
2. Enter 24-hour contact name and phone number.
3. Choose at least one category that reflects the type of assistance you may be available to offer during an emergency. Notifications will be based on these criteria.
4. Enter any additional information requested by the Agency.

g. **Applying for Bench Firm Certification:** This tab will only be available if the Agency is a certifying A&E agent or contractor.

Firms that are certified as Disadvantaged Business Enterprise (DBE) or Small Business Enterprise (SBE) firms are invited to join the Bench to participate in specific RFQ procurement opportunities.

The Bench will serve as an on-call "pool" of UDBE, DBE, and SBE firms that have requested that they be listed as sub-consultants available to prime consultants awarded large, medium and small contracts. The list of Bench firms will be available to all prime consultants awarded contracts for task order work.

Certified UDBE, DBE, and SBE firms desiring to be included on the Bench must fill out the certification form for *Architecture and Engineering (A&E) Bench Certification* and/or *Construction Management (CM) Bench Certification*.

To apply:

1. Select “Yes” to the question “Would you like to be certified as a Bench Firm?”
2. Choose the type of certification you would like to apply for. You can apply for *Architecture and Engineering (A&E) Bench Certification* and/or *Construction Management (CM) Bench Certification*.
3. Click on the “Add” button next to *Service Qualification List* to choose the service qualifications that are applicable. A minimum of one is required.
4. Enter *Fiscal Year Information* for previous three years and the fiscal year beginning.
5. Select “size(s) of projects [your firm is] most competitive in performing”.
6. Enter *Current Professional Liability Insurance Limits*.
7. List 5 prior, or current, public Agency clients (if public Agency clients are unavailable, list private clients) by clicking the “Add” button in *Clients/References*. You will need to include the following information for each client/reference:
  - a. Agency/Client
  - b. Contact Person
  - c. Phone
  - d. Email
  - e. Project Title
  - f. Work Performed
  - g. Contract Amount
  - h. Year Complete
8. List 5 top key staff by clicking the “Add” button next to *Key Staff*. You will need to include the following information for each staff:
  - a. Name
  - b. Title
  - c. Year Started with Firm
  - d. Office Location
  - e. Educational Degrees, Licenses, & Certifications (with dates)
  - f. Major Project Roles & Responsibilities
  - g. Project Experience (with current firm)
  - h. Other Project Experience (other firms)
9. Record the title of your certification documents and attach a copy of your DBE/SBE Certificate(s). SBE must be from the *State of California Office of Small Business*.
10. Record the title of your *Firm Qualification & Summary* and attach the one page document of your firm’s background, experience, qualifications, interests and expertise.
11. Download the *Bench Rate Schedule Sheet* for the certification you are applying for (A&E and/or CM) and fill out the information in the document. Once completed, record the title of your rate schedule sheet and attach it into the correct field.

Please note there are other questions in vendor registration that have a dependency on Bench Firm Certification. These include but are not limited to: DUNS, DBE and SBE Classification, In Business Since, and Number of Full/Part-Tim Employees.

\*The Agency will review submitted Bench Applications and verify the firm's certification as either a DBE or SBE. You will be notified via email when your certification has been reviewed.

- h. **Applying for Small Business Certification:** This tab will only be available if the Agency is a certifying agent.

To Apply:

1. Select "Yes" to answer the question "Would you like to be certified as a Small Business?"
2. Click on the "Add" button next to the *Certification Categories* to choose NAICS codes. A minimum of one is required.
3. Complete the *Fiscal Year Information* by entering your company's "gross annual receipts" for the past three years.
  - a. The most recent year can be changed by clicking on the drop down menu.
  - b. The three-year average will be automatically calculated.
  - c. Update the month when your firm's "fiscal year begins".
4. Complete all questions for *Business Affiliation*. Answering yes to any of those questions will prompt the system to allow space for an explanation.
5. Answer the remaining two questions under *Other Business Information*.

\*The Agency will review submitted SB Certification applications and verify the firm's certification. You will be notified via email when your certification has been reviewed.

3. Click on "Register" at the bottom of the page when you have completed the registration form.

Upon successful registration, you will receive a confirmation message, as well as an email confirmation. You may start using your login information immediately thereafter.

### **Editing a Vendor Profile**

Registered vendors can maintain their profiles online. It is your responsibility to ensure your profile is always accurate and up-to-date.

To edit your profile:



1. From the main portal page, simply log in if you have not already done so, and select "Vendor Profile".  
**Note:** The "New Vendor Registration" button will change to "Vendor Profile" once you are logged in.
2. Make the necessary changes to your profile information.
3. Click "Save and Exit".

**Note for Bench and SB Certification applicants:** There are questions in vendor registration that are required for Certification. These include but are not limited to: Business Type, Company Name, FEI, Principal Owner, DUNS, DBE and SBE Classification, In Business Since, and Number of Full/Part-Tim Employees. If you have an active Bench Firm Certification or SB Certification, you must re-apply for the certification in order to update these fields. To re-apply, click "Re-apply" on the Bench Firm Certification or SB Certification tab.

## Viewing/Maintaining Bench Certification and Small Business Certification

Once you have applied for certification, you may view and maintain your certification at any time. It is your responsibility to ensure your profile is always up-to-date with the most current information.

To view your certification:

1. Log in from the *Vendor Portal* and click on "Vendor Profile".
2. Go to the *Bench Firm Certification* or *SB Certification*. Information pertaining to the certification, including the current status, is provided within the tab.

If your certification has been placed in deficiency, has expired, or has been outdated, you will need to update your application.

1. If your certification status is *Approved* or *Expired*, you must first click on the "Re-apply" button and make any necessary changes.
2. If your certification status has been placed in *Deficiency*, you have an opportunity to make the necessary changes and re-submit the application.
3. Click "Save & Exit" to save changes. If no changes have been made, only click "Exit".

## Activity Report

A summary of your vendor activity and notifications are available in the report provided in your *Vendor Profile*. To run this report:

1. From the main portal simply log in, if you have not already done so, and select "Vendor Profile".

2. Click the “Report” button, available at the bottom right hand corner of the *Vendor Profile* page.
3. Enter a date range or simply click on the green report button, without dates, to get a complete summary of your vendor activity.

## Searching for Certified Bench or SB Certified Firms

Prime consultants are given access by the Agency to search for certified Bench Firms; SB Certified vendors are given access by the Agency to search for other SB Certified vendors.

To search for a *certified vendor(s)*, from the *vendor portal* click on the “Certified Vendors” icon. If you are not already logged in, the system will request that you do so.

**Note:** If you are logged in and the Certified Vendors icon is disabled, then you do not have access to search. Contact the Agency to request access.

By default, search results display all approved certification but you can define your search using any of the following criteria available in the two search tabs.

- A. *General Search*: Allows you to search for group of vendors using the following criteria:
  - Certification
  - Vendor Type
  - License Type
  - Vendor Category
  - Cert. Category
  - Service Quals
  - Country
  - State/Province
  - County
  - City
  - Zip/Postal Code
- B. Find a Vendor: Allows you to search for a particular vendor by:
  - Company Name
  - Contact Name
  - Email
  - City License #
  - Contractor License #

From the search results page, you may export or print your results by selecting the corresponding button at the top right of the results list.

Double click on a vendor to get to the detail page, which you may print by selecting print. You may also view the approval letter for the certification.

## Receiving Bid Notifications

Bid notifications are emailed to all registered vendors, based on matched commodity/category codes between the bid and the vendor's profile. The email notification will include the project name, invitation number, and a direct link to the bid.

## Searching for Bids

Bids for the Agency are listed in the *Bid Opportunities* section. To search for a bid, from the *Vendor Portal*, click "Bid Opportunities". You can define your search, using any of the following criteria:

- Keyword – searches the project title and invitation number
- Stage – searches project stage (i.e. bidding, closed, awarded, etc.)
- Bid Type – searches project type (i.e. bid, RFI, RFP, RFQ, etc.)
- Category – searches for bids associated with a specific commodity code
- Department – searches for projects posted by specific Agency departments
- Due Date – searches for projects due to close within a specified time frame

## Viewing a Bid Detail

Once you have located a project in which you are interested within *Bid Opportunities*, double click on the appropriate line to open the bid. All bid related information is located within the different tabs of the bid details. Only applicable tabs will be available within the bid.

1. **Bid Information:** Includes details of the bid, such as response type, due date, contact information, scope of services, and any additional information the project owner has provided.
2. **Line Items:** List of items you will be bidding on.
  - a. Line items can be exported to an excel spreadsheet by clicking the "Export" button on the upper right corner of the page.
3. **Documents/Attachments:** Allows you to view, download, and/or order plans (if applicable) associated with the project.

- a. To download bid documents:
  1. Select the document you wish to download by double clicking on the title or click the “Download” button on the lower, left corner of the *Electronic Attachments* section.
  2. If the title of the document is preceded by an \* (asterisk), then you must login to view or download the documents. If you are not already logged in, the system will prompt you to do so.
  3. Review the *Prospective Bidders Detail* page. Future correspondences for this specific project will go to the person listed on the *Prospective Bidder Detail* box. Changes made to the *Prospective Bidder Detail* will **not** change information in the main profile.
    - Some projects may require that you choose a *Classification* (prime, subcontractor, supplier, or other).
  4. Click “Done” to close the *Prospective Bidder Detail* page.
  5. Your company will now be added to the *Prospective Bidders* list.
  6. In *File Detail*, you can now download the chosen bid document.
- b. *Download history*: Enables you to see a list of documents that have been downloaded.
- c. To order plans:
  1. Click on the “Order Plans” button.
  2. If you are not already logged in, the system will prompt you to do so.
  3. Review the *Prospective Bidders Detail* page. Future correspondences for this specific project will go to the prospective bidder listed. Changes made to the *Prospective Bidder Detail* will **not** change information in the main profile.
    - The system requires that you choose a *Classification* (prime, subcontractor, supplier, or other).
  4. Click “Done” to close the *Prospective Bidder Detail* page.
  5. In *Hard Copy Plans*, select the documents you wish to order by clicking on the box in front of each title/description. You can also click “Select All” or “Select None” for group selection.
  6. Click “Done”.
  7. In the *Order Detail*, choose shipping method, confirm billing information, enter the shipping address, and choose payment method. If choosing to pay by credit card, fill out the required information. Any other choice will provide directions on how to proceed.
  8. Click “Done” when the form is complete.
- d. *Order History*: Enables you to view placed orders, as well as track if/when they were processed by the Agency.

**4. Addenda & Emails:** Addenda and custom email messages are emailed to prospective bidders as well as posted on this tab.

- a. Addenda are posted in the *Addenda* section within the tab.

- Double click on the addendum to view details and download any associated document (if applicable).
  - To acknowledge an addendum, click the “Acknowledge” button at the bottom of the *Addenda Detail* window. Note that all addenda must be acknowledged prior to eBidding.
- b. Custom email messages, sent by the owner of the project, will be posted in the *Email Messages* section of the tab.
- Double click on the email to view the entire message.
5. **Q&A:** Available only if the buyer chooses to accept questions online for the project. The buyer’s set deadline for submitting Q&A for the project is displayed on the upper, left side of the page.
- a. To ask a question, you must first be logged in:
1. Click the “Ask Question” button on the upper, right of page.
  2. Type your question.
  3. Attach a document, if you choose to do so, by clicking “Attach File”.
  4. Click “Submit”.
- b. Once the buyer answers and releases Q&A, the information will be available here. An email or addenda notification will also be sent to all prospective bidders, letting them know that Q&A has been released.
6. **Prospective Bidders:**
- a. Provides a list of all prospective bidders for the project.
- b. You can update your *Prospective Bidder Profile* by clicking “My PB Profile” at the upper right of the page.
- Note:** You must be logged in to enable this link.
- From here, you can update the contact information, only for this bid.
  - If you choose not to participate in this project, you can change your PB Status from *Bidder* to *Non-Bidder – no communications* or *Non-Bidder – receive communications*. Once changed to *Non-Bidder*, you must contact the Agency to return your status back to *Bidder*.
  - *Status Change Comment*: If you change your status, you must enter a reason for the change in this field.
7. **Bid Results:** This tab is only available after the bid has closed. Once a bid is closed, results may be viewed here, if enabled.
- a. *Electronic Bids*: Results will be available as soon as the Agency publishes them.
- b. *Paper Bids*: Results will be made available after the buyer inputs the results and publishes them.
- a. *Line item* results can be exported to an excel spreadsheet by clicking on the “Export” button on the upper, right of the page, if released by the Agency.

- 8. Awards:** This tab will become available when an award or an award update is made. The *award* tab will list the date of award and the awardee(s).

## Placing an eBid

On the *Bid Detail* page, the bid will state if the response format is *Electronic*, *Electronic & Paper*, or *Paper Only*. To place an electronic bid, click “Place eBid” at the lower, right of the page. This button will be available from all tabs.

For assistance with eBidding, please send in a support request by clicking the “?” (red question mark) located at the upper, right corner of the *Bid Opportunities* page to access the *PlanetBids Support Page*. Here you can view *Frequently Asked Questions* or open a support ticket for further assistance. You may also contact the PlanetBids Support team by calling (818) 992-1771 and clicking “0” for the operator.

## Print

- 1. Printing search results:** Click “Print”, located on the upper, right of the page.
- 2. Printing bid detail:**
  - a. Click “Print”, located on the lower, right of any of the tabs for project bid details.
  - b. Choose which sections you wish to print.
  - c. Click “Print”.
- 3. Printing eBid summary/confirmation:**
  - a. After you submit your eBid, you will receive a confirmation.
    - Click “Summary” at the lower, right of the confirmation box.
    - *eBid Summary*: Click “Print” at the lower, left corner of the page.

## Contact Us

To contact us, please click on the red question mark icon for *Support*, to open a ticket. The icon is accessible from the main *Vendor Portal Menu*, in *Vendor Profile*, *Bid Opportunities*, and *eBidding*.