BuySpeed

POWERED BY Periscope

Seller & Seller Administrator User Manual

BuySpeed supports the National Institute of Governmental Purchasing (NIGP) code as the baseline commodity coding structure. If another commodity code structure, such as the United Nations Standard Products and Services Code® (UNSPSC®) is provided as part of your BuySpeed implementation, system menus will appear differently.

September 30, 2014

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Introduction

Welcome to BuySpeed

BuySpeed is an Internet-enabled application that provides decentralized purchasing functionality specifically designed for government agencies. It is best viewed using Internet Explorer 6, or later.

The BuySpeed seller and seller administrator manual allows providers of commodities and services to:

- Register with an agency by filling out an online application;
- Maintain that application according to commodities and services offered;
- View bid opportunities indexed by commodity and service then respond electronically online;
- View active contracts and search contracts and bids; and.
- View purchase orders.

The unique services offered by BuySpeed, accelerate routine business processes, expand buying opportunities and reduce overall costs.

Benefits of BuySpeed

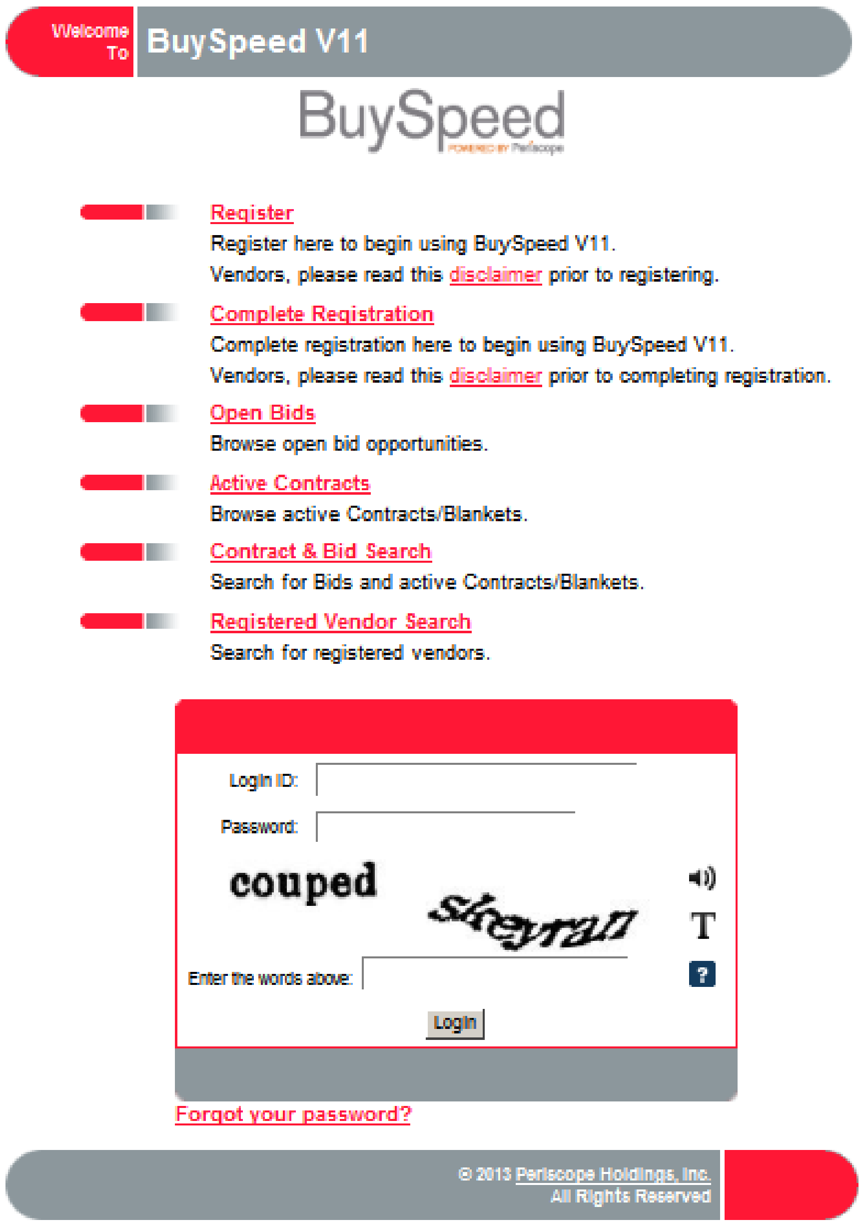
BuySpeed offers numerous benefits to sellers including:

- Ease of accessibility – BuySpeed is available from any workstation with access to the Internet.
- Paperless notification – BuySpeed eliminates manual retrieval of purchase orders and bids.
- No time constraints – BuySpeed is accessible 24 hours a day seven days a week.

This manual has been created to assist the Seller and Seller Administrator in using BuySpeed. If you have any questions, please contact the agency you are registered.

BuySpeed Access

As the Seller or Seller Administrator, you are to login by entering your Login Id and Password. If the captcha security is enabled, you will also need to enter the displayed phases, normally two words.



Multi-Factor Authentication

When the Multi-Factor Authentication is enabled, the Seller Administrator when logging into BuySpeed will be required to enter a token Id within so many minutes after the initial login information is entered. The token Id will be sent to the Seller Administrator to his or her registered email. The text displayed will vary by client.

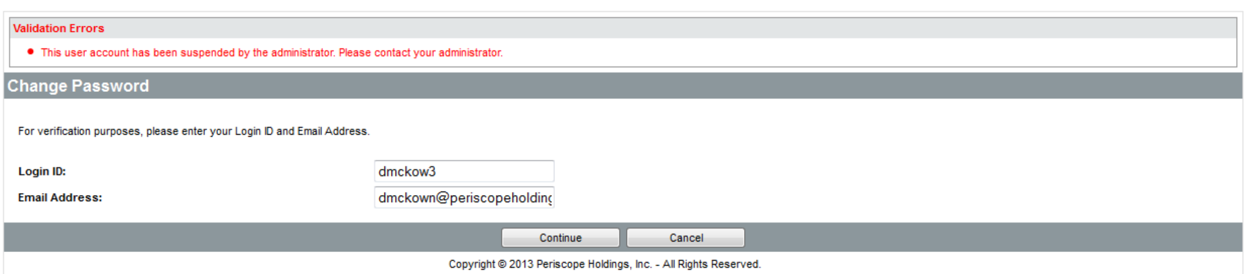
Change Password Process

The Change Password process is activated whenever a user logs in with an “invalid” password or selects the “Forgot you password?” option.

Suspended Account

When your user account has been suspended and you attempt login with your current credentials, you will be presented with Change Password.

After entering Login ID, Email Address and selecting Continue, the user will be prevented from further processing with system validation (error) “This user account has been suspended by the administrator. Please contact your administrator.”

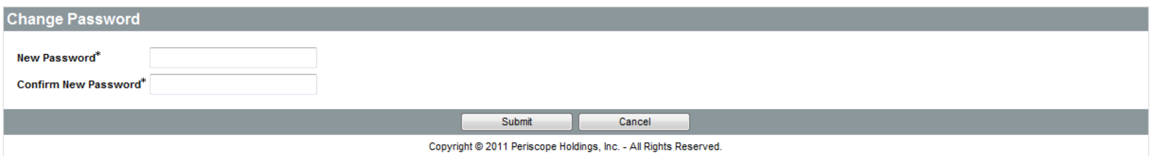


Forgot your password?

When you select the “Forgot your password?” option, the Change Password process is initiated.

On this view you enter you Login ID and Email Address and then click on the “Continue” button. When the Login ID and Email Address combination does not match your My Account Information, an error will be displayed.

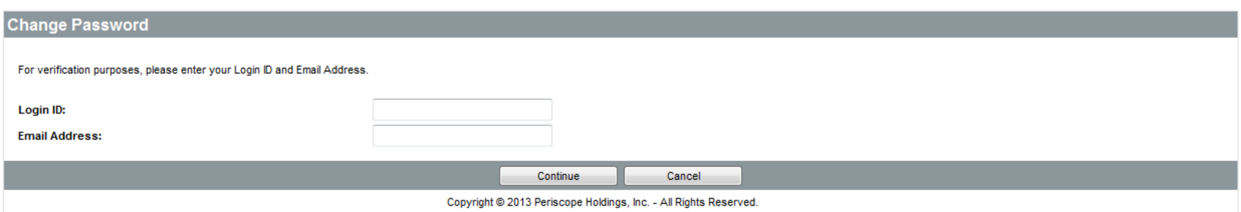
On this view your saved Login Question is displayed and you will enter you Login Answer, and then click on the “Continue” button. When the Login Question and Login Answer combination does not match your My Account Information, an error will be displayed.



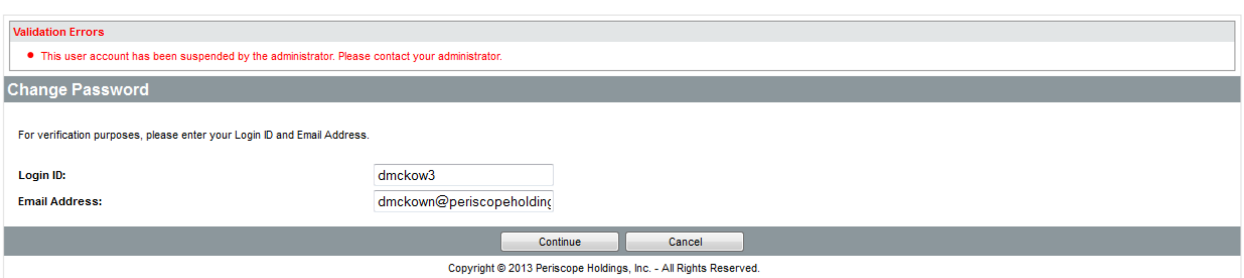
On this view you enter your “New Password” and your “Confirm New Password”, and then click on the “Submit” button. When successful you will be navigated to you Home page view. Additionally, a “Password Reset” notification will be sent to your email address.

Suspended Account

When your user account has been suspended and you attempt change your password Forgot Your Password process, you will be presented with Change Password.



After entering Login ID, Email Address and selecting Continue, the user will be prevented from further processing with system validation (error) “This user account has been suspended by the administrator. Please contact your administrator.”



Invalid Login Password

When you login with an “invalid” password, the Change Password process is initiated for an “invalid Password.

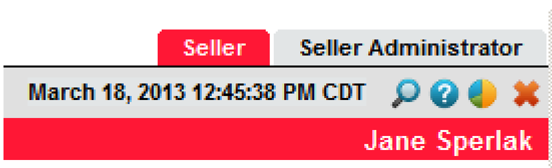
On this view your Login ID is defaulted and you will enter your Email Address, and then click on the “Continue” button. When the Login ID and Email Address combination does not match your My Account Information, an error will be displayed.

NOTE: From this point on the processing is the same as for the “Forgot you password?” option Change Password process.

Application Basics

Roles

If you have multiple roles within BuySpeed (for example you are a Seller as well as a Seller Administrator for your company), you will see role tabs in the upper-right corner of the header as indicated below. Each role within the application will have its own control center. For example, the Seller Administrator has an organization maintenance focus, while the Seller has a purchasing information focus. The tabs will not appear in the application if you only play one role.



Home Page/Control Center (for Seller Role)

BuySpeed was designed to put the information you need right at your fingertips in an easy-to-use format: when you first log in to the BuySpeed application, you will be greeted by name and will see a tabbed listing of:

1) News
2) Vendor Communication
3) Bids to include Request for Revision, Bids / Bid Amendments un-acknowledged, Open and Closed Bids
4) PO to include Purchase Orders / Change Orders un-acknowledged, Purchase Orders Sent and Subcontractor Purchase Orders
5) Quotes to include Informal, Working, Submitted, Revision and Withdrawn
6) Vendor Performance

This is your home page within the application and it is called the **Control Center**. The sections displayed on the control center are dynamic: they are based on up-to-the-minute available data from the agency and/or those items targeted to you.

Each tab has a number in parentheses showing the number of documents waiting for you on each tab.

Header/Navigation Menu

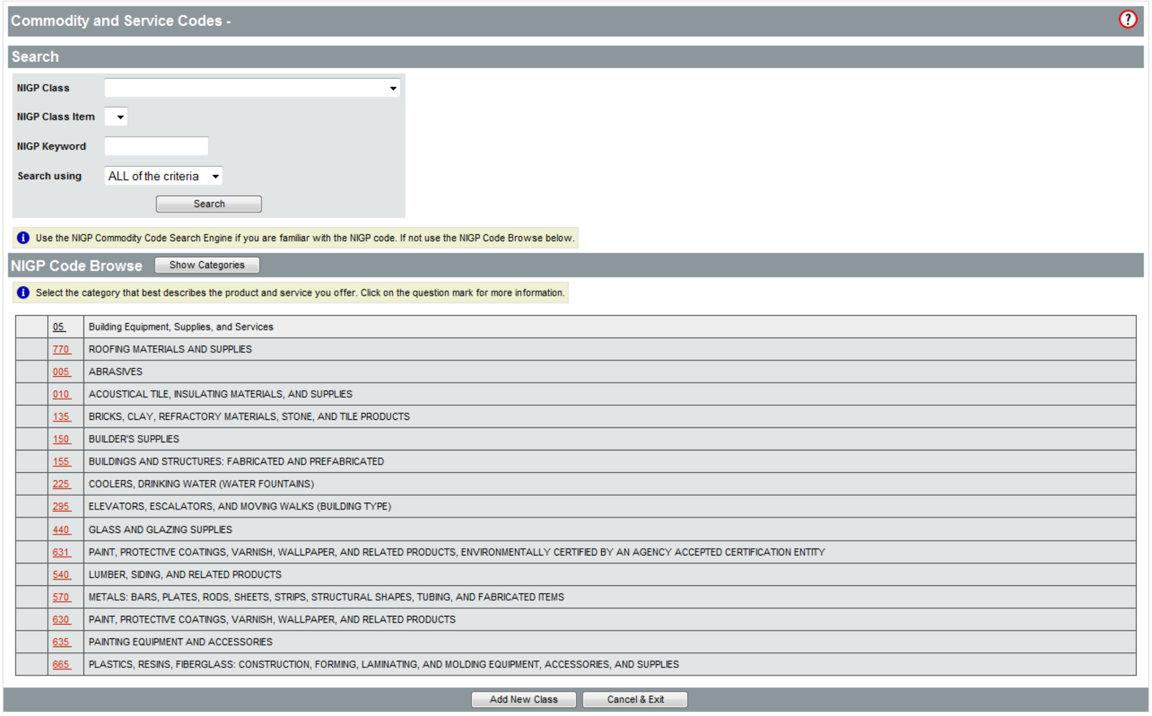
The navigation menu allows you to move within the application and gives you access to open and closed bids, purchase orders, contracts, quotes and account maintenance. As you travel through the application, you will always see this menu at the top of each page.

There are several key icons in the navigation menu:

	Accesses the advance search screen. (Not available for Seller Admin role)
?	Access to the on-line help manual.
	Access to the administrative reports, if the agency has configured reports for use by Sellers. (Not available for Seller Admin role)
	Log out of BuySpeed

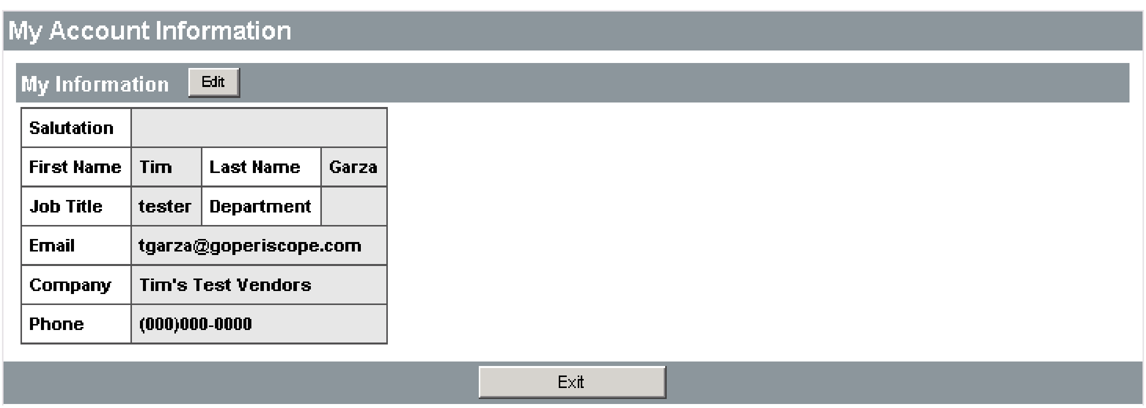
NIGP Code Browse

The NIGP Code Browse link in the Header bar allows you to search commodity codes by Class and Class Item codes set up and maintained in your BuySpeed database.



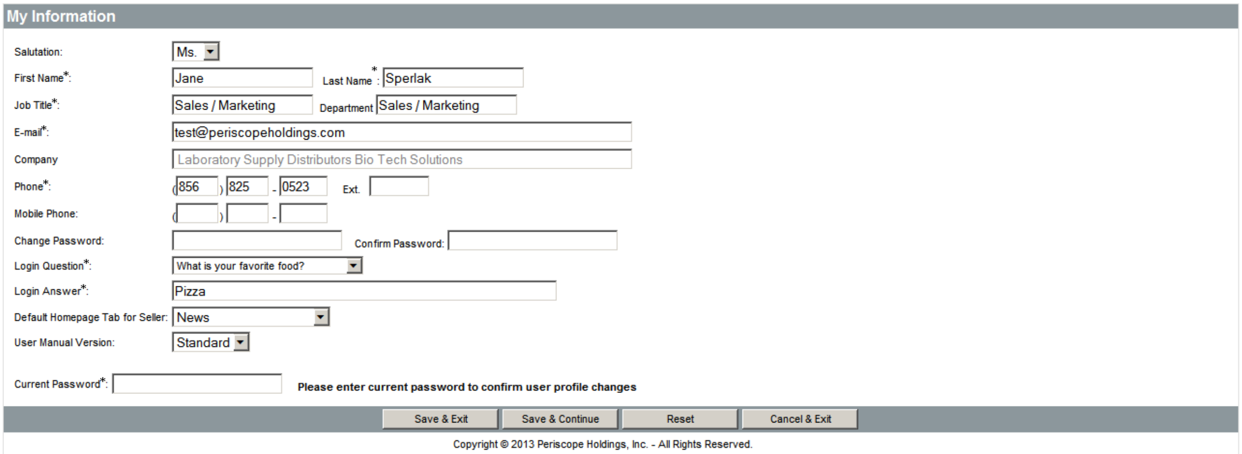
My Account

The My Account link in the navigation menu allows you to keep your individual user profile current with the agency. Modifying your personal login information does not change your company's general information with the agency. To maintain the overall organization information with an agency, you must have the role of Seller Administrator and must use the Seller Maintenance functions.



Use the **Edit** button to update your personal information. You can change your title, contact information, as well as your login password and login security question and answer. You may also select the default tab that you wish to begin on once you log in and view your home page. You must enter your password for the changes to become effective.

NOTE: This is where you can change your BuySpeed password.

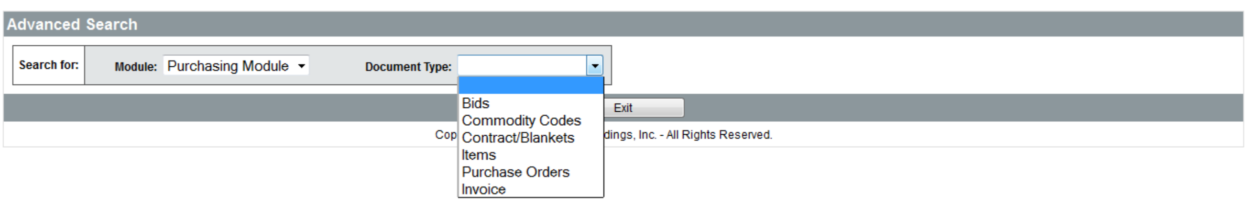


First Name, Last Name, Job Title, E-mail, Phone and Current Password are all required fields. Mobile Phone is used when Multi-Factor Authentication is enabled. Login Question and Login Answer are required fields used for the Change Password Process. User Manual Version allows the option of viewing the help in Standard format or Text Only format.

BuySpeed supports 508compliance. The user manual option allows you to select either the standard manual or text only version. The standard version contains screenshots as visual aids. The text only version is written so that adaptive technologies can assist users who need the assistance.

Advanced Search (Seller Role Only)

Access the advanced search screen by clicking on the magnifying glass icon in the navigation header. The advanced search option lets you search for bids, commodity codes, contract/blankets, items, purchase orders and invoices:



The search criteria that display on the screen is dynamic and depends on the type of search being executed. For example, a commodity code search will prompt you to enter a class-level commodity code, an item-level commodity code, or a keyword, while a contract search will prompt you for a line item description or NIGP commodity code.

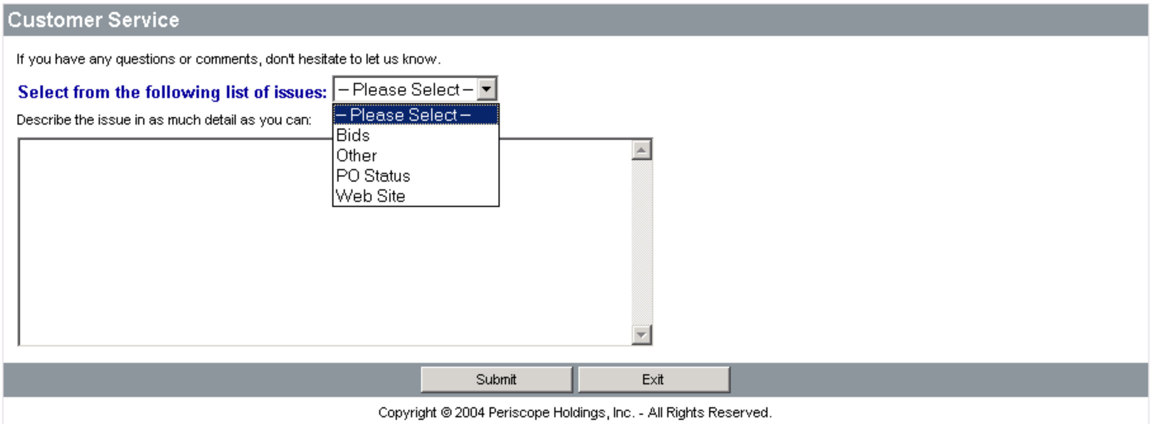
The search page uses ‘LIKE’ functionality. This means that exact matches are not required and results will be returned that include any portion of the keyword or code entered. For example, if you are searching for class codes that include 00, you can enter 00 in the Class field, click on **Find It**, and see all commodity codes where 00 is included (005, 100, etc.).

The search results will appear immediately below the search box. If multiple pages of results are returned, you will see multiple pages of results showing the number of records displayed out of the total number of results returned.

If more than ten (10) pages of results are returned, you will see arrow icons to use for paging through the results.

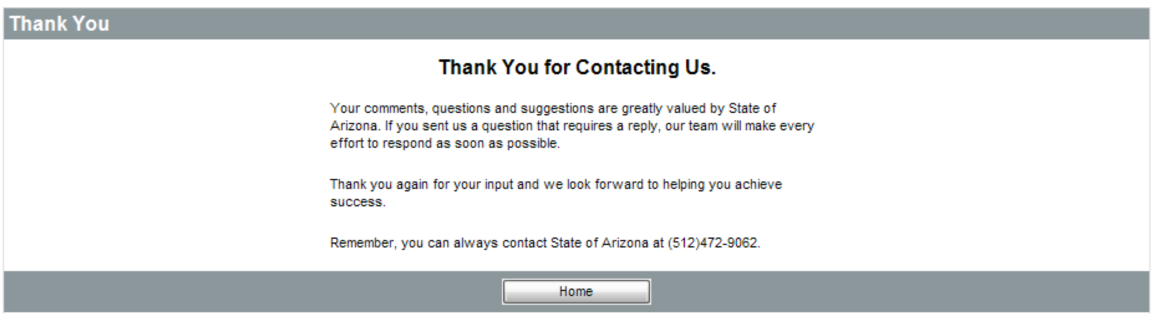
Customer Service

The customer service screen allows you to contact your local BuySpeed Support for additional information or for assistance with some of the items that are found in the BuySpeed application. Please note that the agency has the ability to configure the Customer Service link to point to a customized help page. The following description below is based on the BuySpeed default Customer Service screen.



Select the appropriate category and enter your comments or questions in the issue description box. Your email will be sent to a designated administrator. Click Send & Exit to send your email to BuySpeed, or click Cancel & Exit to return to the previous screen.

A confirmation page similar to the one shown below will appear once you have submitted your request.

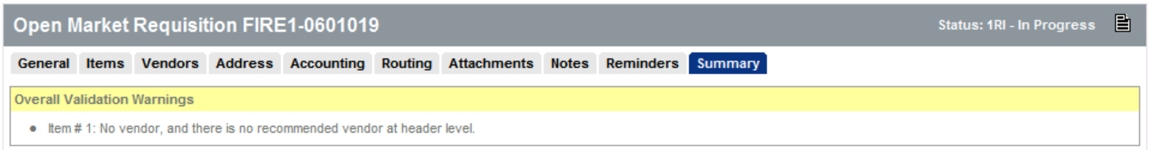


About

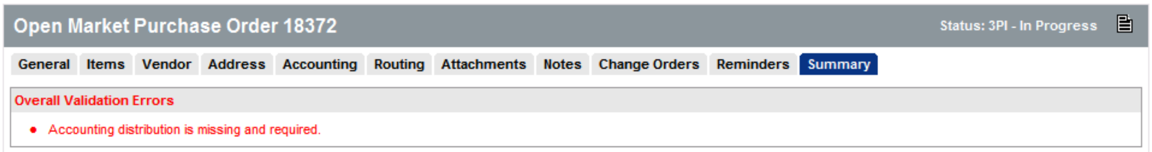
This screen shows the current version of BuySpeed that you have installed.

Red and Yellow Error Messages

BuySpeed has developed a series of messages that will display when data inside your document is not right, criteria are not met or when required fields are not properly filled out. Messages in yellow are errors that do not require any intervention. The document can continue the message is strictly for your information.



A red error means that the document does not have sufficient information to continue forward. Once the proper data is entered, you may continue your document to completion.



Pop-up messages will also appear when required fields were left blank or invalid data was entered.

Bids

If an agency has named your company on a bid, an email will be sent and the bid will appear in the Open Bids section of the (Seller) homepage.

View Open Bids

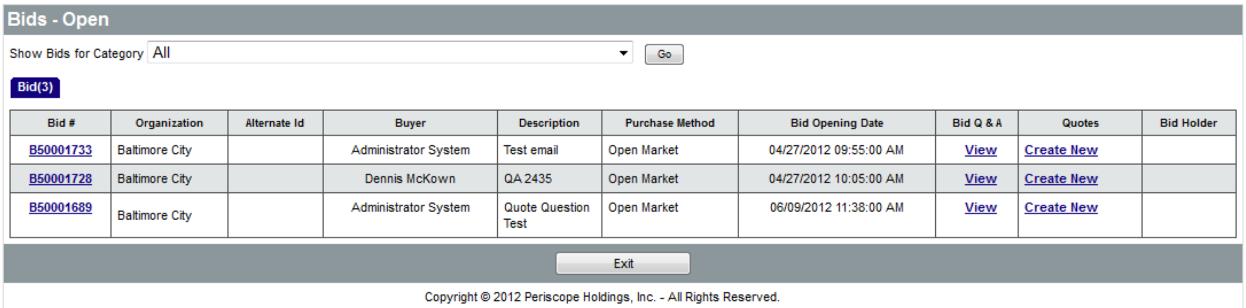
After logging into BuySpeed, bid opportunities that are within 14 days of the Bid Opening date will always appear on your Control Center under the **Open Bids** section. You can also view them by selecting the **Open Bids** option from the drop-down navigation menu.

Filter Bids by Category

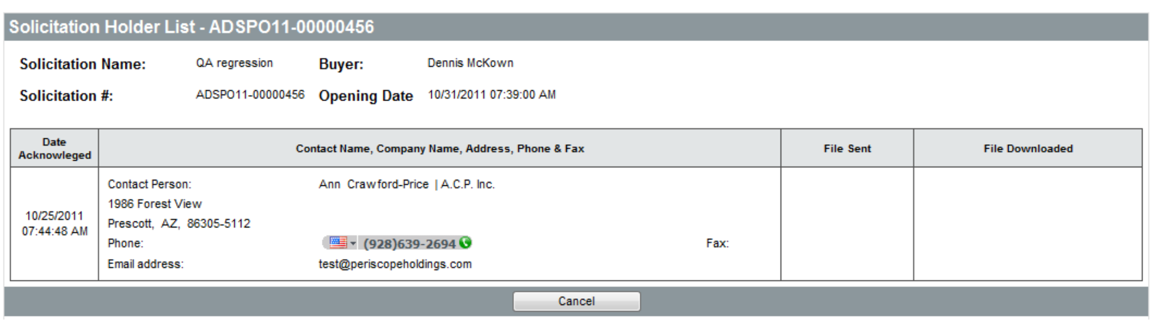
When viewing open bids using the navigation menu, an intermediate screen allows you can view all open bid solicitations or filter by a specific product or service category.

The Open Bids results are then displayed. Below is an example of a listing for all category commodities. You can sort the results page using the column headings: **Bid #**, **Buyer**, **Description**, **Bid Opening Date**, **Pre-Bid Conference,** and **Plan Holder** information.

Select **Print Page** to print the page as is displayed on-screen, and **Cancel** to return to the login page.



Bid #	The Bid Number also functions as a link to the bid detail page.
Organization	The Organization of the bid.
Alternate ID	The Alternate ID of the bid.
Buyer	The agency buyer associated with the bid.
Description	A short description of the bid.
Purchase Method	The Purchase Method of the bid.
Bid Opening Date	The date the bid will be opened and quotes no longer accepted.
Bid Q & A	When Bid Q & A exists for a bid, the “View” link will be displayed. When selected the user will be navigated to the Bid Q & A.
Quotes	Links for Create New and the Quote number generated by the Seller for this bid. Selecting Create New will open the New Quote view and selecting a Quote number will open the document of the listed number.
Bid Holder	The bid holder column contains a link (List) to the bid holder list. This list outlines the sellers who have viewed this bid document after electing to submit an acknowledgement receipt. An example of the Bid Holder list is pictured below. Note that the agency may not allow vendors to see the list.



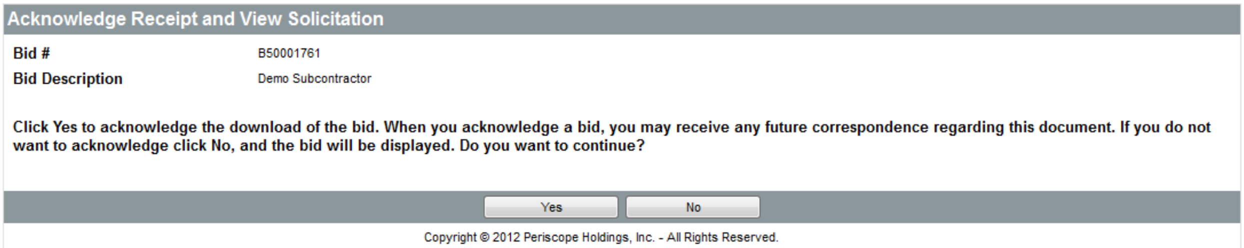
After reviewing the Bid Plan Holder List, select **Cancel** to return to the **Open Bids** selection list.

Open a Bid

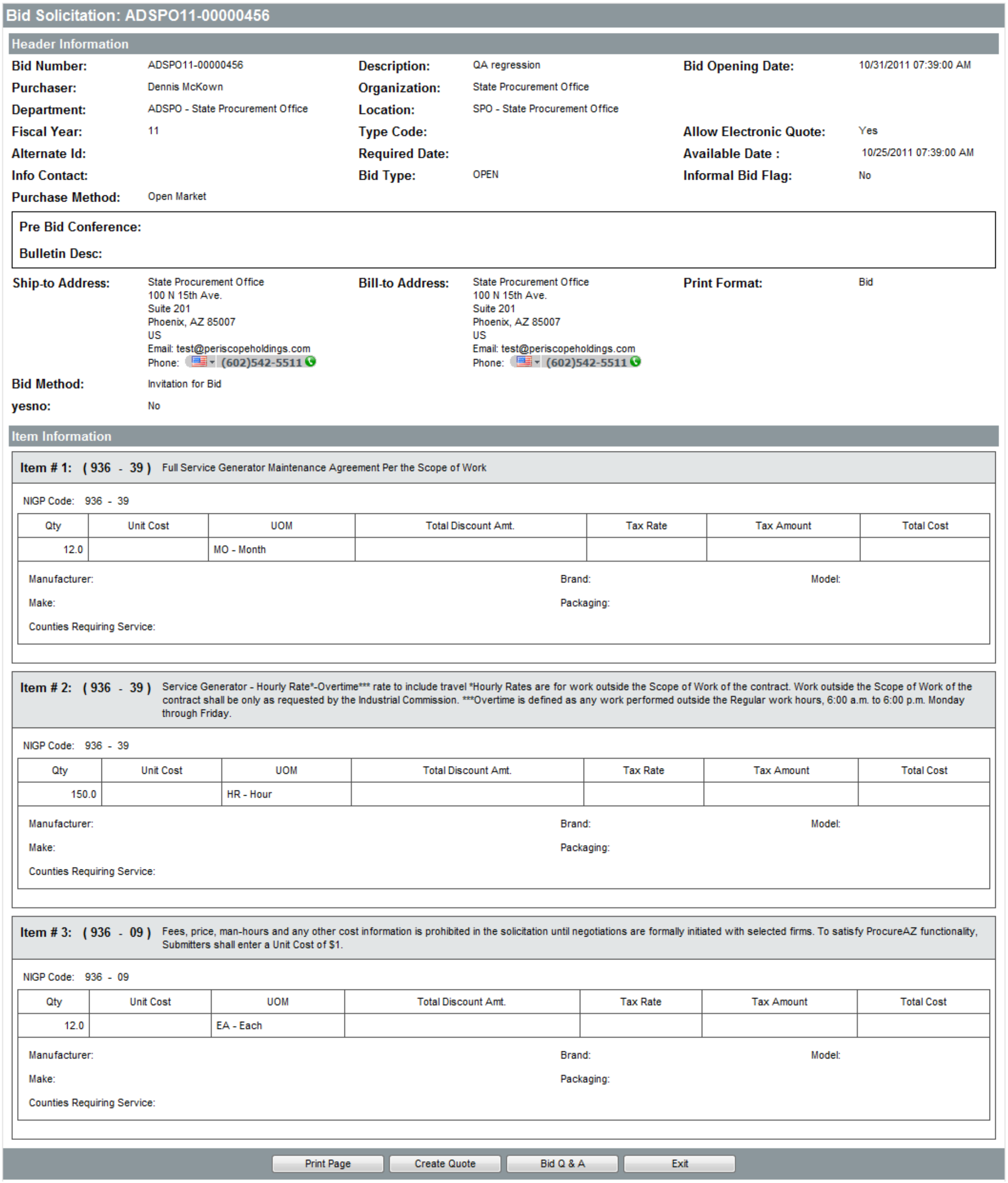
How-To open and view a specific bid:

1) Click on the underlined bid number in the Open Bids selection list.

2) Respond to the Bid Acknowledge Receipt query that displays.
3) BuySpeed automatically allows you to send an acknowledgement receipt to the agency. Selecting "Yes" to the query ensures the agency is aware of your interest in this Bid should they publish an addendum in the future. Selecting "No" will still allow you to view the bid details for the selected bid, but will not prompt the agency to send you updates.



4) View the bid detail. When you click on the bid number link to open and view the bid document, you can use the item fields to calculate the quantity, and unit price. As you update the item fields, the item Total Cost, Item Total, and Bid Solicitation fields reflect the calculations.



Bid Solicitation: ADSPO11-00000456

Header Information

Bid Number:	ADSPO11-00000456	**Description:**	QA regression	**Bid Opening Date:**	10/31/2011 07:39:00 AM
Purchaser:	Dennis McKown	**Organization:**	State Procurement Office		
Department:	ADSPO - State Procurement Office	**Location:**	SPO - State Procurement Office		
Fiscal Year:	11	**Type Code:**		**Allow Electronic Quote:**	Yes
Alternate Id:		**Required Date:**		**Available Date :**	10/25/2011 07:39:00 AM
Info Contact:		**Bid Type:**	OPEN	**Informal Bid Flag:**	No
Purchase Method:	Open Market				

Pre Bid Conference:

Bulletin Desc:

Ship-to Address:	State Procurement Office 100 N 15th Ave. Suite 201 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (602)542-5511	**Bill-to Address:**	State Procurement Office 100 N 15th Ave. Suite 201 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (602)542-5511	**Print Format:**	Bid
Bid Method:	Invitation for Bid				
yesno:	No				

Item Information

Item # 1: (936 - 39) Full Service Generator Maintenance Agreement Per the Scope of Work

NIGP Code: 936 - 39

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
12.0		MO - Month				

Manufacturer: Brand: Model:

Make: Packaging:

Counties Requiring Service:

Item # 2: (936 - 39) Service Generator - Hourly Rate*-Overtime*** rate to include travel *Hourly Rates are for work outside the Scope of Work of the contract. Work outside the Scope of Work of the contract shall be only as requested by the Industrial Commission. ***Overtime is defined as any work performed outside the Regular work hours, 6:00 a.m. to 6:00 p.m. Monday through Friday.

NIGP Code: 936 - 39

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
150.0		HR - Hour				

Manufacturer: Brand: Model:

Make: Packaging:

Counties Requiring Service:

Item # 3: (936 - 09) Fees, price, man-hours and any other cost information is prohibited in the solicitation until negotiations are formally initiated with selected firms. To satisfy ProcureAZ functionality, Submitters shall enter a Unit Cost of $1.

NIGP Code: 936 - 09

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
12.0		EA - Each				

Manufacturer: Brand: Model:

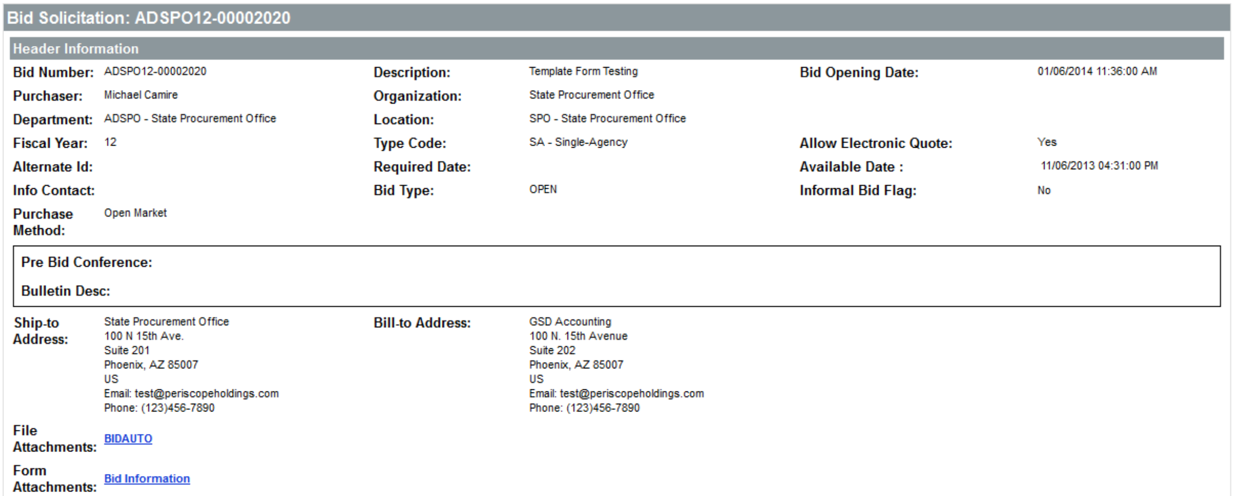
Make: Packaging:

Counties Requiring Service:

Print Page | Create Quote | Bid Q & A | Exit

How Do I View Bid File Attachments

When a bid solicitation includes one or more files that supplement the bid detail, the file attachments hyperlinks are displayed as part of the header information of the bid. Click on the hyperlink of the file to be viewed or downloaded.


Bid Solicitation: ADSPO12-00002020

Header Information

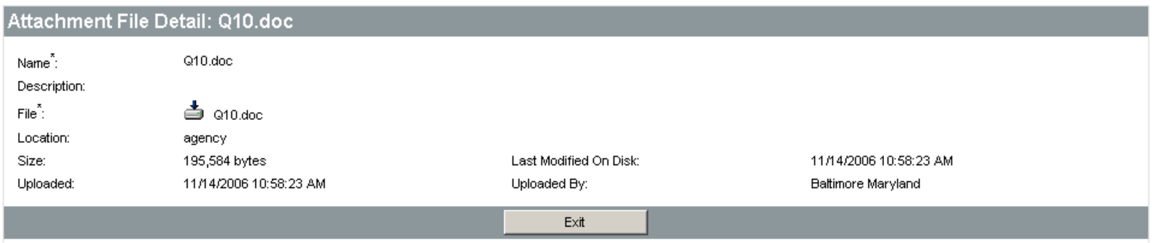
Bid Number:	ADSPO12-00002020	**Description:**	Template Form Testing	**Bid Opening Date:**	01/06/2014 11:36:00 AM
Purchaser:	Michael Camire	**Organization:**	State Procurement Office		
Department:	ADSPO - State Procurement Office	**Location:**	SPO - State Procurement Office		
Fiscal Year:	12	**Type Code:**	SA - Single-Agency	**Allow Electronic Quote:**	Yes
Alternate Id:		**Required Date:**		**Available Date :**	11/06/2013 04:31:00 PM
Info Contact:		**Bid Type:**	OPEN	**Informal Bid Flag:**	No
Purchase Method:	Open Market				

Pre Bid Conference:

Bulletin Desc:

Ship-to Address:	State Procurement Office 100 N 15th Ave. Suite 201 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (123)456-7890	**Bill-to Address:**	GSD Accounting 100 N. 15th Avenue Suite 202 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (123)456-7890
File Attachments:	BIDAUTO		
Form Attachments:	Bid Information		

Clicking on the file name hyperlink will open the Attachment File Detail which displays the file name, description, and other pertinent information.


Attachment File Detail: Q10.doc

Name*:	Q10.doc		
Description:			
File*:	Q10.doc		
Location:	agency		
Size:	195,584 bytes	Last Modified On Disk:	11/14/2006 10:58:23 AM
Uploaded:	11/14/2006 10:58:23 AM	Uploaded By:	Baltimore Maryland

Exit

Click on the  icon for the option to open or download the file.

How Do I View Bid Form Attachments

When a bid solicitation includes one or more forms that supplement the bid detail, the form hyperlinks are displayed as part of the header information of the bid. Click on the hyperlink of the form name to be viewed or downloaded.


Bid Solicitation: ADSPO12-00002020

Header Information

Bid Number:	ADSPO12-00002020	**Description:**	Template Form Testing	**Bid Opening Date:**	01/06/2014 11:36:00 AM
Purchaser:	Michael Camire	**Organization:**	State Procurement Office		
Department:	ADSPO - State Procurement Office	**Location:**	SPO - State Procurement Office		
Fiscal Year:	12	**Type Code:**	SA - Single-Agency	**Allow Electronic Quote:**	Yes
Alternate Id:		**Required Date:**		**Available Date :**	11/06/2013 04:31:00 PM
Info Contact:		**Bid Type:**	OPEN	**Informal Bid Flag:**	No
Purchase Method:	Open Market				

Pre Bid Conference:

Bulletin Desc:

Ship-to Address:	State Procurement Office 100 N 15th Ave. Suite 201 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (123)456-7890	**Bill-to Address:**	GSD Accounting 100 N. 15th Avenue Suite 202 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (123)456-7890
File Attachments:	BIDAUTO		
Form Attachments:	Bid Information		

Clicking on the form name hyperlink will open the attached form.

View Bid Amendment

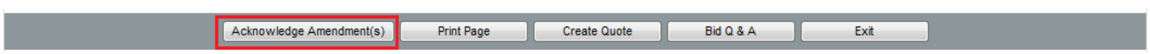
When an agency issues an amendment to a bid, the amendment will be posted in a special section of the bid solicitation window:

Amendments:

Amendment #	Amendment Date	Amendment Note
1	10/25/2011 08:06:01 AM	Item 2 1. Quantity changed from "150" to "300.0".

Acknowledging Bid Amendments

While viewing an amendment, the agency may require that the vendor user acknowledge the amendments in order for the vendor's response to be considered complete. If the function is turned on, a button will be visible at the bottom of the screen labeled 'Acknowledge Amendment(s)'. To acknowledge the amendments, click on the button. A confirmation screen will appear once completed. Please note that if you are attempting to acknowledge the amendments after the bid has opened, the confirmation screen will notify you that the amendments cannot be acknowledged.



Review Quotes

Quotes Overview

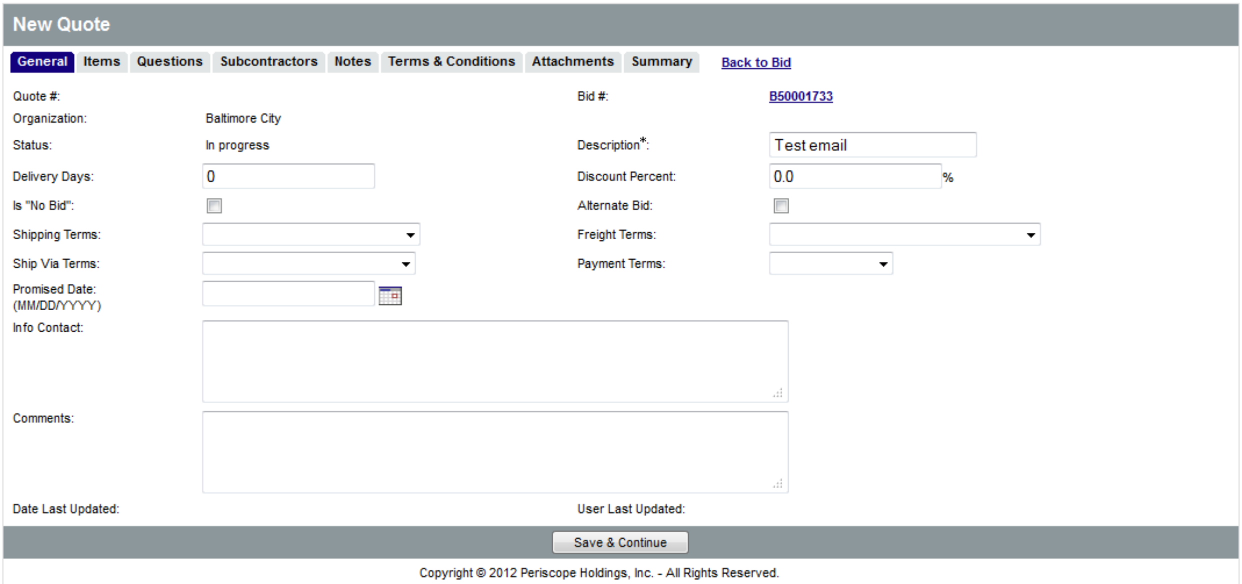
Quotes are generated from bids; they record your response to a bid or other request for pricing in the BuySpeed system. Each seller's response to a bid is an individual quote.

Responding to a Formal Bid

To respond to a formal bid, from the Bid view click the Create Quote button at the bottom of the screen.

General Tab

The first tab that appears is the general tab.



(Asterisk = required)

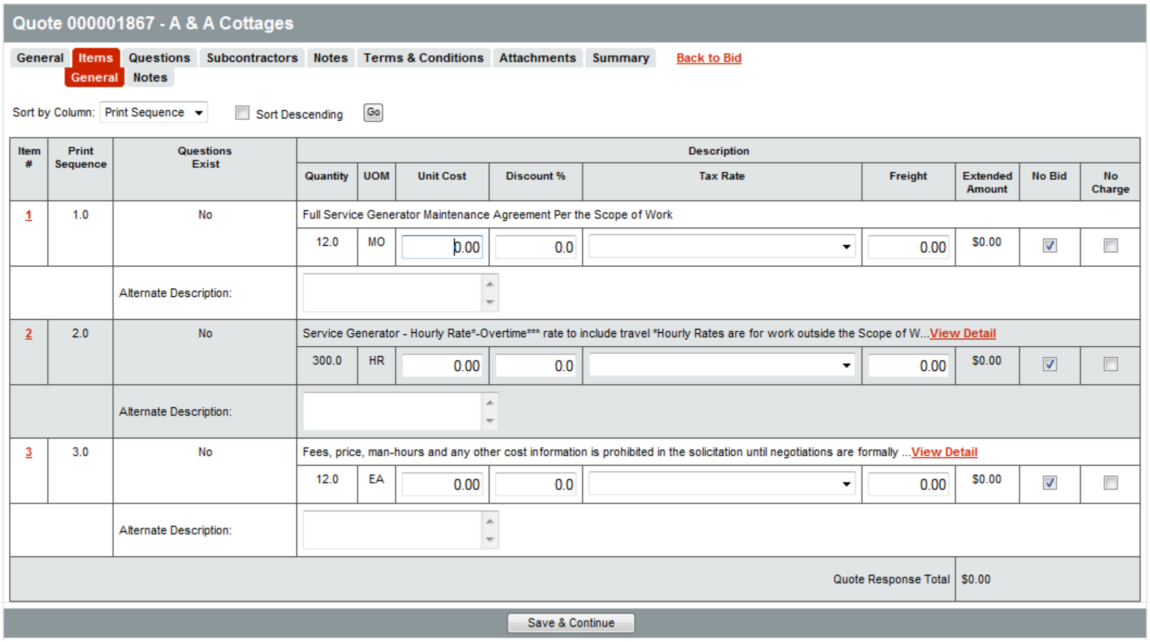
Description*	Defaults to the description of the bid. This can be changed.
Delivery Days	Days to deliver items or services from award of PO.
Discount Percent	If entered, will automatically be applied to all items on quote. This can be done on an item by item basis on the item tab.
Is No Bid	Checkmark to formally respond to bid without actually bidding on items. If you elect to do this, skip straight to the summary tab after saving this screen.
Alternate Bid	If this is the second quote for the vendor, it can be flagged as an alternate bid.
Terms	Shipping Terms, Freight Terms, Ship Via Terms, and Payment Terms default from the vendor profile.
Promised Date	Date to deliver items to agency
Info Contact	Contact information for questions regarding quote
Comments	Field to enter in notes to Agency
Custom Columns	BUYSPEED supports customized fields as set up by agencies. These fields may be marked required and will need to be filled in to complete the tab.

Action buttons are as follows.

- **Save & Continue** – Saves the data entered and displays any error if the exist.

Items Tab

The items tab is where the vendor enters in their pricing.



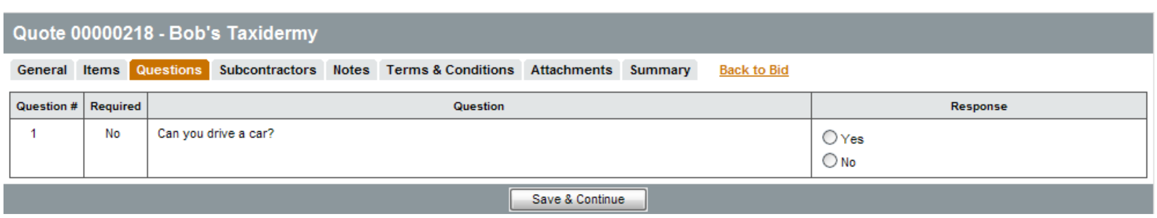
Unit Cost	Cost per item
Discount Percentage	If the vendor is applying a discount, enter it here
Tax Rate	If applicable
Freight	Enter in freight charge
No Bid	The vendor is not submitting a price quote for the item
No Charge	The vendor will supply the item free of charge
Alternate description	If the item will differ from the description entered by the agency, enter that information here.

Action buttons are as follows.

- **Save & Continue –** Saves the data entered and displays any error if the exist.

Questions Tab

The agency may ask questions of the vendor. These questions may be required to answer. The type of answer the vendor is allowed to give will depend on what the agency has selected for an answer type. These can vary from yes/no to a text field for entry.

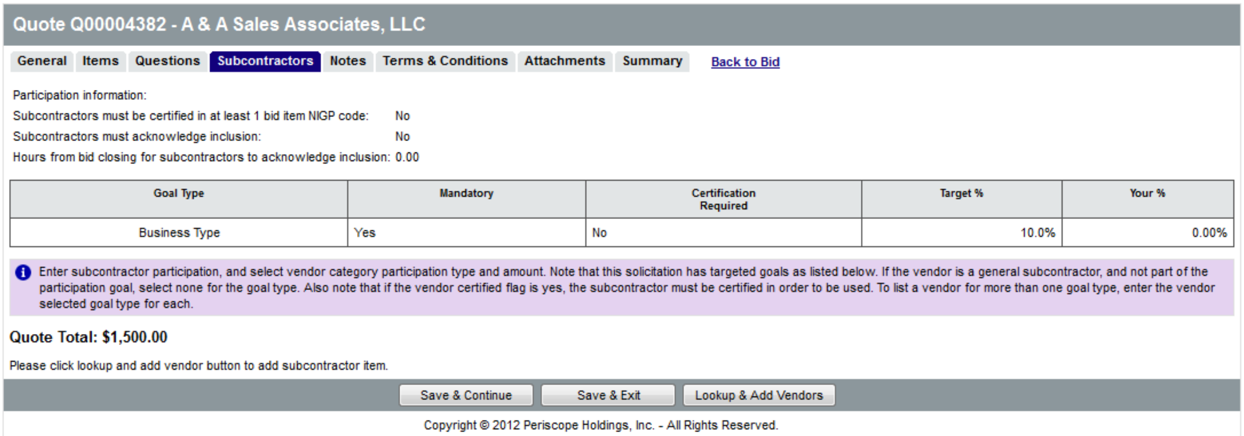


Action buttons are as follows.

- **Save & Continue –** Saves the data entered and displays any error if the exist.

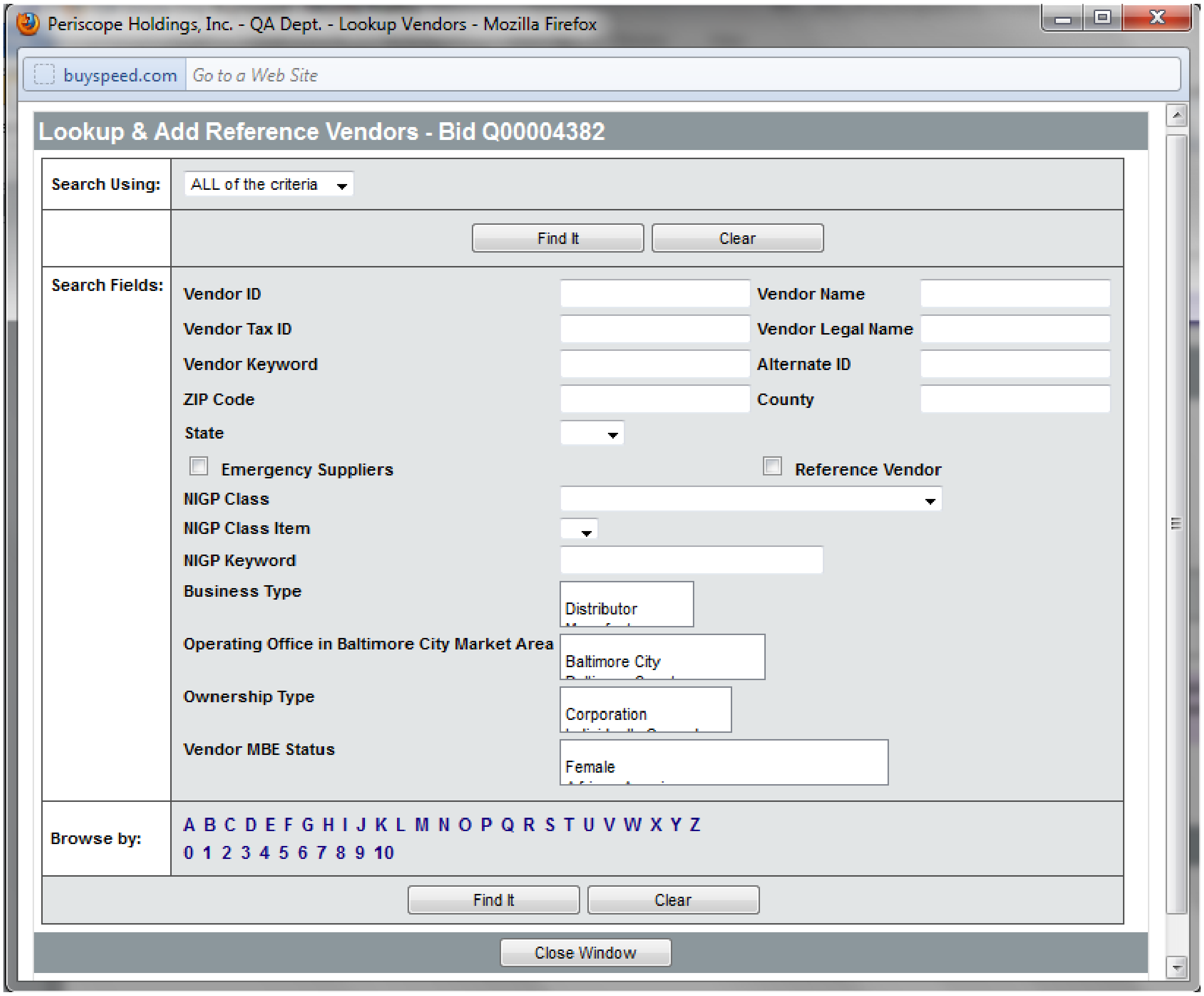
Subcontractor Tab

When the bid is configured for Subcontractor Participation, you may find, select a subcontractor and define target participation of the subcontractor with the Subcontractors tab view.

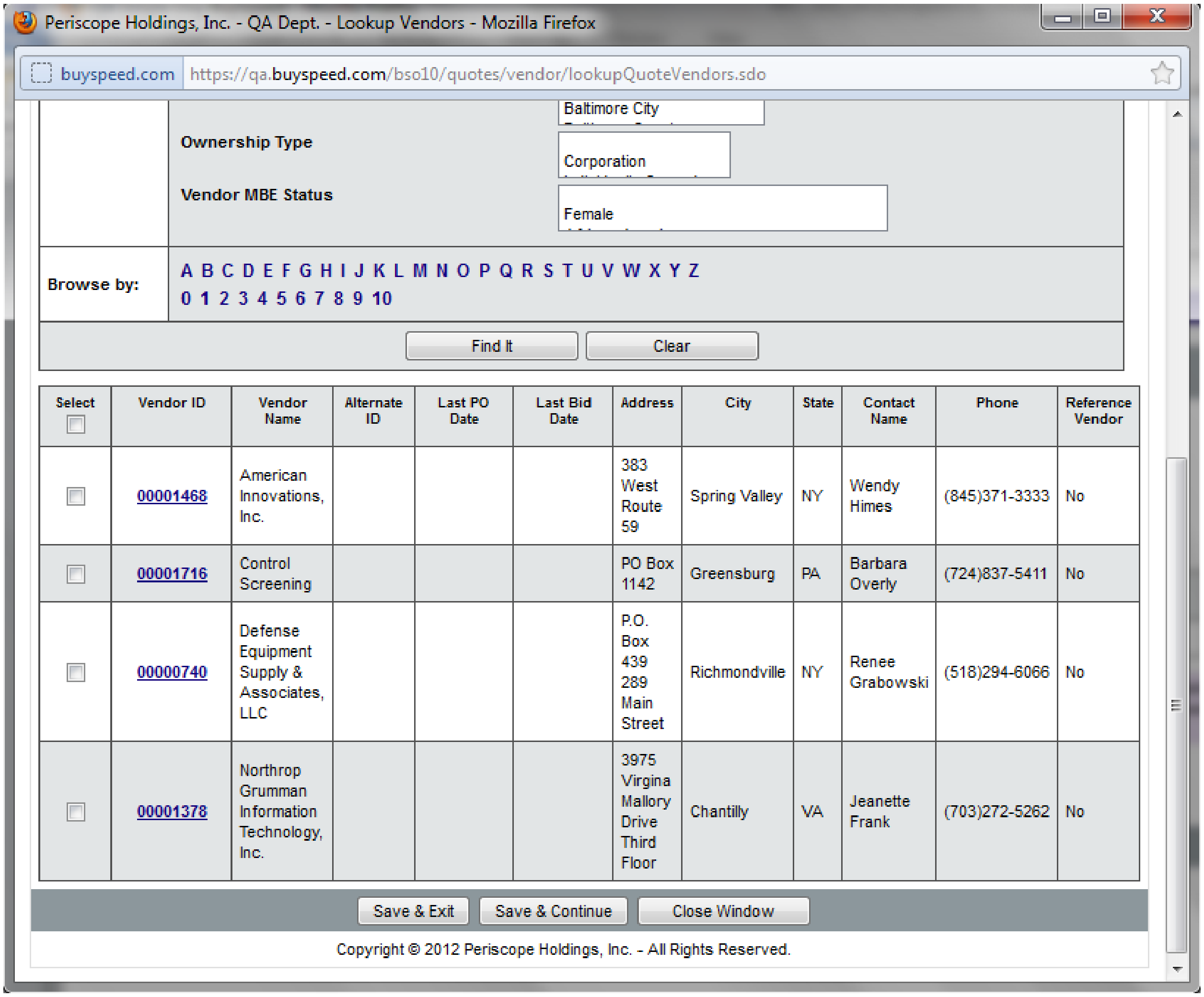


Lookup & Add Vendors

To lookup a subcontractor vendor, you will begin by clicking on the **Lookup & Add Vendors** button. The **Lookup & Add Reference Vendors** view will be displayed in a popup window.



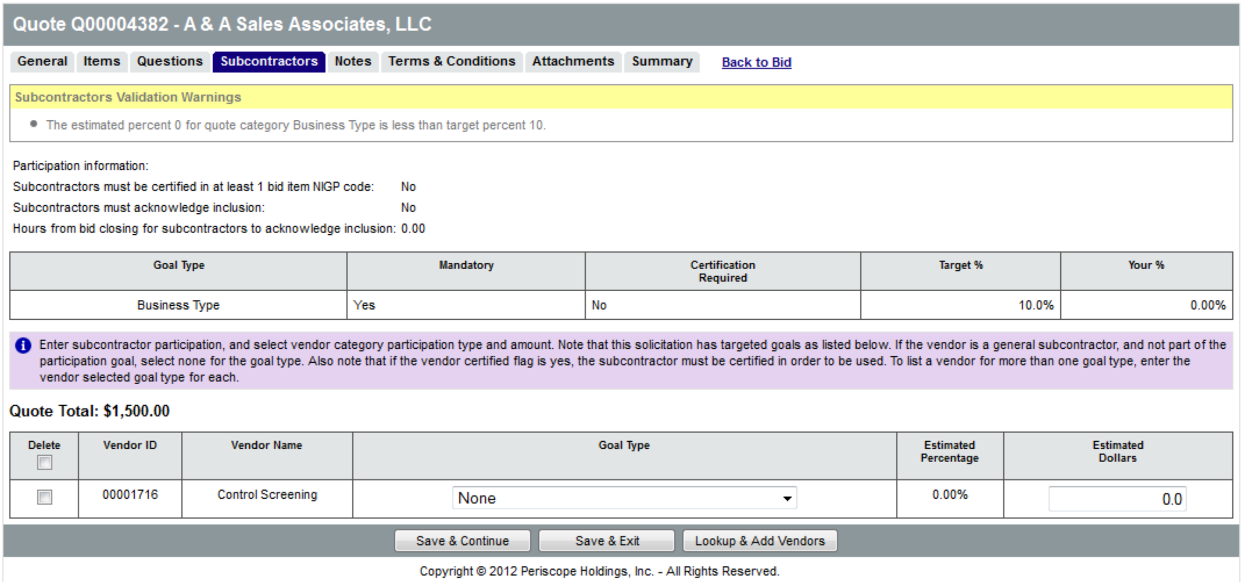
1. Enter/select the desired search criteria.
2. Click on **Find It**. The view will be refreshed with the results.



Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
	00001468	American Innovations, Inc.				383 West Route 59	Spring Valley	NY	Wendy Himes	(845)371-3333	No
	00001716	Control Screening				PO Box 1142	Greensburg	PA	Barbara Overly	(724)837-5411	No
	00000740	Defense Equipment Supply & Associates, LLC				P.O. Box 439 289 Main Street	Richmondville	NY	Renee Grabowski	(518)294-6066	No
	00001378	Northrop Grumman Information Technology, Inc.				3975 Virgina Mallory Drive Third Floor	Chantilly	VA	Jeanette Frank	(703)272-5262	No

3. Select a Vendor.

4. Click on **Save & Exit.** The window will be closed and the **Subcontractors** tab view will be refreshed with the selected vendor(s).

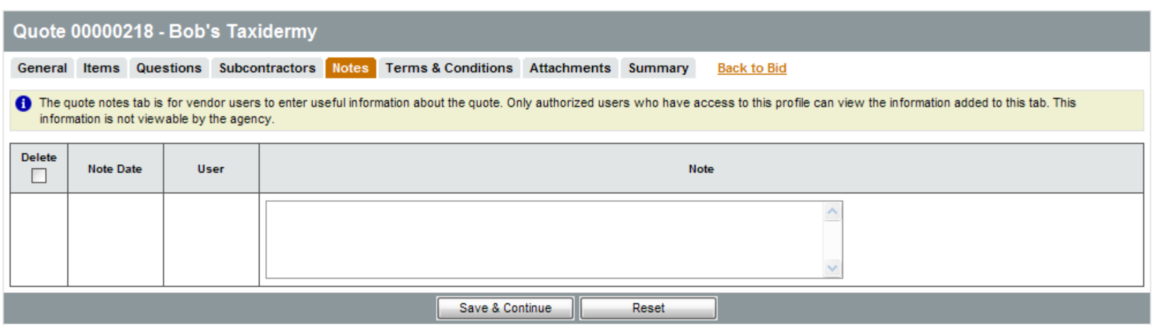


5. Select the "Goal Type" for participation.
6. Enter the "Estimated Dollars" for participation.
7. Click on **Save & Continue.** The changes will be saved and the "Estimated Percentage" will be updated.

NOTE: Estimated Percentage for a vendor should equal to exceed the Target % for participation.

Notes Tab

The notes tab allows the vendor to enter in internal notes or memos to other vendor users who may work on the quote. Please note that the agency cannot see this tab so do not enter in notes to the agency here.

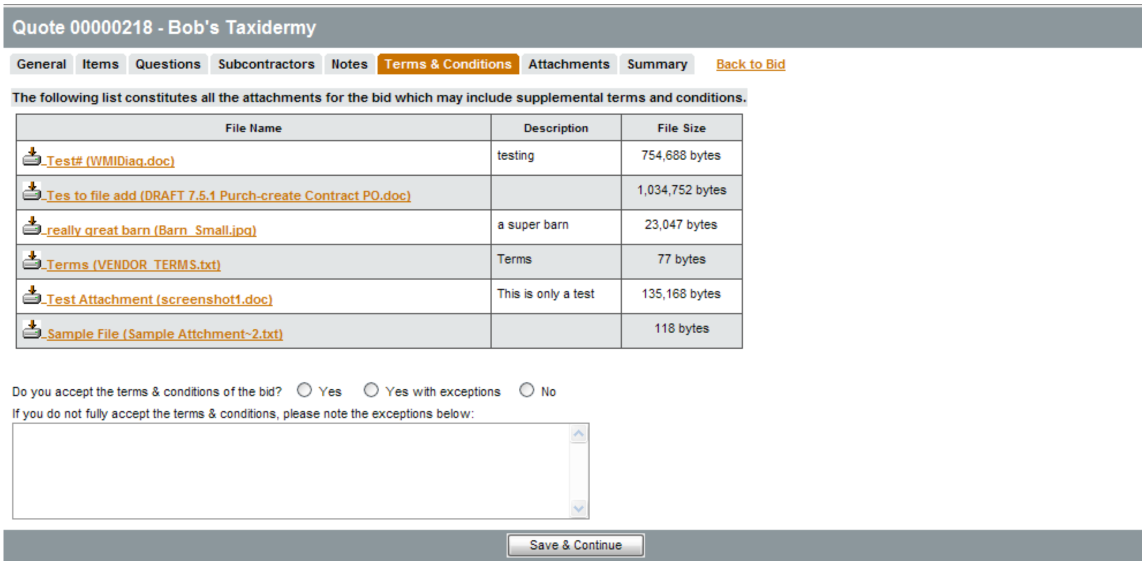


Once all fields are entered, click **Save & Continue.**

Terms and Conditions Tab

The Terms and Conditions tab is a required tab for the vendor to respond. The files attached for the bid will be visible here in case the vendor did not download the attached files from the bid detail view. Typically the Terms and Conditions are part of the attached files.

If you accept the terms and conditions, click Yes and Save & Continue, If you do not accept the terms or have exceptions to them, select that option and then enter in the reasons for not accepting them. Please note your quote will be flagged for agency view for not accepting the terms.

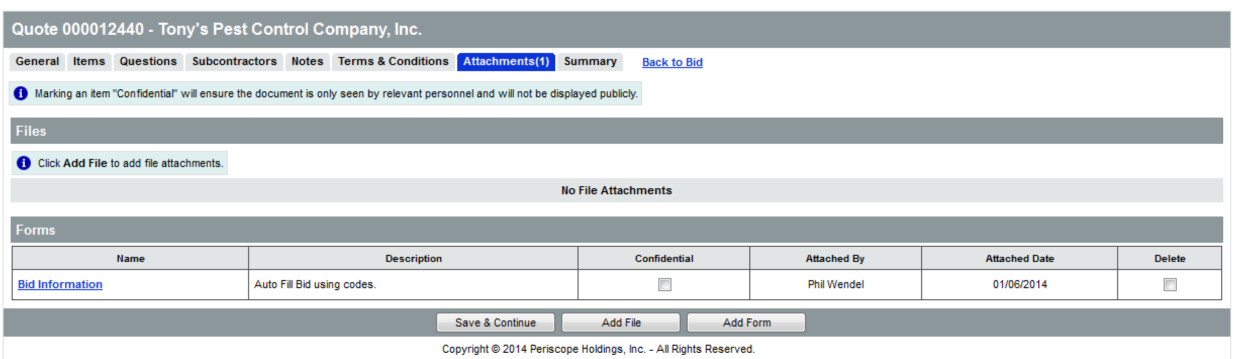


Click on the icon for the option to open or download the file.

Attachments Tab

When a bid solicitation includes one or more forms that supplement the bid and is allowed to be made part of the quote, the form hyperlinks are displayed as part of the forms section of the attachments tab.

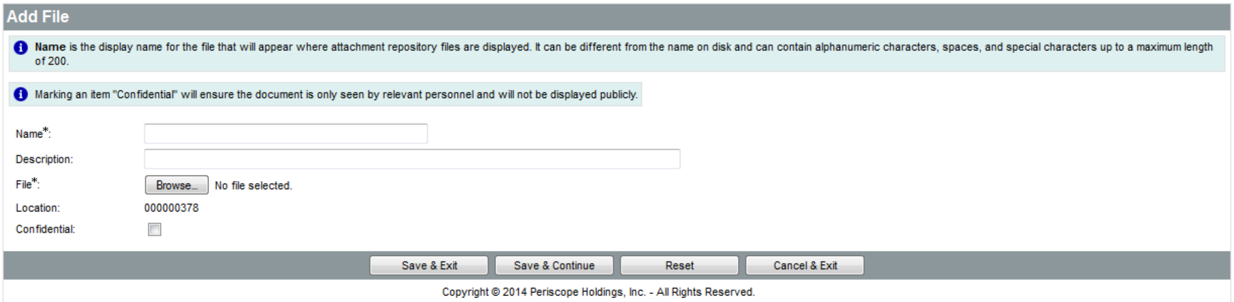
The attachments tab allows the vendor to upload a document if necessary. These can range from references or financial information to specifications or proposals.



Files

How Do I Attach Files

To attach files, select the Attachments tab. Next, select the Add File button. The user will be navigated to the Add File view.



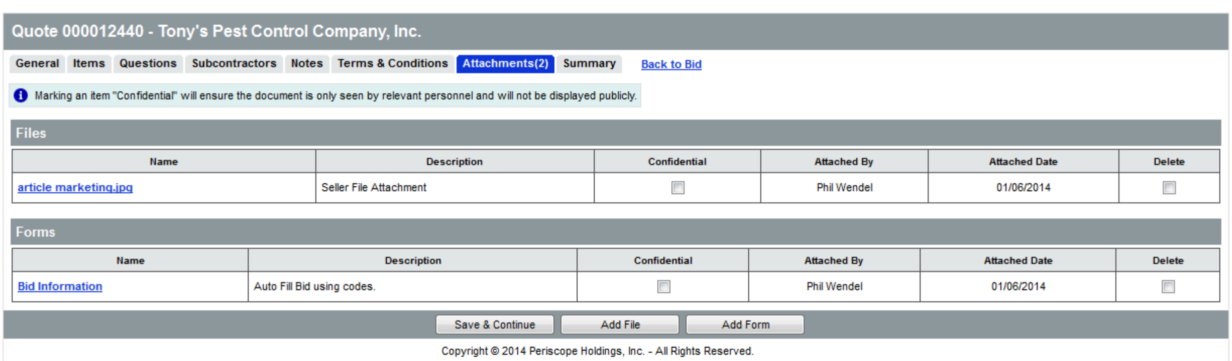
(Asterisk = required)

Name*	Required. Enter a name of the file being uploaded or if left blank, the uploaded file name will default in.
Description	Enter a description of the file being uploaded.
File*	Required. Use the Browse button to locate a file on your computer or on a shared drive to attach to the quote.
Location	Protected. Displays the location where the file is maintained.
Confidential	Place a check in the checkbox to mark the file as confidential. Confidential files are not shared outside the agency. The agency does have the option to remove the confidential indicator.

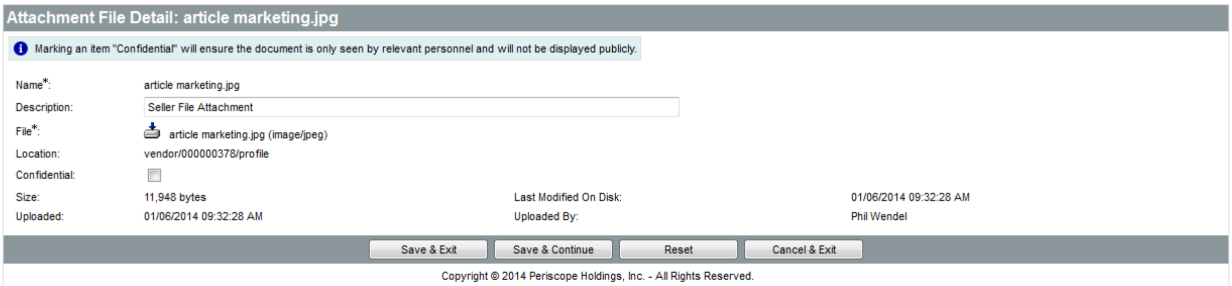
After completing all of the necessary fields for the items, there are several options to choose from:

- **Save & Exit -** The file is uploaded, saved and the user is returned to the attachments tab.
- **Save & Continue -** The file is uploaded, saved, while staying on the same view where further revisions can be made.
- **Reset -** All fields not saved will be reset to its original data.
- **Cancel & Exit -** No changes are made unless they had been previously saved. Returns user to the attachments tab.

How Do I View/Download Files



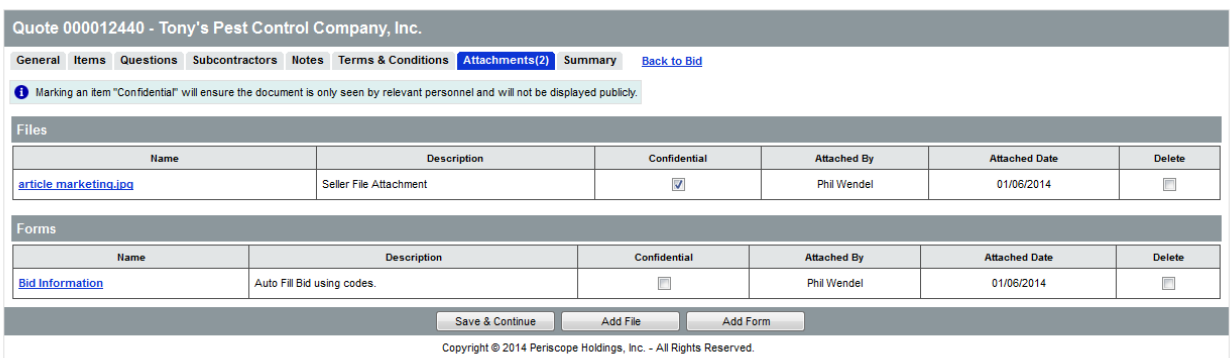
On the Attachments tab, file names are hyperlinks that can be clicked on to show the file details. When an attachment file detail is opened, it will display the name, description, and other pertinent information.



Click on the  icon for the option to open or download the file.

How Do I Identify Files as Confidential

The confidential column in the files section of the Attachments tab allows the user to select whether the file should be identified as confidential or not. Any files marked as confidential are not displayed to other vendors nor are they viewable outside the requesting agency.



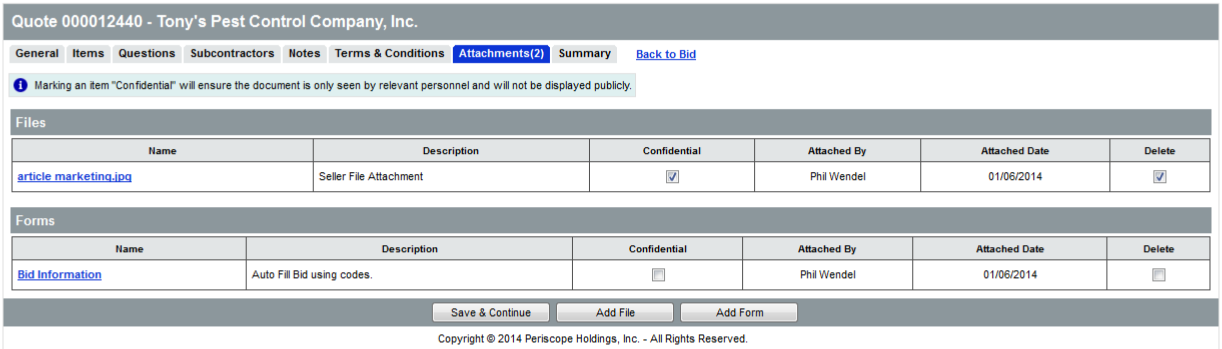
Place a check in the checkbox under the confidential column for the associated file(s).

Action button to use:

- **Save & Continue** -- The selected file(s) are updated as confidential.

How Do I Delete a File

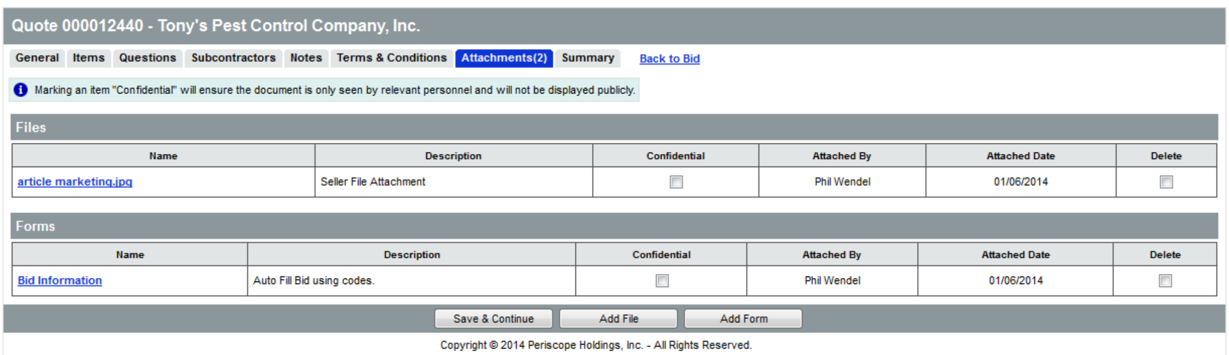
Attached files can be deleted from the document from the Attachments view. Place a check mark in the delete checkbox under the delete column of the files section of the attachments for the file(s) to be deleted then select the Save & Continue button. The view will refresh and the selected files will be deleted.



Forms

How Do I Attach Forms

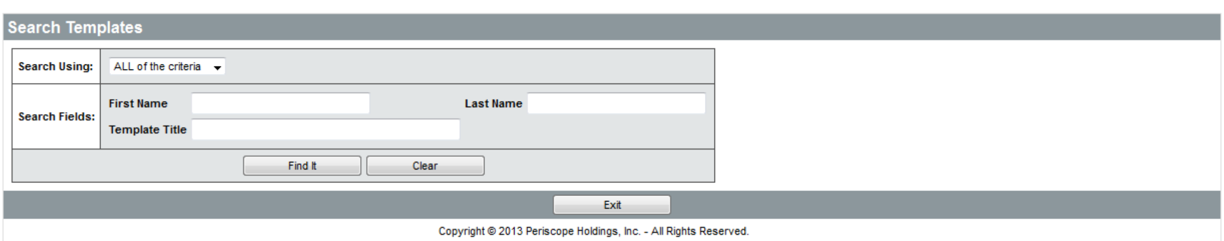
From the Attachments tab, select the Add Form button and the Search Templates view will display.



Action button to use:

- **Add Form –** Navigates the user to the Search Template view.

Using the Search Templates search view, determine the search criteria you wish to search the templates. Enter or select the data and select the Find It button. If records exist that match your search criteria, the search results will return with them or “No Record Found”.



The fields for this form are described below (Asterisk = required)

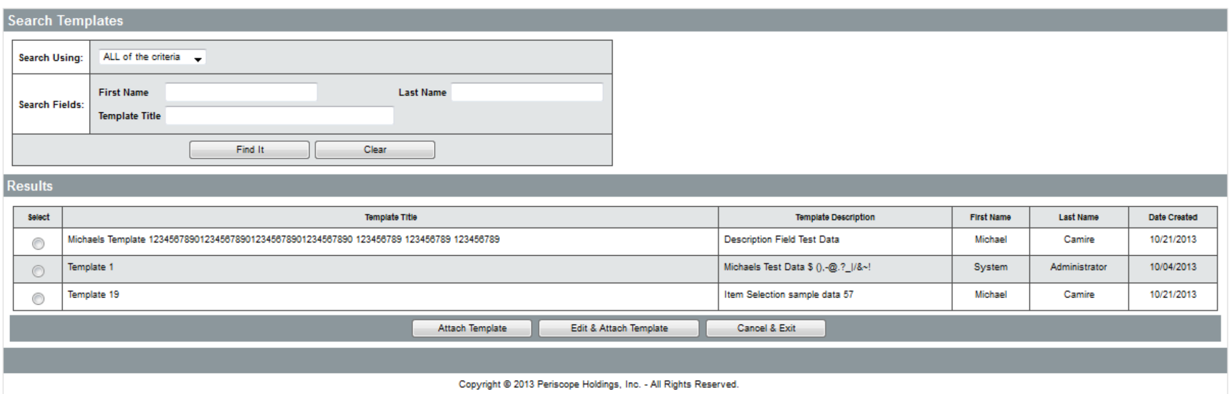
Search Using	You can search using all of the criteria, all selected criteria must be met or any of the criteria, any of the selected criteria is met.

Search Fields	
First Name	Enter the first name of the individual who created the template.
Last Name	Enter the last name of the individual who created the template.
Template Title	Enter the title or partial title of the template title.

Action buttons are as follows.

- **Find It** – Using the search criteria selected, searches the database and returns the results.
- **Clear –** Removes the entered and/or selected data in all the search fields.
- **Exit –** Navigates the user back to the Attachments view.

Enter data in one or more of the search fields and select the Find It button. Search results should display if any records meet your search criteria. From the search results, select the form you wish to attach.



Attach Form without Editing

From the search results displayed, select the form to be attached and select the Attach Template button. Repeat the step to attach additional forms. When all the forms have been attached, select the Cancel & Exit button.

Attach Form with Editing

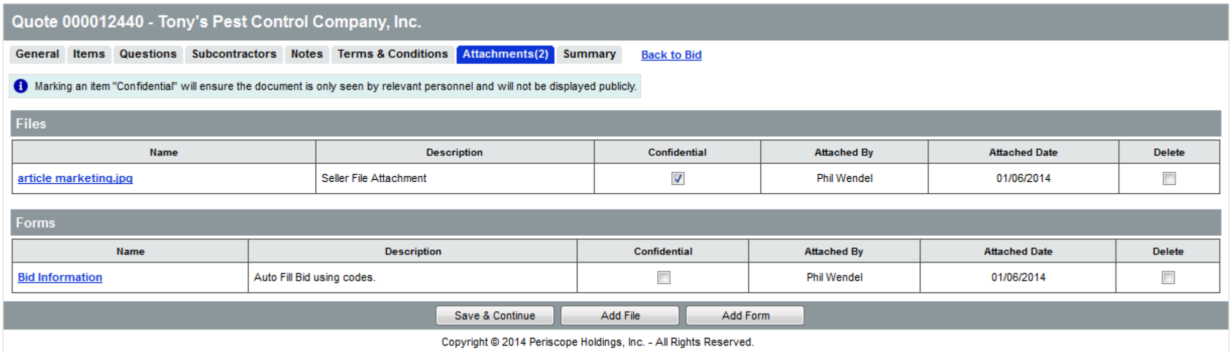
To edit forms, the recommended browsers are:

- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
  - o Opera 12
  - o Internet Explorer 9 and 10
- Not supported
  - o Internet Explorer 8 and earlier

From the search results displayed, select the form to be attached and select the Edit & Attach Template button. The user is navigated to the forms edit view to edit the form. When the editing is completed, select the Save button and then the Exit button.

How Do I Identify Form as Confidential

The confidential column of the forms section of the Attachments tab allows the user to select whether the form should be identified as confidential or not. Any forms marked as confidential are not displayed to other vendors nor are they viewable outside the requesting agency.



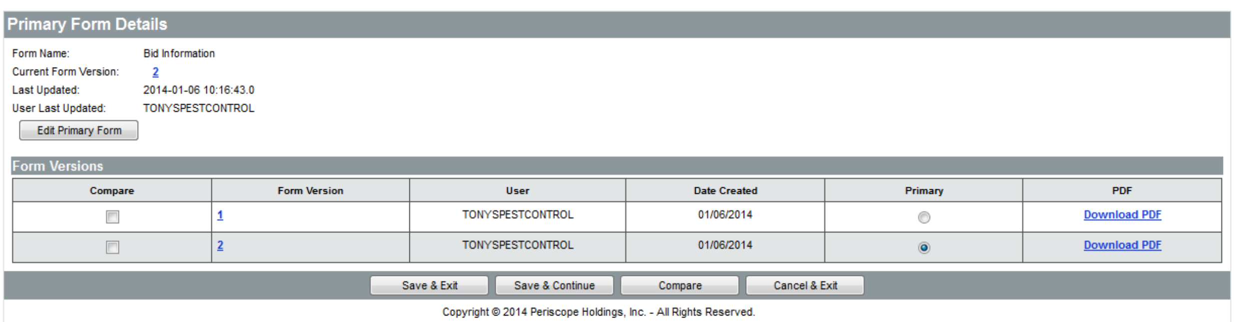
Place a check in the checkbox under the confidential column for the associated form(s).

Action button to use:

- **Save & Continue** -- The selected form(s) are updated as confidential.

How Do I View an Attached Form

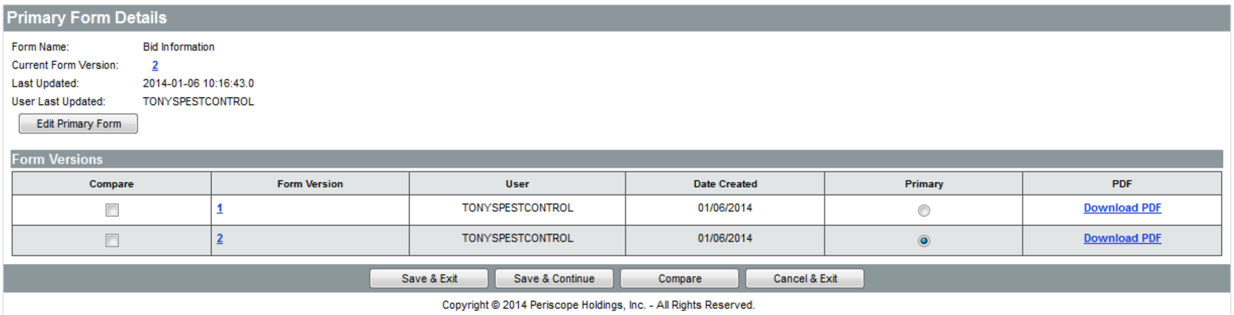
The attached form may be viewed by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select Exit button to return to the previous view.



How Do I View Attached Form In PDF Format

The attached form may be downloaded and viewed in portable document format (PDF) by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select the PDF button to download and view the form in PDF format.

If there are multiple versions of the form, then the form can be downloaded and viewed from the Forms Versions section of the Primary Form Details view. The PDF download link is provided in the last column for each of the versions. Click on the download PDF hyperlink to download and view the form in PDF format.


Primary Form Details

Form Name: Bid Information
Current Form Version: 2
Last Updated: 2014-01-06 10:16:43.0
User Last Updated: TONYSPESTCONTROL

Edit Primary Form

Form Versions

Compare	Form Version	User	Date Created	Primary	PDF
	1	TONYSPESTCONTROL	01/06/2014		Download PDF
	2	TONYSPESTCONTROL	01/06/2014		Download PDF

Save & Exit | Save & Continue | Compare | Cancel & Exit

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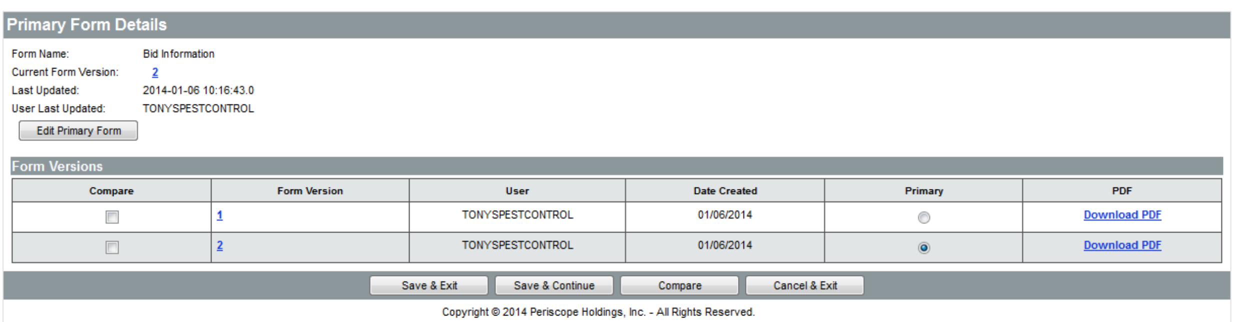
How Do I Edit the Primary Form

To edit forms, the recommended browsers are:

- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
  - Opera 12
  - Internet Explorer 9 and 10
- Not supported
  - Internet Explorer 8 and earlier

Select the name hyperlink on the Attachments tab forms section. The Primary Form Details view is displayed. To edit the primary form, select the Edit Primary Form button. The form is displayed and can be edited. When edits are completed, select the Save button then the Exit button. The user is returned to the Primary Form Details view displaying the different form versions. The edited version will be identified as the primary form. Select the Cancel & Exit button to return to the Attachments tab view.


Primary Form Details

Form Name: Bid Information
Current Form Version: 2
Last Updated: 2014-01-06 10:16:43.0
User Last Updated: TONYSPESTCONTROL

Edit Primary Form

Form Versions

Compare	Form Version	User	Date Created	Primary	PDF
	1	TONYSPESTCONTROL	01/06/2014		Download PDF
	2	TONYSPESTCONTROL	01/06/2014		Download PDF

Save & Exit | Save & Continue | Compare | Cancel & Exit

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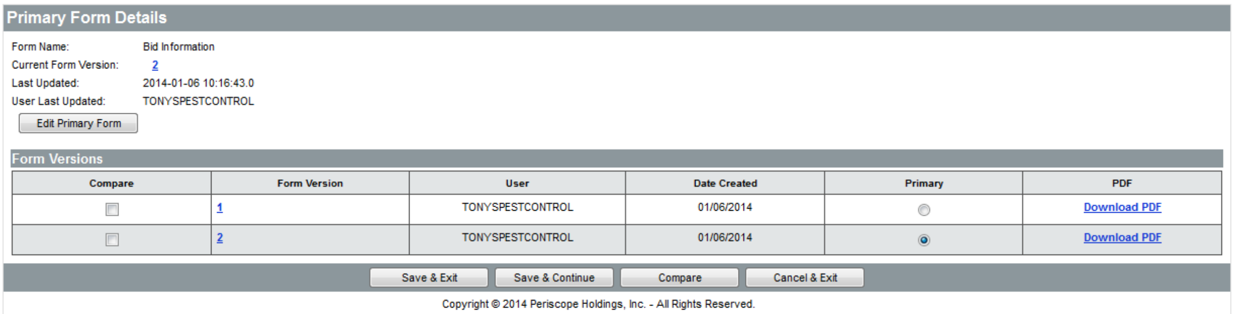
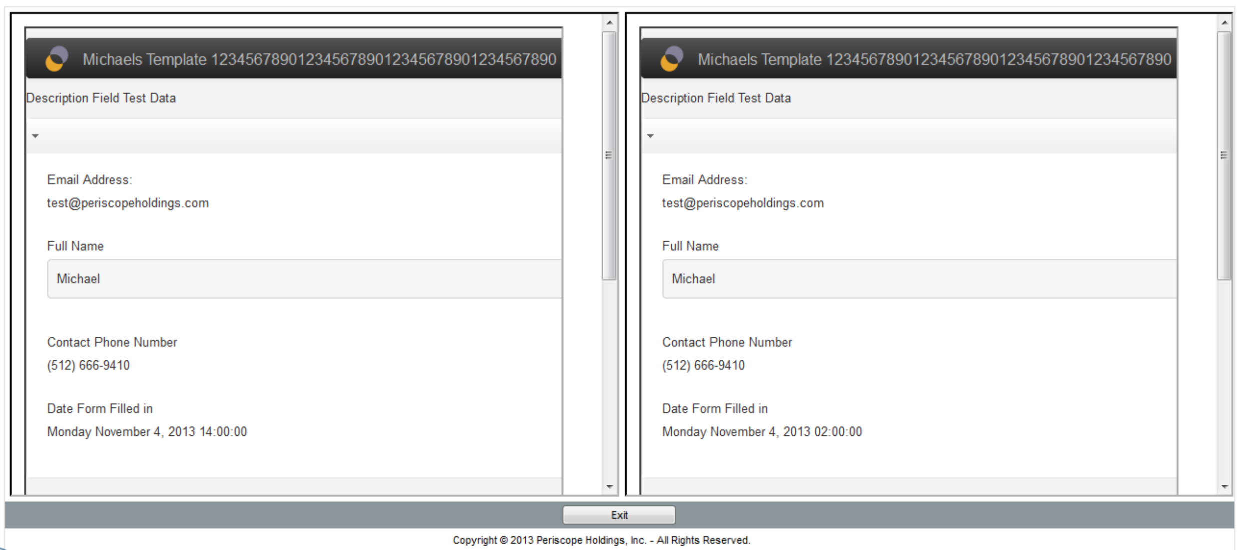
How Do I Compare Forms

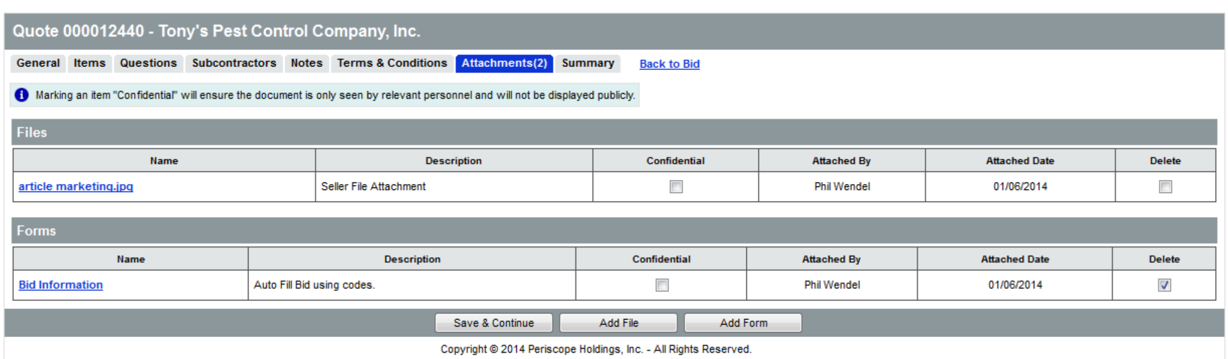
When there is more than one version of the form, the user can compare two of the forms at a time. The comparison between two versions of the form is done from the Primary Form Detail view. Place a check mark in the compare checkbox of the two versions to compare then select the Compare button. The view will refresh with a side-by-side comparison of the two views. Repeat the process to compare additional versions.





How Do I Delete an Attached Form

Attached forms can be deleted from Attachment tab agency sub-tab view. Select the form(s) to be deleted by placing a check mark in the checkbox under the Delete column adjacent to the form name.

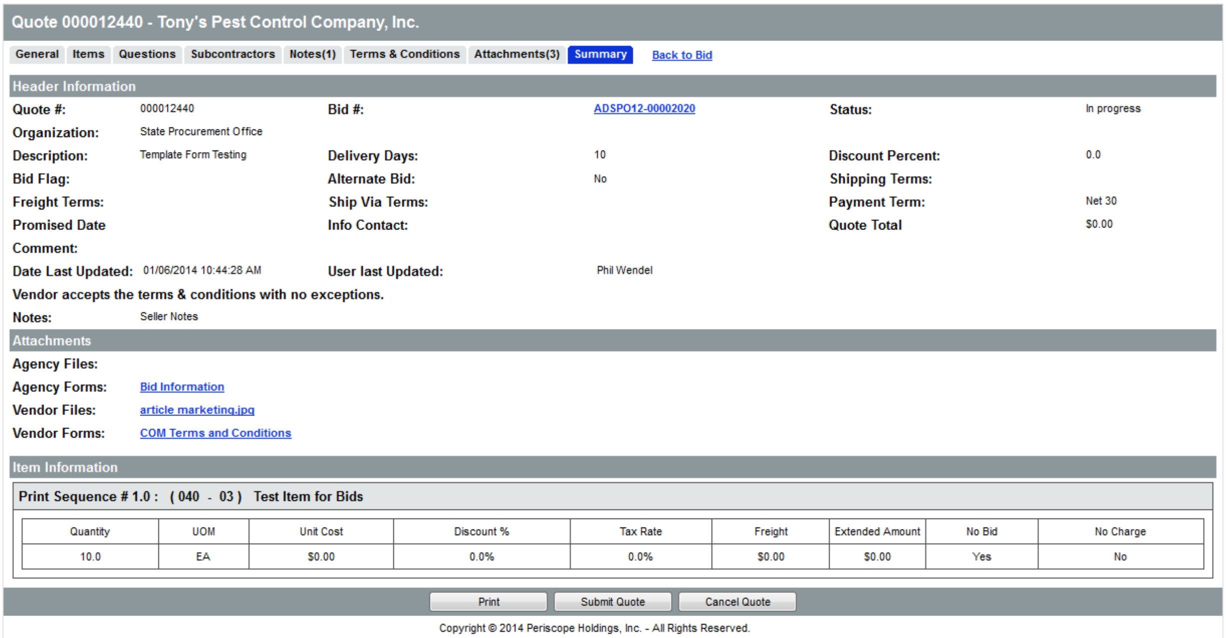


Action button to use:

- **Save & Continue** -- The selected form(s) are deleted.

Summary Tab

The summary tab is the last chance to look over the data entered in. If any changes need to be made, click the tab to go back to that screen to edit. Once everything is entered in, click **Submit Quote** at the bottom of the screen. Once the quote is submitted, the quote is officially saved for view once the Agency opens the bid.

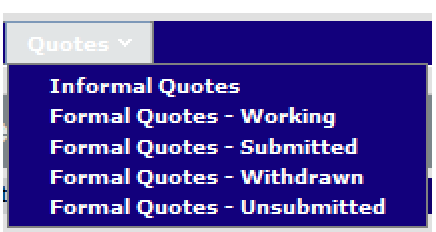


If any changes to the bid need to occur at this point, click **Withdraw Quote** to pull the quote back to the vendor's control. Clicking **Reopen Quote** will open the quote for editing. Please note that the vendor must resubmit the quote to Submitted status in order for it to be used for bid tabulation and awarding.

View Quote

Registered sellers can view quotes they have entered:

From the **Quotes** menu, select from **Informal Quotes**, **Formal Quotes-Working**, **Formal Quotes-Submitted**, **Formal Quotes-Withdrawn** and **Formal Quotes-Unsubmitted**.



Quote Type	**Description**	**Modifiable?**
Informal Quote	Quote has been submitted "on-the-fly" directly from an agency Requisition.	Yes
Formal Quotes-Working	Quote is in progress, but has not yet been	Yes

	submitted to agency in response to a bid solicitation (RFQ).	
Formal Quotes-Submitted	Quote has been completed and submitted to agency.	No. Changes can be submitted as an Alternate Bid.
Formal Quotes-Withdrawn	Quote has been withdrawn from submitted status by vendor	Yes, provided that the bid has not reached the open date/time
Formal Quotes – Unsubmitted	All working quotes, regardless of bid status	Depends on bid status

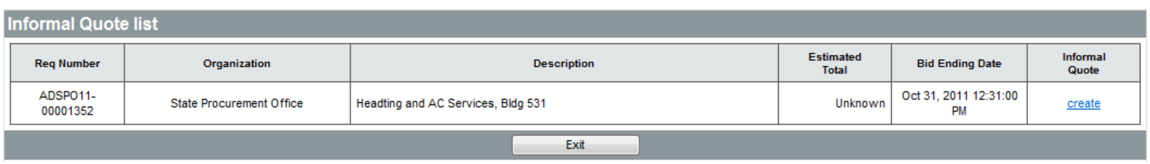
Submit Informal Quotes

An agency may allow you to respond to certain requisitions by using an informal quote.
To view new informal quote opportunities, select the Informal Quotes option from the **Quotes** dropdown menu.

The **Informal Quote** column indicates the status of the informal quote opportunities:

1. “Create” indicates an informal quote opportunity that you have not responded to. Choose this link to create a new quote.

2. “View” indicates that an informal response has already been submitted. Choose this link to view or modify an existing informal quote (see a related section in this help system titled “View Informal Quotes”).

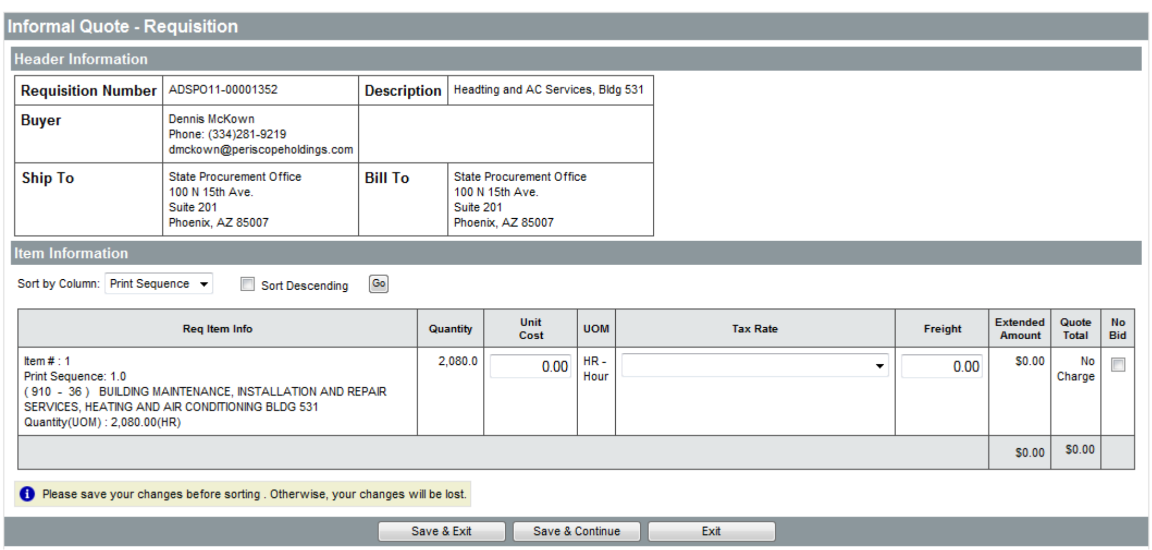


Informal Quote list

Req Number	Organization	Description	Estimated Total	Bid Ending Date	Informal Quote
ADSPO11-00001352	State Procurement Office	Headting and AC Services, Bldg 531	Unknown	Oct 31, 2011 12:31:00 PM	create

Exit

Use the line-item portion of the informal quote form to enter the Unit Price and Freight charges you wish to quote.



Informal Quote - Requisition

Header Information

Requisition Number	ADSPO11-00001352	Description	Headting and AC Services, Bldg 531
Buyer	Dennis McKown Phone: (334)281-9219 dmckown@periscopeholdings.com		
Ship To	State Procurement Office 100 N 15th Ave. Suite 201 Phoenix, AZ 85007	Bill To	State Procurement Office 100 N 15th Ave. Suite 201 Phoenix, AZ 85007

Item Information

Sort by Column: Print Sequence   Sort Descending   Go

Req Item Info	Quantity	Unit Cost	UOM	Tax Rate	Freight	Extended Amount	Quote Total	No Bid
Item # : 1 Print Sequence: 1.0 (910 - 36) BUILDING MAINTENANCE, INSTALLATION AND REPAIR SERVICES, HEATING AND AIR CONDITIONING BLDG 531 Quantity(UOM) : 2,080.00(HR)	2,080.0	0.00	HR - Hour		0.00	$0.00	No Charge	
						$0.00	$0.00	

Please save your changes before sorting . Otherwise, your changes will be lost.

Save & Exit   Save & Continue   Exit

Asterisk = required)

Header Information	
Requisition Number	Protected. Displays the related requisition number for this informal quote.
Description	Protected. Displays the requisition description.
P-Card Desired	Protected. No means the organization is indicating p-card payment is not desired Yes means the organization prefers to pay for this purchase using a procurement card (credit card).
Buyer	Protected. Displays the purchaser's information for this procurement.
Ship To	Protected. Displays the ship to address where the products are to be shipped to or where the services are to be performed.
Bill To	Protected. Displays the billing address where the invoice is to be mailed to.
Requisition Attachments	Displays the hyperlink to the attached requisition files and forms. Clicking on the hyperlink, will allow you to download and view the attached files or forms.
Informal Quote Vendor Attachments	Displays the hyperlink to the attached informal quote vendor files and forms. Clicking on the hyperlink, will allow you to download and view the attached files or forms.
Item Information	
Req Item Info	Protected. Displays the item number, the description, unit of measure (UOM), quantity requested and the estimated unit price when the informal quote settings allows the information to be displayed to the seller.
Quantity	This field can be protected or unprotected depending on the settings of the informal quote. When unprotected, the seller is allowed to change the quantity.
Unit Cost	Enter the unit cost for the item.
UOM	This field can be protected or unprotected depending on the settings of the informal quote. When unprotected, the seller is allowed to change the unit of measure.
Tax Rate	Using the dropdown menu, select the tax rate, if any.
Freight	Enter the freight cost for shipping the item.
Extended Amount	Protected. The amount is calculated when saved to include the unit cost, tax rate and freight times the quantity.

Quote Total	Protected. When the record is saved, the quote total is update for each item and for all items and displayed at the bottom of the column.
No Bid	When checked, the seller is indicating they are not providing a quote for this item. The Quote Total column for the item will be updated to No Bid.

Note: Please save your changes before apply pricing or managing attachments.

Action buttons are as follows:

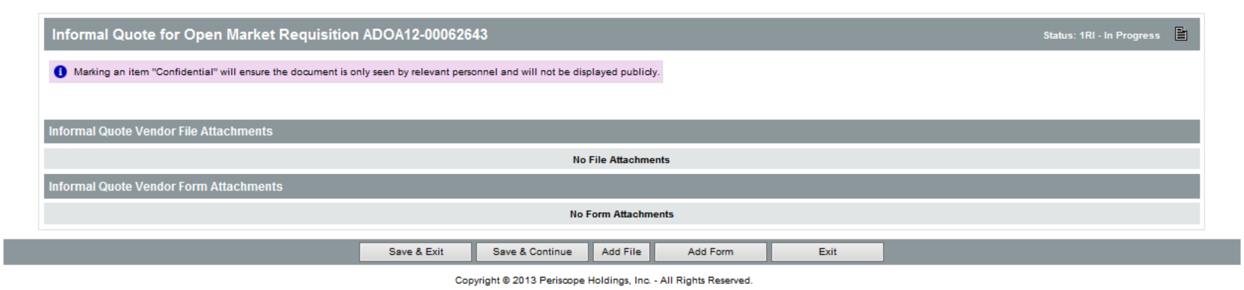
- **Manage Attachments** – Allows the user to add confidential and non-confidential files and forms to the informal quote.
- **Save & Exit –** Saves the informal Quote, closes the window and returns you to the Requisition Vendors tab view.
- **Save & Continue –** Saves the informal Quote and refreshes the view for further maintenance.
- **Apply Pricing to Req Items –** Applies the quantity, unit cost, tax rate and UOM of all the informal quotes items to the corresponding requisition items, and set the item vendors of these requisition items to this vendor.
- **Close Window –** Closes the window (without save action) and returns you to the Requisition Vendors tab view.

Attach Files and Forms to Informal Quote

Both files and forms (when document management is enabled) can be attached to the informal quote.

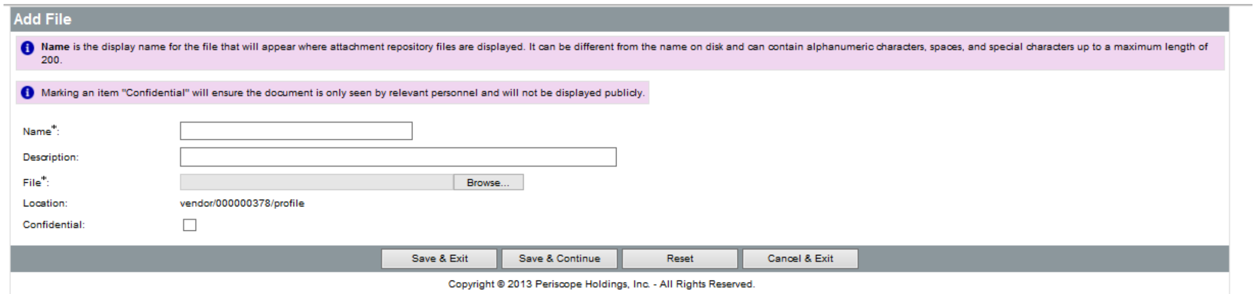
How Do I Attach Files to the Informal Quote

From the Vendors tab, select the Create hyperlink if an informal quote has not be been previously created or View/Edit if an informal quote has been created, under the Informal Quote column of the displayed vendors. A pop-up window will display the requisition informal quote for the vendor selected. You must first select the Save & Continue button to create the informal quote if it wasn't previously created. Next select the Manage Attachments button. The view that allows attachments of files and forms will appear.



Action button to use:

- **Add File** – Navigates the user to the Add File edit view.



Adding files to the informal quote is a useful way to include specifications, spreadsheets, pictures, etc. Multiple files can be attached to the informal quote.

Field Descriptions (Asterisk = required):

Name*	Required. Enter the name of the file. If left blank, the file name will default in. When enhanced security is enabled, certain characters are not allowed in this field.
Description	Enter a description of the file being added.
File*	Required. Using the browse button, search your computer for the file to be uploaded and attached to the informal quote.
Location	Protected. This will display the repository location where the file is saved.
Confidential	When selected, the file is will not be displayed to other than the seller and the agency for this informal quote.

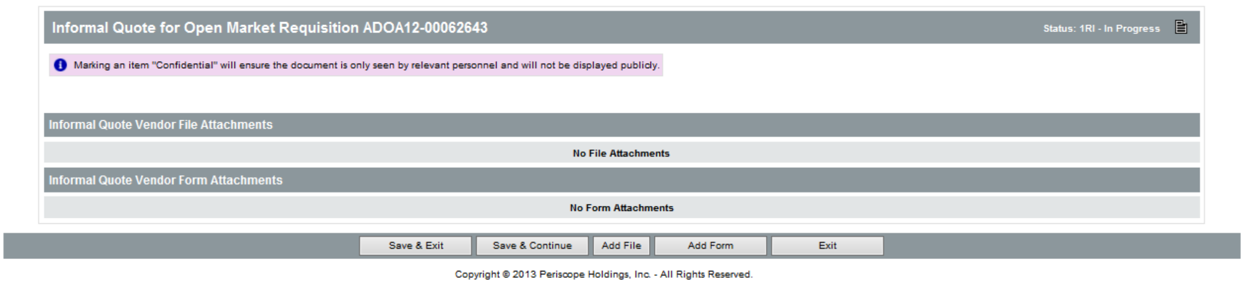
Action button to use:

- **Save & Exit –** If there are no errors, saves the entered data and navigates the user to the Attachment Files view.
- **Save & Continue –** If there are no errors, saves the entered data and remains on the view.
- **Reset –** Resets the fields to its original data without saving the entered data.
- **Cancel & Exit –** Without saving the entered data, returns the user to the Attachment Files view.

Depending on the action button used will determine which view you will be navigated to.

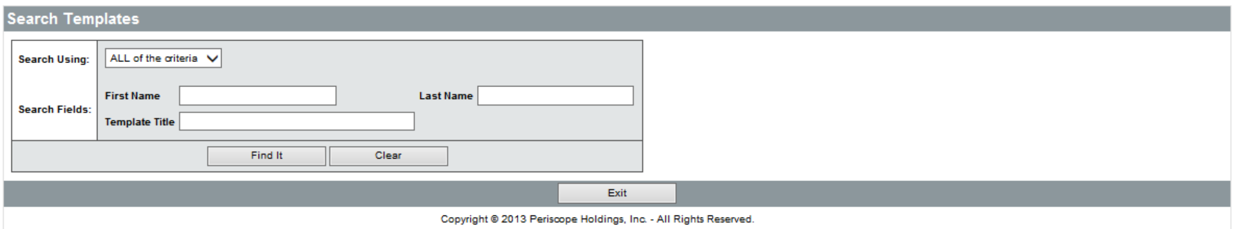
How Do I Attach Forms to the Informal Quote

From the Vendors tab, select the Create hyperlink if an informal quote has not be been previously created or View/Edit if an informal quote has been created, under the Informal Quote column of the displayed vendors. A pop-up window will display the requisition informal quote for the vendor selected. You must first select the Save & Continue button to create the informal quote if it wasn’t previously created. Next select the Manage Attachments button. The view that allows attachments of files and forms will appear.



Action button to use:

- **Add Form** – Navigates the user to the Search Template view.



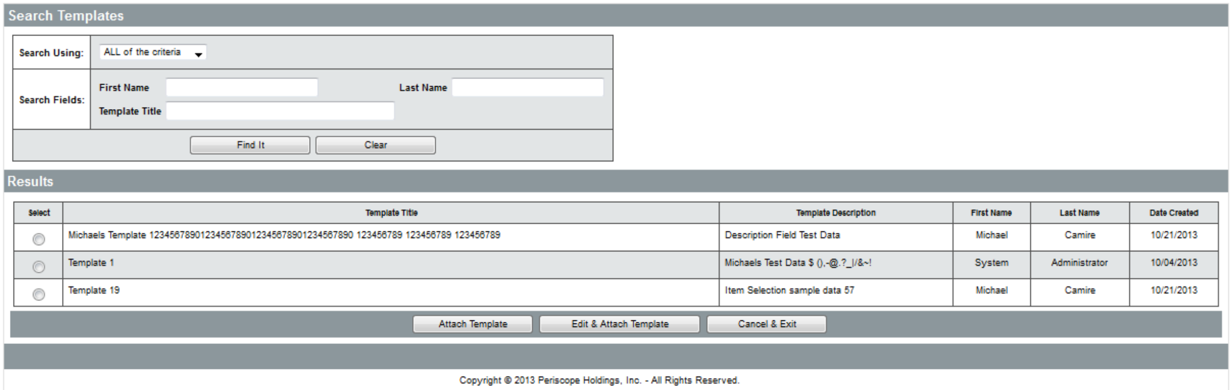
Field Descriptions (Asterisk = required):

Search Using	You can search using all of the criteria, all selected criteria must be met or any of the criteria, any of the selected criteria is met.
First Name	Enter the first name of the individual who created the template.
Last Name	Enter the last name of the individual who created the template.
Template Title	Enter the title or partial title of the template title.

Action buttons are as follows.

- **Find It** – Using the search criteria selected, searches the database and returns the results.
- **Clear –** Removes the entered and/or selected data in all the search fields.
- **Exit –** Navigates the user back to the home page.

Enter data in one or more of the search fields and select the Find It button. Search results should display if any records meet your search criteria. From the search results, select the form you wish to attach to the informal quote.



Attach Form without Editing

From the search results displayed, select the form to be attached to the informal quote and select the Attach Template button. Repeat the step to attach additional forms. When all the forms have been attached, select the Cancel & Exit button to return to the Informal Quote Attachments view.

Attach Form with Editing

To edit forms, the recommended browsers are:

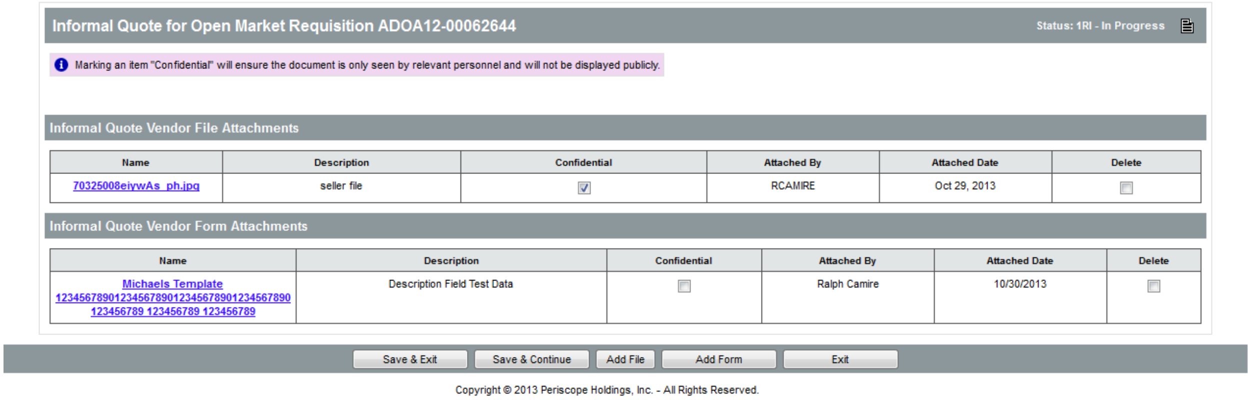
- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
    - Opera 12
    - Internet Explorer 9 and 10
- Not supported
    - Internet Explorer 8 and earlier

From the search results displayed, select the form to be attached to the informal quote and select the Edit & Attach Template button. The user is navigated to the forms edit view to edit the form. When the editing is completed, select the Save button and then the Exit button. The form is attached and the user is returned to the Informal Quote Attachments view.

How Do I Indicate the Form is Confidential

Once the form has been attached to the informal quote, place a check mark in the checkbox under the confidential column of the Informal Quote Vendor Form Attachments section on the Informal Quote Attachment view and select the Save & Continue button or Save & Exit Button if no further action is required.

To indicate a confidential form as not confidential, remove the check mark from the checkbox under the confidential column and select the Save & Continue button or Save & Exit Button if no further action is required.

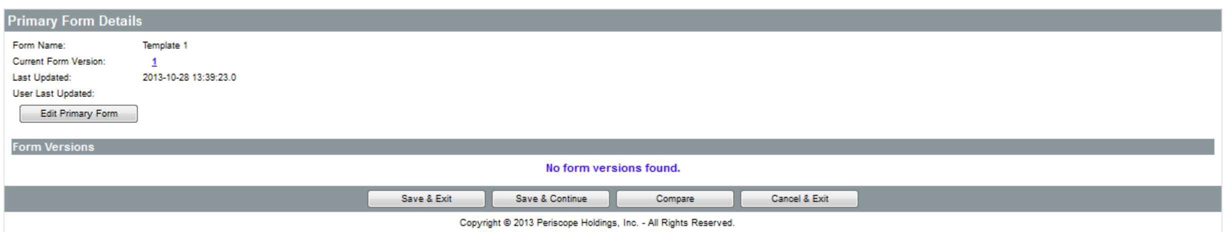


Action button to use:

- **Save & Exit** – The selected form(s) are deleted and the user is navigated to the Informal Quote – Requisition view.
- **Save & Continue** -- The selected form(s) are deleted and the user remains on the view.

How Do I View an Attached Form

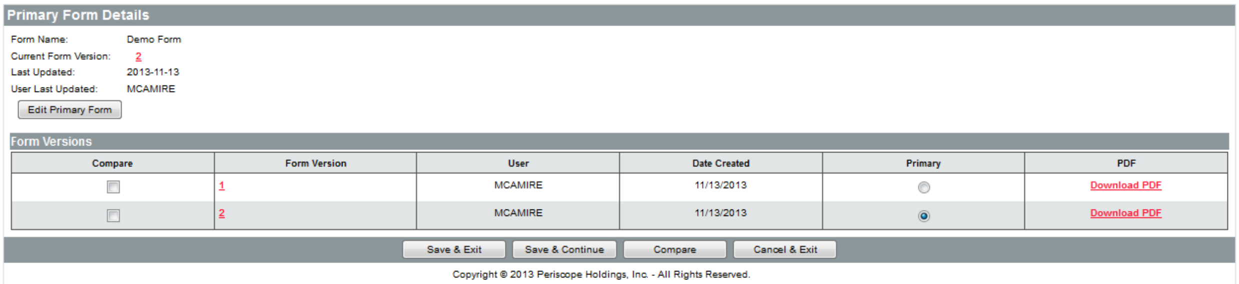
The attached form may be viewed by selecting the form name hyperlink under the Name column of the Informal Quote Vendor Form Attachments section on the Informal Quote Attachment view. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select Exit button to return to the previous view.



How Do I View Attached Form In PDF Format

The attached form may be downloaded and viewed in portable document format (PDF) by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select the PDF button to download and view the form in PDF format.

If there are multiple versions of the form, then the form can be downloaded and viewed from the Forms Versions section of the Primary Form Details view. The PDF download link is provided in the last column for each of the versions. Click on the download PDF hyperlink to download and view the form in PDF format.


Primary Form Details

Form Name: Demo Form
Current Form Version: 2
Last Updated: 2013-11-13
User Last Updated: MCAMIRE

Edit Primary Form

Form Versions

Compare	Form Version	User	Date Created	Primary	PDF
	1	MCAMIRE	11/13/2013		Download PDF
	2	MCAMIRE	11/13/2013		Download PDF

Save & Exit Save & Continue Compare Cancel & Exit

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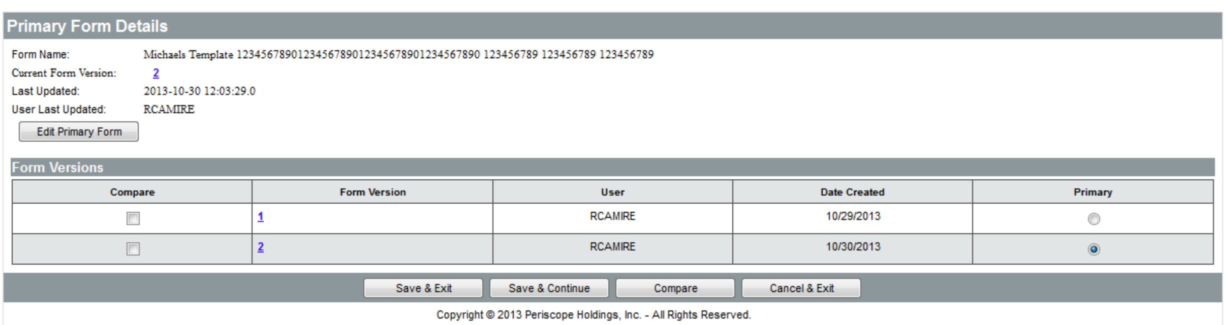
How Do I Edit the Primary Form

To edit forms, the recommended browsers are:

- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
    - Opera 12
    - Internet Explorer 9 and 10
- Not supported
    - Internet Explorer 8 and earlier

Select the name hyperlink on the Informal Quote Vendor Form Attachments section. The Primary Form Details view is displayed. To edit the primary form, select the Edit Primary Form button. The form is displayed and can be edited. When edits are completed, select the Save button then the Exit button. The user is returned to the Primary Form Details view displaying the different form versions. The edited version will be identified as the primary form. Select the Cancel & Exit button to return to the Informal Quote Attachments view.


Primary Form Details

Form Name: Michaels Template 12345678901234567890123456789012345678901 23456789 123456789 123456789
Current Form Version: 2
Last Updated: 2013-10-30 12:03:29.0
User Last Updated: RCAMIRE

Edit Primary Form

Form Versions

Compare	Form Version	User	Date Created	Primary
	1	RCAMIRE	10/29/2013	
	2	RCAMIRE	10/30/2013	

Save & Exit Save & Continue Compare Cancel & Exit

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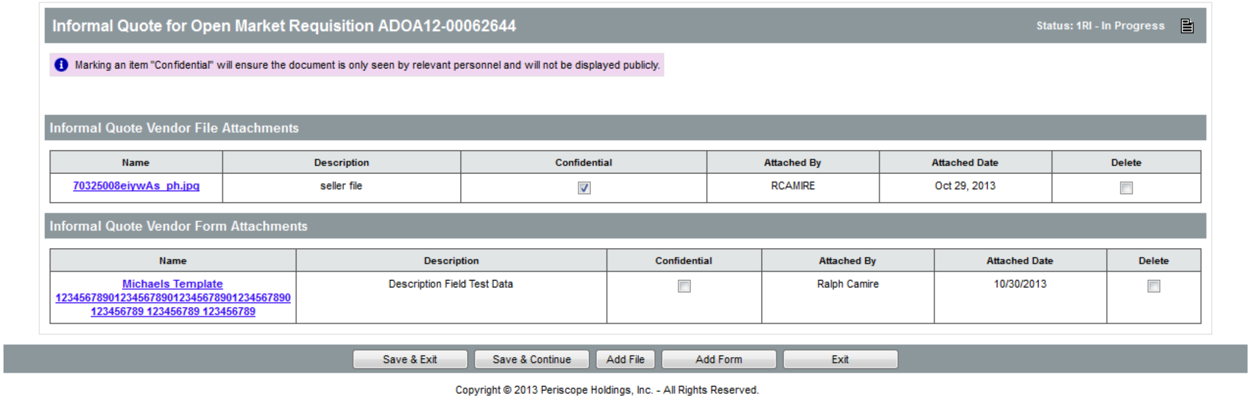
How Do I Delete an Attached Form

Attached forms can be deleted from the informal quote from the Informal Quote Attachments view. Select the form(s) to be deleted by placing a check mark in the checkbox under the Delete column adjacent to the form name.



Action button to use:

- **Save & Exit** – The selected form(s) are deleted and the user is navigated to the Informal Quote – Requisition view.
- **Save & Continue** -- The selected form(s) are deleted and the user remains on the view.

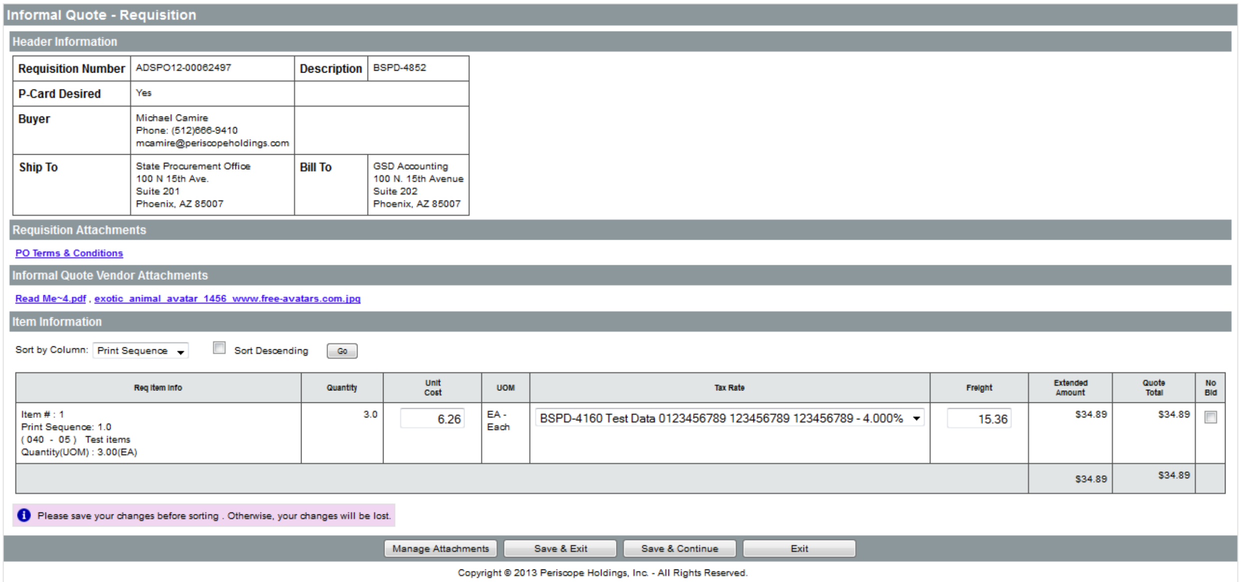
View Informal Quotes

To view informal quotes that you've submitted in response to a bid opportunity, select the **Informal Quotes** item from the Quotes dropdown menu.

BuySpeed will open a list displaying bidding opportunities (marked with a "create" in the **Informal Quote** column) as well as informal quotes you've already submitted (marked with a "view/update").

The **Req Number** column lists the agency requisition number(s) that originated the bid to which you responded, it's used by the agency to identify your quote.

To review an informal quote, select the corresponding **view/update** link in the Informal Quote column. BuySpeed opens the quote you submitted.



You can make changes to the data in the Unit Cost, Tax Rate, Freight fields and manage quote attachments.

After you have entered the data, click **Save & Exit**.

- **Management Attachments** – Allows the user to add confidential and non-confidential attachments to the informal quote.
- **Save & Exit –** Saves the informal Quote, closes the window and returns you to the Requisition Vendors tab view.
- **Save & Continue –** Saves the informal Quote and refreshes the view for further maintenance.
- **Close Window –** Closes the window (without save action) and returns you to the Requisition Vendors tab view.

Open Formal Quotes –Working

Select the **Formal Quotes – Working** item from the Quotes menu to view a list of formal quotes that have not been submitted and are not past the bid opening date.

Modify Working Quote

To open a quote for review or to modify, select the corresponding number in the **Quote #** column. Notice that when the quote opens, it is enabled for editing.

- Select a number in the **Quote #** to view the corresponding quote document.
- The **Organization** column displays the organization of the corresponding bid document.
- Select a number in the **Bid #** to view the corresponding bid document.
- The **Bid Opening Date** column displays the date quotes for this bid will officially be reviewed.

- The **Date Last Modified** column indicates when the most recent changes were made to the current quote.
- Select **Print Page** to generate a printed version of the document.
- Select **Exit** to return to the Seller Control Center.

View Submitted Quotes

To open a submitted quote for review:

1) Select the “Formal Quote–Submitted” option from the Quotes menu.
2) A selection list opens displaying formal quotes that have been submitted.
3) Click the number in the Quote # column that corresponds to the quote you wish to review.
   a. The Organization column displays the organization the corresponding bid document.
   b. Select a number in the Bid # column to view the corresponding bid document.
   c. The Bid Opening Date column displays the date quotes for this bid will officially be reviewed.
   d. The Date Last Modified column indicates when the most recent changes were made to the current quote.
4) After the quote is opened, select Print to generate a printed version of the document.
5) When the bid has not closed, to withdraw the quote select the Withdraw Quote button.

Modify Submitted Quote

Notice that when the quote opens, it is not enabled for editing. To modify the quote you submitted, you must re-submit the quote information using an alternate bid. Please see the section titled “Submit Alternate Quote.”

Create Alternate Quote

Creating an alternate quote is an easy way for you to submit new quote data to an agency, even after submitting an earlier quote. To submit an alternate quote:

1) Locate the corresponding bid from the Control Center, or by using the Bids menu.
2) On the list of open Bids you can see the quotes you have already submitted in response to this bid in the column labeled “Quotes” or “Create Quote/View Auction.” Do not select any of those quote numbers. Instead, select “Create Quote” or “Create New” to open an empty quote form.
3) Click in the Alternate Bid checkbox so that it is checked.
4) Complete the fields with your new quote information. The quote functionality continues to work as in the section ‘Responding to a Formal Bid’.
5) Select Submit Quote to submit your alternate quote record to the agency.

Quote Revisions

Quote revisions allows the agency to ask for clarification or more information from the vendor. Quote revisions will occur once the bid has been opened and the agency is evaluating to award.
If the agency asks for a quote revision, the vendor will receive an email with instructions on what the agency is requesting. To create a quote revision:

1) Log into BuySpeed
2) On the vendor's homepage Quotes tab, select the sub-tab Revision and a list will appear for un-submitted revisions.
3) Click on the quote number. Note the quote now is numbered 'XXXXX –RX'. The number after the dash displays the number of revisions done to the quote.
4) Follow the instructions given by the agency. The quote functionality continues to work as in the section 'Responding to a Formal Bid'.
5) Make sure to submit the revision by clicking 'Submit Quote' on the Summary tab. Failure to do so will cause the revision to be ignored and the last known submitted quote to be used in evaluation.

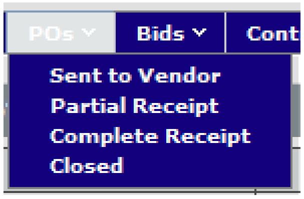
Purchase Orders and Contracts

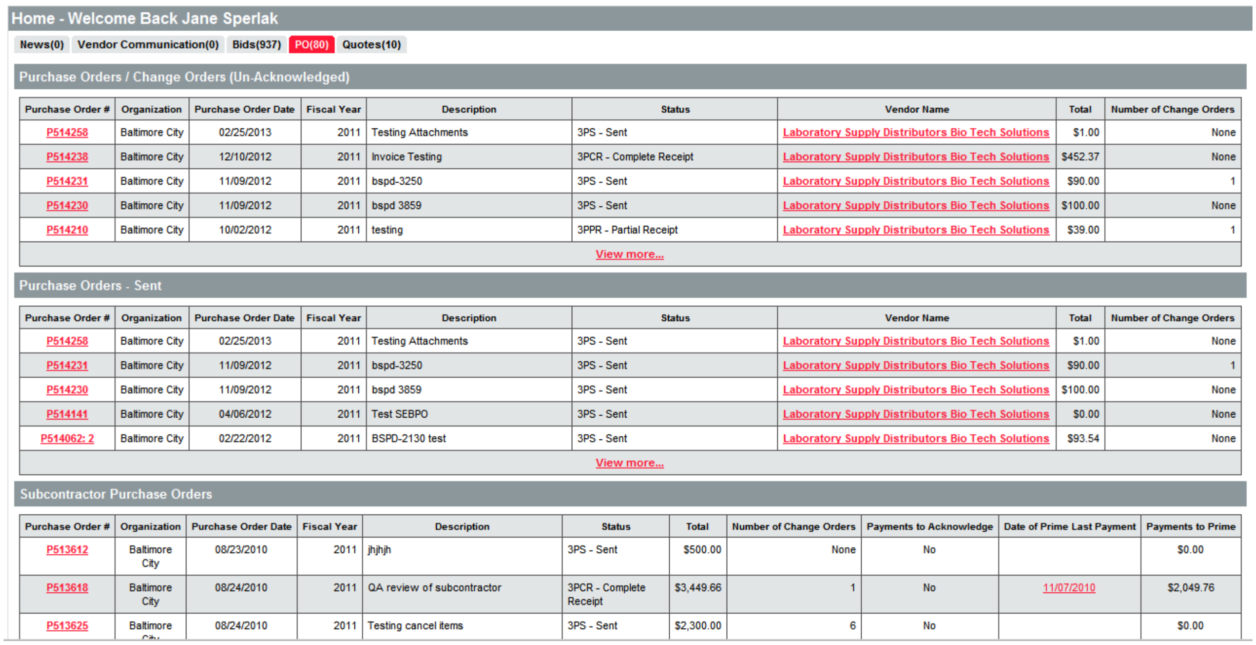
Purchase Order and Contracts Overview

Registered sellers can view any purchase orders awarded to them, as well as view items on contract with the agency.

View Purchase Orders

When you log into the BuySpeed application, you will automatically see a list of open purchase orders awarded to you. At any time, you can access all of the purchase orders awarded to you via the Purchase Order dropdown menu in the navigation bar:





Home - Welcome Back Jane Sperlak

News(0) Vendor Communication(0) Bids(937) PO(80) Quotes(10)

Purchase Orders / Change Orders (Un-Acknowledged)

Purchase Order #	Organization	Purchase Order Date	Fiscal Year	Description	Status	Vendor Name	Total	Number of Change Orders
P514258	Baltimore City	02/25/2013	2011	Testing Attachments	3PS - Sent	Laboratory Supply Distributors Bio Tech Solutions	$1.00	None
P514238	Baltimore City	12/10/2012	2011	Invoice Testing	3PCR - Complete Receipt	Laboratory Supply Distributors Bio Tech Solutions	$452.37	None
P514231	Baltimore City	11/09/2012	2011	bspd-3250	3PS - Sent	Laboratory Supply Distributors Bio Tech Solutions	$90.00	1
P514230	Baltimore City	11/09/2012	2011	bspd 3859	3PS - Sent	Laboratory Supply Distributors Bio Tech Solutions	$100.00	None
P514210	Baltimore City	10/02/2012	2011	testing	3PPR - Partial Receipt	Laboratory Supply Distributors Bio Tech Solutions	$39.00	1

View more...

Purchase Orders - Sent

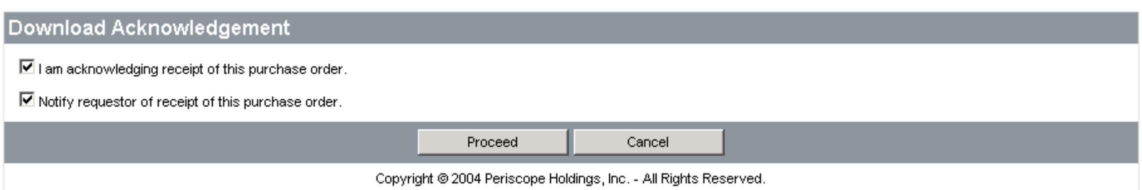
Purchase Order #	Organization	Purchase Order Date	Fiscal Year	Description	Status	Vendor Name	Total	Number of Change Orders
P514258	Baltimore City	02/25/2013	2011	Testing Attachments	3PS - Sent	Laboratory Supply Distributors Bio Tech Solutions	$1.00	None
P514231	Baltimore City	11/09/2012	2011	bspd-3250	3PS - Sent	Laboratory Supply Distributors Bio Tech Solutions	$90.00	1
P514230	Baltimore City	11/09/2012	2011	bspd 3859	3PS - Sent	Laboratory Supply Distributors Bio Tech Solutions	$100.00	None
P514141	Baltimore City	04/06/2012	2011	Test SEBPO	3PS - Sent	Laboratory Supply Distributors Bio Tech Solutions	$0.00	None
P514062: 2	Baltimore City	02/22/2012	2011	BSPD-2130 test	3PS - Sent	Laboratory Supply Distributors Bio Tech Solutions	$93.54	None

View more...

Subcontractor Purchase Orders

Purchase Order #	Organization	Purchase Order Date	Fiscal Year	Description	Status	Total	Number of Change Orders	Payments to Acknowledge	Date of Prime Last Payment	Payments to Prime
P513612	Baltimore City	08/23/2010	2011	jhjhjh	3PS - Sent	$500.00	None	No		$0.00
P513618	Baltimore City	08/24/2010	2011	QA review of subcontractor	3PCR - Complete Receipt	$3,449.66	1	No	11/07/2010	$2,049.76
P513625	Baltimore City	08/24/2010	2011	Testing cancel items	3PS - Sent	$2,300.00	6	No		$0.00

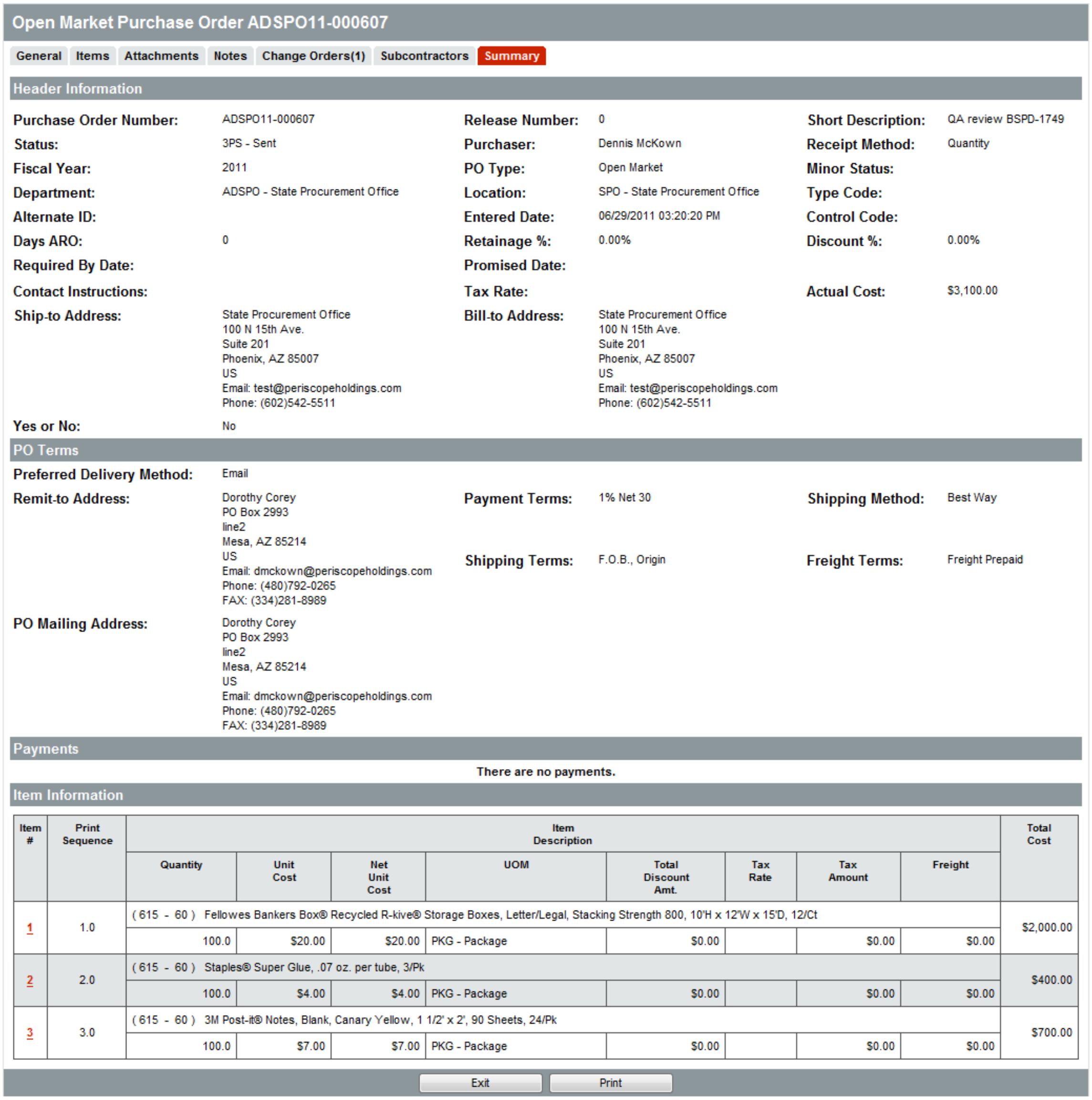
In order to view the purchase order, simply click on the purchase order number to open the order details. If you haven't yet acknowledged receipt of the purchase order, you will be asked to:



You must acknowledge receipt of the purchase order before you can view the details. To acknowledge the purchase order:

1) Check the box marked "I'm acknowledging receipt of this purchase order". If you are not acknowledging receipt, leave the box unchecked.
2) Check the box marked "Notify requestor of receipt of the order" if you want an email to be sent to the document requestor. If you do not want to send the notification, leave the box unchecked.
3) Click Proceed to view the purchase order. You may be required to acknowledge receipt of the purchase order prior to viewing it.

This purchase order detail page shows the customer's billing and shipping information, as well as a list of the products they ordered from you.



Open Market Purchase Order ADSPO11-000607

General | Items | Attachments | Notes | Change Orders(1) | Subcontractors | Summary

Header Information

Purchase Order Number:	ADSPO11-000607	**Release Number:**	0	**Short Description:**	QA review BSPD-1749
Status:	3PS - Sent	**Purchaser:**	Dennis McKown	**Receipt Method:**	Quantity
Fiscal Year:	2011	**PO Type:**	Open Market	**Minor Status:**	
Department:	ADSPO - State Procurement Office	**Location:**	SPO - State Procurement Office	**Type Code:**	
Alternate ID:		**Entered Date:**	06/29/2011 03:20:20 PM	**Control Code:**	
Days ARO:	0	**Retainage %:**	0.00%	**Discount %:**	0.00%
Required By Date:		**Promised Date:**			
Contact Instructions:		**Tax Rate:**		**Actual Cost:**	$3,100.00
Ship-to Address:	State Procurement Office 100 N 15th Ave. Suite 201 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (602)542-5511	**Bill-to Address:**	State Procurement Office 100 N 15th Ave. Suite 201 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (602)542-5511		
Yes or No:	No				

PO Terms

Preferred Delivery Method:	Email				
Remit-to Address:	Dorothy Corey PO Box 2993 line2 Mesa, AZ 85214 US Email: dmckown@periscopeholdings.com Phone: (480)792-0265 FAX: (334)281-8989	**Payment Terms:** **Shipping Terms:**	1% Net 30 F.O.B., Origin	**Shipping Method:** **Freight Terms:**	Best Way Freight Prepaid
PO Mailing Address:	Dorothy Corey PO Box 2993 line2 Mesa, AZ 85214 US Email: dmckown@periscopeholdings.com Phone: (480)792-0265 FAX: (334)281-8989				

Payments

There are no payments.

Item Information

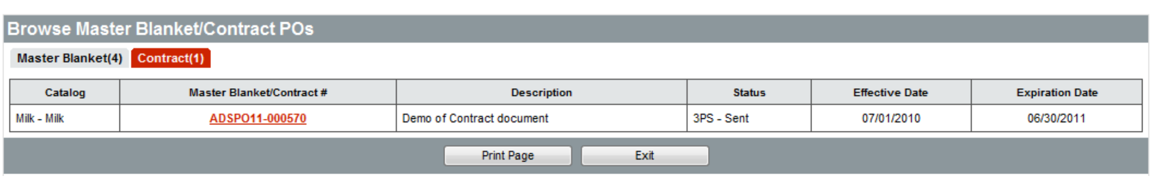
Item #	Print Sequence	Item Description								Total Cost
		Quantity	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Freight	
1	1.0	(615 - 60) Fellowes Bankers Box® Recycled R-kive® Storage Boxes, Letter/Legal, Stacking Strength 800, 10'H x 12'W x 15'D, 12/Ct								$2,000.00
		100.0	$20.00	$20.00	PKG - Package	$0.00		$0.00	$0.00	
2	2.0	(615 - 60) Staples® Super Glue, .07 oz. per tube, 3/Pk								$400.00
		100.0	$4.00	$4.00	PKG - Package	$0.00		$0.00	$0.00	
3	3.0	(615 - 60) 3M Post-it® Notes, Blank, Canary Yellow, 1 1/2' x 2', 90 Sheets, 24/Pk								$700.00
		100.0	$7.00	$7.00	PKG - Package	$0.00		$0.00	$0.00	

Exit | Print

View Contracts/Blankets

As a registered seller, you can view applicable contracts and blanket purchase orders that you may have with an agency. Access your contract listing by clicking on **Contracts** in the navigation header.

A list of your active documents will appear:



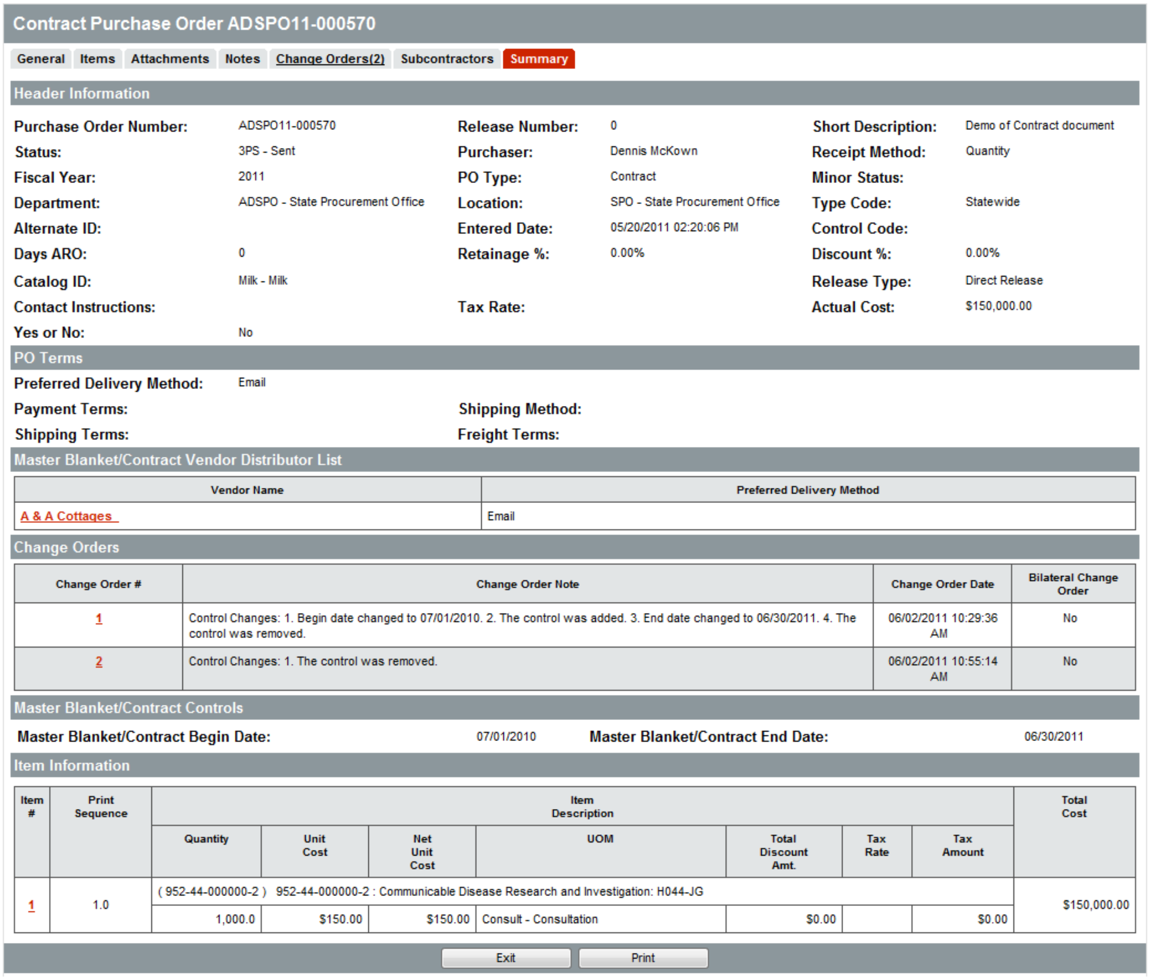
Browse Master Blanket/Contract POs

Master Blanket(4) | Contract(1)

Catalog	Master Blanket/Contract #	Description	Status	Effective Date	Expiration Date
Milk - Milk	ADSPO11-000570	Demo of Contract document	3PS - Sent	07/01/2010	06/30/2011

Print Page | Exit

Click on the blanket/PO# to view the contract/blanket details:



Contract Purchase Order ADSPO11-000570

General | Items | Attachments | Notes | Change Orders(2) | Subcontractors | Summary

Header Information

Purchase Order Number:	ADSPO11-000570	**Release Number:**	0	**Short Description:**	Demo of Contract document
Status:	3PS - Sent	**Purchaser:**	Dennis McKown	**Receipt Method:**	Quantity
Fiscal Year:	2011	**PO Type:**	Contract	**Minor Status:**	
Department:	ADSPO - State Procurement Office	**Location:**	SPO - State Procurement Office	**Type Code:**	Statewide
Alternate ID:		**Entered Date:**	05/20/2011 02:20:06 PM	**Control Code:**	
Days ARO:	0	**Retainage %:**	0.00%	**Discount %:**	0.00%
Catalog ID:	Milk - Milk			**Release Type:**	Direct Release
Contact Instructions:		**Tax Rate:**		**Actual Cost:**	$150,000.00
Yes or No:	No				

PO Terms

Preferred Delivery Method:	Email		
Payment Terms:		**Shipping Method:**	
Shipping Terms:		**Freight Terms:**	

Master Blanket/Contract Vendor Distributor List

Vendor Name	Preferred Delivery Method
A & A Cottages	Email

Change Orders

Change Order #	Change Order Note	Change Order Date	Bilateral Change Order
1	Control Changes: 1. Begin date changed to 07/01/2010. 2. The control was added. 3. End date changed to 06/30/2011. 4. The control was removed.	06/02/2011 10:29:36 AM	No
2	Control Changes: 1. The control was removed.	06/02/2011 10:55:14 AM	No

Master Blanket/Contract Controls

Master Blanket/Contract Begin Date: 07/01/2010 **Master Blanket/Contract End Date:** 06/30/2011

Item Information

Item #	Print Sequence	Item Description							Total Cost
		Quantity	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	
1	1.0	(952-44-000000-2) 952-44-000000-2 : Communicable Disease Research and Investigation: H044-JG							$150,000.00
		1,000.0	$150.00	$150.00	Consult - Consultation	$0.00		$0.00	

Exit Print

As the Seller, you are able to add notes to the document by selecting the Notes tab, enter your notes and then select the Save & Continue button.

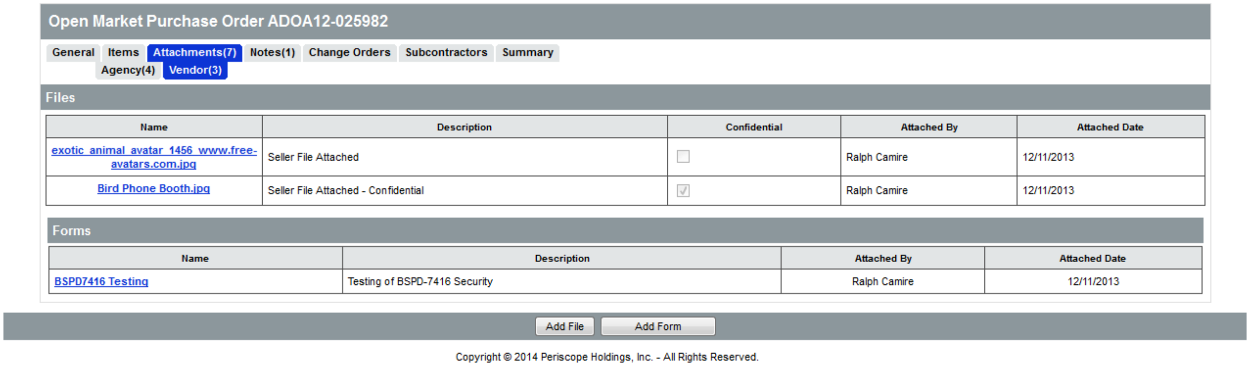
View and Add Attachments to Purchase Orders, Contracts and Blankets

Both files and forms (when document management is enabled) can be attached by the seller under the Attachments Vendor sub-tab.

Attaching files to any of your BuySpeed documents is a useful way to include specifications or other guidelines in your procurement documents. You can attach multiple files, such as documents, spreadsheets, memoranda, etc. You can use the Attachments Vendor sub-tab view to upload the files.

Adding Forms, when enabled by the Internal Administrator, will display the Add Form button. This will allow the user to attached pre-defined published forms. Only those forms that are published for the seller role can be attached to the specific document.

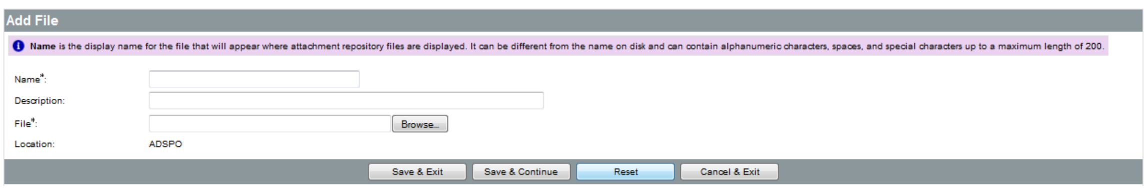
The seller can add attachment files and forms for the vendor under the Attachments Vendor sub-tab. The seller can view agency attached files and forms under the Attachments Agency sub-tab.



Files

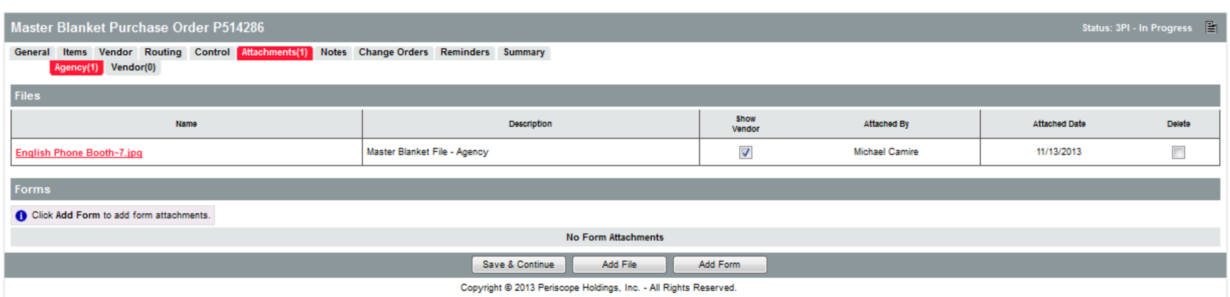
How Do I Attach Files

To attach seller files, select the Attachments tab and ensure the Vendor sub-tab is highlighted. Then, select the Add File button. The user will be navigated to the Add File view.

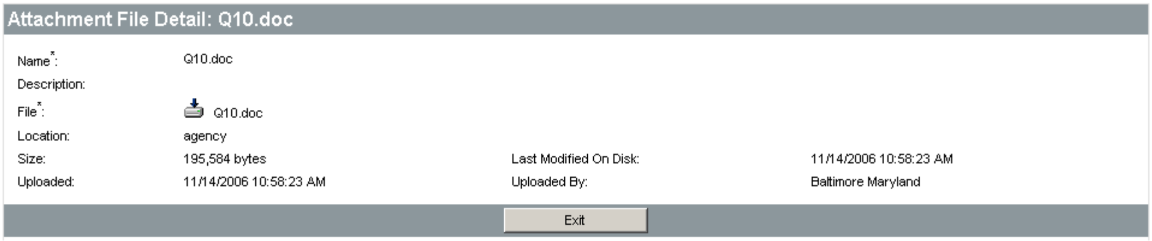


Use the Browse button to locate a file on your computer or on a shared drive to attach to the document. Once selected, the name will be displayed as the filename of the file being attached. This can be changed if necessary. A description field allows the user to give a description of what the file is about, but is not required. Then select the Save & Exit button to upload the file.

How Do I View/Download Files



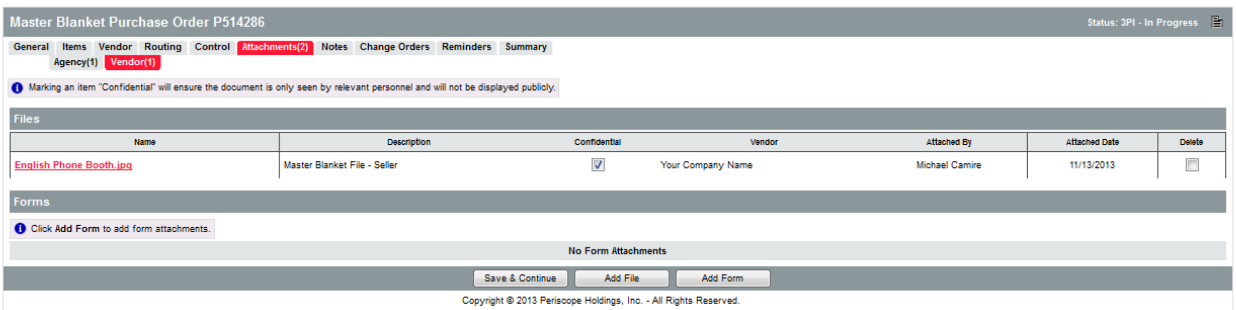
On the Attachments tab, file names are hyperlinks that can be clicked on to show the file details. When an attachment file detail is opened, it will display the name, description, and other pertinent information.



Click on the  icon for the option to open or download the file. The usual Windows dialogue box will come up asking to Open or Save the document.

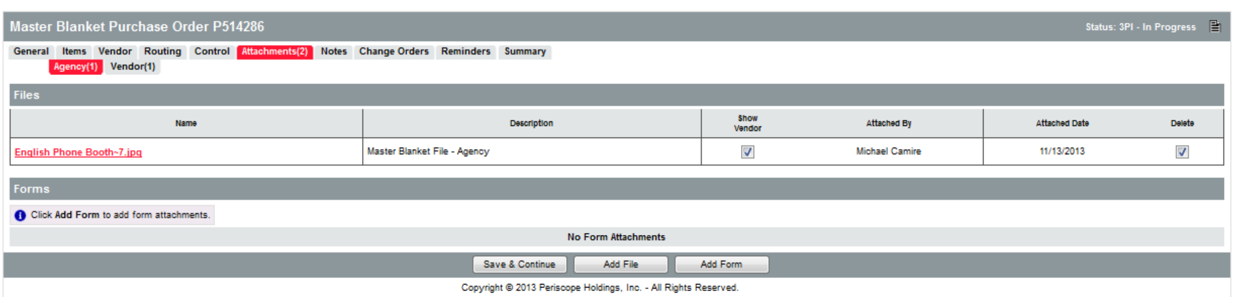
How Do I Mark Vendor Files as Confidential

A column on the Attachments Vendor sub-tab allows the user to select whether the attached file should be confidential or not. Any attachments marked confidential will be displayed to seller and certain roles within the organization. Place a check mark in the check box under the Confidential Colum of the Files section of the attachments and select the Save & Continue button.



How Do I Delete a File

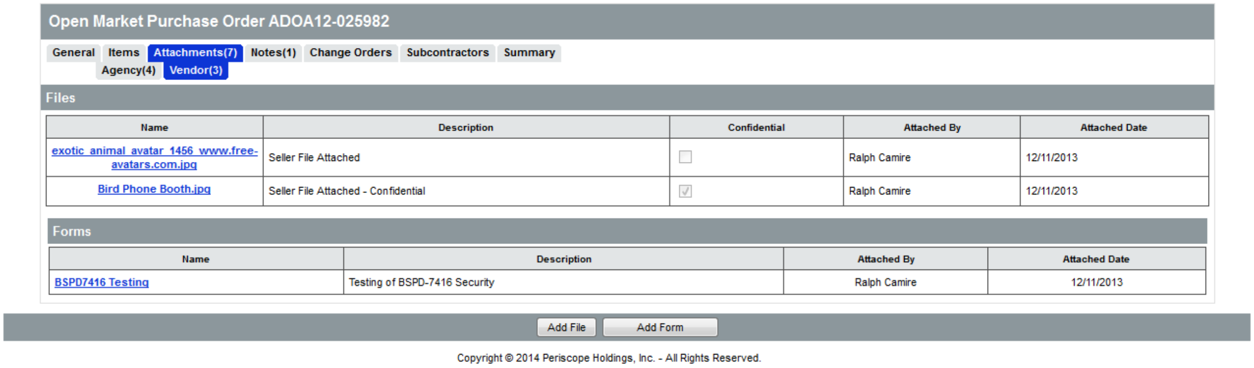
Attached files can be deleted from the document from the Attachments Vendor sub-tab view. Place a check mark in the delete checkbox under the delete column of the files section of the attachments for the file(s) to be deleted then select the Save & Continue button. The view will refresh and the selected file(s) will be deleted.



<u>Forms</u>

How Do I Attach Forms

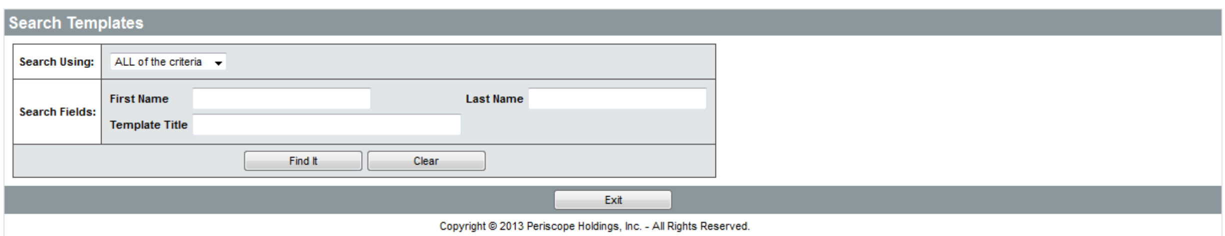
From the Attachments Vendor sub-tab or Attachments Vendor sub-tab. Select the Add Form button and the Search Templates view will display.



Action button to use:

- **Add Form** – Navigates the user to the Search Template view.

Using the Search Templates search view, determine the search criteria you wish to search the templates. Enter or select the data and select the Find It button. If records exist that match your search criteria, the search results will return with them or “No Record Found”.



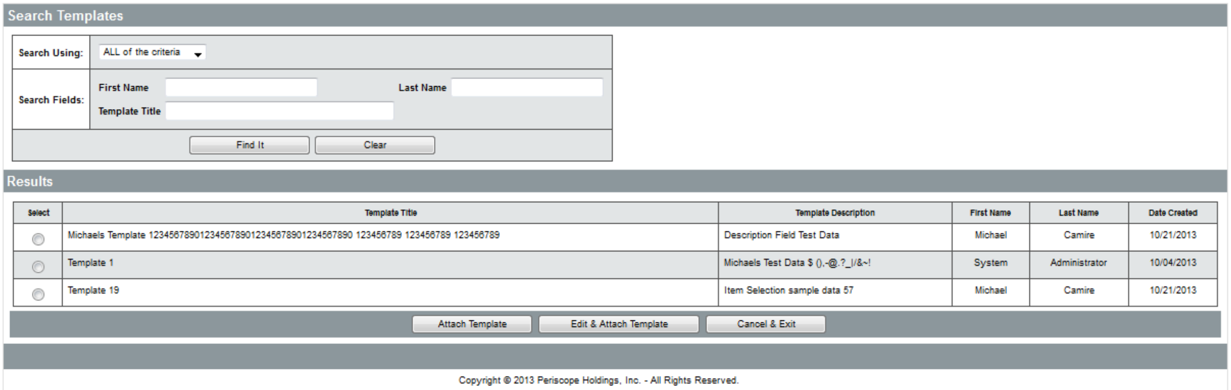
The fields for this form are described below (Asterisk = required)

Search Using	You can search using all of the criteria, all selected criteria must be met or any of the criteria, any of the selected criteria is met.
Search Fields	
First Name	Enter the first name of the individual who created the template.
Last Name	Enter the last name of the individual who created the template.
Template Title	Enter the title or partial title of the template title.

Action buttons are as follows.

- **Find It** – Using the search criteria selected, searches the database and returns the results.
- **Clear –** Removes the entered and/or selected data in all the search fields.
- **Exit** – Navigates the user back to the Attachments view.

Enter data in one or more of the search fields and select the Find It button. Search results should display if any records meet your search criteria. From the search results, select the form you wish to attach.



Attach Form without Editing

From the search results displayed, select the form to be attached and select the Attach Template button. Repeat the step to attach additional forms. When all the forms have been attached, select the Cancel & Exit button.

Attach Form with Editing

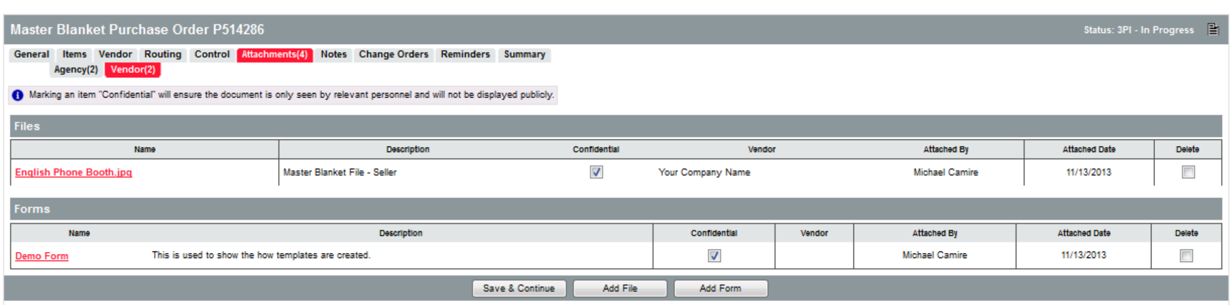
To edit forms, the recommended browsers are:

- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
    - Opera 12
    - Internet Explorer 9 and 10
- Not supported
    - Internet Explorer 8 and earlier

From the search results displayed, select the form to be attached and select the Edit & Attach Template button. The user is navigated to the forms edit view to edit the form. When the editing is completed, select the Save button and then the Exit button.

How Do Mark the Vendor Form as Confidential

A column on the Attachments Vendor sub-tab allows the user to select whether the attached form should be confidential or not. Any attachments marked confidential will be displayed to seller and certain roles within the organization. Place a check mark in the check box under the Confidential Colum of the Forms section of the attachments and select the Save & Continue button.

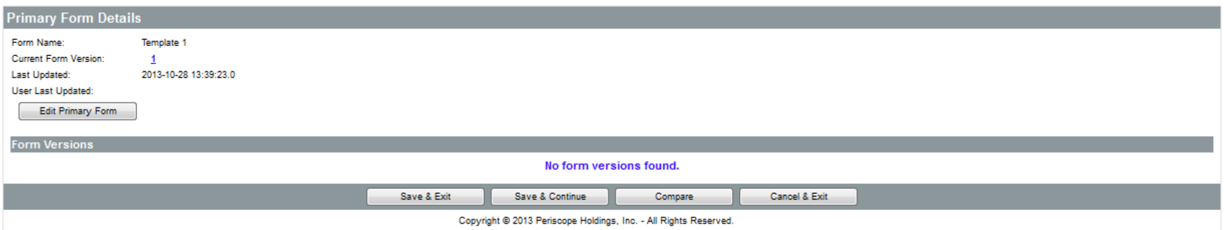


Action button to use:

- **Save & Continue** -- The selected form(s) are updated to either show or not show to the vendor.

How Do I View an Attached Form

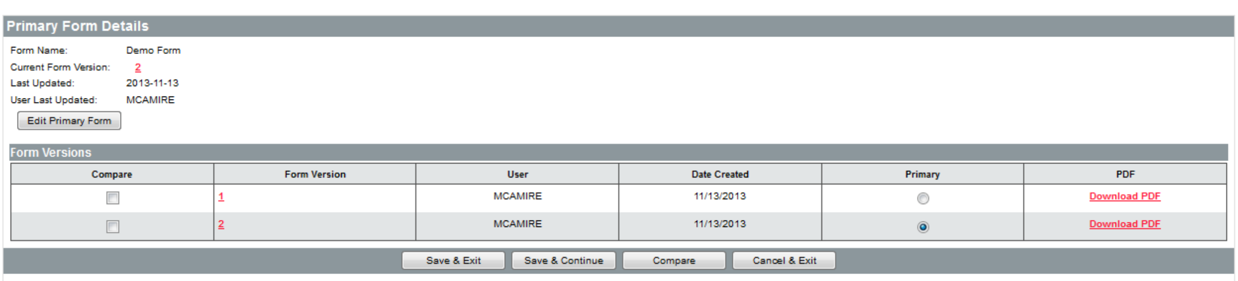
The attached form may be viewed by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select Exit button to return to the previous view.



How Do I View Attached Form In PDF Format

The attached form may be downloaded and viewed in portable document format (PDF) by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select the PDF button to download and view the form in PDF format.

If there are multiple versions of the form, then the form can be downloaded and viewed from the Forms Versions section of the Primary Form Details view. The PDF download link is provided in the last column for each of the versions. Click on the download PDF hyperlink to download and view the form in PDF format.

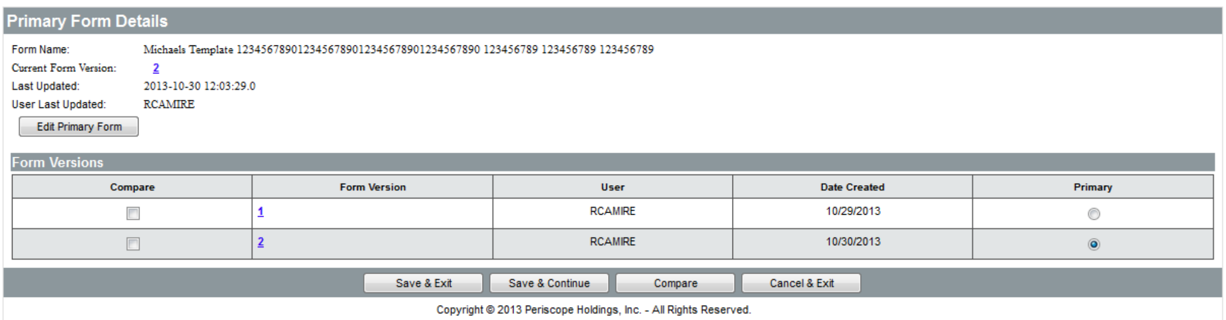


How Do I Edit the Primary Form

To edit forms, the recommended browsers are:

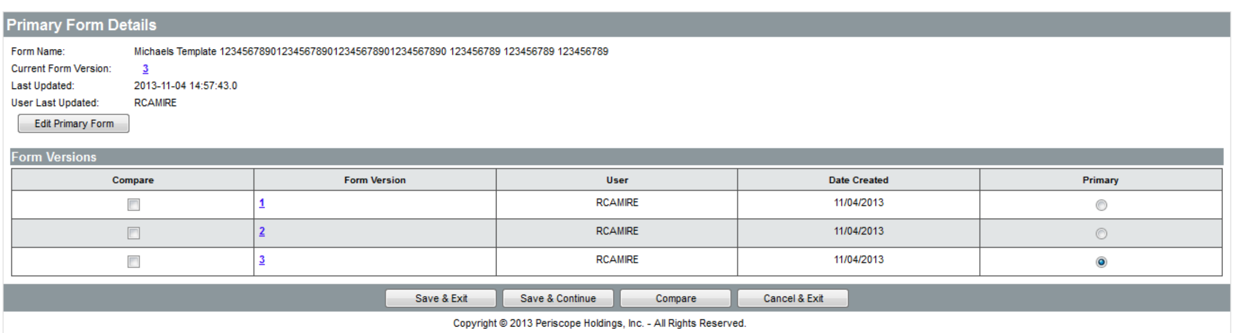
- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
  - Opera 12
  - Internet Explorer 9 and 10
- Not supported
  - Internet Explorer 8 and earlier

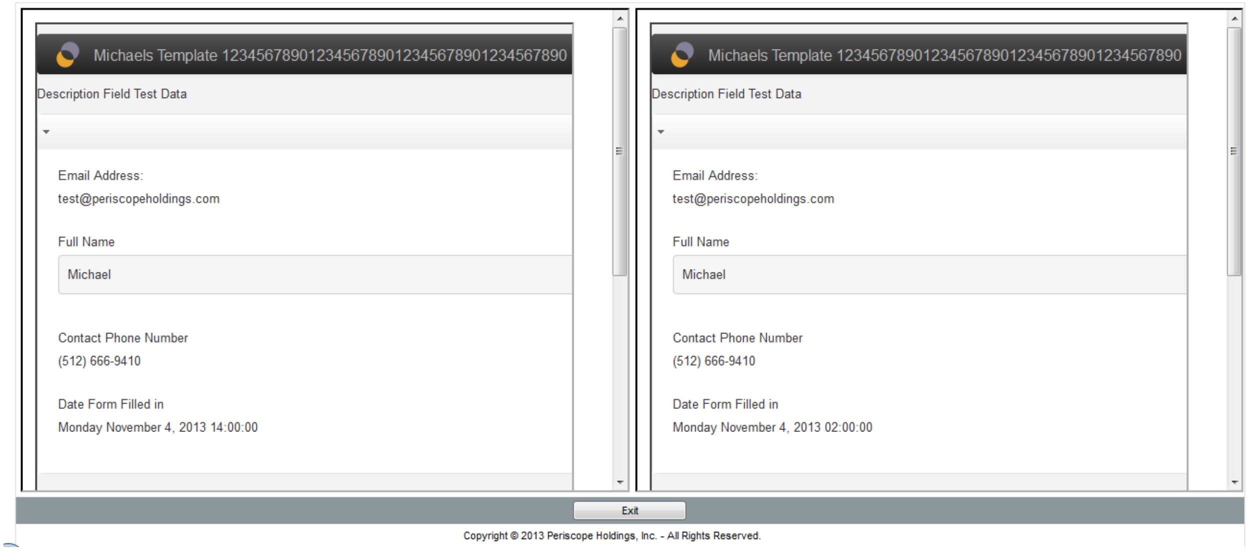
Select the name hyperlink on the Attachment tab Forms section for either the agency or vendor forms. The Primary Form Details view is displayed. To edit the primary form, select the Edit Primary Form button. The form is displayed and can be edited. When edits are completed, select the Save button then the Exit button. The user is returned to the Primary Form Details view displaying the different form versions. The edited version will be identified as the primary form. Select the Cancel & Exit button to return to the Attachments view.



How Do I Compare Forms

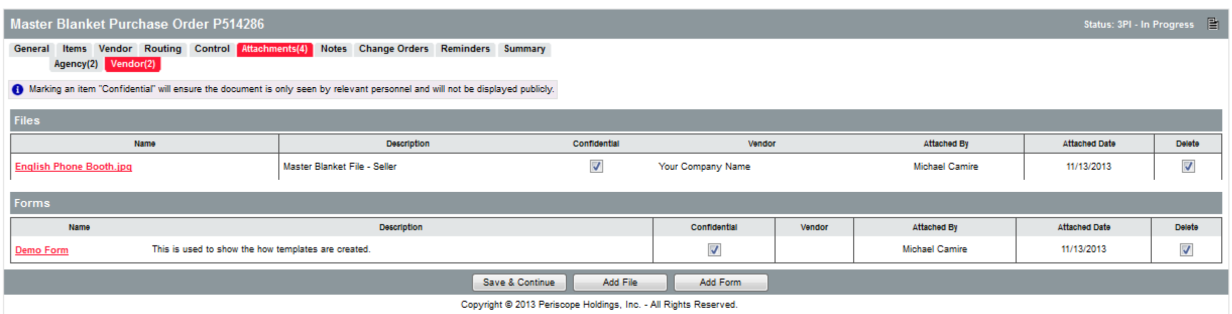
When there is more than one version of the form, the user can compare two of the forms at a time. The comparison between two versions of the form is done from the Primary Form Detail view. Place a check mark in the compare checkbox of the two versions to compare then select the Compare button. The view will refresh with a side-by-side comparison of the two views. Repeat the process to compare additional versions.





How Do I Delete an Attached Form

Attached forms can be deleted from Attachment tab agency sub-tab view. Select the form(s) to be deleted by placing a check mark in the checkbox under the Delete column adjacent to the form name.



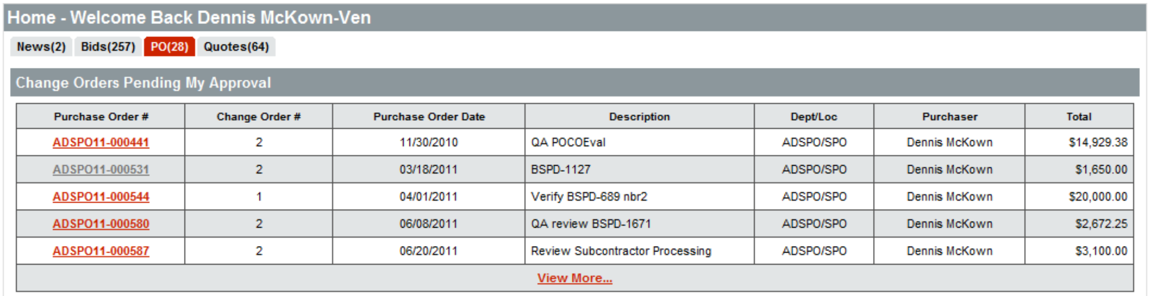
Action button to use:

- **Save & Continue** -- The selected form(s) are deleted.

Bilateral Change Orders

Bilateral Change Orders allow the agency to create a change order to a purchase order and request the vendor to approve the change. When a vendor is asked for approval of a bilateral change order, an email is sent to notify the vendor. The bilateral notifications are also visible on the vendor's homepage on the PO tab. To view and take action on the request:

1) Log into BSO
2) On the vendor's home page, select the PO tab
3) On the PO tab will be a section labeled Change Orders Pending My Approval


Home - Welcome Back Dennis McKown-Ven

News(2) Bids(257) PO(28) Quotes(64)

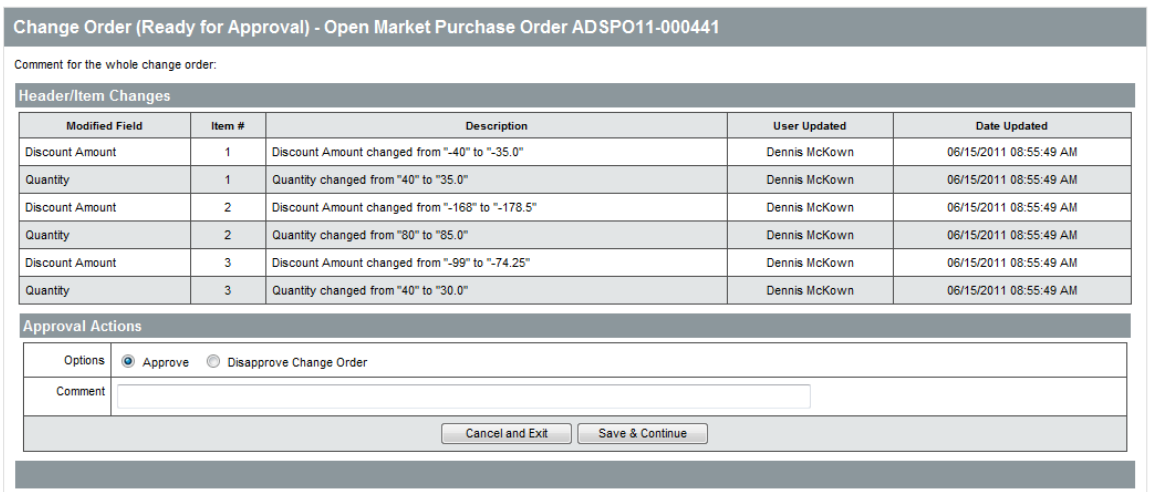
Change Orders Pending My Approval

Purchase Order #	Change Order #	Purchase Order Date	Description	Dept/Loc	Purchaser	Total
ADSPO11-000441	2	11/30/2010	QA POCOEval	ADSPO/SPO	Dennis McKown	$14,929.38
ADSPO11-000531	2	03/18/2011	BSPD-1127	ADSPO/SPO	Dennis McKown	$1,650.00
ADSPO11-000544	1	04/01/2011	Verify BSPD-689 nbr2	ADSPO/SPO	Dennis McKown	$20,000.00
ADSPO11-000580	2	06/08/2011	QA review BSPD-1671	ADSPO/SPO	Dennis McKown	$2,672.25
ADSPO11-000587	2	06/20/2011	Review Subcontractor Processing	ADSPO/SPO	Dennis McKown	$3,100.00

View More...

4) To review the change order onscreen, click on the Purchase Order # link.
5) A Change Order Disclaimer will be displayed, select Continue.

6) At the bottom of the screen will be the approval actions.


Change Order (Ready for Approval) - Open Market Purchase Order ADSPO11-000441

Comment for the whole change order:

Header/Item Changes

Modified Field	Item #	Description	User Updated	Date Updated
Discount Amount	1	Discount Amount changed from "-40" to "-35.0"	Dennis McKown	06/15/2011 08:55:49 AM
Quantity	1	Quantity changed from "40" to "35.0"	Dennis McKown	06/15/2011 08:55:49 AM
Discount Amount	2	Discount Amount changed from "-168" to "-178.5"	Dennis McKown	06/15/2011 08:55:49 AM
Quantity	2	Quantity changed from "80" to "85.0"	Dennis McKown	06/15/2011 08:55:49 AM
Discount Amount	3	Discount Amount changed from "-99" to "-74.25"	Dennis McKown	06/15/2011 08:55:49 AM
Quantity	3	Quantity changed from "40" to "30.0"	Dennis McKown	06/15/2011 08:55:49 AM

Approval Actions

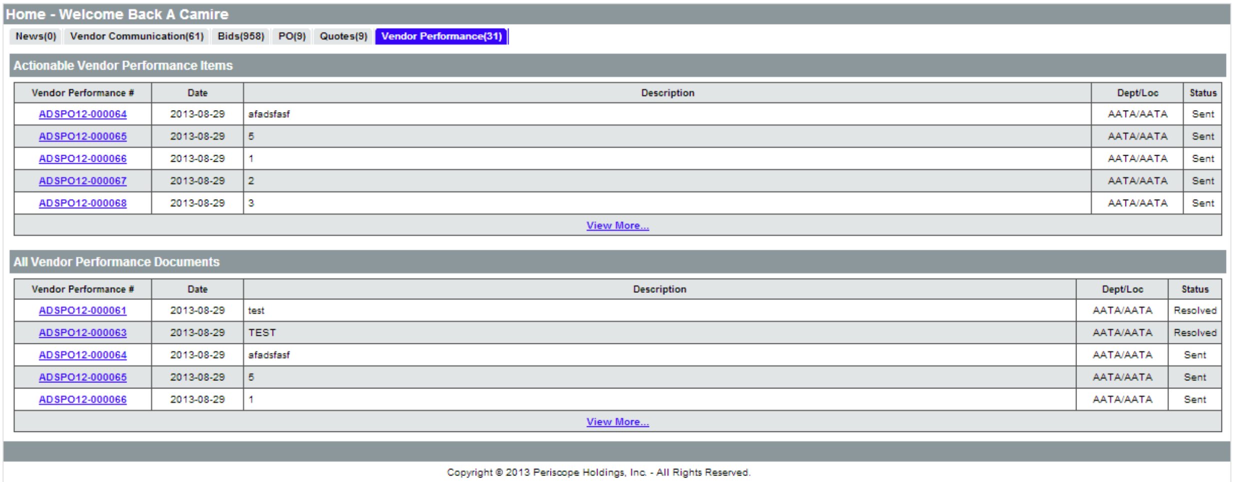
Options	Approve Disapprove Change Order
Comment	

Cancel and Exit Save & Continue

7) Approve will date and timestamp the vendor's approval to the change order. Disapprove will send the change order back to the purchaser. If the vendor selects disapprove, the vendor must fill in the comment field with the reasons for the disapproval.
8) Select an action option and then click Save & Continue to complete the process.

Viewing Vendor Performance Document against a Purchase Order

Vendor Performance Document must be enabled by the parent organization's internal administrator or organization administrator and by the standalone organization administrator for multi-organizations environments and by the internal administrator or agency administrator for single organization environments. Vendor performance, when enabled, allows the basic purchaser and/or the department access user to document the performance of the seller, subcontractor or distributor against a particular purchase order. The purchase order must be at the status of sent, partial receipts, complete receipt, closed or canceled to create a vendor performance document. The seller has the opportunity to respond to vendor performance documents while in sent status.



Home - Welcome Back A Camire

News(0) | Vendor Communication(61) | Bids(958) | PO(9) | Quotes(9) | Vendor Performance(31)

Actionable Vendor Performance Items

Vendor Performance #	Date	Description	Dept/Loc	Status
ADSPO12-000064	2013-08-29	afadsfasf	AATA/AATA	Sent
ADSPO12-000065	2013-08-29	5	AATA/AATA	Sent
ADSPO12-000066	2013-08-29	1	AATA/AATA	Sent
ADSPO12-000067	2013-08-29	2	AATA/AATA	Sent
ADSPO12-000068	2013-08-29	3	AATA/AATA	Sent

View More...

All Vendor Performance Documents

Vendor Performance #	Date	Description	Dept/Loc	Status
ADSPO12-000061	2013-08-29	test	AATA/AATA	Resolved
ADSPO12-000063	2013-08-29	TEST	AATA/AATA	Resolved
ADSPO12-000064	2013-08-29	afadsfasf	AATA/AATA	Sent
ADSPO12-000065	2013-08-29	5	AATA/AATA	Sent
ADSPO12-000066	2013-08-29	1	AATA/AATA	Sent

View More...

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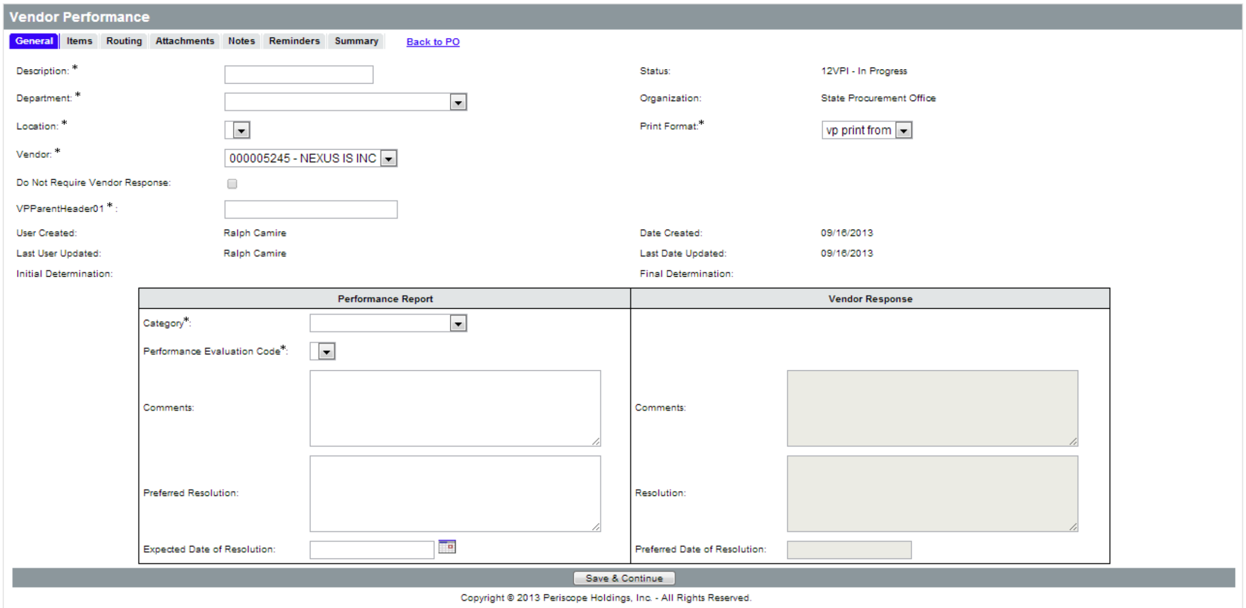
Actionable Vendor Performance Items	
Vendor Performance #	Displays the vendor performance number hyperlink. Clicking the hyperlink will display the vendor performance document
Date	Protected. Displays the date the vendor performance was created.
Description	Protected. Displays the description of the vendor performance document.
Dept/Loc	Protected. Displays the department & location code.
Status	Protected. System generated and updated as the vendor performance document is processed through the different stages. Only vendor performance document in Sent status are displayed in this section.
All Vendor Performance Documents	
Vendor Performance #	Displays the vendor performance number hyperlink. Clicking the hyperlink will display the vendor performance document
Date	Protected. Displays the date the vendor performance was created.
Description	Protected. Displays the description of the vendor performance document.
Dept/Loc	Protected. Displays the department & location code.
Status	Protected. System generated and updated as the vendor performance document is processed through the different stages. Vendor performance document in Sent, Completed Response, Resolved or Not Resolved statuses are displayed in this section.

How Do I View and Respond to the Vendor Performance Document

From the seller home page, select the Vendor Performance tab. The seller will see two sections, Actionable Vendor Performance Items and All Vendor Performance Documents. The Actionable Vendor Performance Items section will display vendor performance documents in sent status and require action from the seller. The All Vendor Performance Documents show vendor performance documents in sent, completed response, resolved or not resolved.

Click on the vendor performance number hyperlink to view the vendor performance document.



(Asterisk = required)

Description*	Protected. Displays a brief description to describe the vendor performance document.
Status	Protected. System generated and updated as the vendor performance document is processed through the different stages.
Final Status	Protected. Label and value displays when the purchaser makes a determination. Resolve, Resolved No Response or Not Resolved will display.
Department	Protected. Displays the organizational department.
Organization	Protected. Displays the organization from the purchase order.
Location	Protected. Displays the organization department location from the purchase order.
Vendor	Protected. Defaults to the originating vendor, subcontractor or distributor for the purchase order.
User Created	Protected. Updated with the name of the person creating the vendor performance document.
Date Created	Protected. Updated with the system date upon a successful add of the vendor performance document.
Last User Updated	Protected. Updated with the name of the person updating the vendor performance document.
Last Date Updated	Protected. Updated with the system date upon a successful edit of the vendor performance document.
Initial Determination	Protected. Updated by the originating purchaser through the 1st approval process.
Final Determination	Protected. Updated by the originating purchaser through the 2nd approval process.
Custom Columns	When custom columns are added, they will display next. They may or may not be required. If a dependency is created between the purchase order and vendor performance document, the values from the purchase order will be displayed.

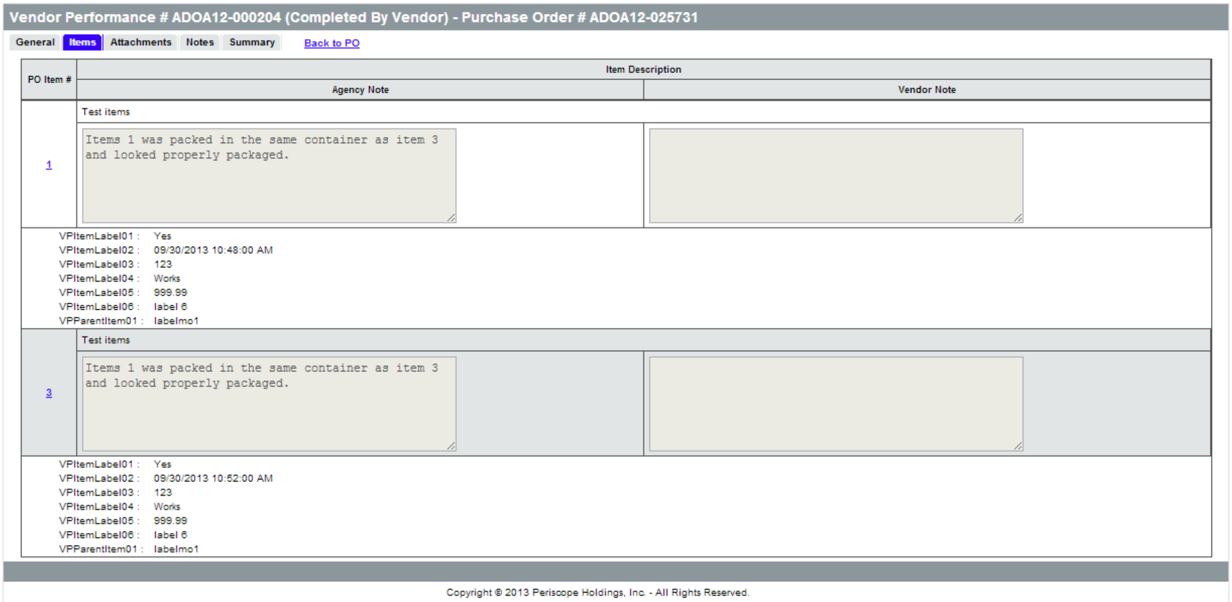
Performance Report	
Category	Protected. Displays the category that best describes this vendor performance.
Performance Evaluation Code	Protected. Displays the performance evaluation code that best describes this vendor performance.
Comments	Protected. Displays the comments entered by the agency pertaining to the vendor performance.
Preferred Resolution	Protected. Displays the preferred resolution by the agency.
Expected Date of Resolution	Protected. Displays the date resolution is expected by the seller.
Vendor Response	
Comments	Enter comments up to you wish to add. The comments are viewable by the agency.
Resolution	Enter the proposed resolution to resolve the issue. The resolution is viewable by the agency.
Preferred Date of Resolution	Enter the preferred date of resolution or use the calendar lookup icon to select a date.

Action buttons are as follows.

- **Save & Continue –** Updates the data and creates the vendor performance document. Validation errors may appear that will require action prior to successfully adding the vendor performance document.

How do I View Purchase Order items and Add Notes to the Vendor Performance Document

Adding items from the originating purchase order is optional and can only be added by the agency. To view purchase order items that may have been added, select the Items tab. All items, including cancelled items can be added to the vendor performance document. At any time, the user can be taken back to the purchase order by clicking on the Back to PO hyperlink as long as the order was not canceled.



(Asterisk = required)

PO Item #	Displays a hyperlink of the purchase order number. Selecting the hyperlink will allow the user to view the item detail in a pop up window.
Item Description	Protected. Displays the item description of the purchase order.
Agency Note	Protected. Displays notes entered by the agency pertaining to the particular item. These notes are viewable by the seller.
Vendor Notes	Enter notes that pertain to the particular item. These notes cannot be deleted or modified by the assignee.
Custom Columns	Protected. When custom columns are added, they will display next. They may or may not be required. If a dependency is created between the purchase order item and vendor performance document item, the values from the purchase order will be displayed.

Action buttons are as follows:

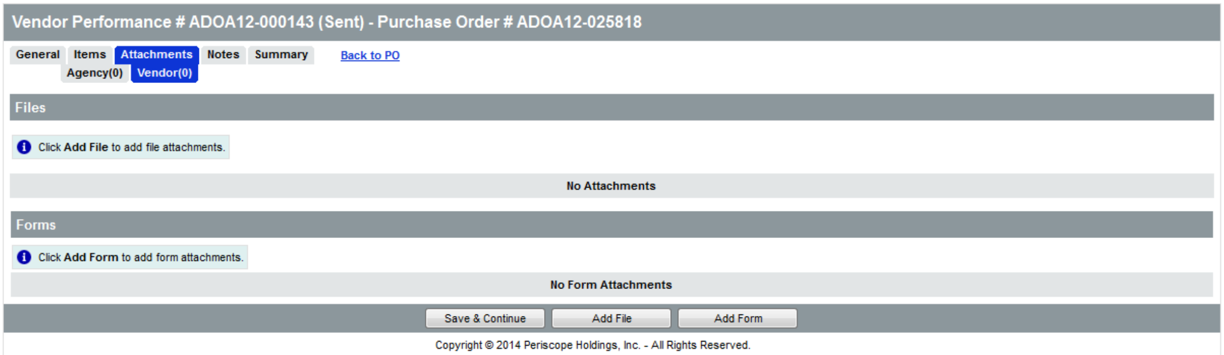
- **Save & Continue** – Updates the data entered for vendor notes. Validation errors may appear that will require action prior to successfully adding the vendor note.
- **Reset** – Returns the previous data prior to any save being done.

How Do I Add, View or Delete Vendor Performance Vendor Attachments

Adding attachments to the vendor performance document is a useful way to include pictures of damaged items or any other type of documents. Multiple items can be attached and will be made available to the agency if you so choose to.

When enabled by the Internal Administrator, the Add Form button will display. This will allow the user to attached pre-defined published forms. Only those forms that are published for the seller with the specific document type and specific user role can be attached to the specific document.

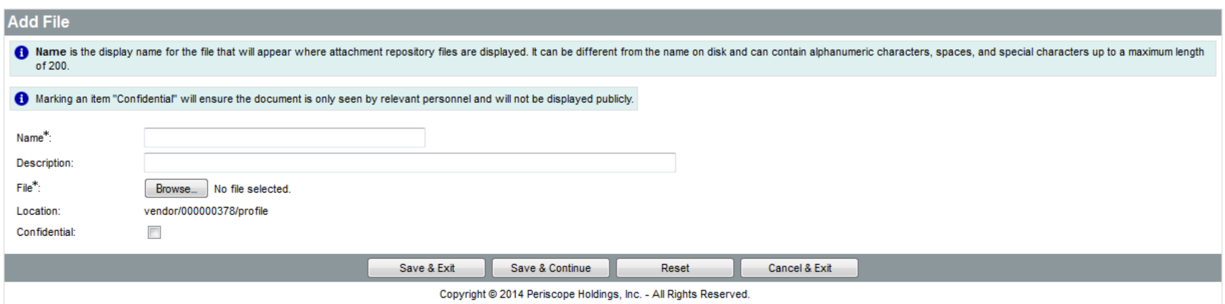
At any time, the user can be taken back to the purchase order by clicking on the Back to PO hyperlink.



Files

How Do I Attach Files

To attach vendor files, select the Attachments tab and ensure the Vendor sub-tab is highlighted. Then, select the Add File button. The user will be navigated to the Add File view.



(Asterisk = required)

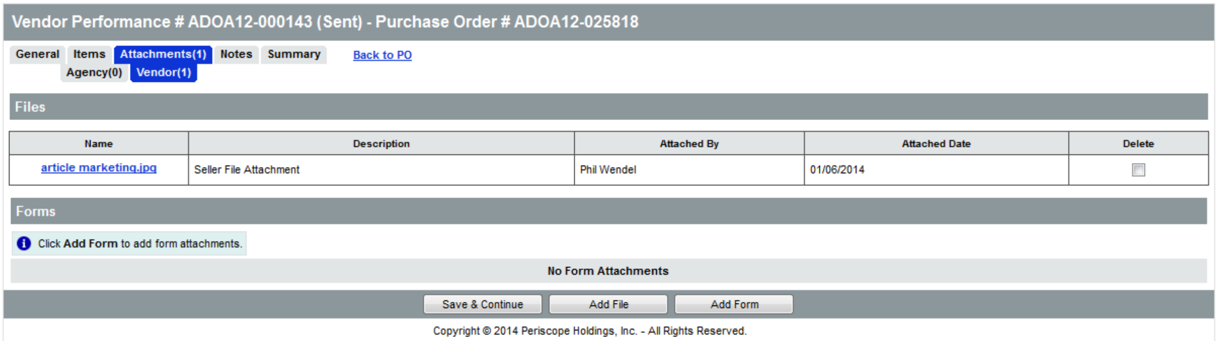
Name*	Required. Enter the name of the attachment or leave blank and the system will enter the file name.
Description	Enter a description of the attachment. This is optional.
File*	Required. Using the Browse button, locate the file on your computer or on a shared drive to be attached.
Location	Protected. Displays the unit cost of the particular item from the purchase order.
Confidential	Place a check mark in the checkbox to make the document confidential. Note: The agency can make the document un-confidential.

Action buttons are as follows:

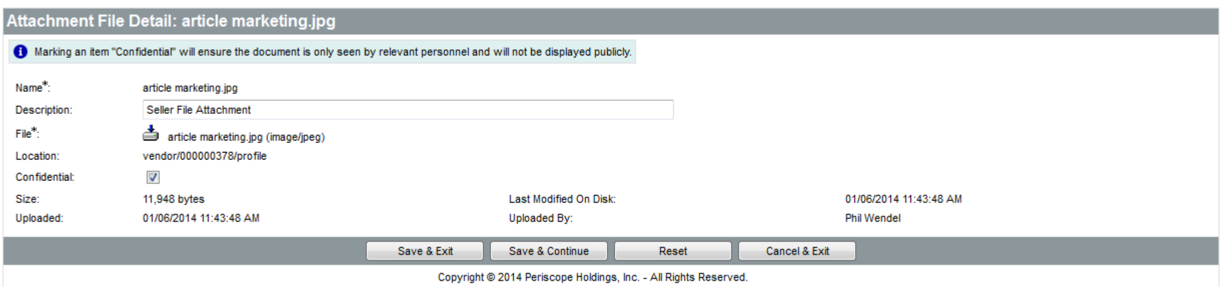
- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Attachments Agency sub-tab detail view.
- **Save & Continue** – Saves the data entered and displays any error if the exist.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.

- **Cancel & Exit** – Does not save the data entered and navigates the user back to the Attachments Agency sub-tab detail view.

How Do I View/Download Files



On the Attachments tab, attachment names are hyperlinks that can be clicked on to show the file details. When an attachment detail is opened, it will display the name, description, and other pertinent information.



(Asterisk = required)

Name	Protected. Displays the name of the.
Description	Displays the description of the attachment if any was entered. The user can update the description here.
File	Protected. Displays the file name that was attached. Click on the icon for the option to open or download the file. The usual Windows dialogue box will come up asking to Open or Save the document.
Location	Protected. Displays the location where the attached file is located.
Confidential	Displays whether the attached file is confidential or not. This field can be updated by placing or removing the check mark.
Size	Protected. Displays the size of the file attached.
Last Modified on Disk	Protected. Displays the date and time of the last changed made to the file.
Uploaded	Protected. Displays the date the attachment was attached to the vendor performance document.

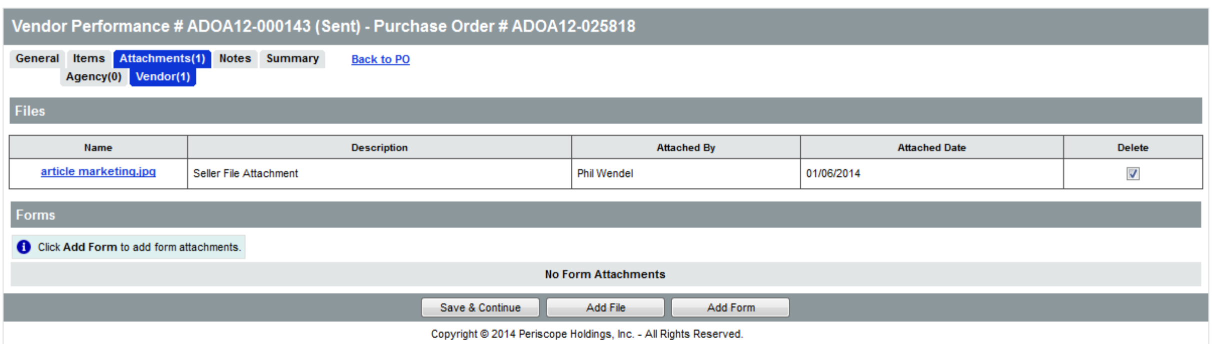
Uploaded By	Protected. Displays the user who attached the file to the vendor performance document.

Action buttons are as follows:

- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Attachments Agency sub-tab detail view.
- **Save & Continue** – Saves the data entered and displays any error if the exist.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit** – Does not save the data entered and navigates the user back to the Attachments Agency sub-tab detail view.

How Do I Delete a File

Attached files can be deleted from the document from the Attachments Vendor sub-tab view. Place a check mark in the delete checkbox under the delete column of the files section of the attachments for the file(s) to be deleted then select the Save & Continue button. The view will refresh and the selected file(s) will be deleted.



(Asterisk = required)

Name	Protected. Displays the name of the.
Description	Protected. Displays the description of the attachment if any was entered.
Attached By	Protected. Displays the user who attached the file to the vendor performance document.
Attached Date	Protected. Displays the date the attachment was attached to the vendor performance document.
Delete	When checked and the Save & Continue button is selected, the attachment is deleted from the vendor performance document.

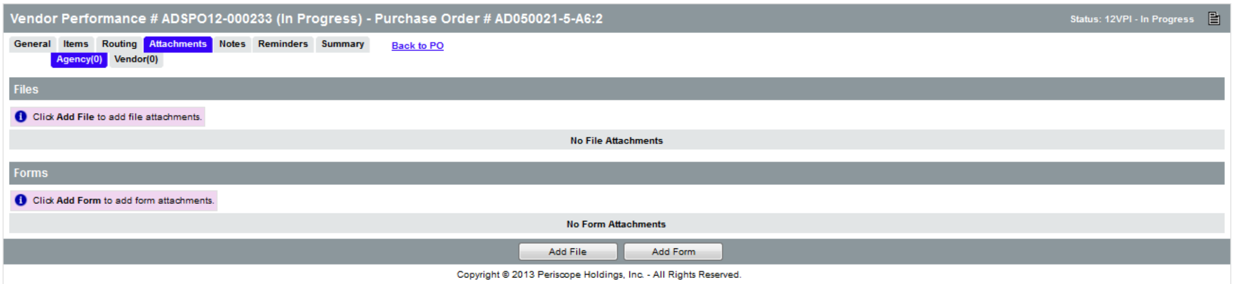
Action button are as follow.

- **Save & Continue** – Saves the data entered and displays any error if the exist.

Forms

How Do I Attach Forms

From the Attachments Vendor sub-tab, select the Add Form button and the Search Templates view will display.



Action button to use:

- **Add Form –** Navigates the user to the Search Template view.

Using the Search Templates search view, determine the search criteria you wish to search the templates. Enter or select the data and select the Find It button. If records exist that match your search criteria, the search results will return with them or “No Record Found”.

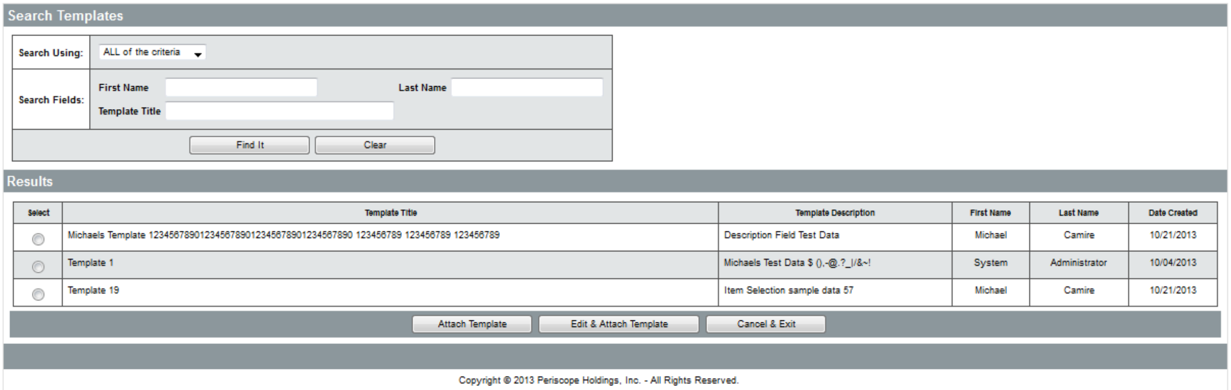
The fields for this form are described below (Asterisk = required)

Search Using	You can search using all of the criteria, all selected criteria must be met or any of the criteria, any of the selected criteria is met.
Search Fields	
First Name	Enter the first name of the individual who created the template.
Last Name	Enter the last name of the individual who created the template.
Template Title	Enter the title or partial title of the template title.

Action buttons are as follows.

- **Find It** – Using the search criteria selected, searches the database and returns the results.
- **Clear –** Removes the entered and/or selected data in all the search fields.
- **Exit** – Navigates the user back to the Attachments view.

Enter data in one or more of the search fields and select the Find It button. Search results should display if any records meet your search criteria. From the search results, select the form you wish to attach.



Attach Form without Editing

From the search results displayed, select the form to be attached and select the Attach Template button. Repeat the step to attach additional forms. When all the forms have been attached, select the Cancel & Exit button.

Attach Form with Editing

To edit forms, the recommended browsers are:

- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
    - Opera 12
    - Internet Explorer 9 and 10
- Not supported
    - Internet Explorer 8 and earlier

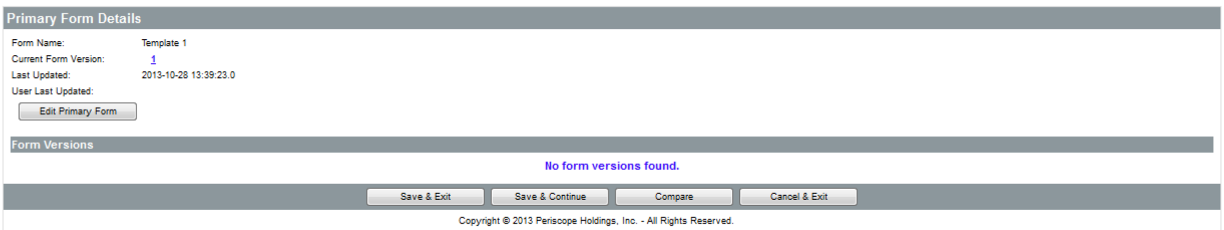
From the search results displayed, select the form to be attached and select the Edit & Attach Template button. The user is navigated to the forms edit view to edit the form. When the editing is completed, select the Save button and then the Exit button.

How Do I View an Attached Form

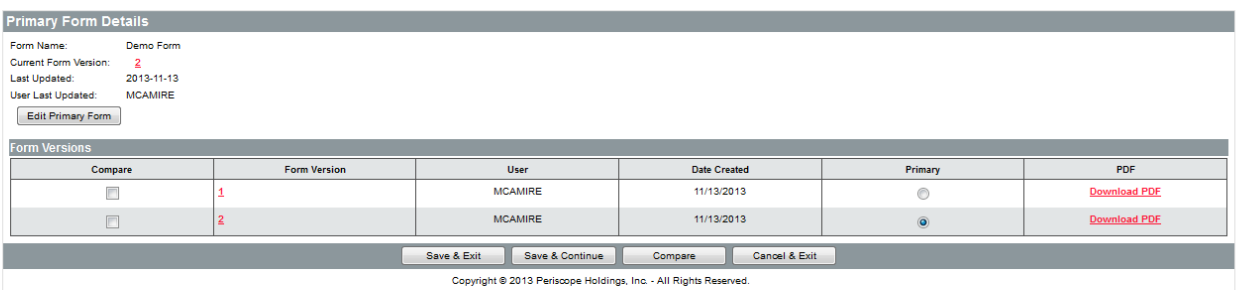
The attached form may be viewed by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select Exit button to return to the previous view.

How Do I View Attached Form In PDF Format

The attached form may be downloaded and viewed in portable document format (PDF) by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select the PDF button to download and view the form in PDF format.



If there are multiple versions of the form, then the form can be downloaded and viewed from the Forms Versions section of the Primary Form Details view. The PDF download link is provided in the last column for each of the versions. Click on the download PDF hyperlink to download and view the form in PDF format.

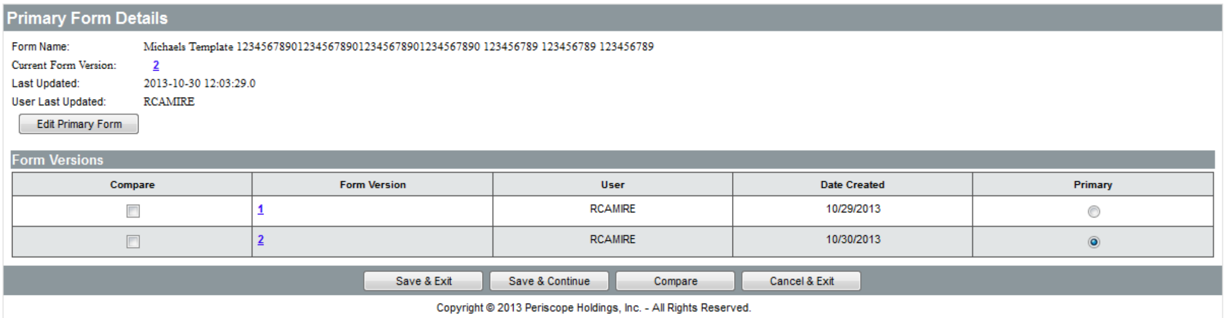


How Do I Edit the Primary Form

To edit forms, the recommended browsers are:

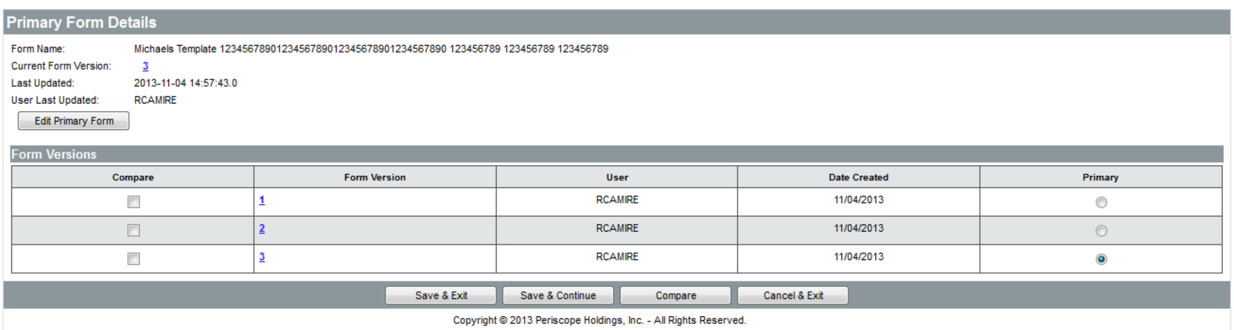
- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
  - Opera 12
  - Internet Explorer 9 and 10
- Not supported
  - Internet Explorer 8 and earlier

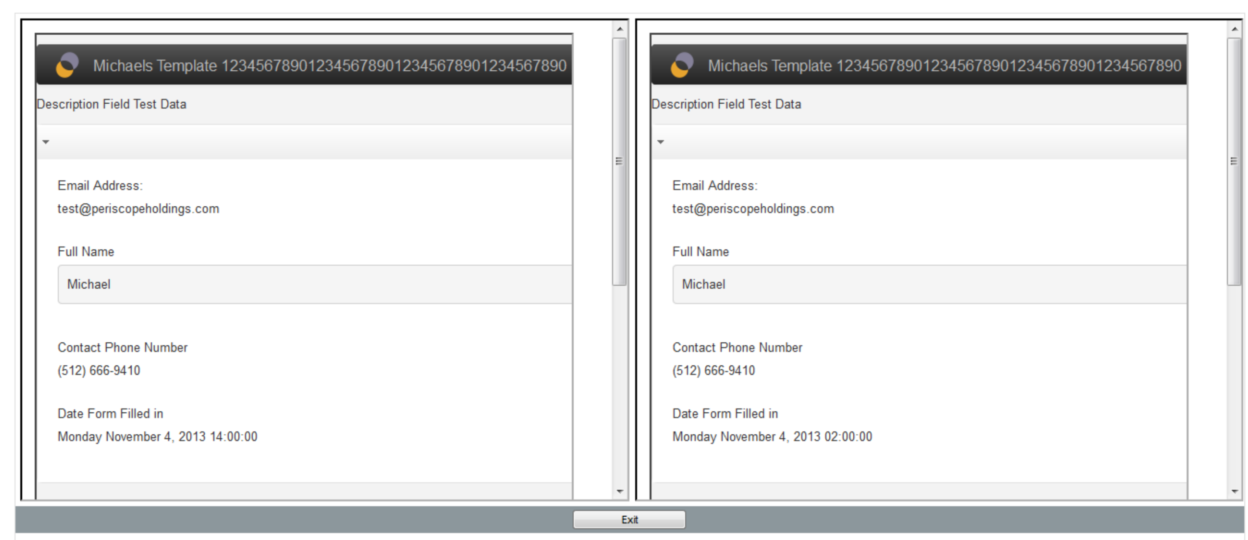
Select the name hyperlink on the Attachment tab Forms section for either the agency or vendor forms. The Primary Form Details view is displayed. To edit the primary form, select the Edit Primary Form button. The form is displayed and can be edited. When edits are completed, select the Save button then the Exit button. The user is returned to the Primary Form Details view displaying the different form versions. The edited version will be identified as the primary form. Select the Cancel & Exit button to return to the Attachments view.



How Do I Compare Forms

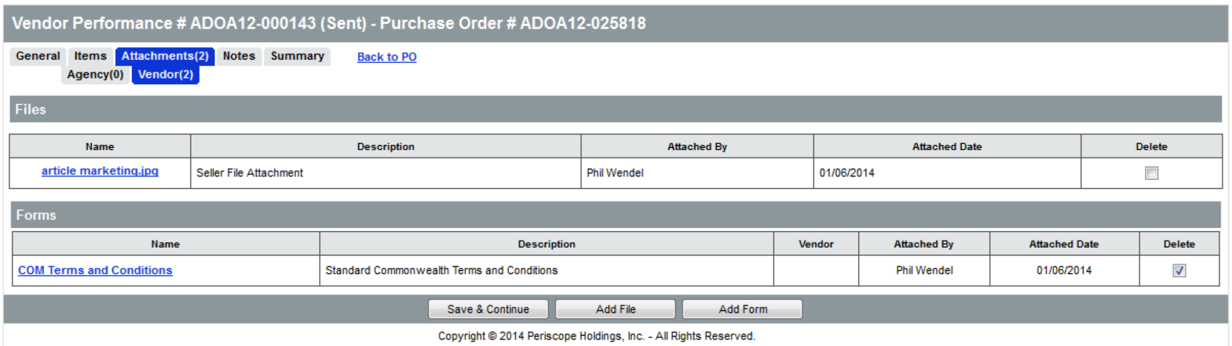
When there is more than one version of the form, the user can compare two of the forms at a time. The comparison between two versions of the form is done from the Primary Form Detail view. Place a check mark in the compare checkbox of the two versions to compare then select the Compare button. The view will refresh with a side-by-side comparison of the two views. Repeat the process to compare additional versions.





How Do I Delete an Attached Form

Attached forms can be deleted from Attachment tab vendor sub-tab view. Select the form(s) to be deleted by placing a check mark in the checkbox under the Delete column adjacent to the form name.



Action button to use:

- **Save & Continue** -- The selected form(s) are deleted.

How Do I Add Vendor Performance Notes

The **Notes Tab** allows you to add notes to provide additional information or special instructions. Notes added from the Notes Tab are for the overall vendor performance document and do not pertain to specific items on the vendor performance document. Saved notes appear on the Summary tab in the Header Information section. At any time, the user can be taken back to the purchase order by clicking on the Back to PO hyperlink.

Adding Vendor Performance Notes

To add vendor performance document notes, select the Notes tab. Enter up to 2000 characters in the notes field.

(Asterisk = required)

Note Date	Protected. Displays the date the note was added.
User	Protected. Displays the name of the user who added the notes.
Note	Enter the note up to 2000 characters.

Action buttons are as follows:

- **Save & Continue** – Saves the data entered and displays any error if the exist.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.

How Do I Send the Vendor Performance Document to the Agency

Once the seller reviews the data entered from the Summary tab, select the Complete Response button. The vendor performance document status is updated to Completed by Vendor at which time an email notification is sent to the agency notifying them of the vendor performance document requiring action. No further action can be taken by the seller once the status of the document has been returned to the agency.

Vendor Created Invoices

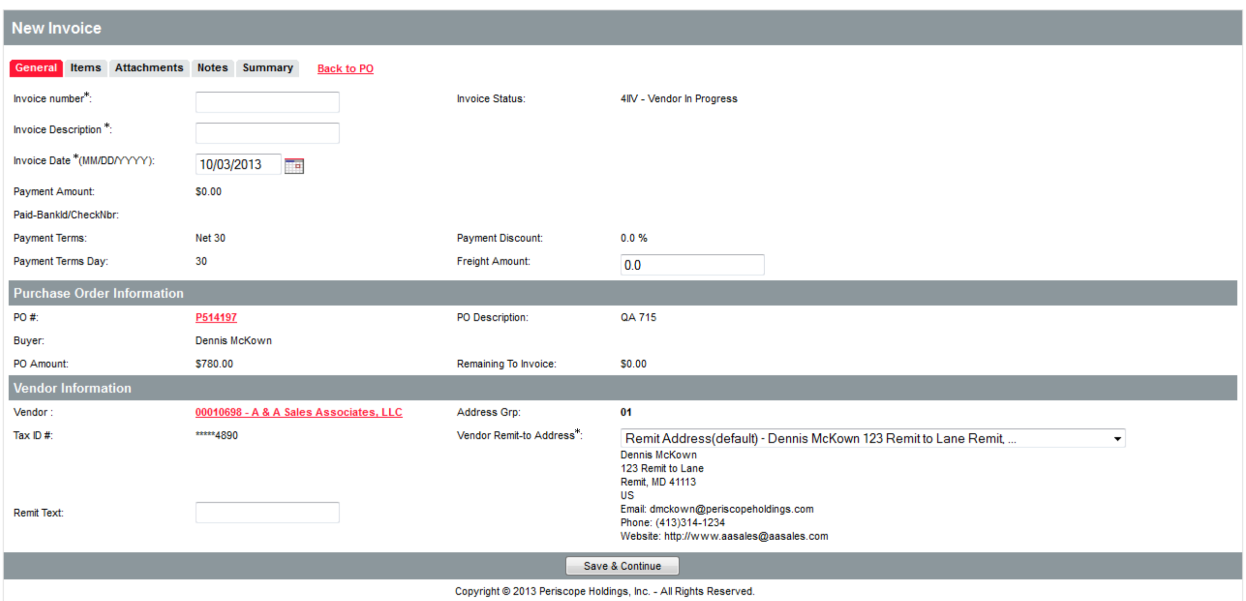
BuySpeed System Configuration has been modified to provide the ability to allow a Seller user to create invoices for a purchase order that is "Sent to Vendor". Once create and completed, the vendor invoice may be submitted to the Accounts Payable user for review and further processing.

How Do I Create an Invoice for a PO?

When System Configuration "Allow Vendors to Create Invoices" is enabled, on the PO Summary tab will be displayed the "Create Invoice" button. Process will begin when you select the button.

<u>Create Invoice</u>

1. Navigate to a PO "Sent to Vendor"
2. Select "PO#"
3. On PO – Summary tab select "Create Invoice", the view will be refreshed with "New Invoice" page.

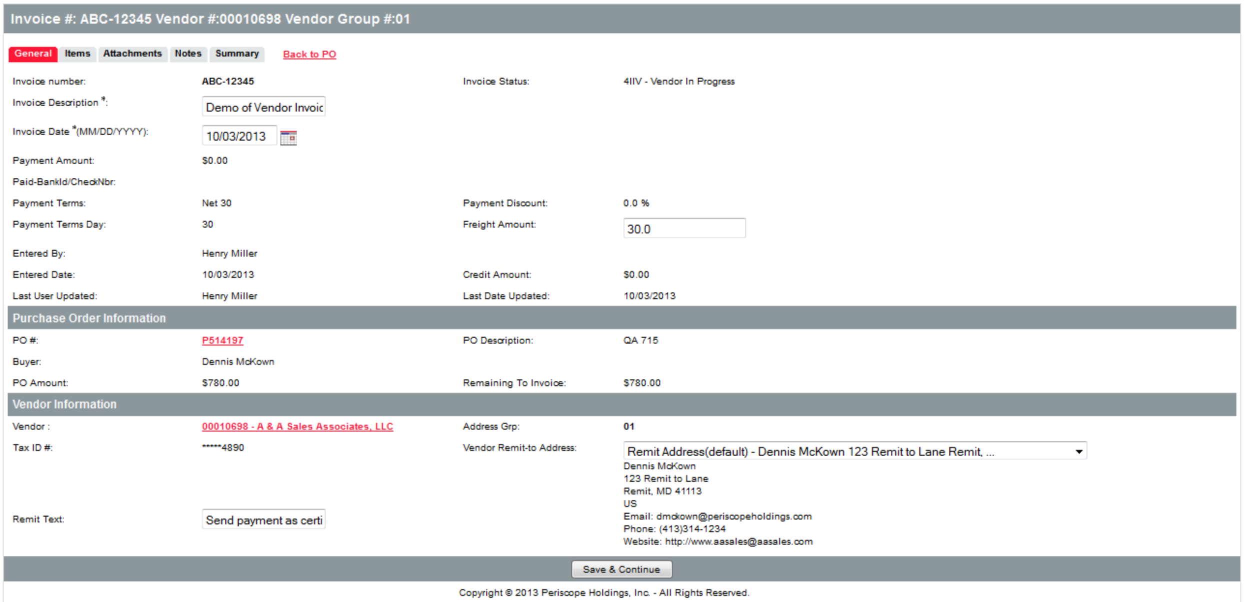


(Asterisk = required)

Invoice Number *	Enter the vendor's invoice number here.
Invoice Description *	Enter a description for the invoice.
Invoice Date *	Date the invoice was entered.
Freight Amount	Amount of Freight charges subject to payment for this invoice.
Vendor Remit to Address	The default remit-to address for the referenced vendor. Address is subject to change.

Remit Text	Text field for entry of comment for remit-to information.

4. Complete, as minimum required information.
5. Select “Save & Continue” button. An invoice will be created at 4VI – Vendor – In Progress status.



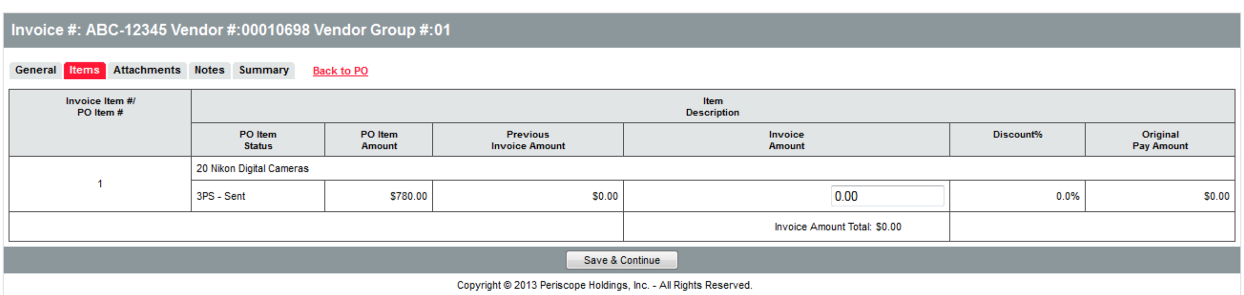
(Asterisk = required)

Invoice Number *	Enter the vendor’s invoice number here.
Invoice Description *	Enter a description for the invoice.
Invoice Date *	Date the invoice was entered.
Freight Amount	Amount of Freight charges subject to payment for this invoice.
Vendor Remit to Address	The default remit-to address for the referenced vendor. Address is subject to change.
Remit Text	Text field for entry of comment for remit-to information.

How Do I Maintain Invoice Amount?

Invoice Amount is maintained by updating the Invoice – Items “Invoice Amount”.

1. Select the “Items” tab of the invoice. View will be refreshed with “Items” tab page.



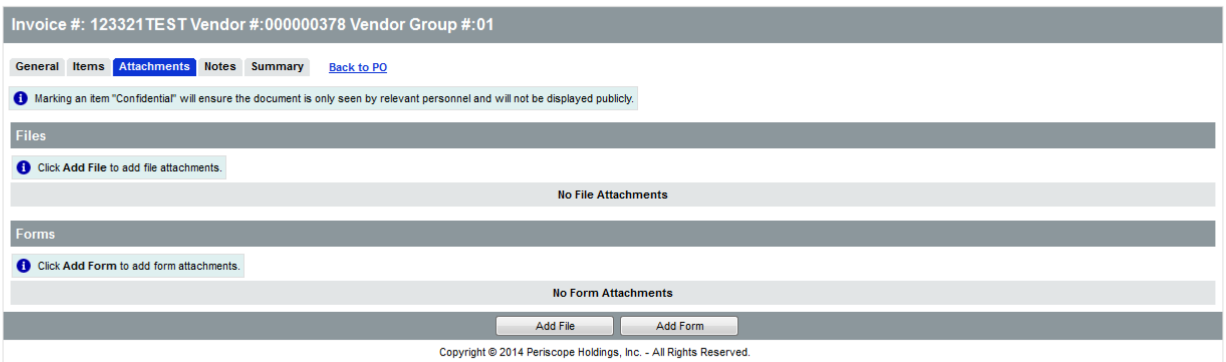
NOTE: The items tab displays all items to be paid. To pay individual items, enter the invoice amount in the field provided and save.

2. After all entries are made, select Save & Continue.

How Do I Maintain Invoice Attachments?

Adding attachments to the invoice document is a useful way to include pictures or any other type of documents. Multiple items can be attached and will be made available to the agency if you so choose to.

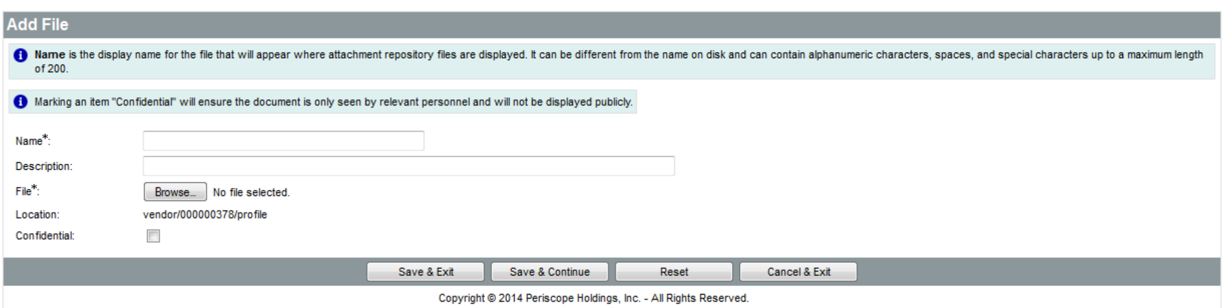
When enabled by the Internal Administrator, the Add Form button will display. This will allow the user to attached pre-defined published forms. Only those forms that are published for the seller with the specific document type and specific user role can be attached to the specific document.



<u>*Files*</u>

How Do I Attach Files

To attach vendor files, select the Attachments tab. Then, select the Add File button. The user will be navigated to the Add File view.



(Asterisk = required)

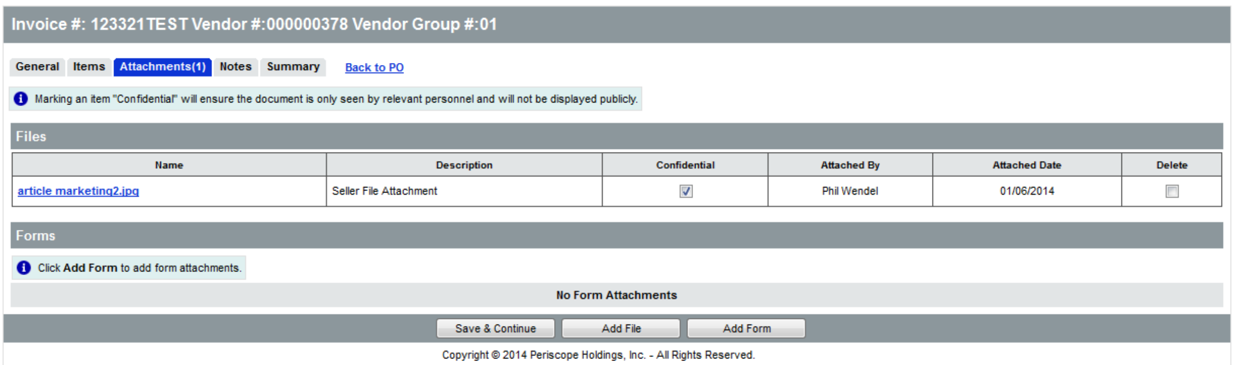
Name*	Required. Enter the name of the attachment or leave blank and the system will enter the file name.
Description	Enter a description of the attachment. This is optional.
File*	Required. Using the Browse button, locate the file on your computer or on a shared drive to be attached.

Location	Protected. Displays the unit cost of the particular item from the purchase order.
Confidential	Place a check mark in the checkbox to make the document confidential. Note: The agency can make the document un-confidential.

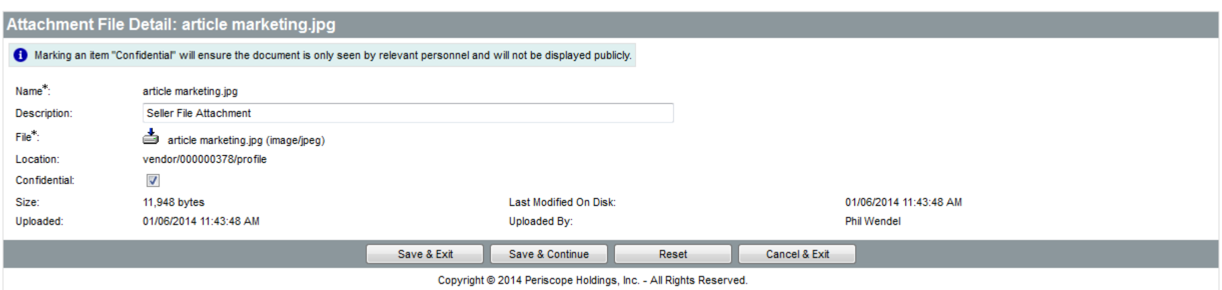
Action buttons are as follows:

- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Attachments Agency sub-tab detail view.
- **Save & Continue** – Saves the data entered and displays any error if the exist.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit** – Does not save the data entered and navigates the user back to the Attachments Agency sub-tab detail view.

How Do I View/Download Files



On the Attachments tab, attachment names are hyperlinks that can be clicked on to show the file details. When an attachment detail is opened, it will display the name, description, and other pertinent information.



(Asterisk = required)

Name	Protected. Displays the name of the.
Description	Displays the description of the attachment if any was entered. The user can update the description here.

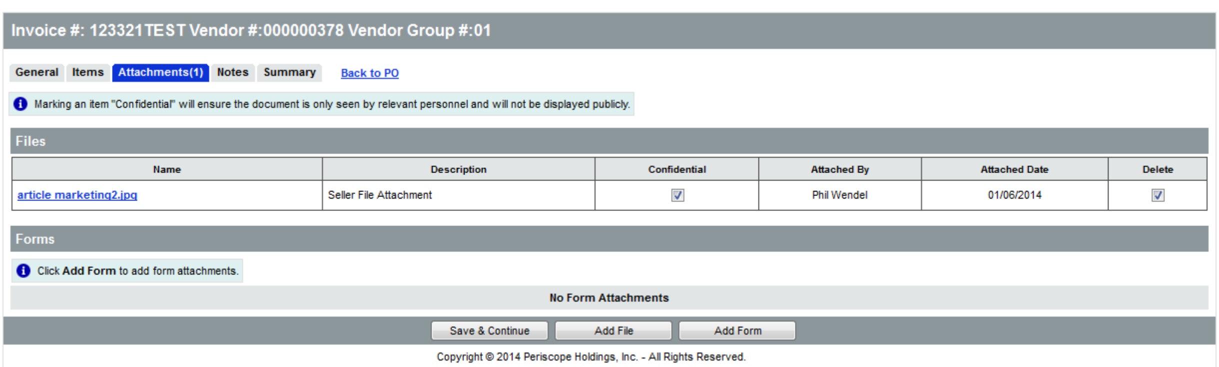
File	Protected. Displays the file name that was attached. Click on the icon for the option to open or download the file. The usual Windows dialogue box will come up asking to Open or Save the document.
Location	Protected. Displays the location where the attached file is located.
Confidential	Displays whether the attached file is confidential or not. This field can be updated by placing or removing the check mark.
Size	Protected. Displays the size of the file attached.
Last Modified on Disk	Protected. Displays the date and time of the last changed made to the file.
Uploaded	Protected. Displays the date the attachment was attached to the vendor performance document.
Uploaded By	Protected. Displays the user who attached the file to the vendor performance document.

Action buttons are as follows:

- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Attachments Agency sub-tab detail view.
- **Save & Continue** – Saves the data entered and displays any error if the exist.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit** – Does not save the data entered and navigates the user back to the Attachments Agency sub-tab detail view.

How Do I Delete a File

Attached files can be deleted from the document from the Attachments tab view. Place a check mark in the delete checkbox under the delete column of the files section of the attachments for the file(s) to be deleted then select the Save & Continue button. The view will refresh and the selected file(s) will be deleted.



(Asterisk = required)

Name	Protected. Displays the name of the.
Description	Protected. Displays the description of the attachment if any was entered.

Attached By	Protected. Displays the user who attached the file to the vendor performance document.
Attached Date	Protected. Displays the date the attachment was attached to the vendor performance document.
Delete	When checked and the Save & Continue button is selected, the attachment is deleted from the vendor performance document.

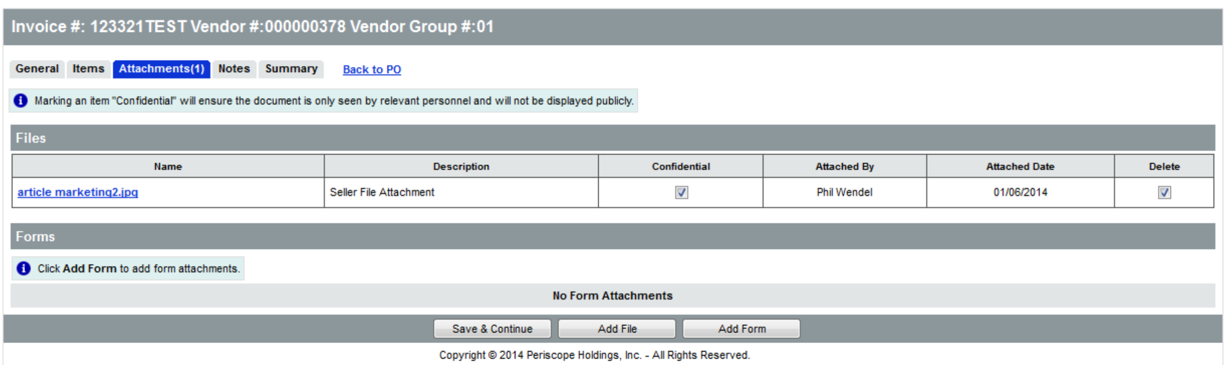
Action button are as follow.

- **Save & Continue** – Saves the data entered and displays any error if the exist.

Forms

How Do I Attach Forms

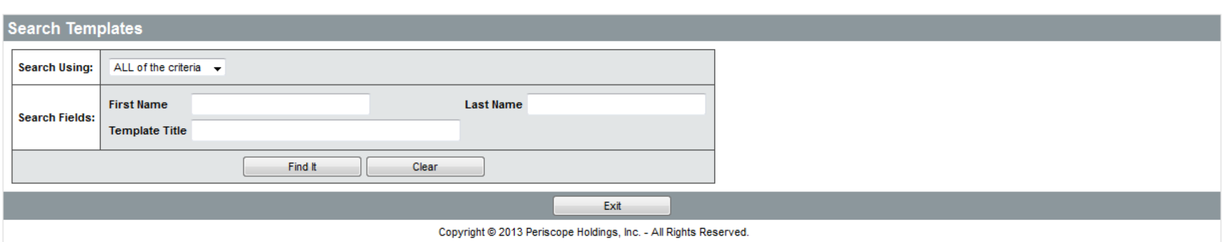
From the Attachments tab, select the Add Form button and the Search Templates view will display.



Action button to use:

- **Add Form** – Navigates the user to the Search Template view.

Using the Search Templates search view, determine the search criteria you wish to search the templates. Enter or select the data and select the Find It button. If records exist that match your search criteria, the search results will return with them or "No Record Found".



The fields for this form are described below (Asterisk = required)

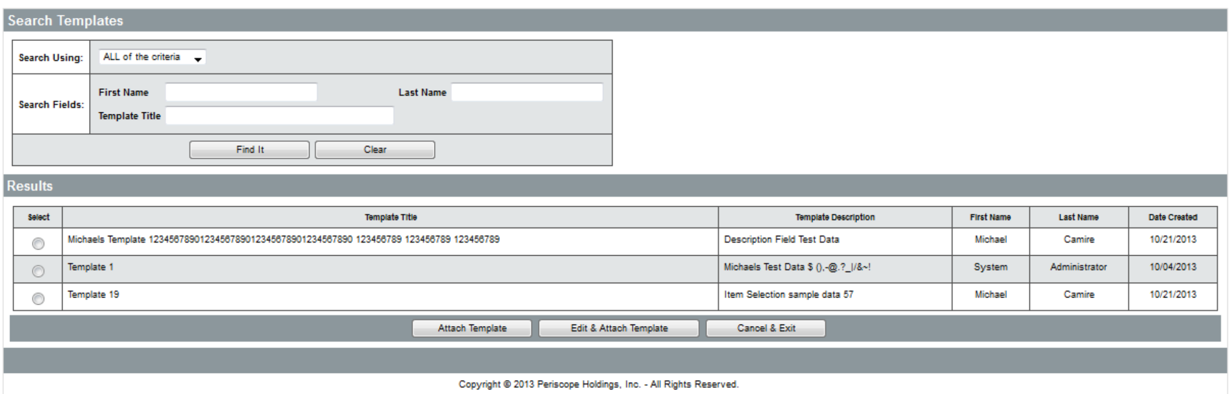
Search Using	You can search using all of the criteria, all selected criteria must be met or any of the criteria, any of the selected criteria is met.

Search Fields	
First Name	Enter the first name of the individual who created the template.
Last Name	Enter the last name of the individual who created the template.
Template Title	Enter the title or partial title of the template title.

Action buttons are as follows.

- **Find It** – Using the search criteria selected, searches the database and returns the results.
- **Clear –** Removes the entered and/or selected data in all the search fields.
- **Exit –** Navigates the user back to the Attachments view.

Enter data in one or more of the search fields and select the Find It button. Search results should display if any records meet your search criteria. From the search results, select the form you wish to attach.



Attach Form without Editing

From the search results displayed, select the form to be attached and select the Attach Template button. Repeat the step to attach additional forms. When all the forms have been attached, select the Cancel & Exit button.

Attach Form with Editing

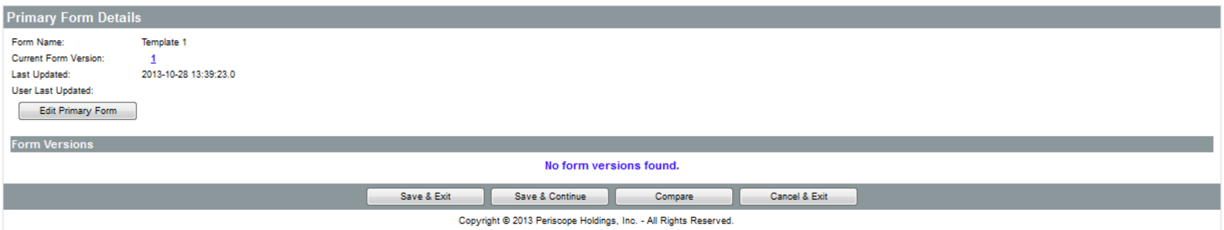
To edit forms, the recommended browsers are:

- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
  - Opera 12
  - Internet Explorer 9 and 10
- Not supported
  - Internet Explorer 8 and earlier

From the search results displayed, select the form to be attached and select the Edit & Attach Template button. The user is navigated to the forms edit view to edit the form. When the editing is completed, select the Save button and then the Exit button.

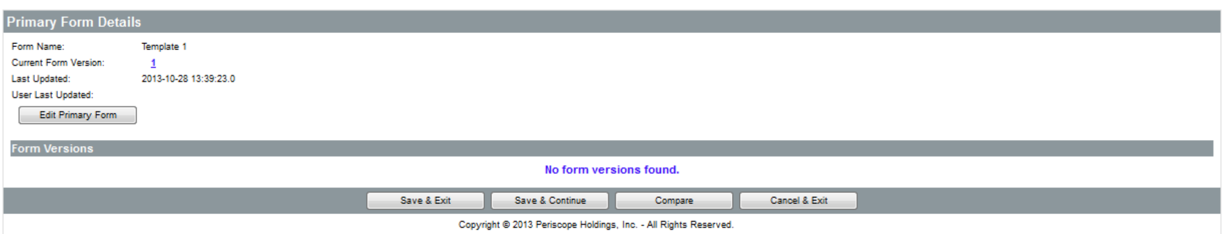
How Do I View an Attached Form

The attached form may be viewed by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select Exit button to return to the previous view.

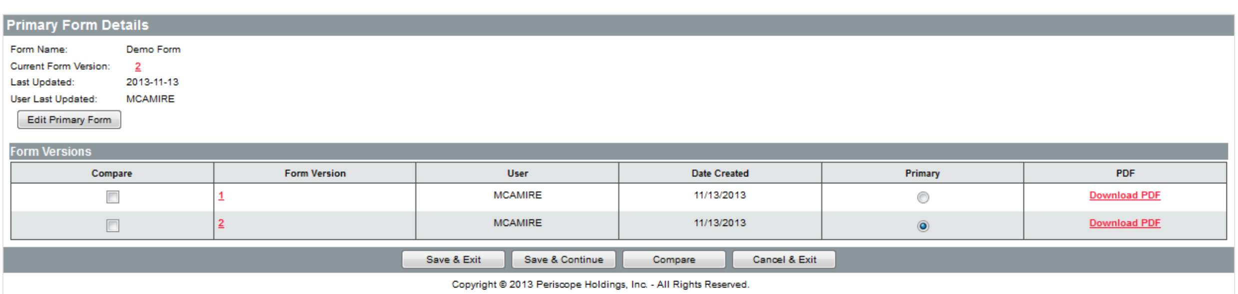


How Do I View Attached Form In PDF Format

The attached form may be downloaded and viewed in portable document format (PDF) by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select the PDF button to download and view the form in PDF format.



If there are multiple versions of the form, then the form can be downloaded and viewed from the Forms Versions section of the Primary Form Details view. The PDF download link is provided in the last column for each of the versions. Click on the download PDF hyperlink to download and view the form in PDF format.

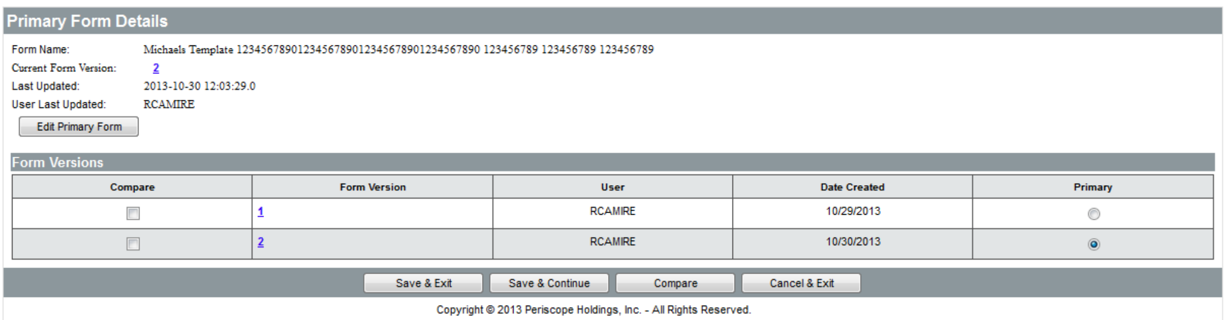


How Do I Edit the Primary Form

To edit forms, the recommended browsers are:

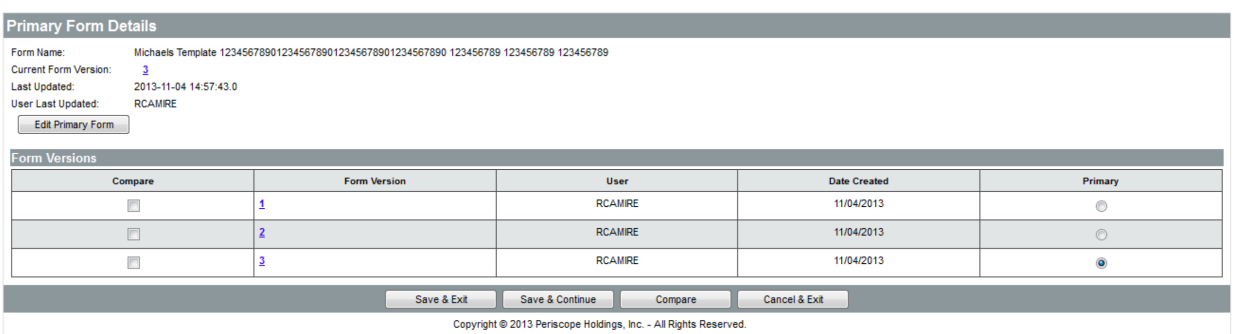
- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
  - Opera 12
  - Internet Explorer 9 and 10
- Not supported
  - Internet Explorer 8 and earlier

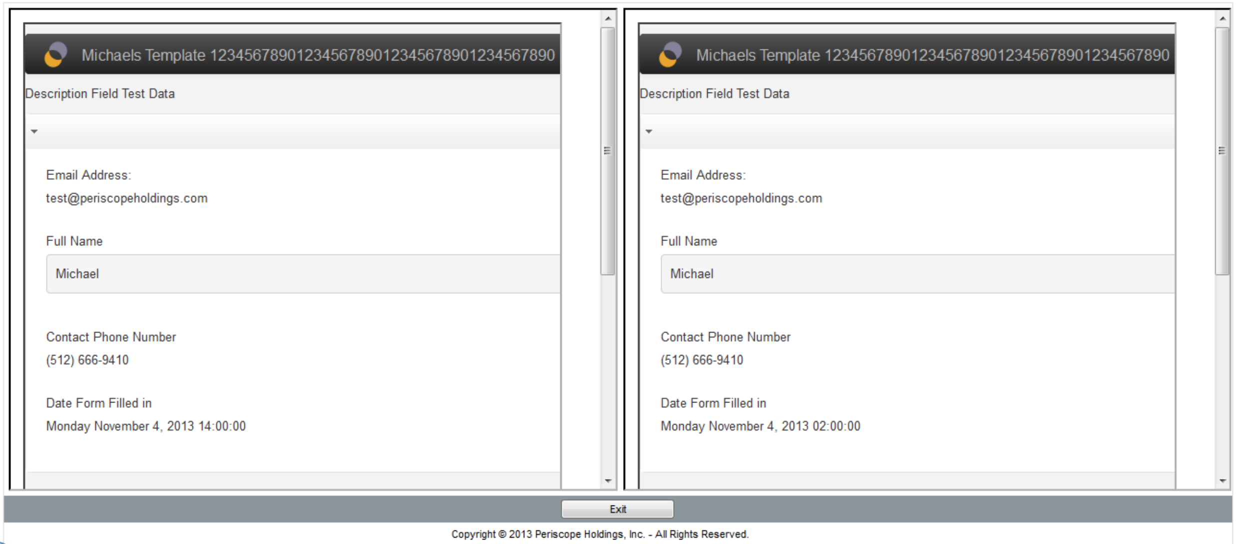
Select the name hyperlink on the Attachment tab Forms section for either the agency or vendor forms. The Primary Form Details view is displayed. To edit the primary form, select the Edit Primary Form button. The form is displayed and can be edited. When edits are completed, select the Save button then the Exit button. The user is returned to the Primary Form Details view displaying the different form versions. The edited version will be identified as the primary form. Select the Cancel & Exit button to return to the Attachments view.



How Do I Compare Forms

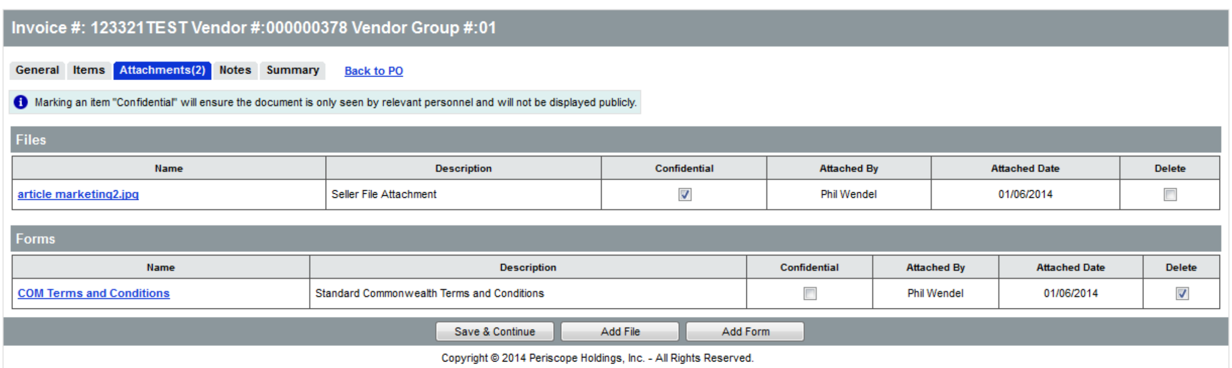
When there is more than one version of the form, the user can compare two of the forms at a time. The comparison between two versions of the form is done from the Primary Form Detail view. Place a check mark in the compare checkbox of the two versions to compare then select the Compare button. The view will refresh with a side-by-side comparison of the two views. Repeat the process to compare additional versions.





How Do I Delete an Attached Form

Attached forms can be deleted from Attachment tab vendor sub-tab view. Select the form(s) to be deleted by placing a check mark in the checkbox under the Delete column adjacent to the form name.

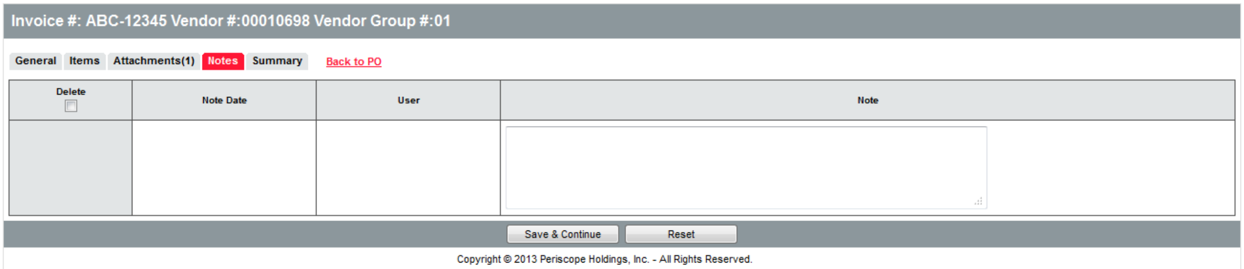


Action button to use:

- **Save & Continue** -- The selected form(s) are deleted.

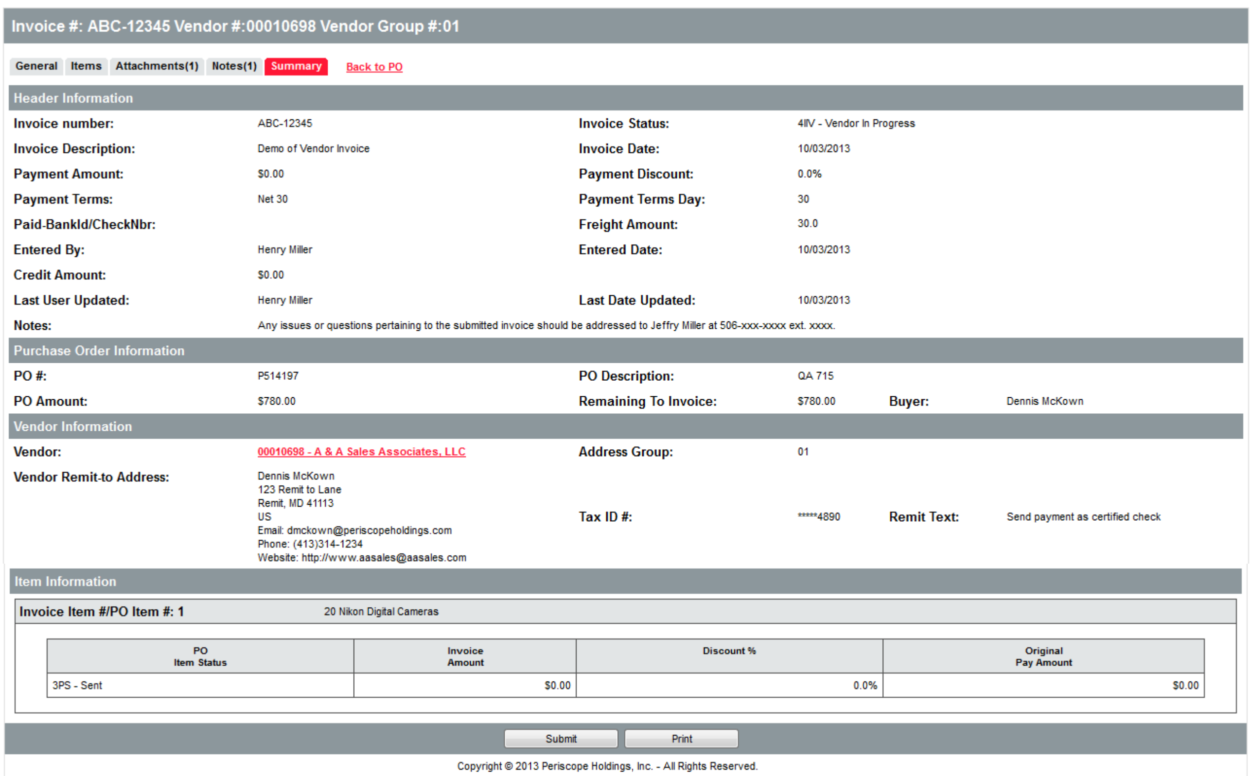
How Do I Maintain Invoice Notes?

The **Notes Tab** allows you to add a note to the invoice to give additional information or special instructions. Type your note in the **Note** field. Select **Save & Continue** to save your note entry and a new blank line will appear, allowing you to enter an additional note to the invoice. To delete a note once it is saved, check the box in the **Delete** column next to the note, and select **Save & Continue**.



How Do I Submit Invoice to Accounts Payable User?

The **Summary Tab** allows you to submit your invoice to the BuySpeed Accounts Payable user for review and further processing, i.e., Approval for Payment. To submit the completed invoice, select "Submit" button, invoice will be submitted to BuySpeed and the Invoice Status will be set to 4II – In Progress status. Additionally, an email notification will be issued to the applicable BuySpeed Accounts Payable user notifying the user that the invoice was submitted.



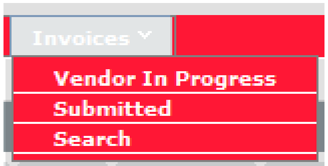
How Do I View Vendor Invoices?

There three methods for viewing vendor created invoices. The first method is on the Menu bar option of Invoices, the second is on the Seller Home page, using the Invoices tab and the third method is on the PO Summary tab page.

<u>Viewing Vendor Invoices from the Invoices Menu</u>

On the Seller menu bar you will see an **Invoices** menu option. By moving the mouse over the menu option it is expanded to display a list of options.

and



Vendor In Progress (menu option)

By selecting Vendor In Progress the view is refreshed with Invoices – Vendor In Progress displaying vendor generated invoice at 4IIV - Vendor In Progress status.

Invoices - Vendor In Progress

Invoice #	Vendor	Invoice Description	Invoice Date	Invoice Amt.	PO #	Invoice Status
P514252	00010698 - A & A Sales Associates, LLC	BSPD-6452	10/01/2013	$10,920.00	P514252	4IIV - Vendor In Progress
P514252-1	00010698 - A & A Sales Associates, LLC	BSPD-6452	10/01/2013	$5,500.00	P514252	4IIV - Vendor In Progress
P514196	00010698 - A & A Sales Associates, LLC	BSPD-5957	10/02/2013	$3,000.00	P514196	4IIV - Vendor In Progress
ABC-12345	00010698 - A & A Sales Associates, LLC	Demo of Vendor Invoice	10/03/2013	$30.00	P514197	4IIV - Vendor In Progress
P514235	00010698 - A & A Sales Associates, LLC	QA-BSPD-6609	10/14/2013	$0.00	P514235	4IIV - Vendor In Progress
P514321-2	00010698 - A & A Sales Associates, LLC	QA-BSPD-6609	10/15/2013	$0.00	P514321	4IIV - Vendor In Progress
P514322-2	00010698 - A & A Sales Associates, LLC	QA-BSPD-6609	10/15/2013	$0.00	P514322	4IIV - Vendor In Progress

Exit

Submitted (menu option)

By selecting Submitted the view is refreshed with Invoices – Submitted displaying vendor generated and Agency generated invoices for the vendor.

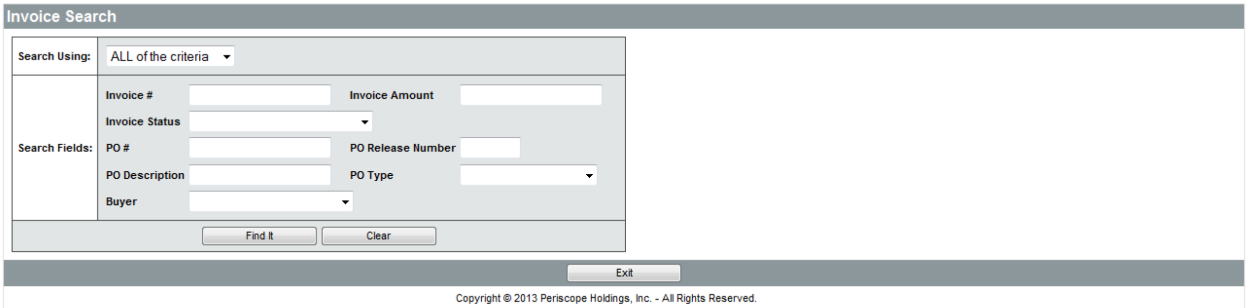
Invoices - Submitted

Invoice #	Vendor	Invoice Description	Invoice Date	Invoice Amt.	PO #	Invoice Status
P51414-0001	00010698 - A & A Sales Associates, LLC	QA-2781	04/10/2012	$1,333.00	P514145	4IA - Approved for Payment
P514143-0001	00010698 - A & A Sales Associates, LLC	QA-2781	04/10/2012	$1,333.00	P514143	4IA - Approved for Payment
P514190-4	00010698 - A & A Sales Associates, LLC	QA-Regression	09/18/2013	$1,000.00	P514190:4	4IA - Approved for Payment
P514215	00010698 - A & A Sales Associates, LLC	QA regression	10/12/2012	$400.00	P514215	4IA - Approved for Payment
P514236-0001	00010698 - A & A Sales Associates, LLC	QA 4049	01/08/2013	$54,960.41	P514236	4IA - Approved for Payment
P514321	00010698 - A & A Sales Associates, LLC	QA-BSPD-6609	10/14/2013	$7,000.00	P514321	4IA - Approved for Payment
P514340	00010698 - A & A Sales Associates, LLC	Test of Freight	11/08/2013	$7,500.00	P514340	4IA - Approved for Payment
P514341	00010698 - A & A Sales Associates, LLC	QA-BSPD-6565	11/08/2013	$7,350.00	P514341	4IA - Approved for Payment
P514112-0001	00010698 - A & A Sales Associates, LLC	QA 2492	03/27/2012	$0.00	P514112	4IC - Canceled
RPA311	00010698 - A & A Sales Associates, LLC	Auto-generated RPA Invoice	09/15/2011	$11.00	RPA311	4IC - Canceled
RPA313	00010698 - A & A Sales Associates, LLC	Auto-generated RPA Invoice	09/15/2011	$11.00	RPA313	4IC - Canceled
P514079-0001	00010698 - A & A Sales Associates, LLC	AP Funds Allocation Processing	03/09/2012	$300.00	P514079	4II - In Progress
P514087-0001	00010698 - A & A Sales Associates, LLC	AP Funds Allocation Processing	03/13/2012	$300.00	P514087	4IR - Ready for Approval
P514112-0002	00010698 - A & A Sales Associates, LLC	QA 2492	03/27/2012	$300.00	P514112	4II - In Progress

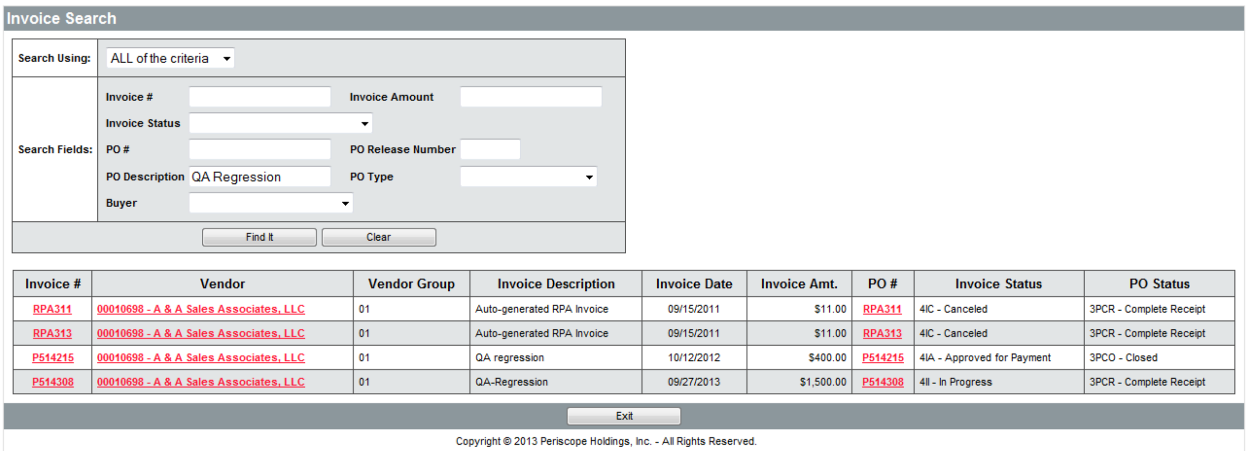
NOTE: When Configure Vendor System - Display All Invoices to Vendors: is disabled, to not display all invoices to the vendor, only invoices generated by the vendor and submitted to the Agency will be displayed.

Search (menu option)

The last option is Search. By selecting Search the user is routed to the Invoices Search view.



By completing search fields and selecting Find It, or by just selecting Find It results will be returned.



Invoice #	Vendor	Vendor Group	Invoice Description	Invoice Date	Invoice Amt.	PO #	Invoice Status	PO Status
RPA311	00010698 - A & A Sales Associates, LLC	01	Auto-generated RPA Invoice	09/15/2011	$11.00	RPA311	4IC - Canceled	3PCR - Complete Receipt
RPA313	00010698 - A & A Sales Associates, LLC	01	Auto-generated RPA Invoice	09/15/2011	$11.00	RPA313	4IC - Canceled	3PCR - Complete Receipt
P514215	00010698 - A & A Sales Associates, LLC	01	QA regression	10/12/2012	$400.00	P514215	4IA - Approved for Payment	3PCO - Closed
P514308	00010698 - A & A Sales Associates, LLC	01	QA-Regression	09/27/2013	$1,500.00	P514308	4II - In Progress	3PCR - Complete Receipt

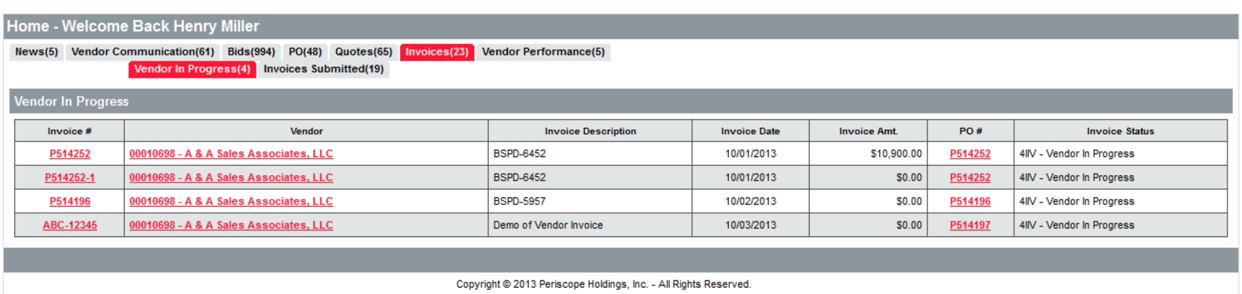
NOTE: When Configure Vendor System - Display All Invoices to Vendors: is disabled, to not display all invoices to the vendor, only invoices generated by the vendor will be displayed.

Viewing Vendor Invoices on the Seller Home Page

On the Seller Home page, when the **Invoices** tab is displayed you will start by selecting this tab. When the page is rendered it will be defaulted to the Vendor In Progress sub-tab.

Vendor In Progress Tab

This tab view displays all vendor invoices at 4VII – Vendor In Progress status.



Invoice #	Vendor	Invoice Description	Invoice Date	Invoice Amt.	PO #	Invoice Status
P514252	00010698 - A & A Sales Associates, LLC	BSPD-6452	10/01/2013	$10,900.00	P514252	4IIV - Vendor In Progress
P514252-1	00010698 - A & A Sales Associates, LLC	BSPD-6452	10/01/2013	$0.00	P514252	4IIV - Vendor In Progress
P514196	00010698 - A & A Sales Associates, LLC	BSPD-5957	10/02/2013	$0.00	P514196	4IIV - Vendor In Progress
ABC-12345	00010698 - A & A Sales Associates, LLC	Demo of Vendor Invoice	10/03/2013	$0.00	P514197	4IIV - Vendor In Progress

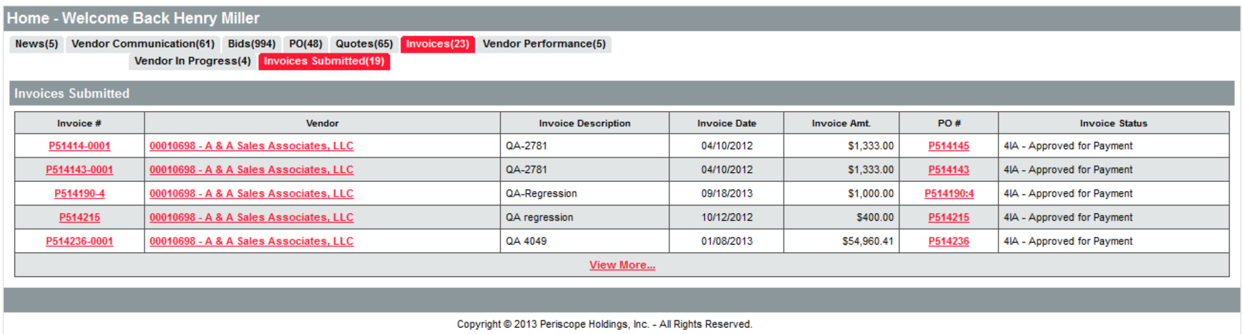
(Asterisk = required)

Invoice #	Vendor defined invoice number of the invoice. When selected, the user is navigated to the "Summary" tab of the selected invoice.

Vendor	Vendor consists of vendor number – vendor name. When selected, the Vendor Profile view is opened in a new window for the selected vendor.
PO#	Purchase Order number to which the vendor invoice is associated with. When selected, the user is navigated to the PO – Summary tab of the select purchase order.
View More…	When invoices displayed exceed the display limits of the page, "View More…" will be displayed. When selected the page will be refreshed to display all invoices within the category.
Pagination	When View More is used and the display is expanded and the number of records to display exceeds the page display limits, standard pagination is provided for navigation.

Invoices Submitted Tab

This tab view displays all invoices for purchase orders Sent to Vendor, including vendor invoices submitted by the vendor to BuySpeed.

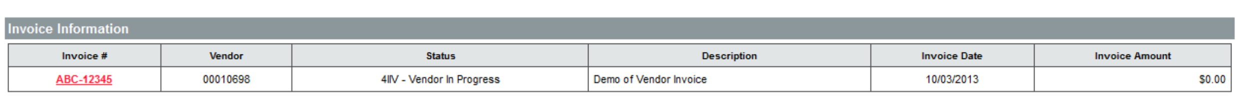


(Asterisk = required)

Invoice #	Vendor defined invoice number of the invoice. When selected, the user is navigated to the "Summary" tab of the selected invoice.
Vendor	Vendor consists of vendor number – vendor name. When selected, the Vendor Profile view is opened in a new window for the selected vendor.
PO#	Purchase Order number to which the vendor invoice is associated with. When selected, the user is navigated to the PO – Summary tab of the select purchase order.
View More…	When invoices displayed exceed the display limits of the page, "View More…" will be displayed. When selected the page will be refreshed to display all invoices within the category.
Pagination	When View More is used and the display is expanded and the number of records to display exceeds the page display limits, standard pagination is provided for navigation.

Viewing Vendor Invoices on the PO Summary Tab

On the Purchase Order **Summary** tab page vendor Invoices will be displayed in the "Invoice Information" section. The Invoice # is a link to the vendor invoice document.



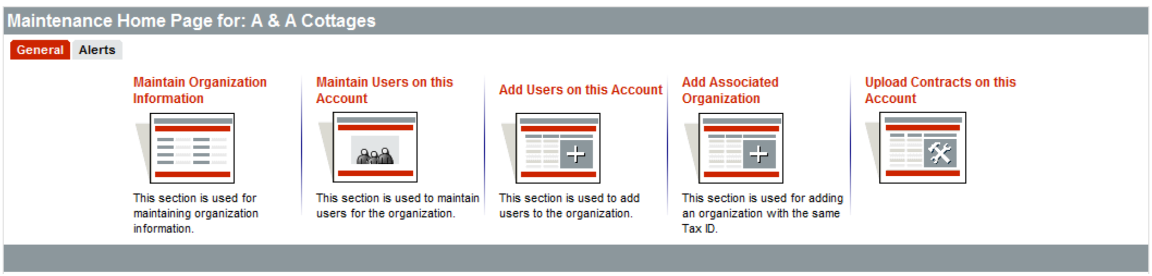
How Do I Search For Vendor Invoices?

See *.**Advanced Search (Seller Role Only)*** above and use a document type of "Invoices",

Seller Administration

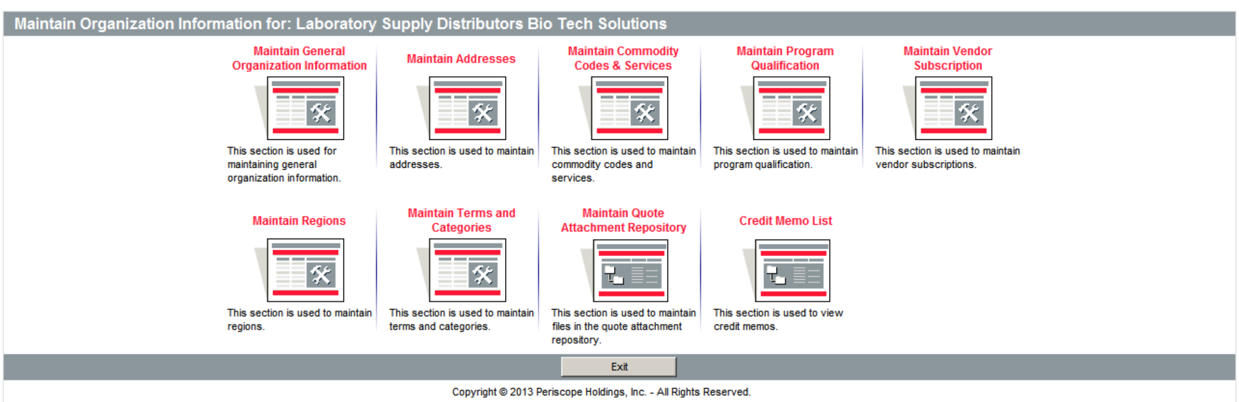
Maintenance Home Page

Seller Administrators can maintain organization information and can maintain and add users to the seller account. The Seller Administrator maintenance home page looks as follows:



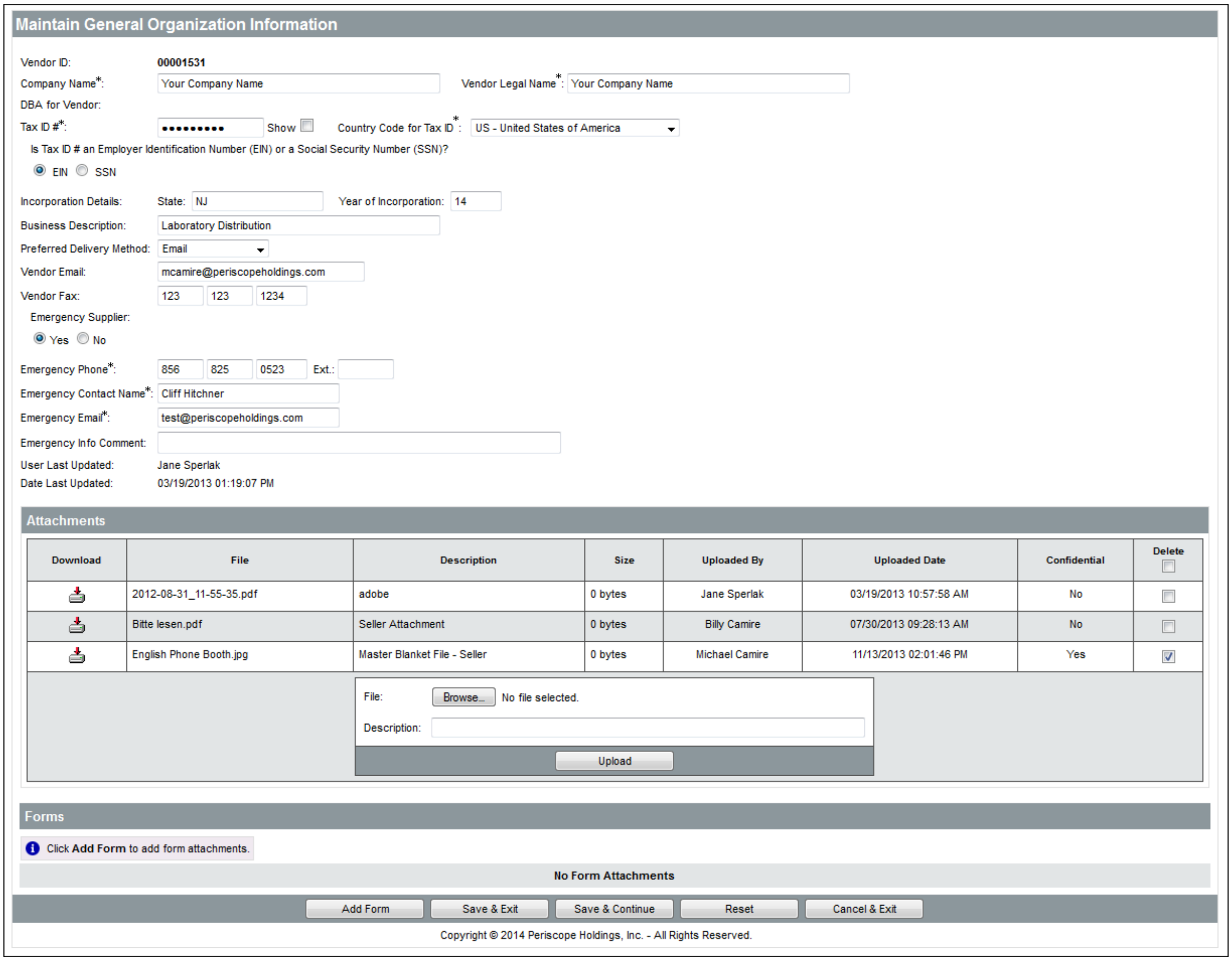
Maintain Organization Information

This option allows you to maintain all of the organization's information, as registered with the agency including addresses, links, terms, categories, and commodities.



Maintain General Organization Information

This option allows you to maintain the organization's default information including name and business description.



(Asterisk = required)

Vendor ID	This field displays your vendor id.
Company Name*	Enter or modify the company name. This is a required field.
Vendor Legal Name*	The “legal” name of your business used on documentation, i.e., license.
DBA for Vendor	Displays the hyperlinked vendor ID of the vendor whom you are “Do Business As”.
Tax ID#*	Enter or modify the vendor Tax ID #. This is a required field.
Show	To display the Tax ID on the view, enter a check in the box. If the box is not checked, the Tax ID number will be masked.
Country Code for Tax ID*	Displays the Country for the Tax ID.
Is Tax ID EIN or SSN	Displays whether the Tax ID is EIN or SSN.
Incorporation Details	Enter the State abbreviation where the seller is incorporated.
Year of Incorporation	Enter the year of incorporation for the current seller.
Business Description	Enter or modify a short business description.
Preferred Delivery Method	Use the dropdown menu to select or change the preferred delivery method for bids sent to this vendor.
Vendor Email	The email address for your organization.
Vendor Fax	The Fax phone number for your organization.

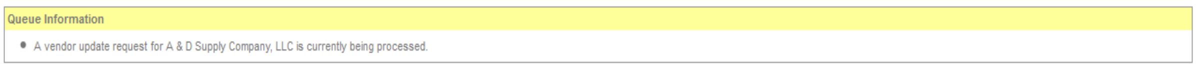
Emergency Supplier	Select the **Yes** button to designate the vendor as an emergency supplier who can deliver with short lead times, outside of standard work hours, and in cases of disaster.
Emergency Phone*	The phone number used to reach the vendor in emergencies. *This is a required field only if the vendor is marked as an Emergency Supplier*.
Emergency Contact Name*	The contact name associated with this emergency supplier. *This is a required field only if the vendor is marked as an Emergency Supplier*.
Emergency Email*	The email address associated with this emergency supplier. *This is a required field only if the vendor is marked as an Emergency Supplier*.
Emergency Info Comment	Enter additional information about the Emergency Supplier.
User Last Updated	Protected. Updated by the system. Enters the user's name that made the last update.
Date Last Updated	Protected. Updated by the system. Enters the date and time of the last update.
Attachments	
Download	Icon to download the attached file.
File	Protected. Displays the file name that was uploaded.
Description	Protected. Displays the file description entered when the file was uploaded.
Size	Protected. The file size of the uploaded file.
Uploaded By	Protected. The person's name that uploaded the file.
Uploaded Date	Protected. The system date and time the file was uploaded.
Confidential	Protected. Identifies if the file is confidential or not. This determines if the file displays on the seller profile view.
Delete	When selected and the user selects the Save button, the file is deleted.
File	Required. Browse for the file you wish to upload as an attachment to your Seller profile.
Description	Enter a description of the file being uploaded.
Upload	Select the upload button to upload the file. When the file is uploaded successfully, a list of attachments will appear.
Forms	
Name	Protected. The name of the form added.
Description	Protected. The description of the form added.
Confidential	To identify an attached form as confidential so it does not display on the seller profile view, place a check mark in the check box.
Attached By	Protected. The name of the person that attached the form.
Attached Date	Protected. The system date when the form was attached.
Delete	When selected and the user selects the Save button, the form is deleted.

Action buttons are as follows.

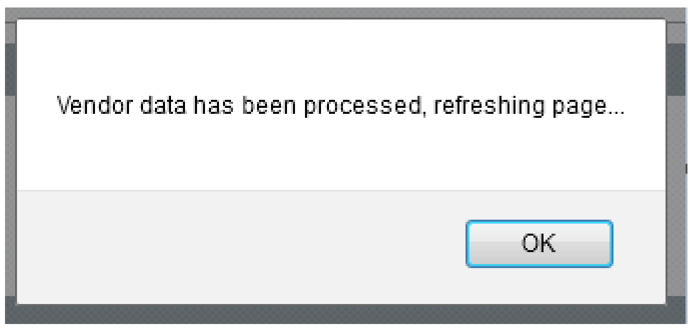
- **Add Form –** The user is navigated to the Search Template view to search and add the form.
- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Maintain Organization Information for view.
- **Save & Continue –** Saves the data entered and displays any error if the exist and remains on the same view.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit –** Does not save the responses entered and navigates the user back to the Maintain Organization Information for view.

Message Queue – General Organization Information Vendor Messages

When Message Queue is enabled and General Organization Information is updated a validation message will be displayed to the administrator informing that an update request is in progress with a vendor interface. Additionally, the vendor is locked from further update (save buttons will be removed from view for which message is displayed) until a response is received and a message as follows will be displayed.

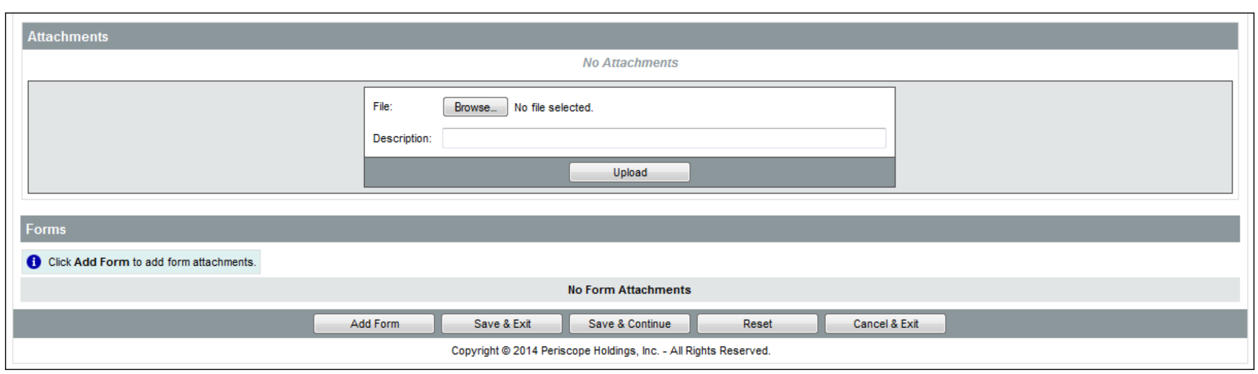


Once a response is received, the vendor is unlocked and message will be cleared and no longer display for that vendor. The following UI will be displayed, select OK.



How Do I Attach Forms

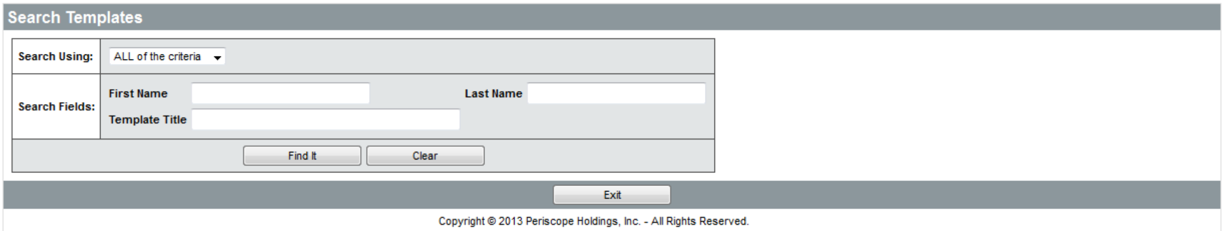
Select the Add Form button and the Search Templates view will display.



Action button to use:

- **Add Form** – Navigates the user to the Search Template view.

Using the Search Templates search view, determine the search criteria you wish to search the templates. Enter or select the data and select the Find It button. If records exist that match your search criteria, the search results will return with them or "No Record Found".



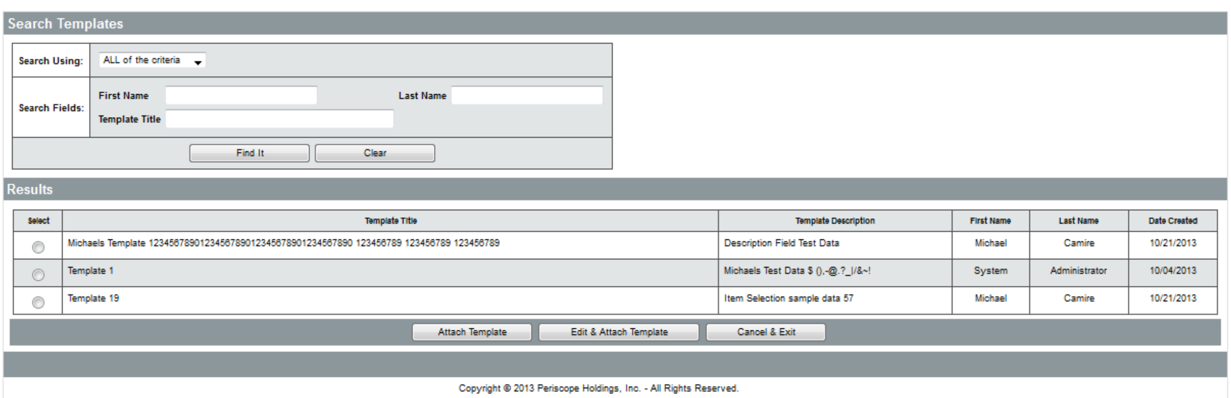
The fields for this form are described below (Asterisk = required)

Search Using	You can search using all of the criteria, all selected criteria must be met or any of the criteria, any of the selected criteria is met.
Search Fields	
First Name	Enter the first name of the individual who created the template.
Last Name	Enter the last name of the individual who created the template.
Template Title	Enter the title or partial title of the template title.

Action buttons are as follows.

- **Find It** – Using the search criteria selected, searches the database and returns the results.
- **Clear –** Removes the entered and/or selected data in all the search fields.
- **Exit –** Navigates the user back to the Attachments view.

Enter data in one or more of the search fields and select the Find It button. Search results should display if any records meet your search criteria. From the search results, select the form you wish to attach.



Attach Form without Editing

From the search results displayed, select the form to be attached and select the Attach Template button. Repeat the step to attach additional forms. When all the forms have been attached, select the Cancel & Exit button.

Attach Form with Editing

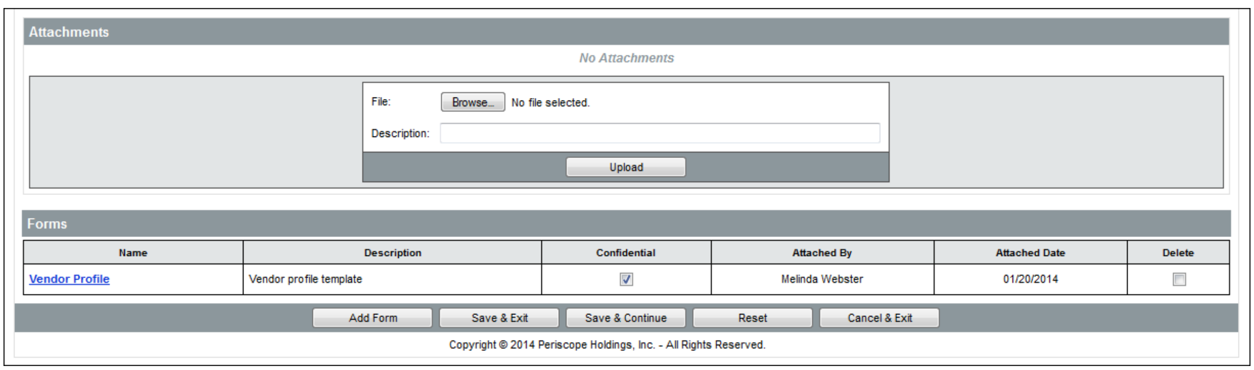
To edit forms, the recommended browsers are:

- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
    - Opera 12
    - Internet Explorer 9 and 10
- Not supported
    - Internet Explorer 8 and earlier

From the search results displayed, select the form to be attached and select the Edit & Attach Template button. The user is navigated to the forms edit view to edit the form. When the editing is completed, select the Save button and then the Exit button.

How Do I Identify Form as Confidential

For forms the seller administrator wishes to not display on the vendor profile view, mark it as confidential by placing a check mark in the confidential check box under the confidential check box adjacent to the description of the form.



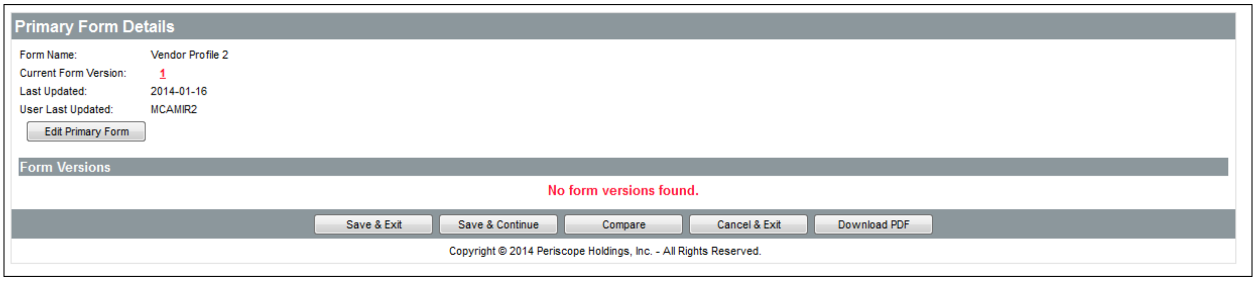
Forms	
Name	Protected. The name of the form added.
Description	Protected. The description of the form added.
Confidential	To identify an attached form as confidential so it does not display on the seller profile view, place a check mark in the check box.
Attached By	Protected. The name of the person that attached the form.
Attached Date	Protected. The system date when the form was attached.
Delete	When selected and the user selects the Save button, the form is deleted.

Action buttons are as follows.

- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Maintain Organization Information for view.
- **Save & Continue** – Saves the data entered and displays any error if the exist and remains on the same view.

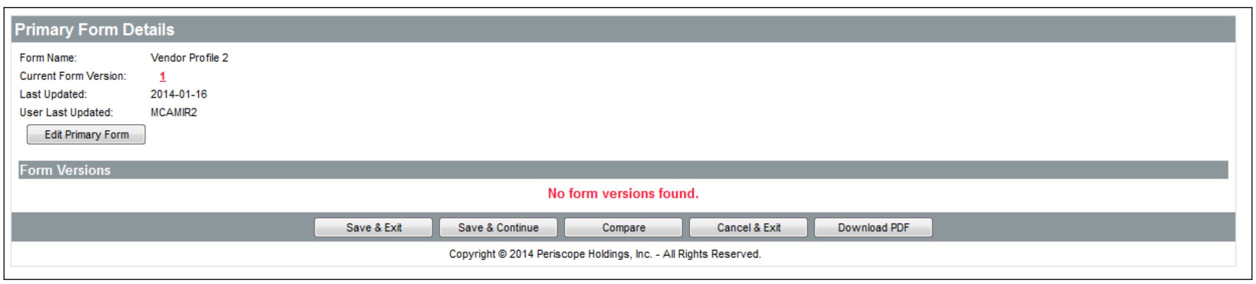
How Do I View an Attached Form

The attached form may be viewed by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select Exit button to return to the previous view.

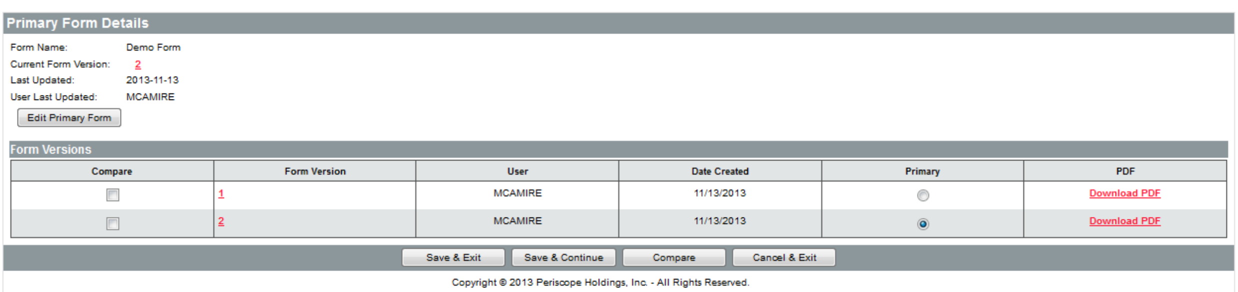


How Do I View Attached Form In PDF Format

The attached form may be downloaded and viewed in portable document format (PDF) by selecting the form name hyperlink under the Name column of the attached forms. The user is then navigated to the Primary Form Details view. Select the Current Form Version hyperlink. The current version of the form will be displayed. Select the PDF button to download and view the form in PDF format.



If there are multiple versions of the form, then the form can be downloaded and viewed from the Forms Versions section of the Primary Form Details view. The PDF download link is provided in the last column for each of the versions. Click on the download PDF hyperlink to download and view the form in PDF format.



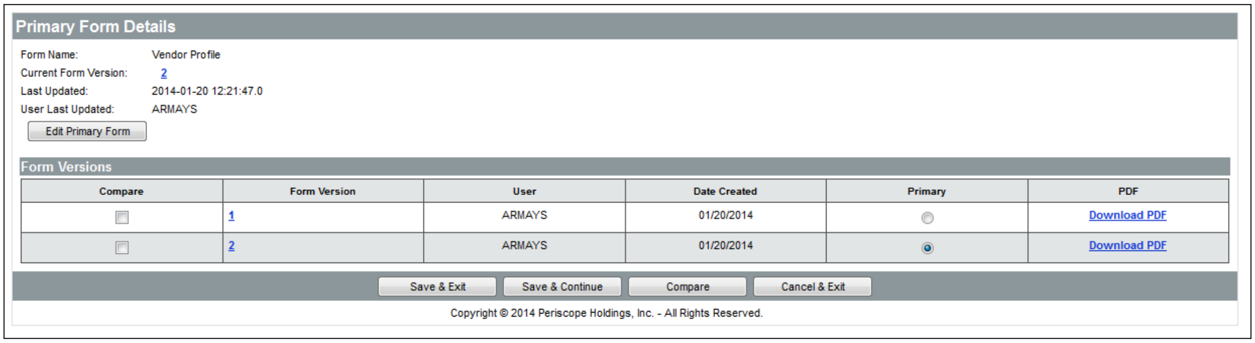
How Do I Edit the Primary Form

To edit forms, the recommended browsers are:

- Google Chrome (latest versions, both in the *stable* and *dev* channels)
- Safari 6
- Firefox (latest released version)
- Other supported browsers
    - Opera 12

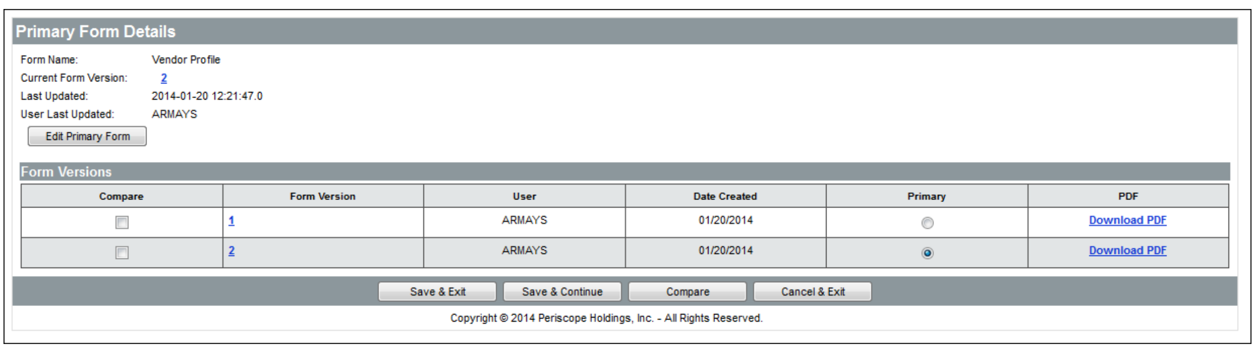
    - Internet Explorer 9 and 10
- Not supported
    - Internet Explorer 8 and earlier

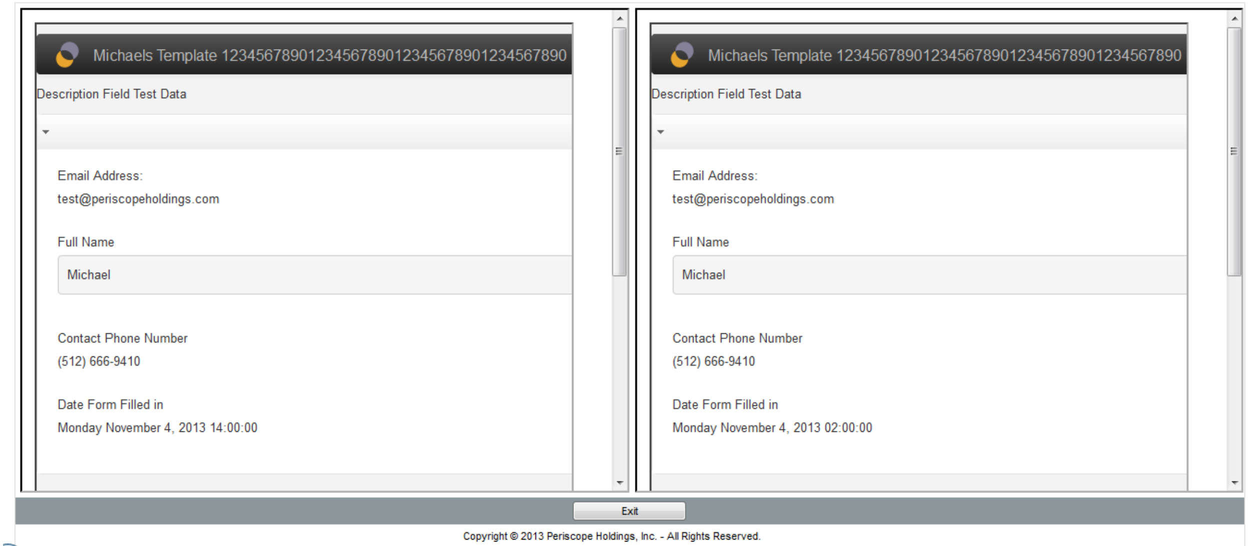
Select the name hyperlink and you'll be taken to the Primary Form Details view. To edit the primary form, select the Edit Primary Form button. The form is displayed and can be edited. When edits are completed, select the Save button then the Exit button. The user is returned to the Primary Form Details view displaying the different form versions. The edited version will be identified as the primary form. Select the Cancel & Exit button to return to the Attachments view.



How Do I Compare Forms

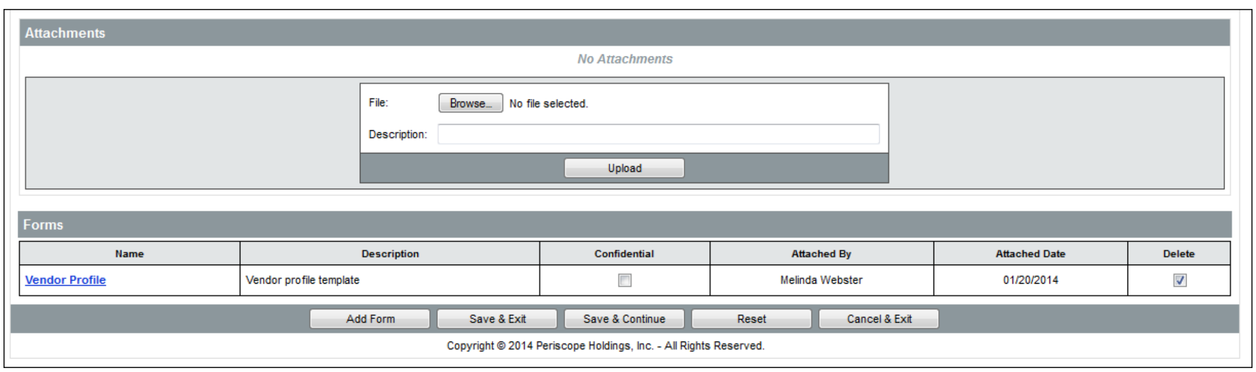
When there is more than one version of the form, the user can compare two of the forms at a time. The comparison between two versions of the form is done from the Primary Form Detail view. Place a check mark in the compare checkbox of the two versions to compare then select the Compare button. The view will refresh with a side-by-side comparison of the two views. Repeat the process to compare additional versions.





How Do I Delete an Attached Form

Attached forms can be deleted by selecting the form(s) to be deleted and placing a check mark in the checkbox under the Delete column adjacent to the form name.

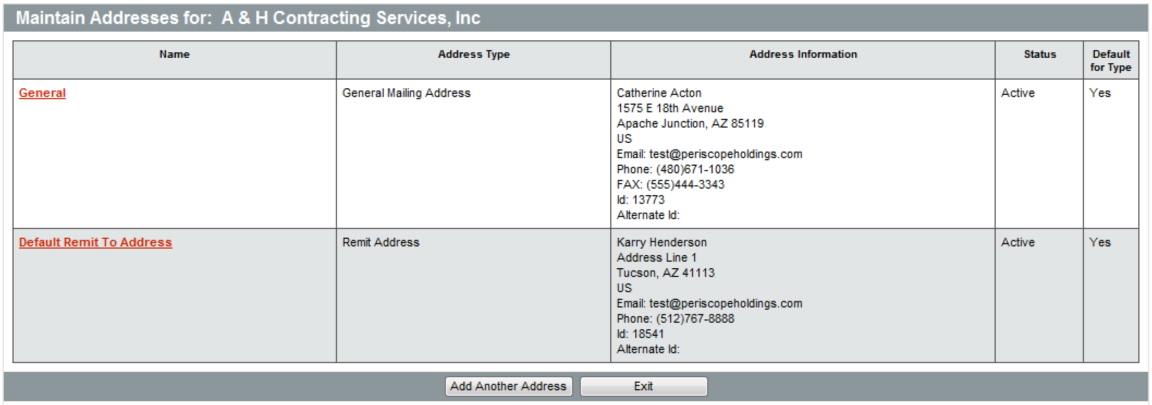


Action button to use:

- **Save & Continue** -- The selected form(s) are deleted.

Maintain Addresses

This option allows you to maintain, add, or remove the organization's various addresses that are registered with the agency. It is a good idea to periodically check your address information to make sure that the agency has the most current information for your company on file. This ensures they will always be able to get in touch with you for bid or purchase opportunities. Types of addresses may include, general mailing address, remit to address, bid mailing address, and purchase order mailing address.



Maintain Addresses for: A & H Contracting Services, Inc

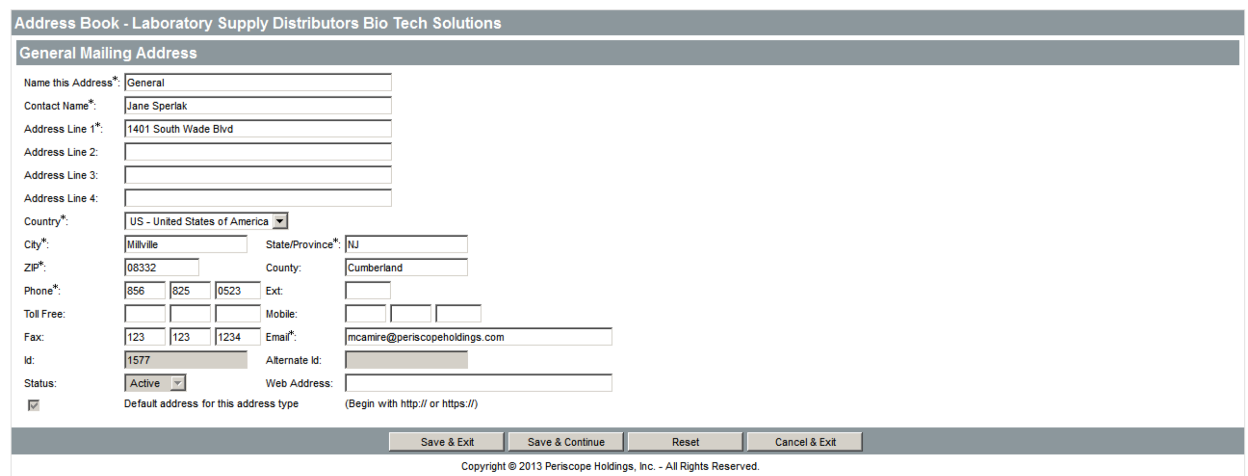
Name	Address Type	Address Information	Status	Default for Type
General	General Mailing Address	Catherine Acton 1575 E 18th Avenue Apache Junction, AZ 85119 US Email: test@periscopeholdings.com Phone: (480)671-1036 FAX: (555)444-3343 Id: 13773 Alternate Id:	Active	Yes
Default Remit To Address	Remit Address	Karry Henderson Address Line 1 Tucson, AZ 41113 US Email: test@periscopeholdings.com Phone: (512)767-8888 Id: 18541 Alternate Id:	Active	Yes

Add Another Address | Exit

Edit an Existing Address

To edit an existing address click on the **Name** link which is located to the left of the address type heading for the address you wish to modify. Once you have made any necessary changes, click **Save & Exit** or **Save & Continue** to submit the record. When an address needs to be added, click the **Add Another Address** button on the Maintain Addresses view. Complete the new address information and click **Save**. An asterisk identifies required fields. Fields without an asterisk are optional entry fields. Use the Tab key to advance to the next field, or click in the field with the left mouse button.

US Address:



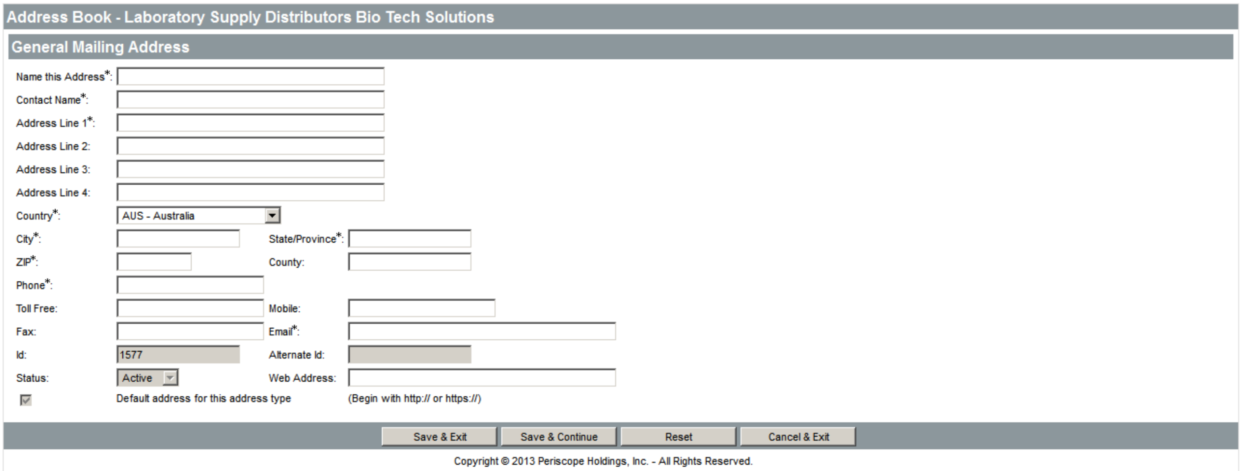
Address Book - Laboratory Supply Distributors Bio Tech Solutions

General Mailing Address

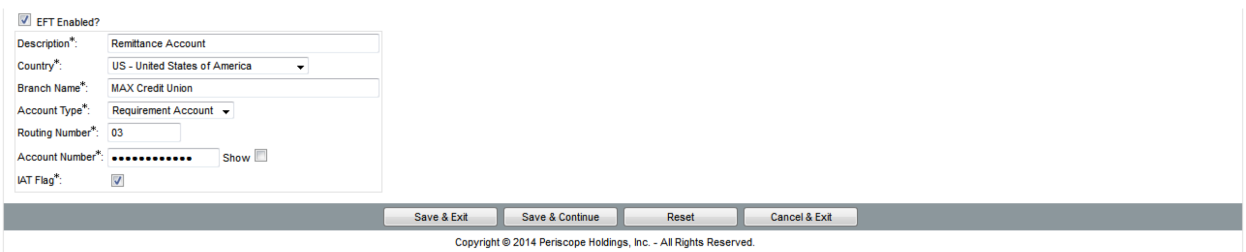
Name this Address*: General
Contact Name*: Jane Sperlak
Address Line 1*: 1401 South Wade Blvd
Address Line 2:
Address Line 3:
Address Line 4:
Country*: US - United States of America
City*: Millville | State/Province*: NJ
ZIP*: 08332 | County: Cumberland
Phone*: 856 825 0523 | Ext:
Toll Free: | Mobile:
Fax: 123 123 1234 | Email*: mcamire@periscopeholdings.com
Id: 1577 | Alternate Id:
Status: Active | Web Address: (Begin with http:// or https://)
Default address for this address type

Save & Exit | Save & Continue | Reset | Cancel & Exit

Foreign Address:



If the address type is Remit Address, the additional information for Electronic Funds Transfer (EFT) will be displayed.



(Asterisk = required)

Name this Address*	Required. Enter a descriptive name for the address (i.e. Corporate, Bids, POs, etc.).
Contact Name *	Required. Enter the primary contact person for this address.
Address Line 1*	Required. Enter the first line of the street address for the Seller.
Address Line 2	Enter the second line of the street address for the Seller.
Address Line 3	Enter the third line of the street address for the Seller.
Address Line 4	Enter the fourth line of the street address for the Seller.
Country*	Required. Enter the country for the Seller.
City*	Required. Enter the city in which the Seller address is located.
State/Province*	Required. Enter the state or province for the address.
ZIP*	Required. Enter the Zip or Zip +4 code for US Sellers or Postal Code for foreign Sellers in which the Seller address is located.
County*	Required. Enter the abbreviated county code in which the Seller address is located.
Phone*	Required. Enter the phone number associated with this address.
Ext	For US addresses, enter the extension associated with this address.

Toll Free	Enter the toll free number associated with this address.
Mobile	Enter the mobile (cell) phone number associated with this address.
Fax	Enter the fax number associated with this address.
Email*	Required. Enter the email address associated with this address.
Status	Required. Select the status for this address.
Web Address	Enter the Web address (URL) associated with this address.
Default Address	The “default” address designation, for this address. When checked, the address is default for this address type.
Remit Address Electronic Fund Transfer (EFT) Information NOTE: EFT information will only be displayed for Address Type of Remit Address.	
EFT (checkbox)	Required. When selected, the EFT information is enabled for entry/maintenance.
Description*	Required. User entered description of the EFT account.
Country*	Required. The country in which the account is active.
Branch Name*	Required. Name of the financial entity in which the account is maintained.
Account Type*	Required. The type of account in which funds are maintained. Options are, Business Checking Personal Checking Personal Savings Requirement Account
Routing Number*	Required. The routing number for the account used.
Account Number*	Required. The account number of the account used.
Show (checkbox)	When selected the Account Number entry is displayed unmasked. When unchecked the Account Number is displayed masked.
IAT Flag*	Required. Default is unchecked (false). When checked (true) IAT is applicable for the identified account.

Action buttons are as follows.

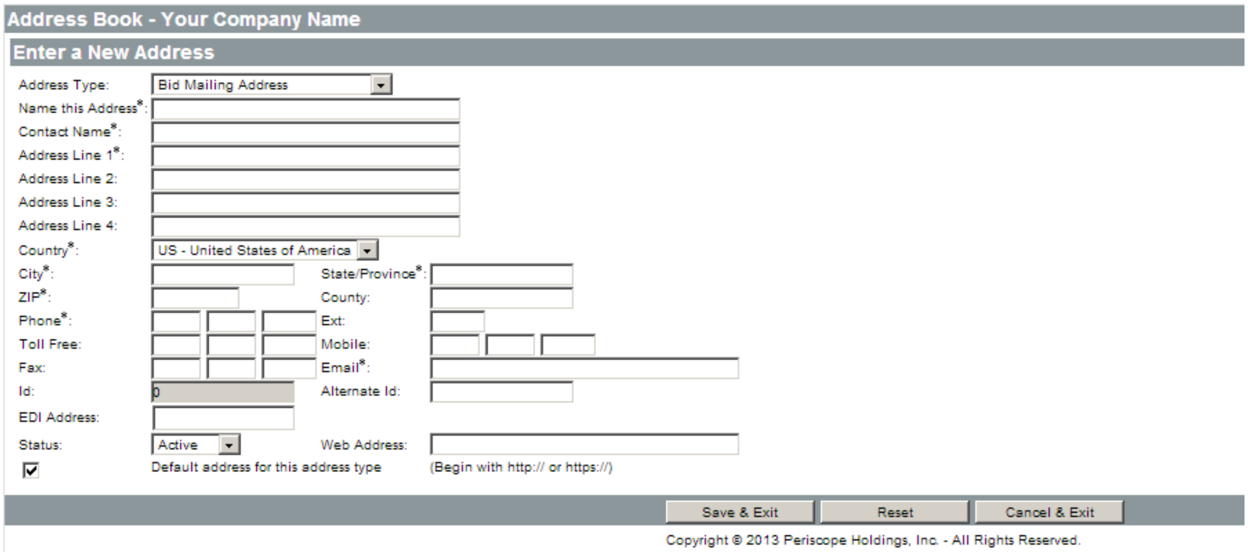
- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Maintain Addresses for view.
- **Save & Continue –** Saves the data entered and displays any error if the exist and remains on the same view.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit –** Does not save the responses entered and navigates the user back to the Maintain Addresses for view.

Add Vendor Address

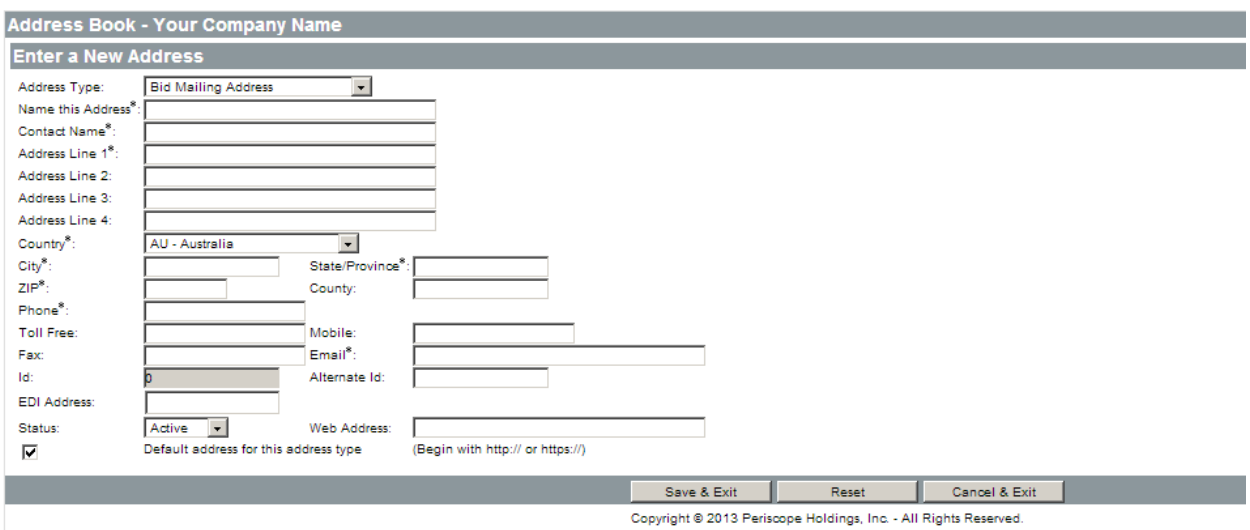
When a vendor address needs to be added, click the **Add Another Address** button on the Maintain Addresses window. There are four address types to choose from: Bid Mailing Address, Emergency Mailing Address, Purchase Order Mailing Address, and Remit Address. There can be as many addresses as the agency wants for each type, but each type will have one address as the default. For instance, there may be two PO Mailing Addresses, but when creating a PO only the default will appear on the purchase order. However, the other address can be selected at that time if desired.

Complete the new address information and click **Save**. An asterisk identifies required fields. Fields without an asterisk are optional entry fields. Use the Tab key to advance to the next field, or click in the field with the left mouse button.

US Address:



Foreign Address:



If the address type is Remit Address, the additional information for Electronic Funds Transfer (EFT) will be displayed.

(Asterisk = required)

Name this Address*	Required. Enter a descriptive name for the address (i.e. Corporate, Bids, POs, etc.).
Contact Name *	Required. Enter the primary contact person for this address.
Address Line 1*	Required. Enter the first line of the street address for the Seller.
Address Line 2	Enter the second line of the street address for the Seller.
Address Line 3	Enter the third line of the street address for the Seller.
Address Line 4	Enter the fourth line of the street address for the Seller.
Country*	Required. Enter the country for the Seller.
City*	Required. Enter the city in which the Seller address is located.
State/Province*	Required. Enter the state or province for the address.
ZIP*	Required. Enter the Zip or Zip +4 code for US Sellers or Postal Code for foreign Sellers in which the Seller address is located.
County*	Required. Enter the abbreviated county code in which the Seller address is located.
Phone*	Required. Enter the phone number associated with this address.
Ext	For US addresses, enter the extension associated with this address.
Toll Free	Enter the toll free number associated with this address.
Mobile	Enter the mobile (cell) phone number associated with this address.
Fax	Enter the fax number associated with this address.
Email*	Required. Enter the email address associated with this address.
Status	Required. Select the status for this address.
Web Address	Enter the Web address (URL) associated with this address.
Default Address	The “default” address designation, for this address. When checked, the address is default for this address type.
Remit Address Electronic Fund Transfer (EFT) Information NOTE: EFT information will only be displayed for Address Type of Remit Address.	
EFT (checkbox)	Required. When selected, the EFT information is enabled for entry/maintenance.
Description*	Required. User entered description of the EFT account.
Country*	Required. The country in which the account is active.
Branch Name*	Required. Name of the financial entity in which the account is maintained.
Account Type*	Required. The type of account in which funds are maintained. Options are, Business Checking Personal Checking Personal Savings

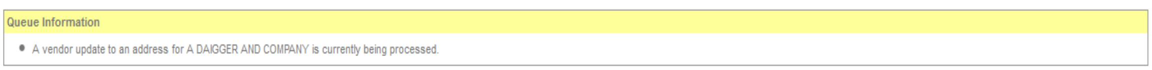
	Requirement Account
Routing Number*	Required. The routing number for the account used.
Account Number*	Required. The account number of the account used.
Show (checkbox)	When selected the Account Number entry is displayed unmasked. When unchecked the Account Number is displayed masked.
IAT Flag*	Required. Default is unchecked (false). When checked (true) IAT is applicable for the identified account.

Action buttons are as follows.

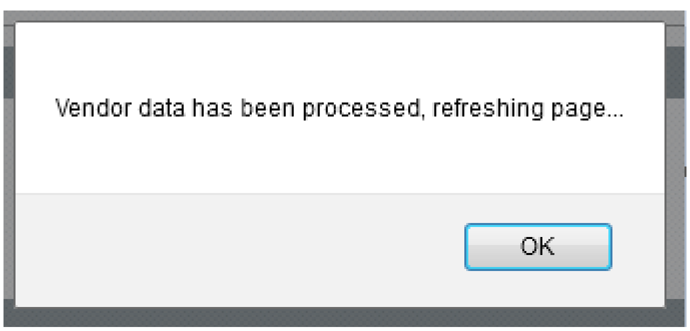
- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Maintain Addresses for view.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit –** Does not save the responses entered and navigates the user back to the Maintain Addresses for view.

Message Queue – Address Vendor Messages

When Message Queue is enabled and Address is updated (a new address added or an existing address edited) a validation message will be displayed to the administrator informing that an update request is in progress with a vendor interface. Additionally, the vendor is locked from further update (save buttons will be removed from view for which message is displayed) until a response is received and a message as follows will be displayed.

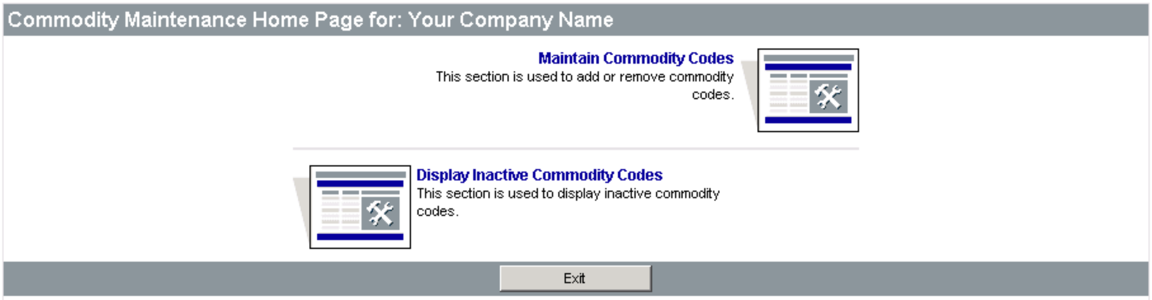


Once a response is received, the vendor is unlocked and message will be cleared and no longer display for that vendor. The following UI will be displayed, select OK.



Maintain Commodity Codes & Services

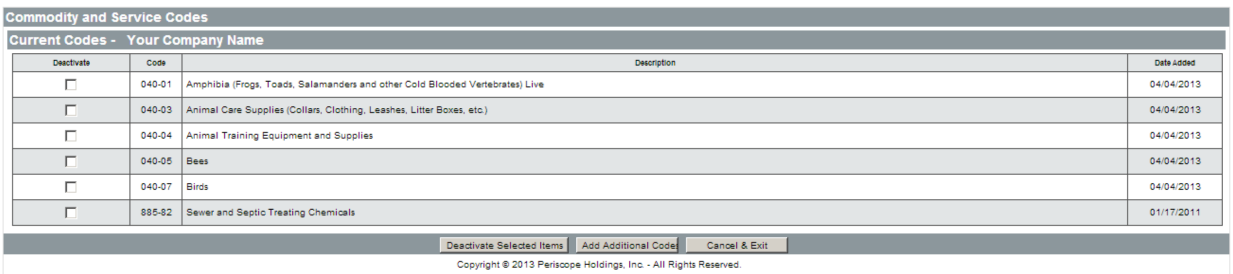
Select the **Maintain Commodity Codes and Services** to maintain, add, and remove item commodity codes associated with a vendor's record.



Commodity and Services Codes

To view existing commodity/service codes, to add additional commodity/services codes or to deactivate existing commodity/services codes, choose **Maintain Commodity Codes** icon.

View Existing Commodity/Service Codes:

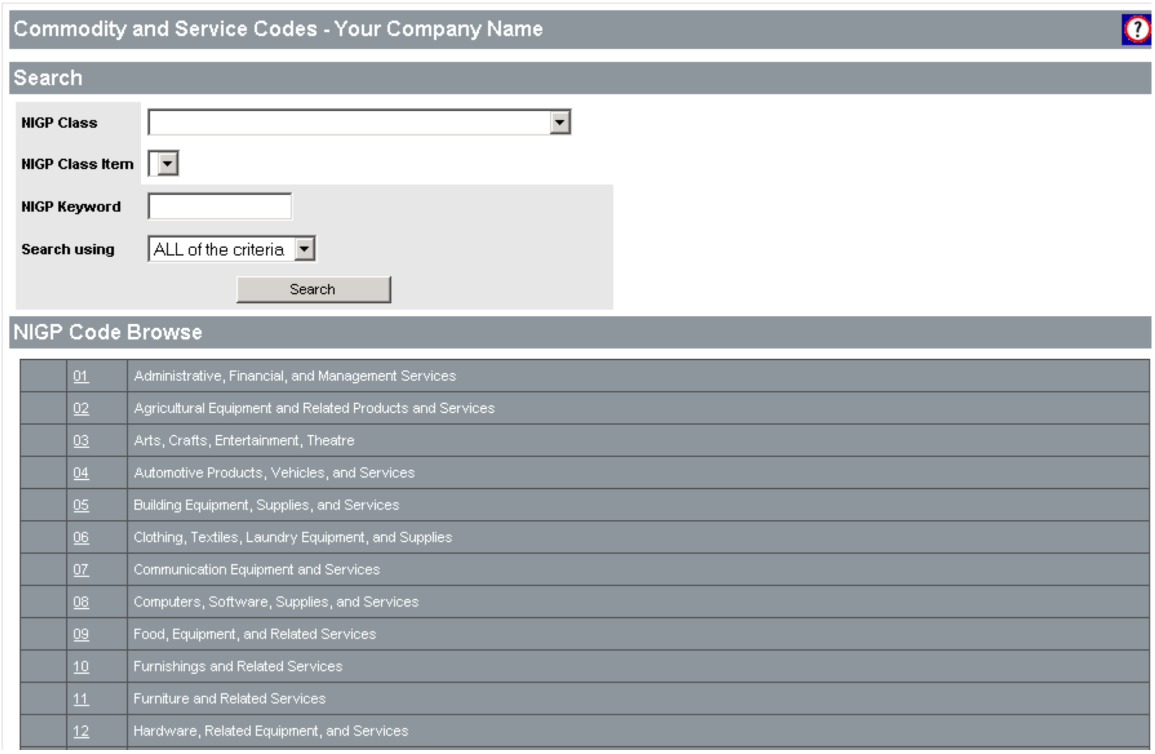


Deactivate Existing Commodity/Service Codes:

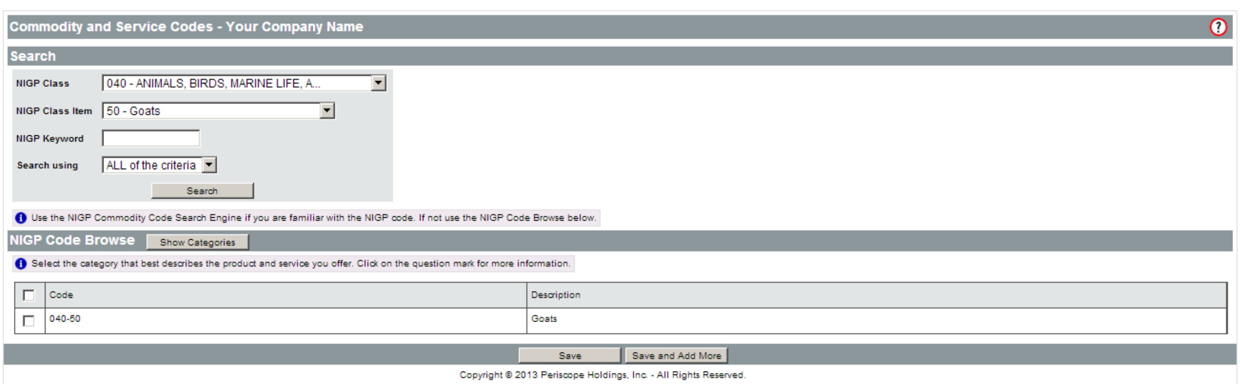
To deactivate commodity/services codes from your, place a check in the checkbox to the left of the code in the **Deactivate** column and click on the **Deactivate Selected Items** button. The view will refresh displaying only the activated commodity/service codes.

Add Additional Commodity/Service Codes

To add a new commodity/service codes to your profile, select the **Add Additional Codes** button. Then use the NIGP Code Brower feature to locate commodity codes you wish to add.



Using the NIGP Class dropdown menu, select the class you wish to add. To narrow the search results, you may select the class item from the NIGP Class Item dropdown menu then select the Search button. You also can search by NIGP keywords.



Place a check down the left side of the search results for each of the NIGP Class Items you wish to add then select the Save button if your finished or the Save and Add More if you need to add additional commodity/service codes.

View Inactive Commodity/Service Codes

Choose **Display Inactive Commodity Codes** to open a listing of inactive commodity codes.

Activate Deactivated Commodity/Service Codes

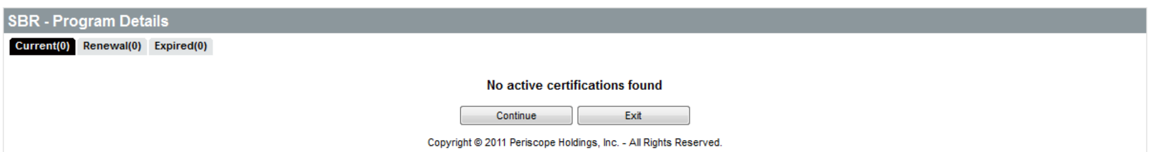
To **activate** previously deactivated commodity/services codes from your profile, place a check in the checkbox to the left of the NIGP Class Item code in the **Activate** column and click the **Save & Exit** or **Save & Continue** button.

Maintain Program Qualification

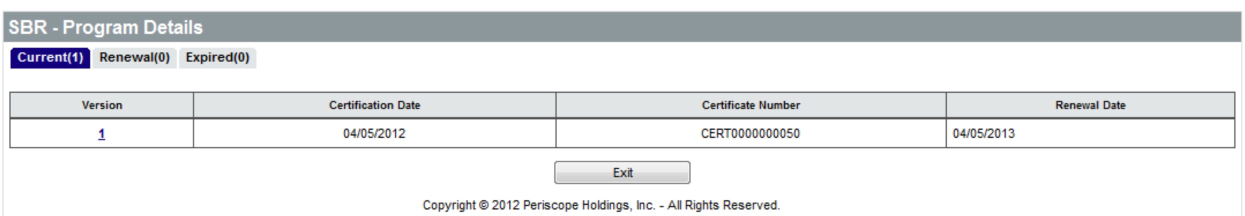
The **Maintain Organization Information** page has been modified to provide a new option 'Maintain Program Qualification' that will be used to group all the pages for the Program Qualification process after the initial program qualification determination.

Program Details

When "Maintain Program Qualification' is selected the **Program Details** page is displayed.



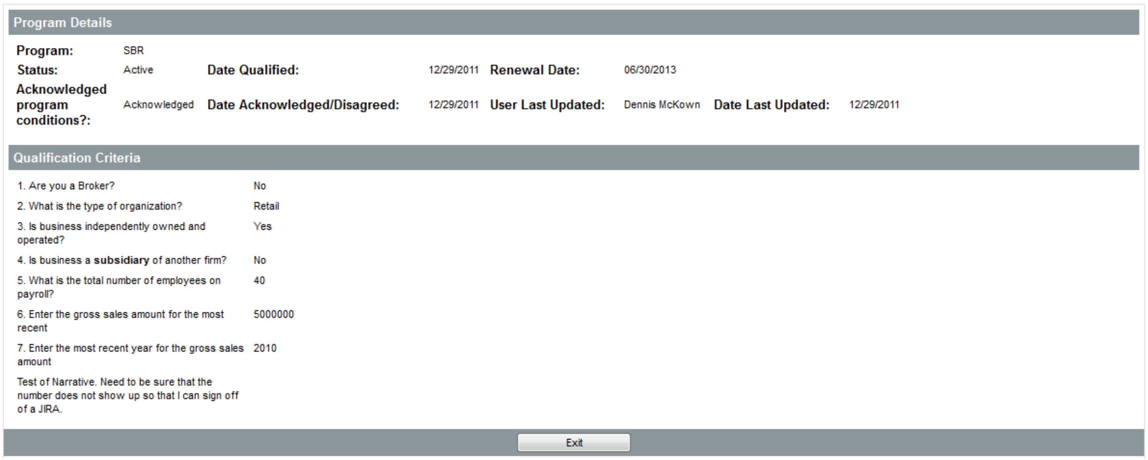
OR



This page is used to display the most recent vendor program information, Current, Renewal, and Expired program qualification attempts. The page will provide an option for the user to either continue or skipping the qualification process.

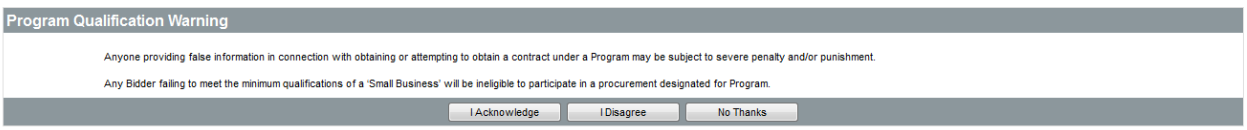
Qualification Criteria

When a displayed Version link is selected on the **Program Details** page, the **Program Details** page is displayed with the "Qualification Criteria" for the latest attempt to qualify.



Program Qualification Warning

This page is displayed when the Continue button is clicked on the Program Details page.

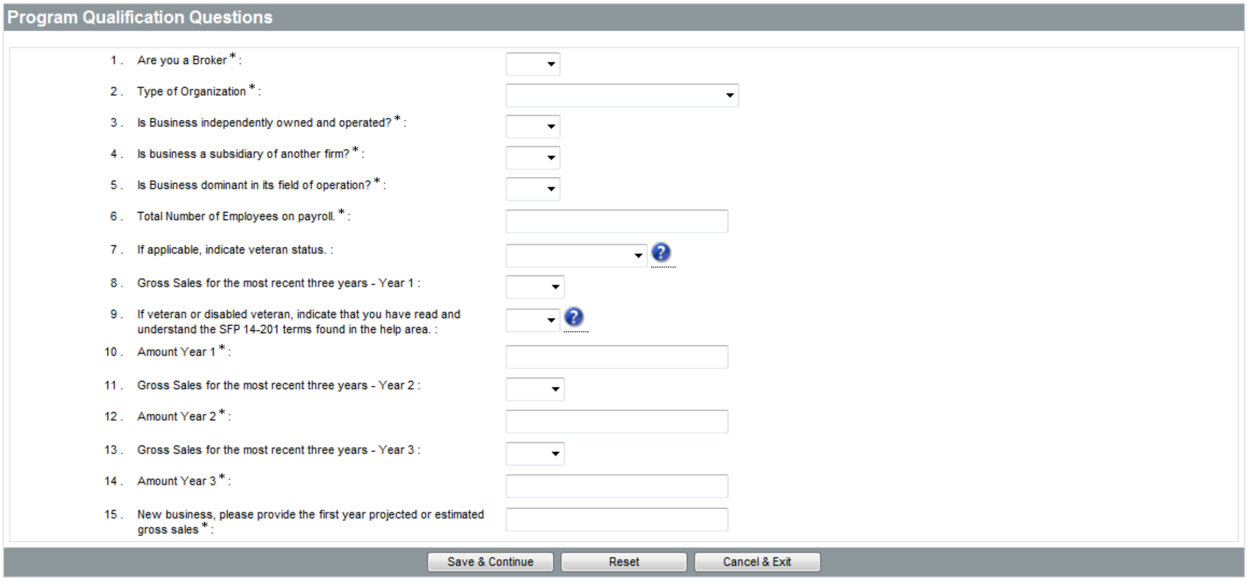


This page is used to inform the user about the consequences of providing false information during the qualification process. This page also displays the consequences of failure to meet minimum qualifications for the program. The text displayed in relation to providing false information and its consequences are customizable through the Maintain Standard Text page under Internal Administrator – Agency Settings.

The page provides an option for the user to either continue with the qualification process by clicking the 'I Acknowledge' button or skipping the qualification process by clicking the 'I Disagree' or 'No Thanks' button.

Program Qualification Questions

This page can be accessed only by clicking the 'I Acknowledge' button on the 'Program Qualification Warning' page.



This page is used to list all the program qualification criteria questions and capture the response for those questions. The page will display the most recent responses to their corresponding program qualification criteria questions and allow the program coordinator / program auditor to edit any response before submission.

This page in addition to capturing the response to the program qualification criteria questions, evaluates the responses by executing a customized program rule to determine whether the vendor qualifies for the Program. Any errors that arise due to validation on the response will be displayed as popup messages.

NOTE: The '*' at the end of a question indicates that entry is required for that field.

NOTE: The '?' at the end of a question, when the mouse is moved over it the help text for that question will be displayed.

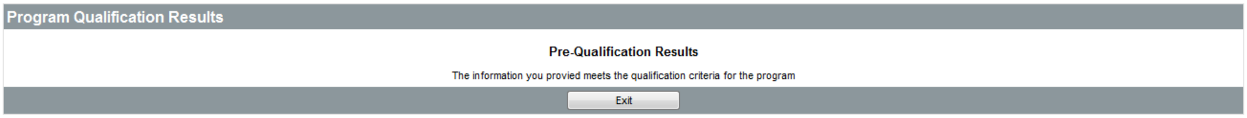
The program qualification criteria questions text, question help, the control for capturing the response and pre-defined response values is customized through the Maintain Pre-Qualification Criteria page.

Action buttons are as follows.

- **Save & Continue** – Saves the responses and evaluates the responses by executing a customized program rule to determine whether the vendor qualifies for the Program.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit** – Does not save the responses entered and navigates the user back to the calling page Maintain Organization Information page.

Program Qualification Results

This page can be accessed only by clicking the 'Save & Continue' button on the 'Program Qualification Questions' page.



This page is used to display the result of the program qualification criteria evaluation based on the responses provided by the vendor, responses meet the criteria rule or responses do not meet the criteria rule for this program. The text that is displayed for passed or failed results on this page is customizable through the Maintain Standard Text functionality. When Exit is selected (clicked on), the action navigates the user back to the calling page Maintain Organization Information page.

Maintain Vendor Subscription

This section is used to maintain subscription level and payment mechanism for using the BuySpeed system. When enabled by the System Internal Administrator, the Seller Administrator can:

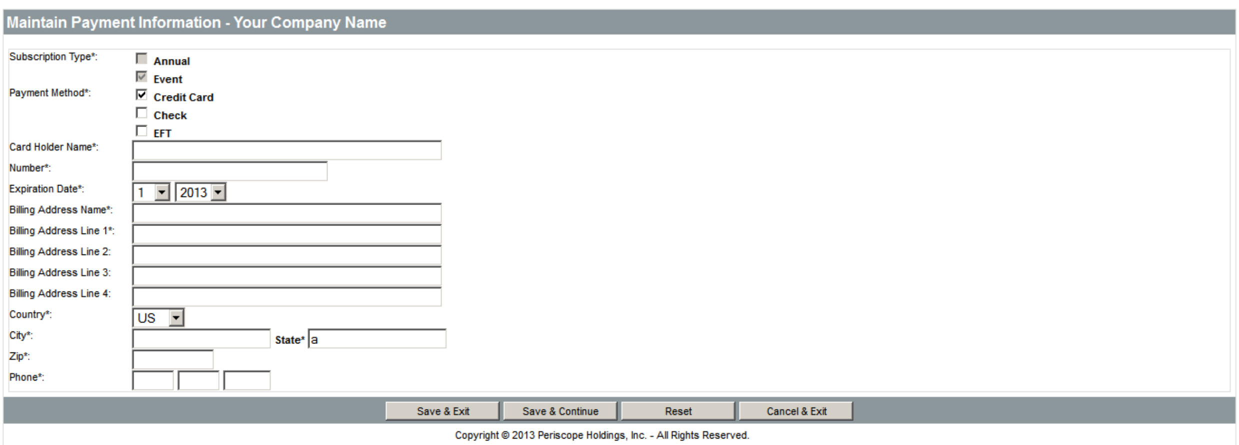
- Select the subscription level.
- Select the payment method.
- Provide payment information.

Maintain Payment Information

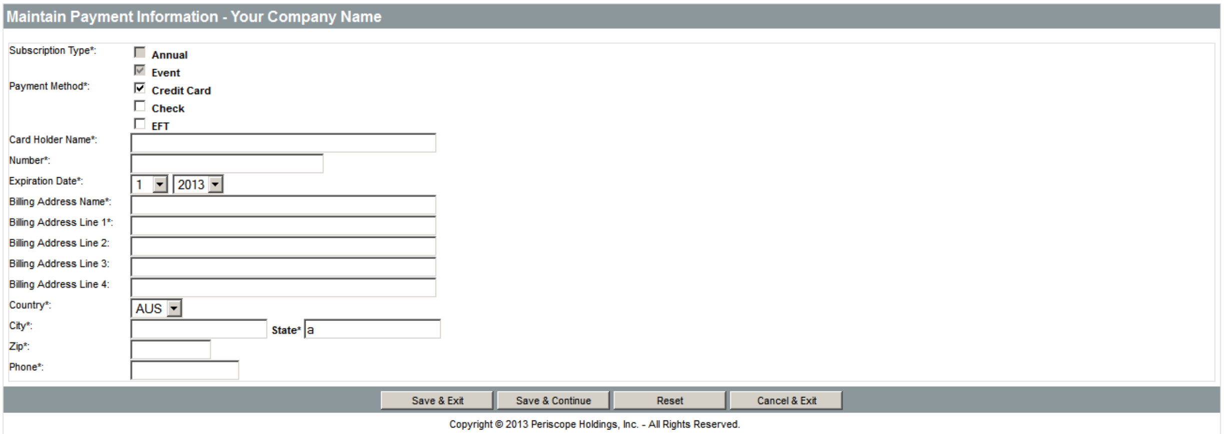
This section is used to maintain the payment information for the Seller. Payment methods allowed are credit card, check or electronic funds transfer (EFT).

Payment by Credit Card

US Address:



Foreign Address:



(Asterisk = required)

Subscription Type*	Required. Select the subscription type you wish to subscribe to, Annual or Event.
Payment Method*	Required. Credit Card is checked.
Card Holder Name*	Required. Enter the name as it appears on the credit card.
Number*	Required. Enter the credit number as it appears on the credit card.
Expiration Date*	Required. Using the dropdown menu, select the month and year as it appears on the credit card.
Billing Address Name*	Required. Enter the billing address name for the credit card being used.
Billing Address Line 1*	Required. Enter the billing address line 1 for the credit card being used.
Billing Address Line 2	Enter the billing address line 2 for the credit card being used.
Billing Address Line 3	Enter the billing address line 1 for the credit card being used.
Billing Address Line 4	Enter the billing address line 1 for the credit card being used.
Country*	Required. Select the country from the dropdown list for the billing address of the credit card being used.
City*	Required. Enter the city for the billing address of the credit card being used.
State*	Required. Enter the state or province for the billing address of the credit card being used.
Zip*	Required. Enter the Zip or Zip +4 code for US or Postal Code for foreign billing address of the credit card being used.
Phone*	Required. Enter the phone number for the contact person for the credit card being used.

Action buttons are as follows.

- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Subscription Level Home Page for
- **Save & Continue** – Saves the data entered and displays any error if the exist.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit** – Does not save the responses entered and navigates the user back to the Subscription Level Home Page for.

Payment by Check

(Asterisk = required)

Subscription Type*	Required. Select the subscription type you wish to subscribe to, Annual or Event.
Payment Method*	Required. Check is selected (checked).
Bank Routing Number*	Required. Enter the 9 digit routing number as it appears on your check.
Checking Account Number*	Required. Enter the checking account number as it appears on your check.
Check Number*	Required. Enter the check number you wish to use for this payment.
Name on Account*	Required. Enter the name for the checking account being used.

Action buttons are as follows.

- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Subscription Level Home Page for
- **Save & Continue** – Saves the data entered and displays any error if the exist.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit** – Does not save the responses entered and navigates the user back to the Subscription Level Home Page for.

Payment by Electronic Funds Transfer (EFT)

(Asterisk = required)

Subscription Type*	Required. Select the subscription type you wish to subscribe to, Annual or Event.
Payment Method*	Required. EFT is selected (checked).
Bank Routing Number*	Required. Enter the 9 digit routing number of the bank from which the transfer is being made from.
Bank Name*	Required. Enter the name of the bank from which the transfer is being made from.
Account Number*	Required. Enter the account number of the bank from which the transfer is

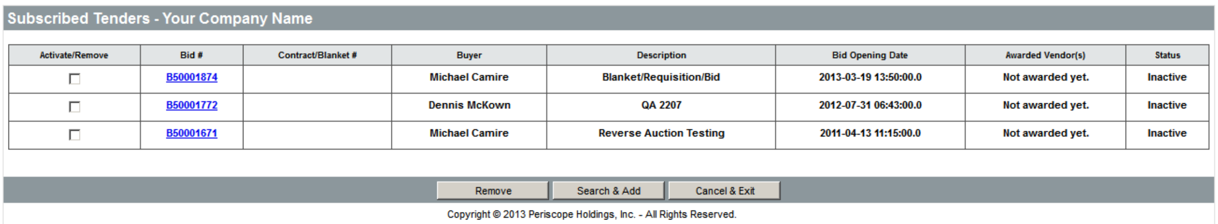
	being made from.
Name on Account*	Required. Enter the name on the account from which the transfer is being made from.

Action buttons are as follows.

- **Save & Exit** -- Saves the data entered and displays any error if the exist. If no errors, the user is navigated back to the Subscription Level Home Page for
- **Save & Continue** – Saves the data entered and displays any error if the exist.
- **Reset** - Refreshes the page clearing the values entered without saving the responses.
- **Cancel & Exit** – Does not save the responses entered and navigates the user back to the Subscription Level Home Page for.

Maintain Event Access

This section is used to maintain event tender access.


Subscribed Tenders - Your Company Name

Activate/Remove	Bid #	Contract/Blanket #	Buyer	Description	Bid Opening Date	Awarded Vendor(s)	Status
☐	B50001874		Michael Camire	Blanket/Requisition/Bid	2013-03-19 13:50:00.0	Not awarded yet.	Inactive
☐	B50001772		Dennis McKown	QA 2207	2012-07-31 06:43:00.0	Not awarded yet.	Inactive
☐	B50001671		Michael Camire	Reverse Auction Testing	2011-04-13 11:15:00.0	Not awarded yet.	Inactive

Remove | Search & Add | Cancel & Exit

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(Asterisk = required)

Activate/Remove	This control is used to enable access to the seller on the selected tender. Selecting this control and clicking the 'Save' button will add this vendor to the selected tenders bidders tab. Selecting this control and clicking the 'Remove' button will remove this vendor request from the vendor profile.
Bid #	The bid number which the seller wishes to be selected for and appear on the bidder's tab.
Contract/Blanket #	The resulting awarded purchase order number(s) for this tender.
Buyer	The Purchaser who is responsible for this tender.
Description	The description that identifies the purpose of the tender.
Bid Opening Date	The opening date and time of the tender.
Awarded Vendor(s)	The seller(s) who received the award for this tender.
Status	The status of the tender, active or inactive. Active indicates the tender has been approved by the Vendor Administrator and inactive has not.

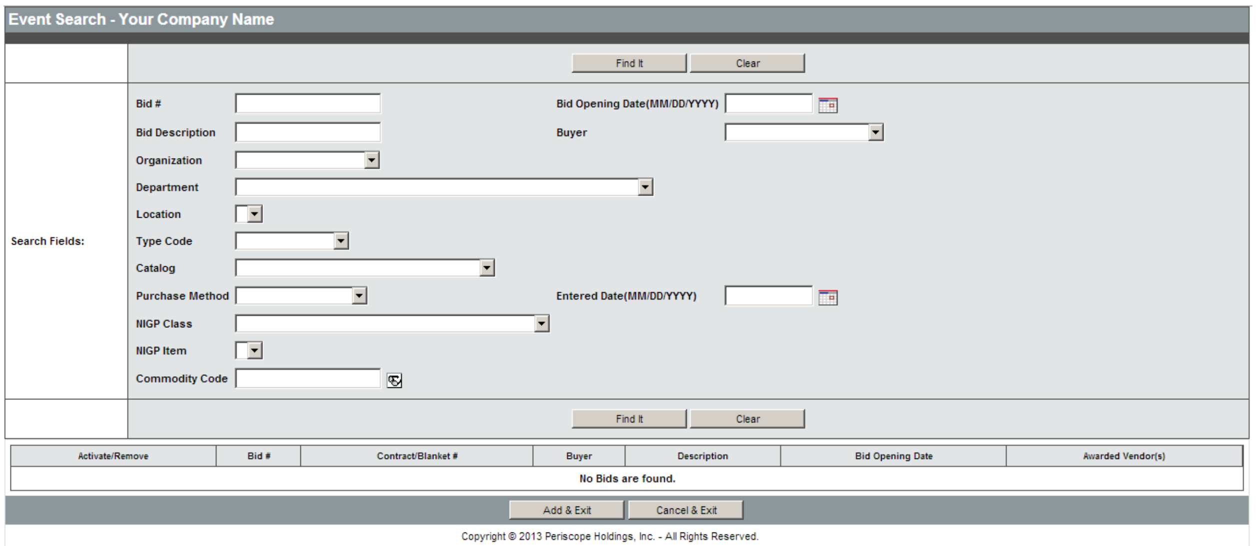
Action buttons are as follows.

- **Remove** – Selecting this option will remove the sellers request for access to this tender (bid).
- **Search & Add** – Selecting this option will navigate you to the Event Search view which allows the seller administrator to select and add tender(s) access requests to their vendor profile. Behavior for this form is comprised of searching for tenders, selecting the items, and clicking the 'Add & Exit' button. This action will return you to the 'Subscribed Tenders' form. Any tenders selected on this view don't result in automatic access to the tender for the seller. Allowing access to the tender is reserved for the Vendor Administrator. Saves the data entered and displays any error if the exist.

- **Cancel & Exit** - Selecting this control will cancel any unexecuted selections and navigate the user up one level to the 'Subscription Level Home Page' form.

Search & Add Tenders

To subscribe to tenders, select the Search & Add button on the Subscribed Tenders view. The user will be navigated to the Event Search view for the seller. Only tenders that have a type code of Closed Bid will appear in the search results.



(Asterisk = required)

Bid #	Enter the bid (tender) number you wish to search for.
Bid Opening Date	Enter the bid opening date of the tender you wish to search for. The date must be entered as MM/DD/CCYY. The user can also select the calendar icon next to the field and click on the date from the pop-up calendar.
Bid Description	Enter the description of the tender you wish to search for.
Buyer	Select the purchaser from the dropdown list of the tender you wish to search for.
Organization	Select the organization from the dropdown list of the tender you wish to search for.
Department	Select the Department from the dropdown list of the tender you wish to search for. You may need to first select the organization for the list of departments to display.
Location	Select the Location from the dropdown list of the tender you wish to search for. You may need to first select the organization and/or department for the list of departments to display.
Type Code	Select the Type Code from the dropdown list of the tender you wish to search for.
Catalog	Select the Catalog from the dropdown list of the tender you wish to search for.
Purchase Method	Select the Purchase Method from the dropdown list of the tender you wish to search for.
Entered Date	Enter the date the tender was created for the tender you wish to search for. The date must be entered as MM/DD/CCYY. The user can also select the

	calendar icon next to the field and click on the date from the pop-up calendar.
NIGP Class	Select the NIGP class from the dropdown list of the tender you wish to search for.
NIGP Item	Select the NIGP Item from the dropdown list of the tender you wish to search for. For the NIGP Item list to display, the user must first select the NIGP Class.
Commodity Code	Enter the commodity code or use the lookup icon to search for commodity numbers.

Action buttons are as follows.

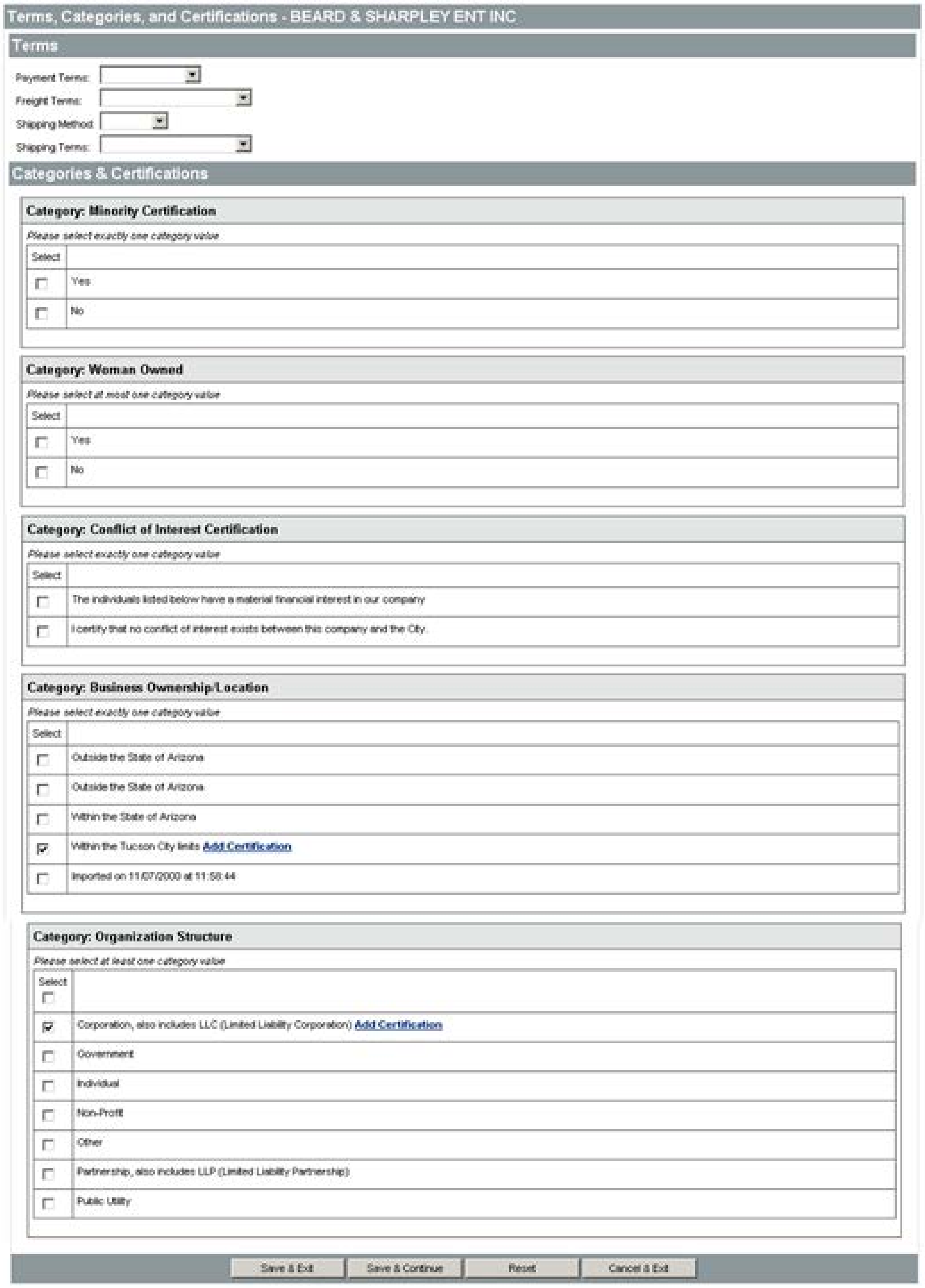
- **Find It** – Searches the database and returns the results base on the search fields selected.
- **Clear** – Clears the data entered or selected in the search fields.
- **Add & Exit** – Adds the selected results where the Activate/Remove box is checked to the Subscribed Tenders view for Vendor Administrator approval.
- **Cancel & Exit** – Closes the Event Search view.

Maintain Regions

This section is no longer in use.

Maintain Terms and Categories

This option allows you to maintain, add, and remove payment and delivery terms, categories, and certifications. To maintain terms and categories either click the drop down for the field and select a new option, or click the check box or radio button to the left of the entry and click **Save & Exit** or **Save & Continue**. Additionally, the ability to add and maintain certifications is provided.

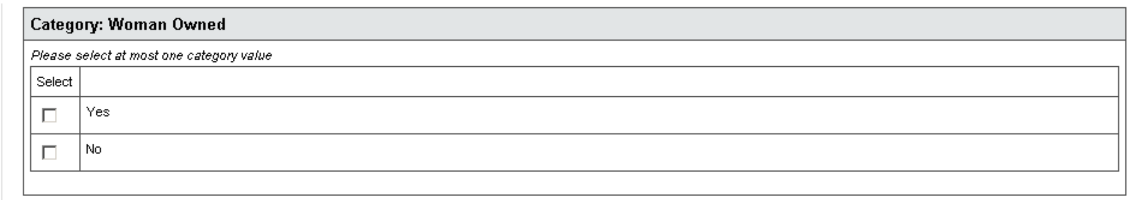


Terms

Vendor terms can be set in this section for **Payment, Freight, Shipping Method,** and **Shipping Terms**. This can make the information easily accessible while completing a purchasing document. However, these terms do not have to be used. If using these default terms is desired, it is simple to do. If they are not desired, it is very easy to choose different terms, on a PO, for instance.

Categories & Certifications

Categories are often used to identify businesses, for instance a minority owned or small business, so that they will be searchable using this criteria. BUYSPEED can also help keep track of the supporting documents for categories, called **Certifications**.

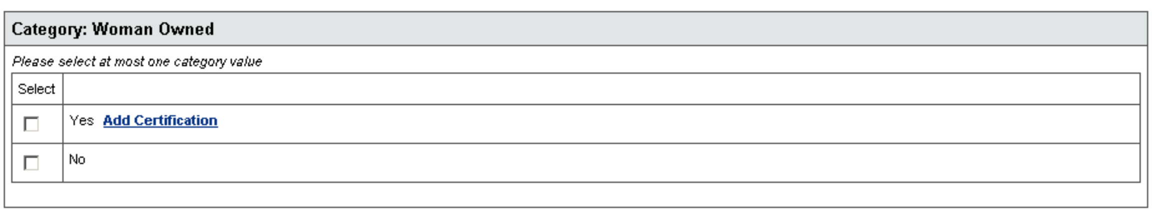


Categories are setup in the Maintain Vendor Categories section in the Vendor Administrator Homepage and will automatically show in the Vendor's profile. However, unless the category is marked as "required", you do not need to select from the supplied answers (like a category called "Women Owned" may have the selections "Yes" and "No" listed with a check box next to each. If this is NOT a required category, you do not need to supply a check mark.)

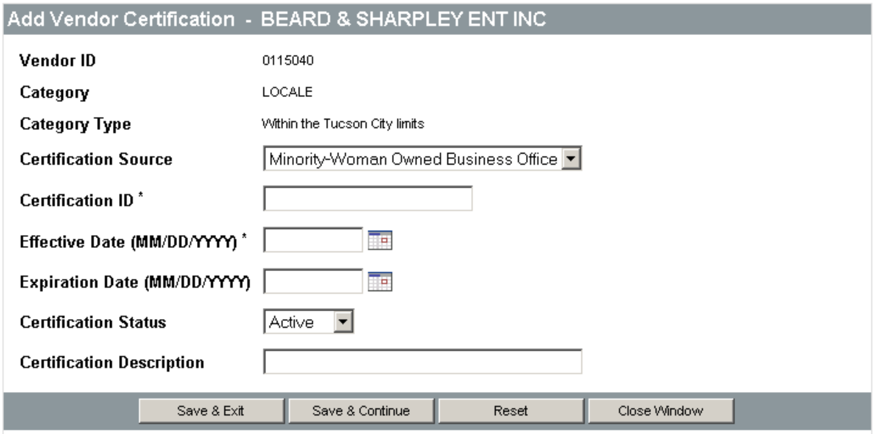
To add a category to a vendor's profile, check the appropriate box and scroll to the bottom of the page. **Save & Exit** will take the user back to the Vendor Maintenance page, **Save & Continue** will save the changes and stay on the same page for further modifications, for instance, adding certification information. **Reset** will clear all choices, **Cancel & Exit** will not save changes and the user will be returned to the vendor maintenance page.

About Certifications

Certifications are agency-defined ways to verify and document vendor's compliance with categories. They may include: licensing, insurance policy numbers, or any proof of compliance as determined by your agency. Certification can be added once a category is set up in the Maintain Vendor Categories section in the Vendor Administrator Homepage. If there is a certification available for a category, it will be available to add once a category has been assigned and the changes have been saved.



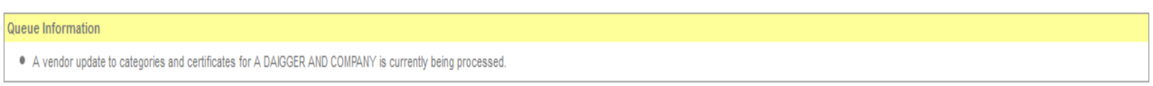
- **Check the box or boxes of the categories to be added.**
- **Save & Continue (at the bottom of the page.)**
- **Return to the category and click Add Certification.**



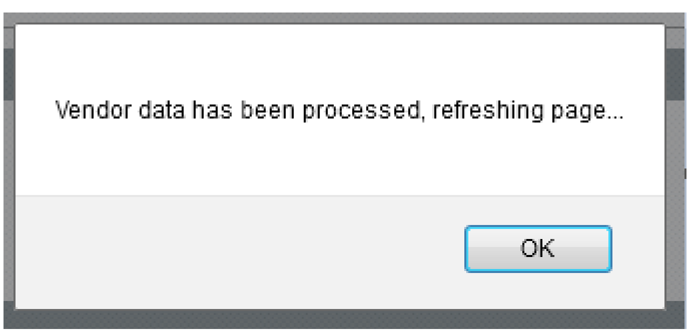
- Choose the proper certification source from the pull-down.
- Create a Certification ID (Up to 25 characters)
- Choose an effective date - required.
- Choose an expiration date.
- Set the Certification Status. This refers to whether this status is active in BUYSPEED, and affects whether this certification may be seen or modified by the vendor.
- Enter a description if desired.
- Click Save & Exit.

Message Queue – Categories & Certifications Vendor Messages

When Message Queue is enabled and Categories & Certifications is updated a validation message will be displayed to the administrator informing that an update request is in progress with a vendor interface. Additionally, the vendor is locked from further update (save buttons will be removed from view for which message is displayed) until a response is received and a message as follows will be displayed.



Once a response is received, the vendor is unlocked and message will be cleared and no longer display for that vendor. The following UI will be displayed, select OK.

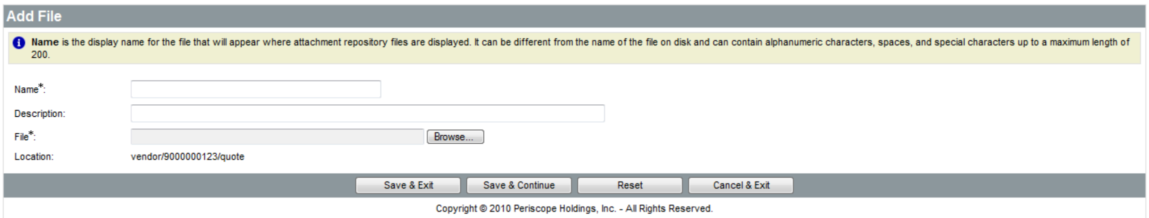


Maintain Quote Attachment Repository

In BUYSPEED, you can maintain attachments for quotes in the repository

Add a File to the Repository

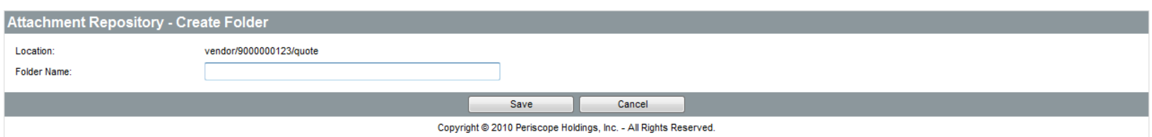
Click the Add File link.



Add a name, a brief description and browse to the file you wish to attach and select Save & Exit. File will now be available for attachment.

Create a Folder in the Repository

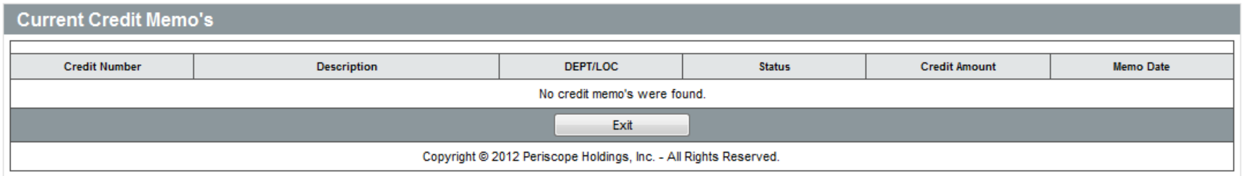
Click Create Folder link, add the name of the folder, and select Save.



The new folder will now be available for file storage.

Credit Memo List

In BUYSPEED, as a Seller Administrator you can view your list of Current Credit Memos. To view the list, select **Credit Memo List** and the view will be refreshed with the “Current Credit Memos” view.



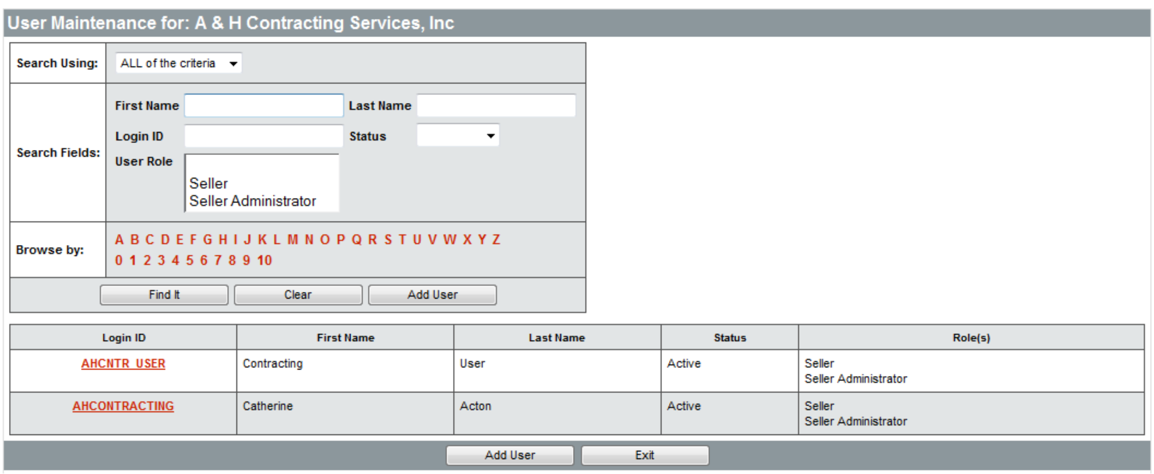
Credit Number	The credit memo identification number
Description	The description of the credit memo.
Dept/Loc	The department and location for which the credit memo was issued for.
Status	The status of the credit memo.
Credit Amount	The amount of the credit memo.
Memo Date	The date which the credit memo was created.

Action buttons are as follows.

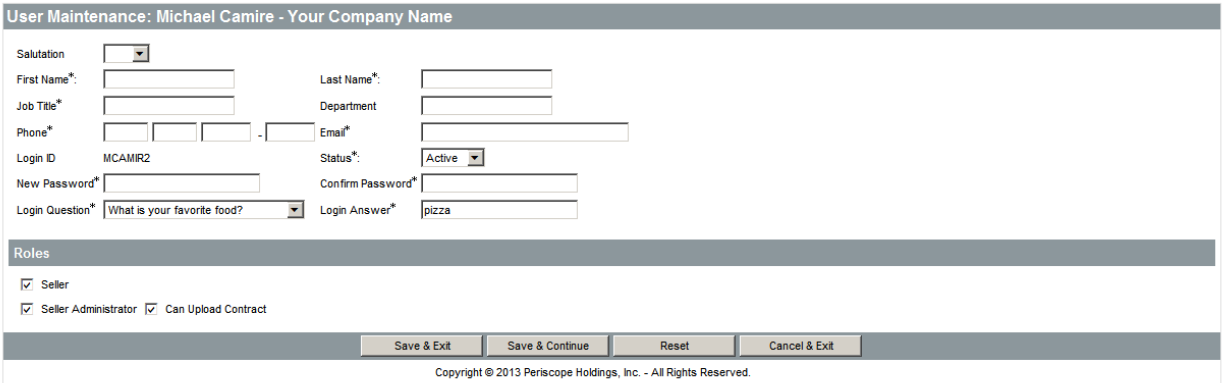
- **Exit** – Exits the view and returns the user to the Maintain Organization Information for view.

Maintain Users on this Account

In order to make changes to a user's profile for an account, click on the **User Maintenance** command, located near the top of the BuySpeed menu bar. You will see a list of users for your organization and the roles they play within the application.



Click on the user's **Login ID** to access the edit page that allows you to update the user information. You can use this page to reset passwords, change roles, or update departments or job titles.



Asterisked (*) fields are required

Salutation	Dr., Mr., Mrs. or Ms.
First Name*	Required. Enter the user’s first name.
Last Name*	Required. Enter the user’s last name.
Job Title*	Required. Enter the user’s job title,
Department	Enter the user’s department name.
Phone*	Required. Enter the user’s primary daytime phone number.
Email*	Required. Enter the user’s primary email address.
Login ID*	Required. Suggested: 6-8 alpha/numeric characters. Once created, it **CANNOT** be changed!
Status*	Required. Select from the dropdown menu to make Active, Deleted, Inactive or Pending.
New Password*	Required. Enter the user’s initial login password (in most cases, user will be required to reset this password upon first login.)
Confirm Password*	Required. Re-enter the initial login password.
Login Question	A security question for user if password is forgotten. A correct answer will enable a password reset. In most cases the user will set this once they log in.
Login Answer	The answer for the security question.
Seller	When selected the “Seller” is a vendor BUYSPEED user who can review and respond to bids, informal quotes, approve changes, accept purchase orders.
Seller Administrator	The initial registrant in BUYSPEED is automatically assigned as a “Seller Administrator”. The Seller Administrator can perform many of the same functions in their BUYSPEED account that an agency Vendor Administrator can. The Seller Administrator can also designate any other BUYSPEED users in their organization to be a Seller Administrator or a Seller or both.
Can Upload Contract	When selected, the user will be able to upload contracts into BuySpeed.

Action buttons are as follows.

- **Save & Exit** – Adds the user and navigates the user to the User Maintenance for view.
- Reset – Clears the data entered without saving and displays the original data.
- Cancel & Exit – Exits the view without saving the data entered and navigates the user to the User Maintenance for view.

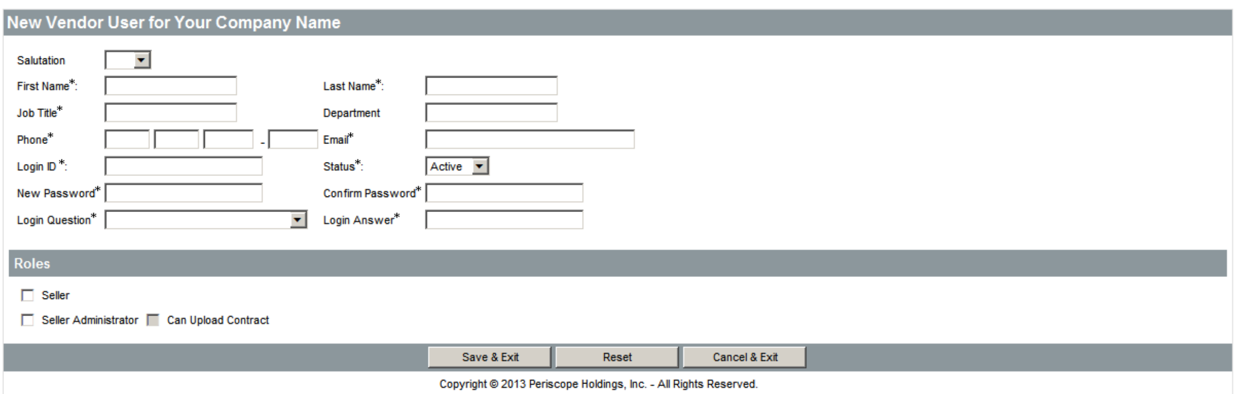
Suspend User Accounts

As an administrator, you are able to change the status of a user account, from “Active” to another value (i.e., “Inactive”) to kick the user out of the system and prevent him or her from logging back into the system so that you can take preventative action if/when fraudulent activity is suspected.

- When the user attempts to log back into the system, he or she will not be able to access the system using previous credentials or by going through the reset password logic if user account has not been reset to active.
- When user attempts to log back into the system, he or she will not be able to utilize forgot password functionality if user account has not been reset to active.
- When user attempts to log back into the system, system must display error that his or her account has been suspended if user account has not be reset to active.
- When admin changes status of user account back to active, user will be able to access the system using previous credentials but be forced to change their password.

Add Users on This Account

When a vendor has been added to BuySpeed, they will have one user who has been set up to maintain the account. More can be added by selecting **Add User** from the vendor maintenance page. Fill in the required information and choose the user’s role: Seller or Seller Administrator.



Asterisked (*) fields are required

Salutation	Dr., Mr., Mrs. or Ms.
First Name*	Required. Enter the user’s first name.
Last Name*	Required. Enter the user’s last name.
Job Title*	Required. Enter the user’s job title,
Department	Enter the user’s department name.
Phone*	Required. Enter the user’s primary daytime phone number.
Email*	Required. Enter the user’s primary email address.
Login ID*	Required. Suggested: 6-8 alpha/numeric characters. Once created, it **CANNOT** be changed!
Status*	Required. Select from the dropdown menu to make Active, Deleted, Inactive or Pending.
New Password*	Required. Enter the user’s initial login password (in most cases, user will be required to reset this password upon first login.)
Confirm Password*	Required. Re-enter the initial login password.
Login Question	A security question for user if password is forgotten. A correct answer will enable a password reset. In most cases the user will set this once they log in.

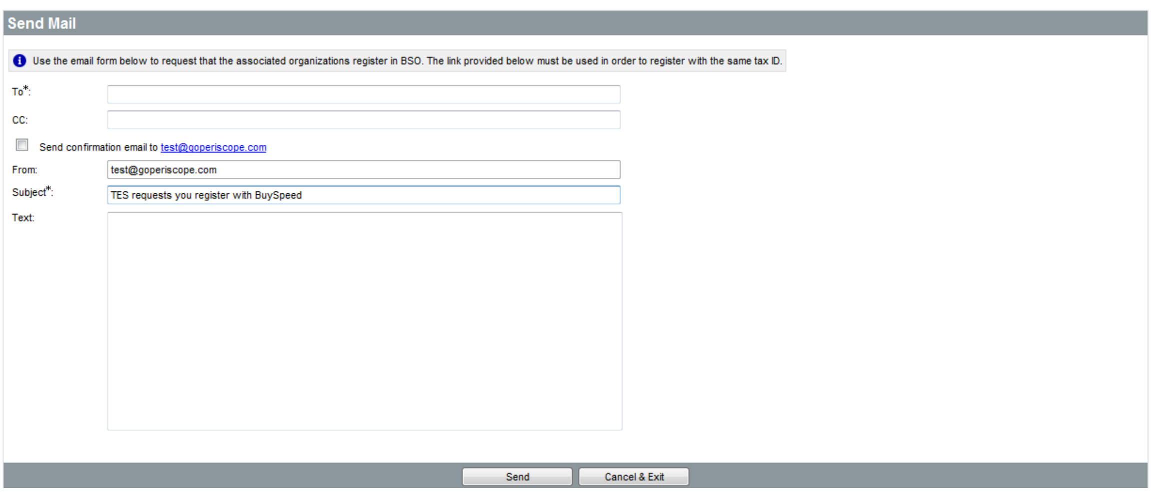
Login Answer	The answer for the security question.
Seller	When selected the “Seller” is a vendor BUYSPEED user who can review and respond to bids, informal quotes, approve changes, accept purchase orders.
Seller Administrator	The initial registrant in BUYSPEED is automatically assigned as a “Seller Administrator”. The Seller Administrator can perform many of the same functions in their BUYSPEED account that an agency Vendor Administrator can. The Seller Administrator can also designate any other BUYSPEED users in their organization to be a Seller Administrator or a Seller or both.
Can Upload Contract	When selected, the user will be able to upload contracts into BuySpeed.

Action buttons are as follows.

- **Save & Exit** – Adds the user and navigates the user to the User Maintenance for view.
- Reset – Clears the data entered without saving and displays the original data.
- Cancel & Exit – Exits the view without saving the data entered and navigates the user to the User Maintenance for view.

Add Associated Organization

For vendors who have associated vendors such as Doing Business As (DBA), this selection will allow the parent vendor to request the DBA vendor to register. When the vendor clicks on the Add Associated Organization option, an email screen appears. The vendor will enter in the email address for the DBA vendor and a message in the Text field onscreen.



Once completed, the vendor will click **Send**. This will send an email to the DBA vendor with a link in the email. By clicking on that link, the DBA vendor will be allowed to register and will be associated with the parent vendor.

For DBA vendors, the registration process follows the standard registration process.

Alerts Tab

When you select the **Alerts** tab BuySpeed will display the **Alerts** tab view.

This view is used to identify incomplete registration issues of a vendor. When the BSO Vendor System Configuration – Registration – Mandatory Registration is checked, the alerts will be displayed as Overall Validations Errors in 'red' text. Additionally, when you access the Maintenance Home Page for a vendor and errors exist, the **Alert** tab will be the default display. When BSO Vendor System Configuration – Registration – Mandatory Registration is unchecked, the alerts will be displayed as Overall Validations Warnings in 'yellow' text.

NOTE: When Alerts are Overall Validation Errors, as a Seller Administrator user you will not be permitted to perform other maintenance functions without clearing the errors.

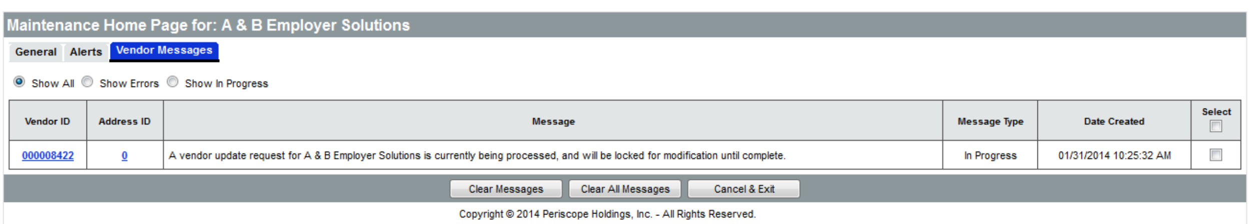
Correcting an Alert

To correct an incomplete registration **Alert** for a vendor, click on the **Alert** text. You will be navigated to the applicable maintenance view for correction of the **Alert**. This process will be repeated by the Seller Administrator until all **Alerts** have been resolved.

Vendor Messages Tab

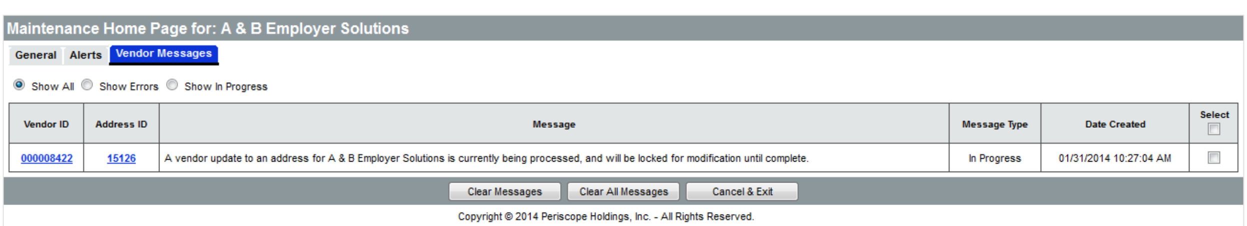
Message Queue processing has been added to BuySpeed for vendor interface processing. When Message Queue is enabled and updates occur to vendor information (e.g., vendor General Organization Information, Address information, and Categories & Certifications information) the message queue is triggered. Messages pertaining to vendors pending response and returned errors may be viewed by the administrator by selecting Vendor Messages tab.

Vendor General Organization Information update:



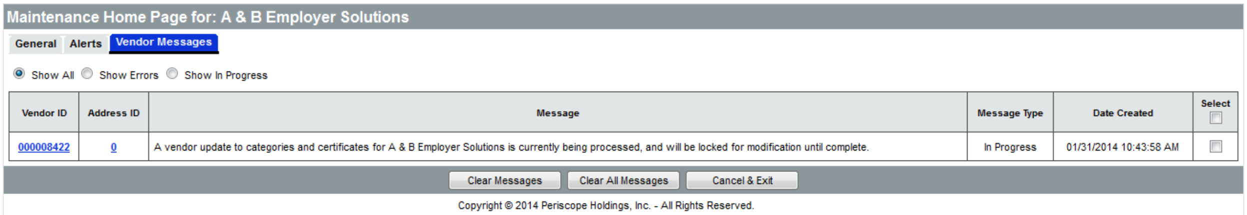
OR,

Vendor Address update:



OR,

Vendor Categories & Certifications update:



Show All	When selected, all messages will be displayed for all vendors.
Show Errors	When selected, all Error messages will be displayed for all vendors.
Show In Progress	When selected, all In Progress messages will be displayed for all vendors.
Vendor ID	Vendor ID of the vendor for which the message applies. Additionally it is a link to the vendor General Organization Information page.
Address ID	When the message pertains to an address, the Address ID for the effected address is displayed. Additionally it is a link to the address record in the edit mode. When '0' and selected, the user is routed to the Add New Address page for the vendor of the record.
Message	Message text.
Message Type	Message Type of the message, i.e., In Progress or Error.
Date Created	Date the message was created.
Select (All) (checkbox)	When Select all is checked, all records displayed will also be checked (selected).
select (checkbox)	When checked, the individual record is selected.
Clear Message (button)	When selected and a message(s) is selected, the selected message(s) is cleared.
Clear All Messages (button)	When selected, all messages will be cleared for all vendors.
Exit (button)	The Exit button is displayed when "No Records Found" is displayed. When selected, the page is closed and the user is returned to the Maintain Vendors search page.

Contract Upload Process

The Contract Import process provides the Seller Administrator the capability to upload contracts and blankets into BuySpeed via an Extensible Markup Language (XML) file. The data entered into the XML file is case sensitive, for example, unit of measure should always be entered in capital letters. The stream of data must also be entered in a particular order as identified in the table below.

XML Document Tree

XML Elements	Description	Example
<PO_Header>	Identifies the document header information for the document.	
<Po_Nbr> </Po_Nbr>	For new document, enter	A1

	alphanumeric data. For a change order, enter the valid document Id.	P0005346
<Use_Po_Nbr_As_Real></Use_Po_Nbr_As_Real>	Enter Y if the Po_Nbr is a valid document number. Enter N if the Po_Nbr is not a valid number.	
<Department_ID></Department_ID>	Enter the Department Id of the Organizational Department responsible for the document.	ASD01
<Location></Location>	Enter the Location Id of the Organizational Department Location responsible for the document.	FMP
<Short_description></Short_description>	Enter a short description of the document being uploaded.	Tire Contract
<Purchaser></Purchaser>	Enter the Purchaser Id of the buyer responsible for the document.	JDOE123
<Fiscal_Year></Fiscal_Year>	Enter the two position fiscal year of the document.	12
<Catalog_ID></Catalog_ID>	Enter the Catalog Id of the catalog to be used.	Test Catalog
<Blanket_Indicator></Blanket_Indicator>	Enter Y if the resulting document is a Blanket. Enter N if the resulting document is not a Blanket.	
<Blanket_Begin_Date></Blanket_Begin_Date>	If the Blanket_Indicator is Y, enter the beginning date of the document, otherwise leave blank.	11/20/2012
<Blanket_End_Date></Blanket_End_Date>	If the Blanket_Indicator is Y, enter the beginning date of the document, otherwise leave blank.	11/19/2013
<Cooperative_Purchasing></Cooperative_Purchasing>	If the Blanket_Indicator is Y, enter Y if cooperative procurement apples to the document or N if it does not, otherwise leave blank.	
<Vendor_Number> </Vendor_Number>	Enter the vendor number of the awarded vendor.	000019766
<Direct_Release_Allowed></Direct_Release_Allowed>	If the Blanket_Indicator is Y and direct releases are allowed enter Y, otherwise enter N for standard releases.	
<Org_ID> </Org_ID>	Enter the Organization Id of the responsible organization for the	AAGO

	document.	
<Change_Order></Change_Order>	Enter Y if this is a change order to an existing document, otherwise enter N. If this is a change order to an existing document, the Po_Nbr element should contain a valid document number and the Use_Po_Nbr_As_Real element must equal Y.	
<PO_Attachment>	Opening Tag that identifies the header attachment information for the document. Note: This section should be repeated for each attachment.	
<Po_Nbr></Po_Nbr>	Enter the identical data that was entered for the Po_Nbr in the PO_Header section.	
<File_Number></File_Number>	If an attachment is being uploaded for this document, enter a file identifier. It can be any alphanumeric character.	ABC
<File_Name_Display></File_Name_Display>	If an attachment is being uploaded for this document, enter the file description to appear on the document's Attachment tab.	Terms and Conditions
<File_Name_on_Disk></File_Name_on_Disk>	If an attachment is being uploaded for this document, enter the actual file name that exists in the repository where the file is located.	Read Me.pdf
<Description> </Description>	If an attachment is being uploaded for this document, enter the description to display on the document's Attachment tab.	Blanket Terms and Conditions
<Directory_Path> </Directory_Path>	If an attachment is being uploaded for this document, enter the organization id to the repository where the file is located.	AAGO
<Show_to_Vendor></Show_to_Vendor>	If an attachment is being uploaded for this document and you want the vendor to have access to the file, enter Y, otherwise enter N.	
</PO_Attachment>	Tag that ends the PO_Attachment section of the XML file.	
<PO_Blanket_Control>	Opening Tag that identifies the	

	blanket control information for the document. Note: this section is used only if the Blanket_Indicator is equal to Y. Note: This section should be repeated for each department allowed to create release orders against this blanket.	
<Po_Nbr></Po_Nbr>	Enter the identical data that was entered for the Po_Nbr in the PO_Header section.	
<Org_ID> </Org_ID>	Enter the identical data that was entered for the Org_Id in the PO_Header section.	AAGO
<Department_ID> </Department_ID>	Enter the Organizational Department Id for the department who is allowed to place release orders against the blanket. If all Departments under the organization are allowed, enter AGY.	ASD01
<Blanket_Dollar_Limit></Blanket_Dollar_Limit>	Enter the dollar limit (whole number only) in which the total of all blankets cannot exceed for this department.	5000000
<Minimum_Order></Minimum_Order>	Enter the minimum order amount (whole number only) of the release against the blanket.	250
</PO_Blanket_Control>	Tag that ends the PO_Blanket section of the XML file.	
<PO_Item>	Opening Tag that identifies the item information for the document. Note: This section should be repeated for each item to be added or changed against this blanket.	
<Po_Nbr></Po_Nbr>	Enter the identical data that was entered for the Po_Nbr in the PO_Header section.	
<Item_Nbr></Item_Nbr>	Enter the item number pertaining to this item.	1
<Description> </Description>	Enter the item description of the item being added or changed.	
<Class></Class>	Enter the three digits Class Id for the item being added or changed.	885
<Class_Item></Class_Item>	Enter the two digits Class Item Id for the item being added or changed.	11
<Quantity></Quantity>	Enter the quantity of the item being added or changed.	

<Unit_of_Measure> </Unit_of_Measure>	Enter the unit of measure Id of the item being added or changed. Note this element is case sensitive.	DOZ
<Unit_Cost></Unit_Cost>	Enter the unit cost of the item being added or changed. Note this element is case sensitive.	99999.99999
<Tax_Rate_Code> </Tax_Rate_Code>	Enter the tax rate code id for the item being added or changed. Note this element is case sensitive.	DE
<Discount_Percentage></Discount_Percentage>	Enter the discount percent for the item being added or changed. If zero, leave blank.	10.00
<Discount_Dollars></Discount_Dollars>	Enter the total discount amount for the item being added or changed. If zero, leave blank. Note: this element should be a negative number.	-10000.00
</PO_Item>	Tag that ends the PO_Item section of the XML file.	
</PO_Header>	Tag that ends the PO_Header section of the XML file.	

XML File Sample

Below is an example of an XML file for a new blanket with multiple attachments, multiple blanket controls and multiple items.


```
<?xml version="1.0" encoding="UTF-8"?>
<dataroot generated="2011-10-16T08:44:05" xmlns:od="urn:schemas-microsoft-com:officedata">
<PO_Header>
<Po_Nbr></Po_Nbr>
<Use_Po_Nbr_As_Real>n</Use_Po_Nbr_As_Real>
<Department_ID>ASD01</Department_ID>
<Location>FMP</Location>
<Short_description>MICHAEL'S TEST UPLOAD for Attorney General</Short_description>
<Purchaser>JCAMIRE</Purchaser>
<Fiscal_Year>12</Fiscal_Year>
<Catalog_ID>Test Catalog</Catalog_ID>
<Blanket_Indicator>y</Blanket_Indicator>
<Blanket_Begin_Date>11/19/2012</Blanket_Begin_Date>
<Blanket_End_Date>11/18/2013</Blanket_End_Date>
<Cooperative_Purchasing>Y</Cooperative_Purchasing>
<Vendor_Number> 000019766</Vendor_Number>
<Direct_Release_Allowed>y</Direct_Release_Allowed>
<Org_ID>AAGO</Org_ID>
<Change_Order>N</Change_Order>
<PO_Attachment>
<Po_Nbr></Po_Nbr>
<File_Number>1</File_Number>
<File_Name_Display>Michaels Test Upload Attachment</File_Name_Display>
```

```
<File_Name_on_Disk>Read Me.pdf</File_Name_on_Disk>
<Description>Michael's Test Upload Attachment</Description>
<Directory_Path>AAGO</Directory_Path>
<Show_to_Vendor>Y</Show_to_Vendor>
</PO_Attachment>
<PO_Attachment>
<Po_Nbr></Po_Nbr>
<File_Number>2</File_Number>
<File_Name_Display>Michaels Test Upload Attachment</File_Name_Display>
<File_Name_on_Disk>Read Me.pdf</File_Name_on_Disk>
<Description>Michael's Test Upload Attachment</Description>
<Directory_Path>AAGO</Directory_Path>
<Show_to_Vendor>Y</Show_to_Vendor>
</PO_Attachment>
<PO_Blanket_Control>
<Po_Nbr></Po_Nbr>
<Org_ID>AAGO</Org_ID>
<Department_ID>ASD01</Department_ID>
<Blanket_Dollar_Limit>5000000.99</Blanket_Dollar_Limit>
<Minimum_Order>250.00</Minimum_Order>
</PO_Blanket_Control>
<PO_Blanket_Control>
<Po_Nbr></Po_Nbr>
<Org_ID>AAGO</Org_ID>
<Department_ID>CAD</Department_ID>
<Blanket_Dollar_Limit></Blanket_Dollar_Limit>
<Minimum_Order></Minimum_Order>
</PO_Blanket_Control>
<PO_Item>
<Po_Nbr></Po_Nbr>
<Item_Nbr>1</Item_Nbr>
<Description>Item description 2 - michael test</Description>
<Class>885</Class>
<Class_Item>11</Class_Item>
<Quantity>1</Quantity>
<Unit_of_Measure>EA</Unit_of_Measure>
<Unit_Cost>99999.99999</Unit_Cost>
<Tax_Rate_Code>DE</Tax_Rate_Code>
<Discount_Percentage>10.00</Discount_Percentage>
<Discount_Dollars>-10000.00</Discount_Dollars>
</PO_Item>
<PO_Item>
<Po_Nbr></Po_Nbr>
<Item_Nbr>2</Item_Nbr>
<Description>Item description 2 - new</Description>
<Class>005</Class>
<Class_Item>05</Class_Item>
<Quantity>10</Quantity>
<Unit_of_Measure>DOZ</Unit_of_Measure>
<Unit_Cost>150.00</Unit_Cost>
</PO_Item>
</PO_Header>
</dataroot>
```


How to Create an XML File

This section describes the steps to generate XML file required by BuySpeed to generate contracts/blankets. You will need to enter the required data into Microsoft Excel spreadsheet and then upload the data into Microsoft Access database. Once uploaded into the database, you will then export as an XML file.
You may obtain a copy of the pre-formatted Microsoft Excel spreadsheet and the Microsoft Access Database, both 32 bit version and 64 bit version, by contacting Periscope Holdings' Support Desk.

Excel spreadsheet has 4 worksheets:

PO_HEADER sheet – Provides the document header information for the document being added or changed.

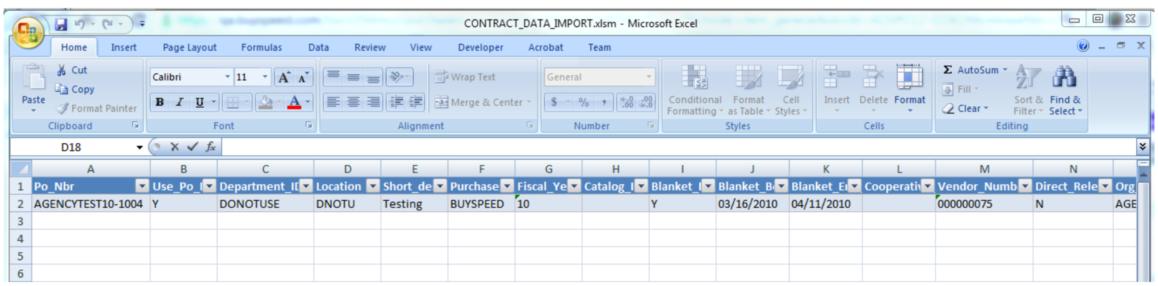
PO_BLNK_CTRL sheet – Provides the information related to the contract/blanket begin and end dates, if cooperative procurement is allowed, the Organizational Departments that are allowed to order off the blanket, applicable dollar limits and minimum order amounts.

PO_ITEM sheet – Provides the information for each item to be added or changed.

PO_Attachment sheet – Provides the information for the attachments to be uploaded for the document being added or changed.

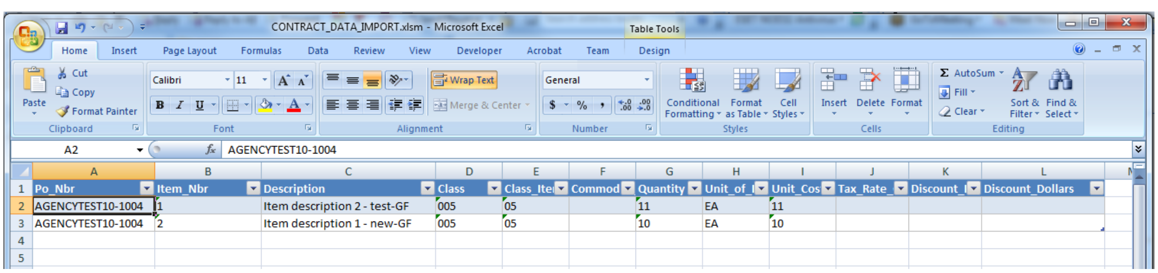
PO_HEADER sheet

Please refer to the XML Document Tree above for a description of the data to be entered into each cell.



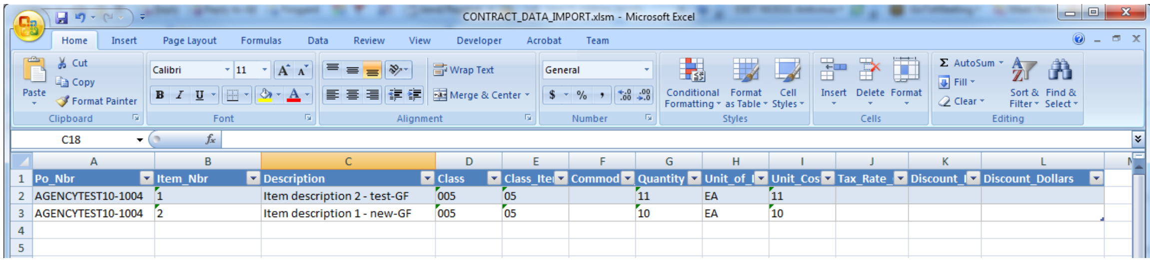
PO_BLNK_CNTRL sheet

Please refer to the XML Document Tree above for a description of the data to be entered into each cell.



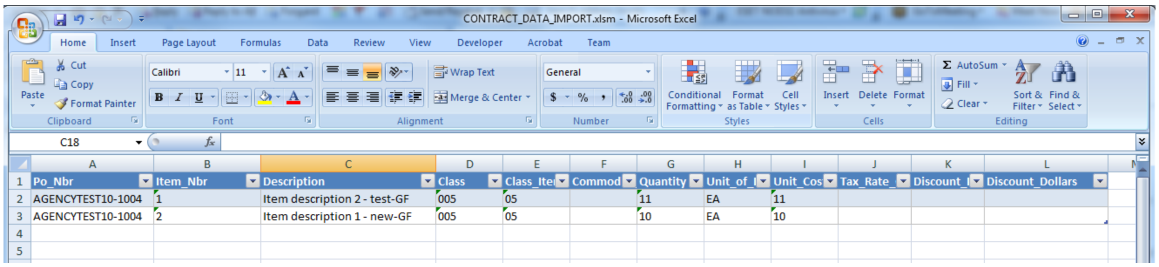
PO_ITEM sheet

Please refer to the XML Document Tree above for a description of the data to be entered into each cell.



PO_ATTACHMENT sheet

Please refer to the XML Document Tree above for a description of the data to be entered into each cell.



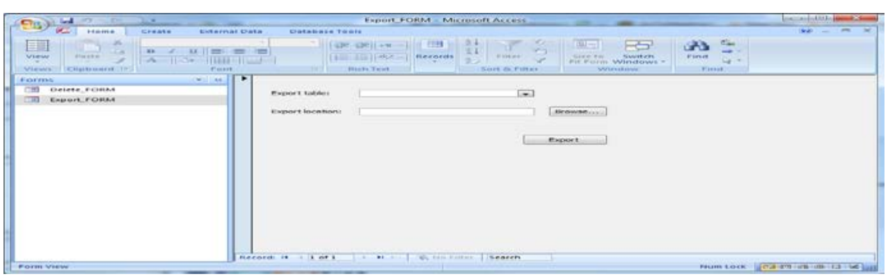
<u>Upload the Microsoft Excel Spreadsheets into Microsoft Access Database</u>

User are presented with 2 forms when they launch Microsoft Access database

Delete_FORM: Purpose of delete form is to delete data and help to recreate new contract data. If not deleted user may export old or data from previous contract.

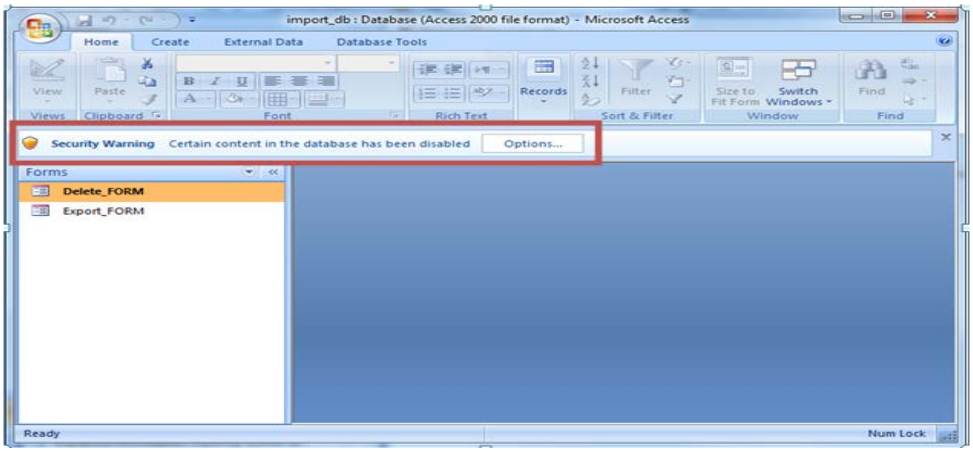
Delete data action deletes data from following Microsoft Access databases
PO_Attachmnet,
PO_Blanket_Control,
PO_Header,
PO_Item

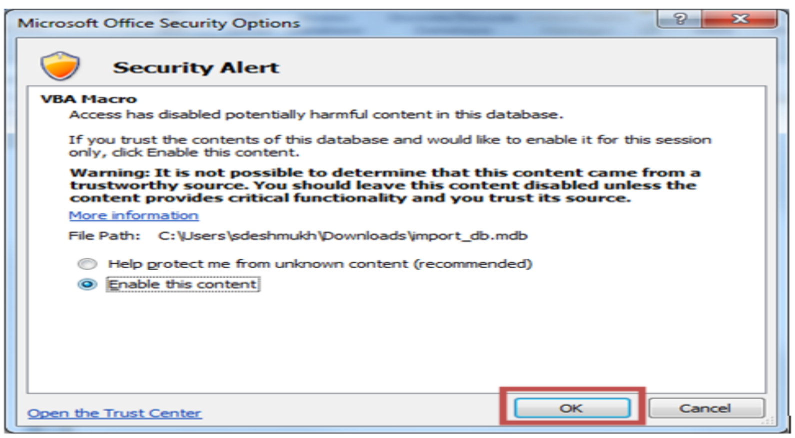
Export_FORM: Purpose of this form is to generate and save the XM L file to desired location on the user's local computer.



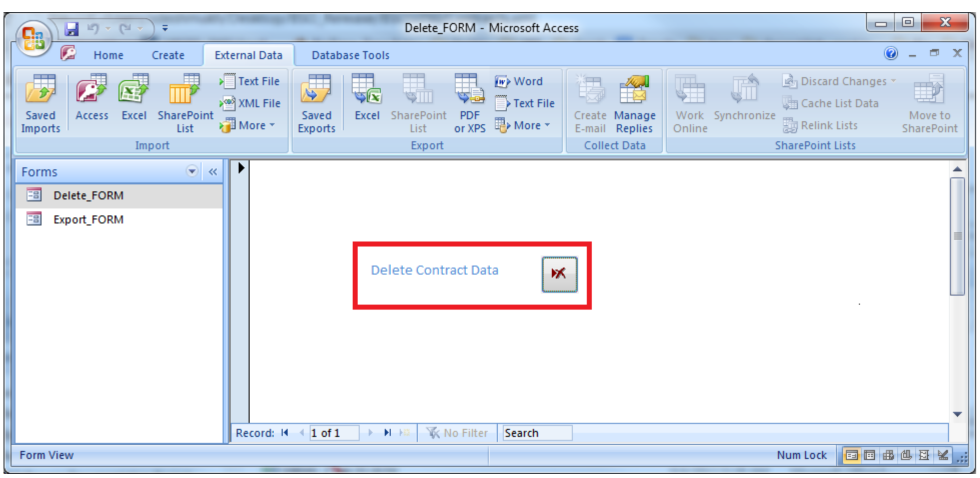
Delete data from access database

Click on Delete_FORM. This launches "Delete Contract Data" form with button. (In case of security warning, click options button and click enable this content and click ok.)

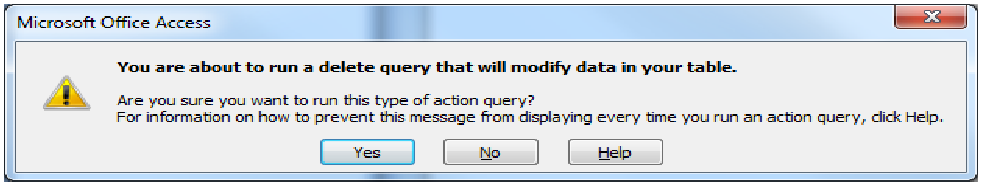


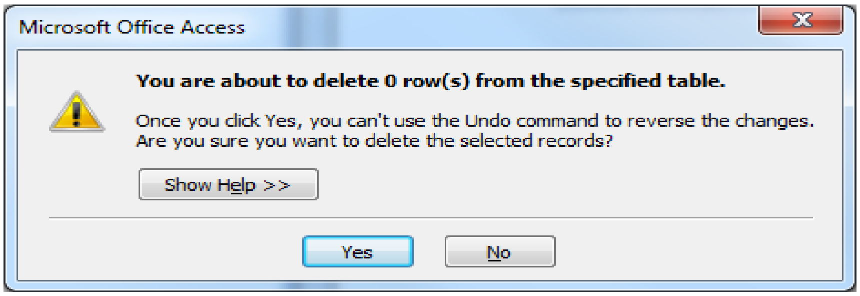


Click on Delete Contract Data button; this action will delete any existing contract data from the databases.



Delete action confirmation screen is prompted 4 times to delete data from 4 tables, the PO_Attachment, PO_Blanket_Control, PO_header, and PO_Item)

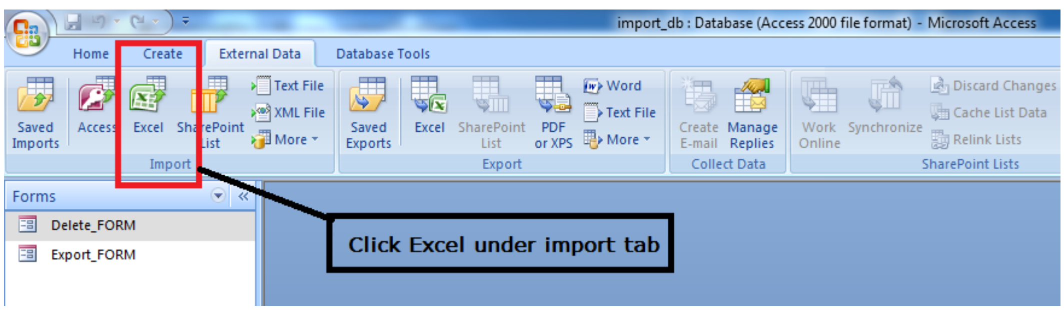




The data is now deleted from the database tables.

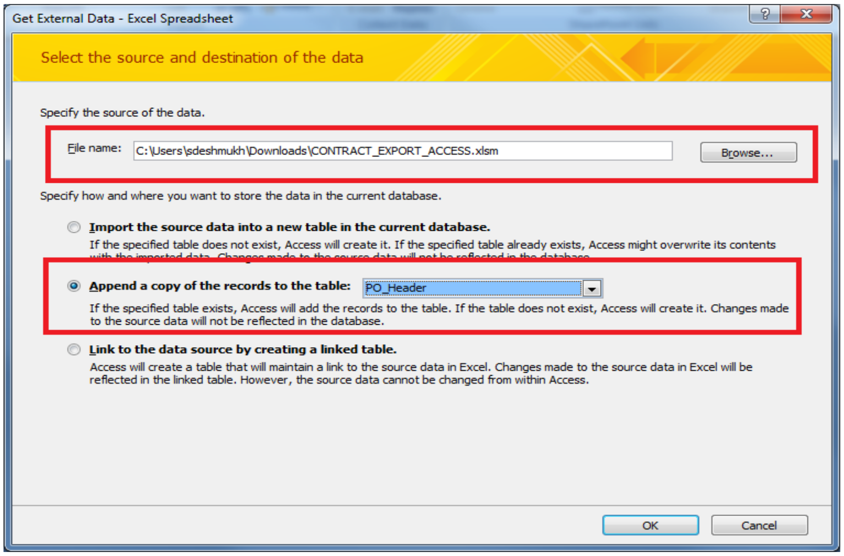
Upload the Excel Spreadsheet to the Access database

Select the External Data tab. Then select the Excel icon in the Import section.

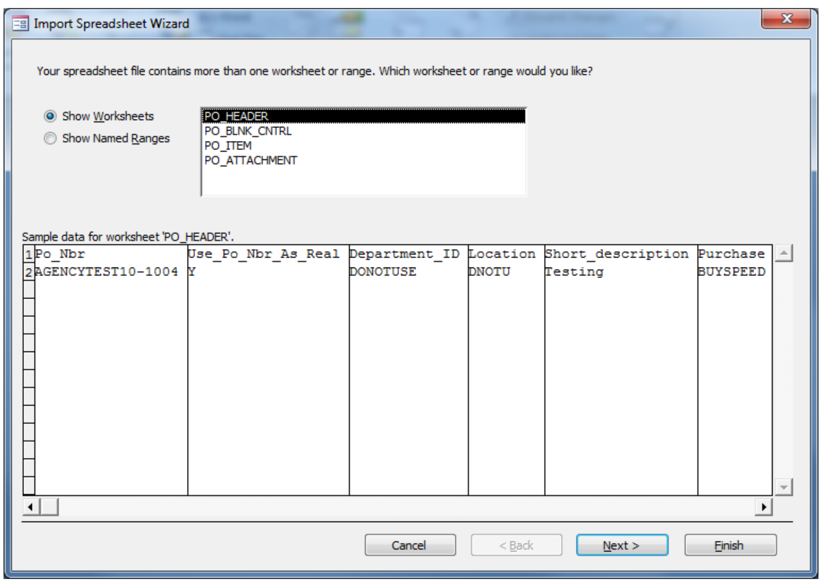


Select location of Excel spreadsheet (CONTRACT_EXPORT_ACCESS.xslm) populated with the data that is ready for import.

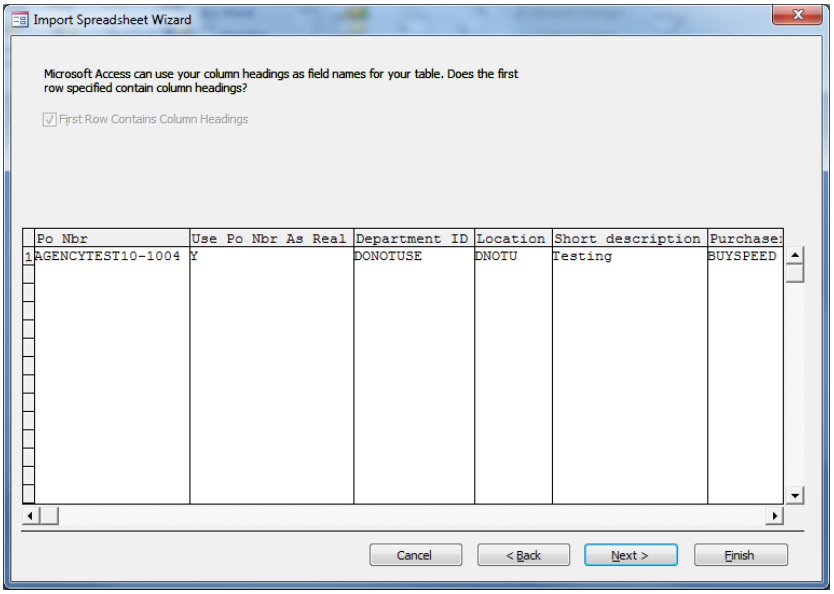
Then select "Append a copy of the records to the table" option and **respective table from the dropdown list to populate in access database.**



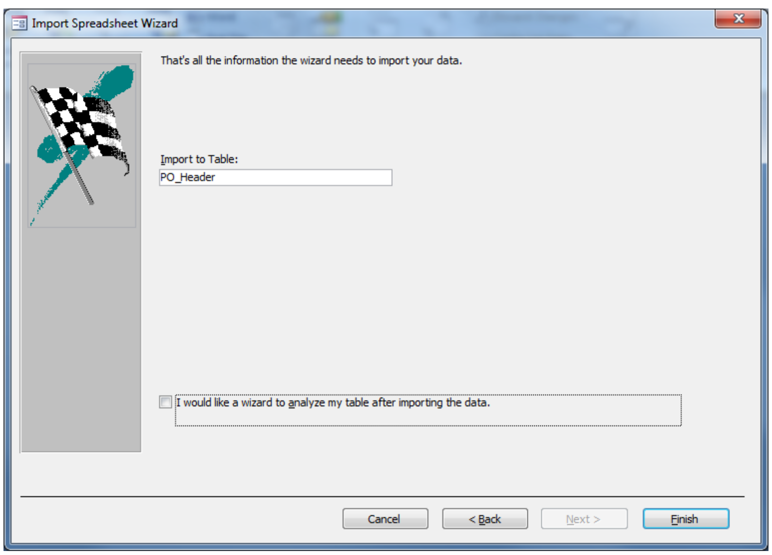
Import Spreadsheet Wizard is presented with each of the Excel worksheets. Selected the PO_HEADER and click the Next button.



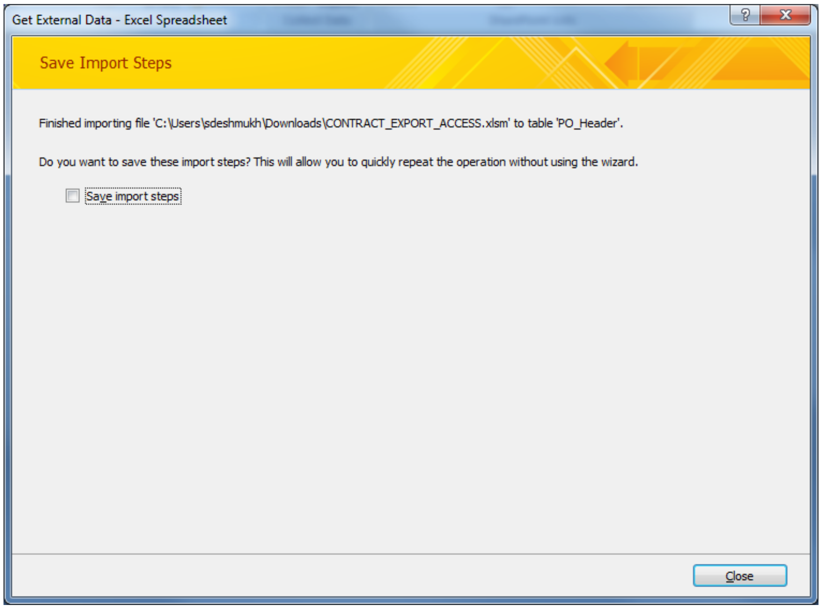
Check “First Row Contains Column Headings” and click the Next button.



Ensure the correct Import to Table is displayed and select the Finish button.



Importing the PO_HEADER data into the database table is completed.

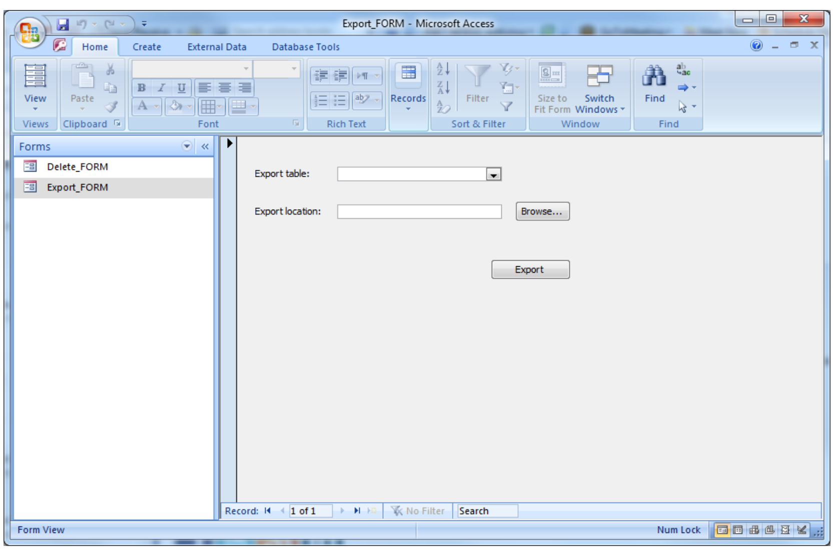


You must repeat these steps for each of the worksheets, PO_item, PO_Blanket_Control and PO_Attachment into the appropriate database table.

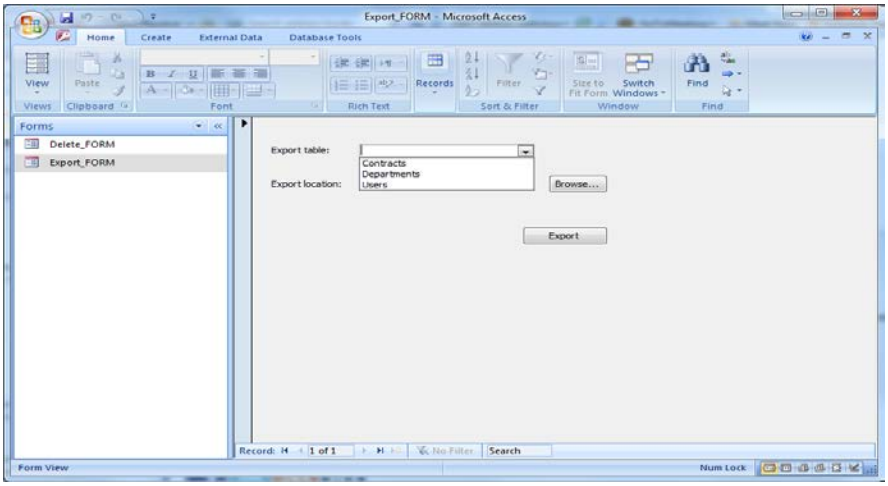
When you have completed the above step for each of the worksheets, the XML file can be generated.

How to generate XML file

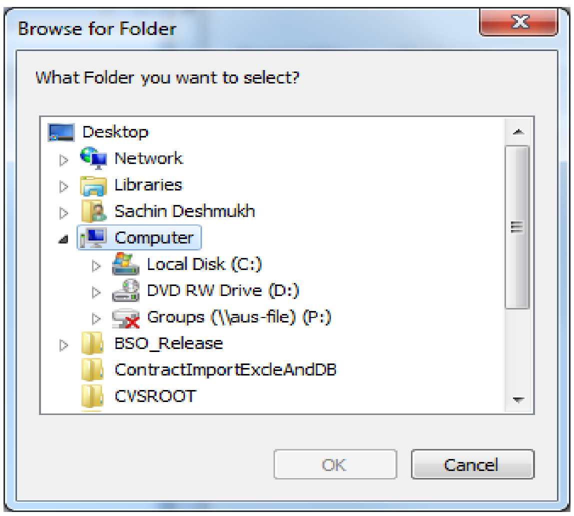
To generate the XML file required by BuySpeed, launch the Access Export_FORM.



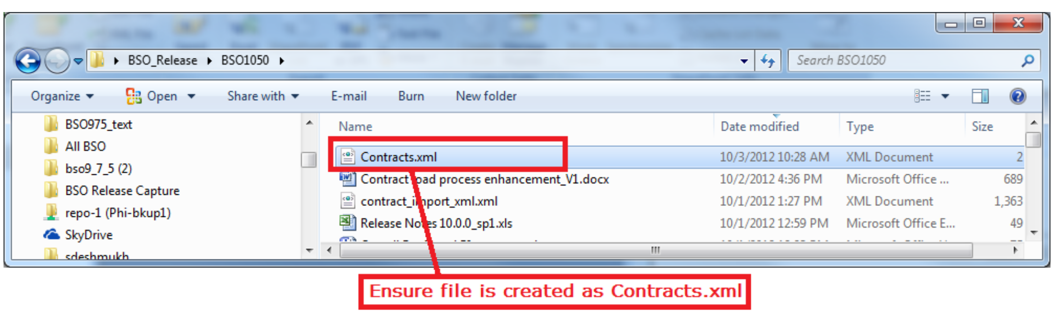
Select “Contracts” from Export table dropdown list.



Then select the Export location by browsing where XML file will be saved on the user’s computer.

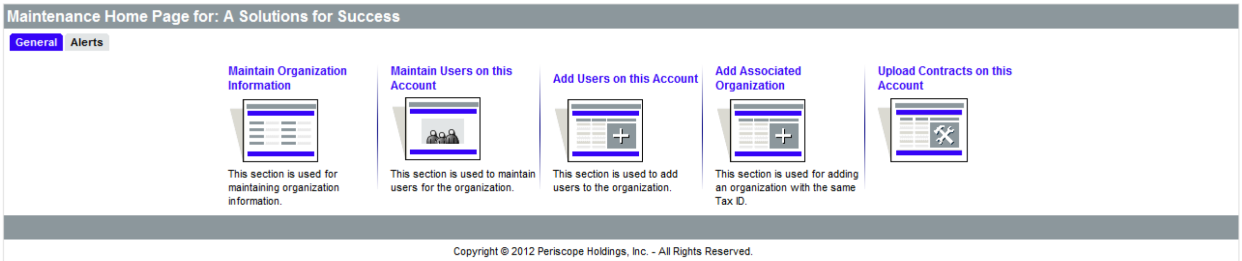


Click the “Export” button. Verify the XML file was created in the location selected.



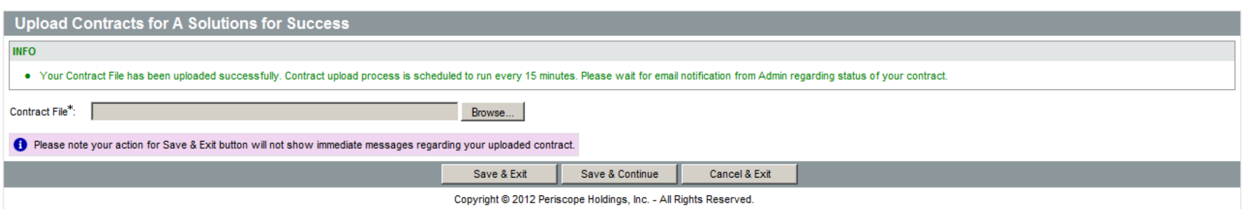
Upload the XML file into BuySpeed

Access BuySpeed and login and select the Upload Contracts on this Account icon.



The user is navigated to the Upload Contracts for view.

Browse for the Contracts.xml file. When located and selected, the file location will display in the Contract File field. If you only have one file to upload, select the Save & Exit button; otherwise select the Save & Continue button. Depending on the save button selected the user may be redirected to the Maintenance Home Page for or remain on the current view.



The user will receive an email when the contract or blanket is created or if it fails.

About This Manual

This Help File was created by Periscope Holdings, Inc., a group of professionals providing products and services for government purchasing and workflow.

BuySpeed Products

We understand the issues faced by purchasing professionals. The industry issues like shrinking budgets and the struggle to squeeze more out of each tax dollar, the challenge to do more with less. Therefore, you can select the BuySpeed product that best suits your needs right now and then, as your needs increase; add more functionality at any time.

Our BuySpeed family of products includes:

- **BuySpeed eCatalog** - an aggregated catalog for purchasing;
- **BuySpeed** – BuySpeed features in a web environment

Professional Services

We offer the following professional services:

- **On-Site Training**
- **Installations**
- **Interface and Integration Services**
- **Custom Development**
- **Workflow and Process Analysis**
- **Project Management**

For more information you can contact us at the following address:

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