City of Yorkton Vendor Portal User Guide

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Vendor Registration (NEW USER)

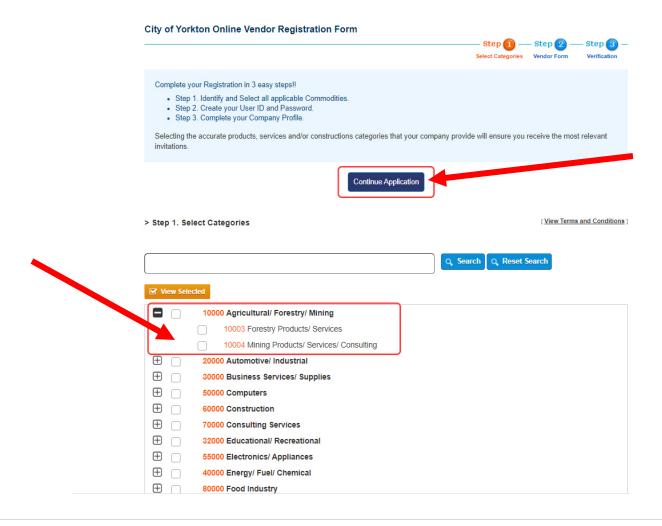
If you are new to the City of Yorkton's Vendor Portal and wish to participate in opportunities, please complete the Vendor Registration process. Registration is free and completed in three easy steps. To begin, select the **Vendor Registration** button.





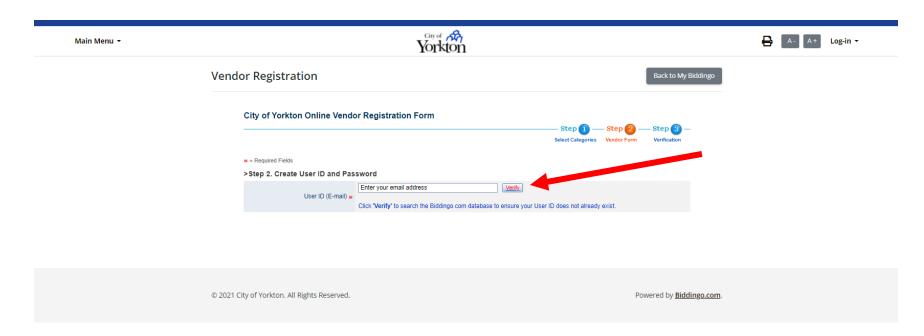
STEP 1 – Identify and select all applicable commodities that your organization provides

City of Yorkton utilizes a category codes classification system to identify their procurement opportunities. You can select from the sub-category to further define the goods and services you sell. Once you have selected category/commodity codes, select the **Continue Application** button



STEP 2 - Create a User ID and password

Your e-mail address is your City of Yorkton Vendor Portal **User ID**. You will be asked to **verify** your User ID prior to creating your password to ensure you have not already registered in the City of Yorkton Vendor Portal. Once your User ID has been verified, enter and re-enter a password. When complete, click the **Next** button.



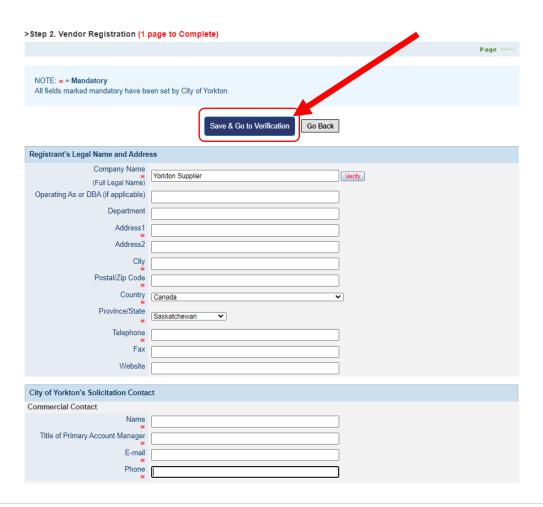
STEP 3 – Complete your company profile.

Type your company name and click Verify. You will receive a note that the Company is available.

If the company already exists, please contact Biddingo to add your contact information to the account.

You must complete all the required fields in each section to successfully submit the application.

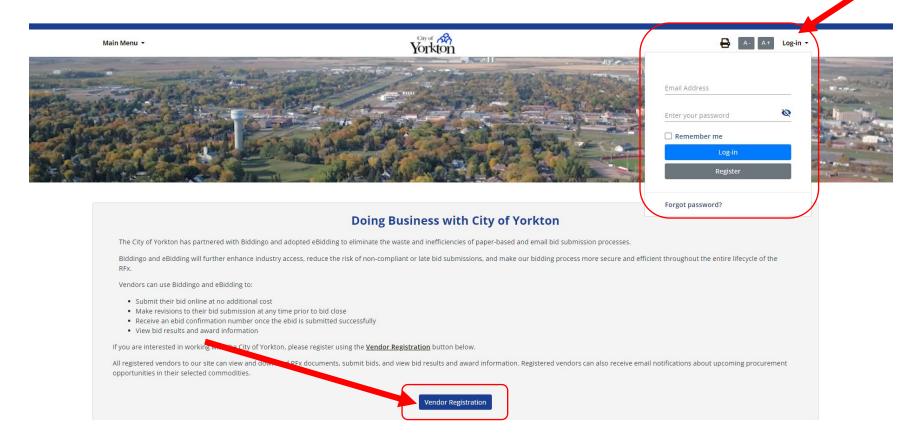
All fields denoted by a red asterisk are required to finish registration.



Once you successfully submit your application form, you will get a confirmation

Vendor Registration (EXISTING USER)

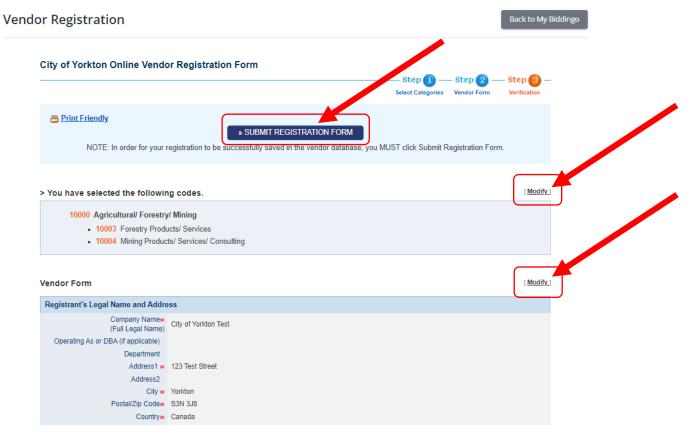
If you have previously registered with Biddingo.com, you must first login with your User ID and Password.



Registration is free and can be completed in a few easy steps. Once you have logged in, click on the **Vendor Registration** button to continue the process of completing the application.

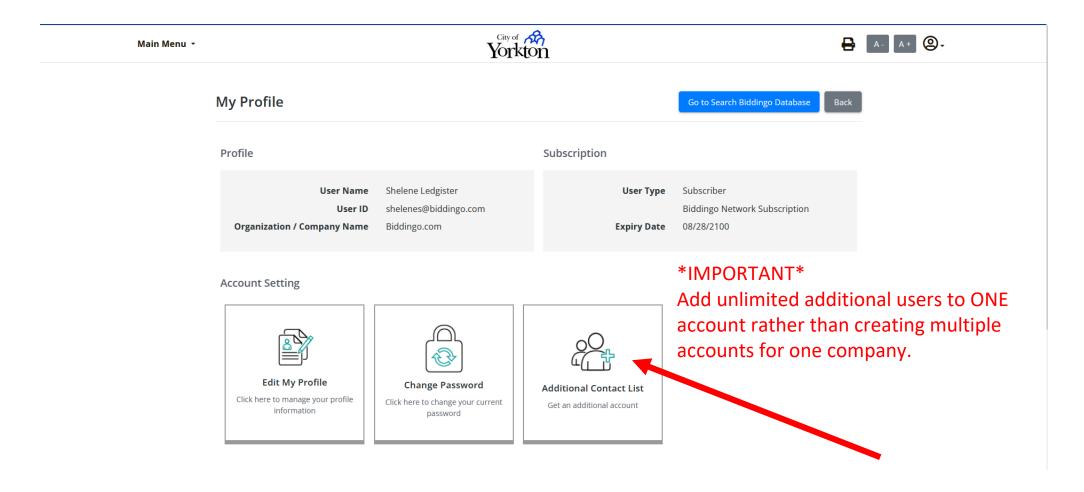
STEP 1 – Modify each step to ensure the information is up to date.

- You can update the existing selection by clicking **Modify**. Once you click modify you can add/delete commodity codes.
- To update the application, click Modify and update the required



Once you've made the necessary updates, click Submit Registration Form

Multiple Users per Account



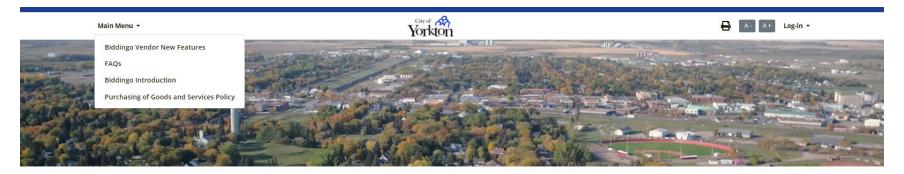
Once you've completed the application, you can click **Additional Contact List** to add new Users to the account.

Vendor Portal Navigation

Main Menu

The main menu dropdown feature enables users to navigate through the various components of the portal, including:

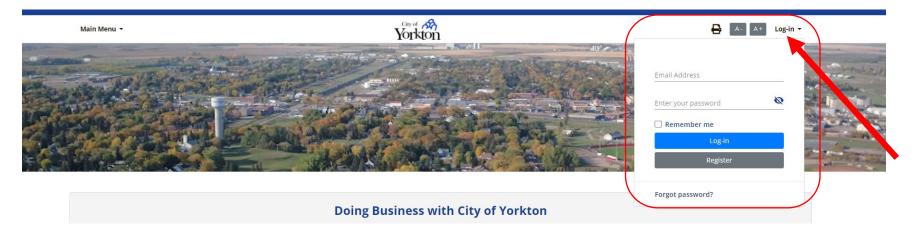
- **Biddingo Vendor New Features** Allows vendors to see any new updated features to the Biddingo bidding system.
- FAQs Outlines commonly asked questions related to City of Yorkton's Vendor Portal and solicitation process
- Letter from the City of Yorkton Provides information about the City of Yorkton's initiative to go to an online bidding platform.
- Purchasing of Goods and Services Policy Allows vendors to see a downloadable version of the City of Yorkton's Purchasing of Goods and Services Policy





Log-in

Registered vendors can use the "Log-in" dropdown in the top right-hand corner of every screen to log in to the City of Yorkton Vendor Portal. You must be a registered vendor and logged in to the Vendor Portal in order to download solicitation documents and added to the Document Takers list.

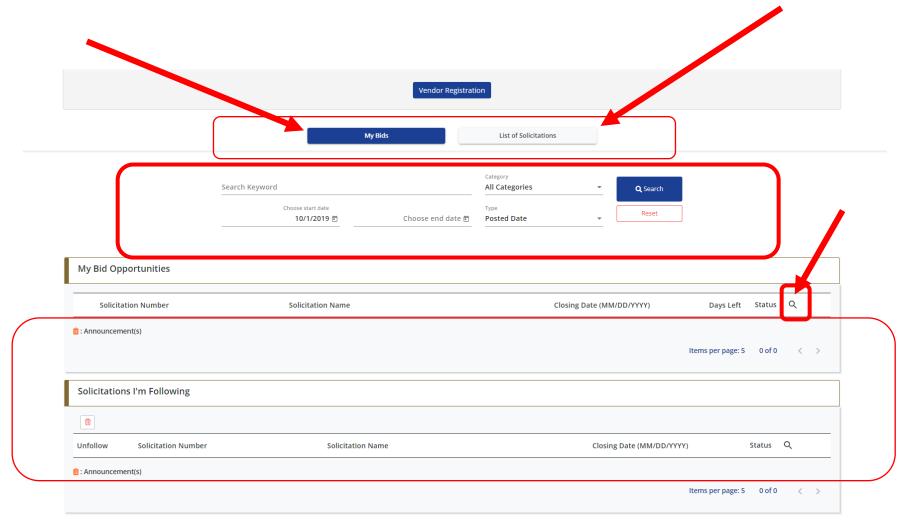


Home Page Navigation

Prior to logging in, users are defaulted to the "List of Solicitations" view which shows all of City of Yorkton's solicitations, regardless of status (Open for Bidding, Closed, Awarded, and Cancelled). Users can search, filter, and view solicitation details, but cannot download solicitation documents unless they are logged into the Vendor Portal.

Once logged in, users will see two tabs on their home page:

- (1) My Bids
- (2) List of Solicitations



List of Solicitations

The List of Solicitations tab shows all of City of Yorkton's solicitations, including solicitations that are **Open for Bidding**, **Closed**, **Awarded**, and **Cancelled**. Users can use the search and filter capabilities to narrow the scope of solicitations being viewed.

• **Keyword Search** – Narrow your view by searching for a particular word, phrase, or number. The keyword search returns match based on the **Solicitation Number** and **Solicitation Name** fields.

- Date Range Search Narrow your view by searching for solicitations that fall within a date range based on the solicitation's Posted Date or Closing Date. Enter a start date and end date and select the date type you wish to search by.
- Status Filter Click the magnifying glass under Status to select one or more statuses to filter your view.

From the List of Solicitations tab, you can see basic information about a solicitation to help you identify solicitations you want to view. Once you have identified a solicitation you would like to view, click on the Solicitation Number or Solicitation Name to access the solicitation.

My Bids

The My Bids tab shows a focused view of solicitations that pertain to you based on solicitations you are either participating in or following. Solicitations are grouped into a few different categories:

- **My Bid Opportunities** Solicitations where you have downloaded solicitation documents and are considered a document taker
- **Solicitations I'm Following** Solicitations you have opted to follow by selecting the **Follow** button within a given solicitation
- Amendment(s) Issued Solicitations where you are a document taker that have issued amendments to the solicitation
- Invitation Received Solicitations you have been invited to bid on by City of Yorkton

Similar to the List of Solicitations view, you can use the search and filter capabilities to narrow the scope of solicitations being viewed.

• Category Search – Narrow your view to solicitations in only one of the categories listed above (e.g. My Bid Opportunities).

- Keyword Search Narrow your view by searching for a particular word, phrase, or number. The keyword search
 returns matches based on the "Solicitation Number" and Solicitation Name fields.
- Date Range Search Narrow your view by searching for solicitations that fall within a date range based on the solicitation's Posted Date or Closing Date. Enter a start date and end date and select the date type you wish to search by.
- Status Filter Click the magnifying glass under **Status** to select one or more statuses to filter your view.

From the My Bids tab, you can see basic information about a solicitation to help you identify solicitations you want to view. Once you have identified a solicitation you would like to view, click on the Solicitation Number or Solicitation Name to access the solicitation.

View a Procurement Opportunity

From the **List of Solicitations** or **My Bids** tab, click on the Solicitation Number or Solicitation Name to view the solicitation. A solicitation is made up of some or all the following components, which vary based on the opportunity and City of Yorkton's business requirements:

- Solicitation Overview
- Solicitation Document(s)
- Site Meeting (optional component)
- Document Takers
- Amendment(s)
- Q&A Board (optional component)

Additionally, you have the option to follow the solicitation by clicking the "Follow" button, or click "Back" to return to the Home Page.

- Solicitation Overview
- Solicitation Document(s)
- Site Meeting
- Document Takers
- Q&A Board

Solicitation Overview

• Provides a high-level overview of the solicitation, including key information like Closing Date, Bid Status, as well as Site Meeting and/or Question Deadline, if applicable.

Solicitation Document(s)

- All solicitation documents are accessible from the Solicitation Document(s) component. From here you can download and access solicitation document(s) to read instructions about how to respond to the solicitation.
- Select **Download All Available Documents** to download the solicitation documents and any amendment/announcement documents to a .zip file.

Site Meeting/Pre-Bid Meeting (if applicable)

- At City of Yorkton's discretion, your attendance may be required or recommended at a site or pre-bid meeting. If a site/pre-bid meeting is required, you must attend or risk disqualification from the bid process.
- Information such as date, time, and address are posted for both mandatory and recommended site/pre-bid meetings.

Document Takers

• This component allows users to view a list of companies that have downloaded solicitation documents.

Amendment(s) (if applicable)

- Throughout the course of a bid, the Buyer may choose to modify or update the bid document by way of an amendment (e.g. solicitation amendments, clarifications, etc.).
- Amendment documents are characterized by name, number, and issue date.
- Amendments should be reviewed in their entirety, and bid responses should be modified as per the instructions therein.

Q&A Board (if applicable)

- Questions can be submitted during the open question and answer period on the Q&A Board. Select "Go to Q&A Board".
- Select "+ Add New Question" to submit a question.
 - When you submit a question, your company name will remain confidential; however, your question can be viewed by other document takers.

- Questions cannot be submitted after the deadline period.
- It is at the Agency's discretion to respond to any questions it receives, make the responses public, or issue an amendment to formally address all questions.

Bid Award

- At City of Yorkton's discretion, users can view the successful bidder's company name, company address, and bid price (if applicable).
- If applicable, the Buyer may post a Notice of Award attachment to announce the successful bidder as a public announcement.

Additional Support

A dedicated customer support team is available to assist you with your questions and to provide technical system support Monday through Friday, between 8:30AM–5:30PM Eastern Time. If you need assistance resetting your password or deactivating your account, please contact us by telephone or e-mail.

Telephone: (416) 756-0955

E-mail: <u>info@biddingo.com</u>

Forgot or Lost Password

If you forgot or lost your password, click the Log-in dropdown button and click the "Forgot password?" hyperlink.

Enter your email address and click the "Send Password Reset Link" button.