

City of Columbus Vendor Services

User Guide

Updated: December 2021

Contents

Accounts Used to Login to Vendor Services	3
Recommended Browsers with Vendor Portal	3
Register New Vendor	3
Existing Vendors: Register as a User for Existing Vendor Account in Vendor Portal / Ac Users to Vendor Account	
Logging into City of Columbus Vendor Services	14
Vendor Maintenance	14
Uploading Attachments to Vendor Record (W9)	14
Update your Vendor Profile	17
Update Address	17
Update Contact Information	20
View/Update/Remove Registered Business Procurement Categories	22
Contract Compliance Questionnaire	26
View Vendor Certifications	28
View Bids in Progress	29
View All Open RFQs	
View Closed RFQs	
Enter and Submit Bid	
View Amendments	
Add Alternate Bid on an Item	40
Complete RFQ Bid Questionnaire	44
Submit Vendor Question Regarding RFQ	45
View Vendor Questions and Answers	47
Recall a Bid	
View or Add Attachments	50
Add Attachments	52
Save File as PDF	54
View Archived Bids	57
View and Print Purchase Orders	59
View Payment Status and Payment Information	60
Vendor Portal Support	65

Accounts Used to Login to Vendor Services

City of Columbus Vendor Services recommends vendors register with their business/work email address.

Recommended Browsers with Vendor Portal

The Vendor Portal works with most major web browsers such as Edge, Safari, and Google. We do not advise using Internet Explorer.

Register New Vendor

City of Columbus vendors may register as a new vendor with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Sign Up

Step 1. Navigate to the <u>City of Columbus Vendor Portal</u> or enter the following address in your browser: <u>https://columbusvendorservices.powerappsportals.com/</u>





Step 3. Complete the requested registration information fields including your work/business email address and Federal Tax ID, then select Register.

CITY OF COLUMBUS	Home	Login Help Sign Up '
	Name *	
	First Name	Last Name
	Email • Business Email	
	Business Line *	
	Select Business Line V	
	Company Name *	Federal Tax ID *
	Company Name	Federal Tax ID
	Reg	jister
	Already registered	? Click here to login.

Step 4. A registration link will be sent to the e-mail address entered during registration.

Note: Please allow up to 15 minutes for the email to arrive. Be sure to check SPAM/Junk Folder(s) for the email that which will arrive from <u>invites@microsoft.com</u>. If you do not receive this email, stop and contact Vendor Services at <u>vendorservices@columbus.gov</u> for further assistance.

Step 5. Select the Accept Invitation button/link in the registration email

City of Colum	bus OH invited you to access applications within their organization		0	
Microsoft Invitations	on behalf of City of Columbus OH <invites@microsoft.com> Sat, Dec 19, 2020, 11:03 AM</invites@microsoft.com>	☆	4	:
	Please only act on this email if you trust the organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution.			
	Organization: City of Columbus OH Domain: cityofcolumbusoh.onmicrosoft.com			
	If you accept this invitation, you'll be sent to https://operations.dynamics.com.			
	Accept invitation			

Step 6. Sign In to your existing Microsoft Account using the email address used during registration **or** create a new Microsoft account for that email address if prompted.

Note: If your work/business email is setup with Microsoft, your account password may be your email/work/network password for your business. For security purposes, we do <u>NOT</u> have access to any passwords. Passwords are managed between you and Microsoft and/or your business. We are unable to reset any passwords. If you create a new Microsoft account, be sure to setup account recovery options when registering so you can reset the password if needed.

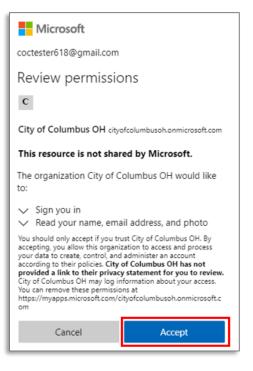
Step 7. After entering your existing password or creating a password if prompted, validate your account using the confirmation code sent to your provided email address.



Step 8. If prompted, select the Country/region where you conduct business

Step 9. Read and accept any Terms and conditions and complete any security prompts.

Step 10. Select Accept to link your Microsoft Account with Vendor Services.



Vendor Registration

.

Step 11. Select Next to begin populating registration.

Vendor registration Stand	dard view 🗸
Country/region	Complete the registration process. Click Next to continue.

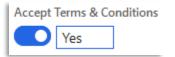
Country/region

Step 12. Select the applicable Country/region or enter an abbreviation in the filter field. For example, **USA** followed by **enter** on the keyboard will bring up United States.

Vendor registration Stand	lard view 🗸		
Country/region	Select the country or re	egion from where you conduct	t business, and then click Next
	C Country/region	Long name :	
O Terms and conditions	USA	United States	

Terms and Conditions of Use

Step 13. Read the Terms and Conditions of Use. Upon your agreement, **click/switch** the button under Accept Terms and Conditions in order to continue.



Company information

GENERAL INFORMATION					
Company name	Doing business as		Organization type		3
CoCTester615	CoC Tester Inc		Organization	Upload W9 form	
Registration Email	Telephone	Fax		Email	Website
CoCTester615@gmail.com	6140000000			CoCTester@gmail.com	CoCTester615.com

Step 14. Under the General Information section, complete the following fields:

- a. Doing business as
- b. Telephone
- c. Email (Company/Business Email) This email is for business RFQ/RFP/PO notifications and can be different from the registration email address.
- d. Address (Select "Add" to create new)
 - a. Vendors must add a primary and remit address using the **Purpose** and **Primary** fields

Name or description	Address	Purpose	Primary
CoCTester615	90 W. Broad Street Columbus, OH 43215 USA	Business:Remit-to	Yes

Step 15. Click the Upload W9 form button to upload a W9 form for the company

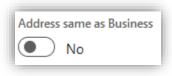
a. A W9 is required before a Purchase Order can be issued by the City or work can be performed by a vendor

Upload document	
File to upload	
fw9.pdf	
Browse	
Notes	
W9 for organization	
Name	
fw9	
Document Type	
W9/W8 ~	
Upload	

Contact Information

Step 16. Enter contact information fields for the primary contact on the vendor account

- a. First name, Middle name (optional), Last name
- b. Telephone
- c. Address (If the address is the same as the business address, click/switch Address same as Business. Otherwise, select Add to add the separate address for the Contact.



Business Information

Step 17. Enter all relevant information regarding Ownership Profile, Business Profile, and Terms of Payment

Procurement categories

Step 18. Select "Add category". Search for applicable categories, and add categories to vendor profile

- a. Vendors should register for all applicable Procurement Categories (UNSPSC) for their business operations during vendor registration. Vendors are auto-notified procurement opportunities based on registered procurement categories.
- b. Multiple categories can be selected. Selecting a Segment or Family of procurement categories will include all categories listed under the primary category
- c. Vendors can add additional categories after registration see <u>View/Update/Remove</u> <u>Business Procurement Categories</u> for details steps on adding procurement categories.

Se	ect procurement categories f	or the products or services that your company requests to provide
Ad	ld category 📋 Remove	
 ✓ 	Procurement category]
	Building and Facility Constructio	
	Education and Training Services	

Contract compliance

Step 19. Review Questions for Contract Compliance Questionnaire. If information is available **Select** "Complete questionnaire" to answer questions

- a. Vendors can fill out contract compliance questionnaire at a later date if information is not available see <u>Contract Compliance Questionnaire</u>
- b. Vendors will need to complete contract compliance questionnaire to be eligible to perform work for the City of Columbus

Vendor registration Sta	andard view 🗸	
•	Questionnaire 1 of 1	
Country/region	1. What date was this company founded? 2. Who is the owner, president or principal of the company?	^
Terms and conditions	3. If you have 50 or more employees, you are required to submit the federal EEO-1 form to the City of Columbus, Office of Diversity and Inclusion within 10 days. Are you required to comply? (Please e-mail the form to throseboro@columbus.gov) 4. Does applicant conspicuously post its EEO Policy?	
Company information	5 Is EED policy available to current and prospective employees? 6. Does applicant state that it is an Equal Opportunity Employer in employment ads and solicitations? Has applicant notified all of its hiring sources that it considers for employment all qualified applicants without regard to race, color, religion, sex, national	~
Contact information		
Business information		
Procurement categories	Status	
Questionnaires	Not started	
Submit registration	Complete questionnaire View answers Previous questionnaire Next questionnaire	

c. The Status will show as Finished when questionnaire is completed

Step 20. When you have completed all registration information, click Finish

a. It is important to submit registration as accurate and complete as possible

When you have submitted your registration, you cannot modify the information. Click Finish to submit.

Step 21. The registered vendor will receive an email confirming registration was successful, if the vendor does not receive this email the registration is not yet complete.

Existing Vendors: Register as a User for Existing Vendor Account in Vendor Portal / Add Additional Users to Vendor Account

Existing City of Columbus vendors may register as a **user** and be associated with their existing account with the documented steps below in the City of Columbus D365 Vendor Portal.

- Existing vendors do not need to create a new vendor account

Menu Path: Homepage > Sign Up

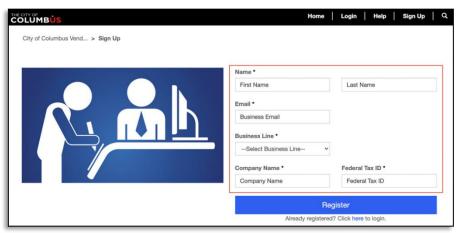
Step 1. Navigate to the <u>City of Columbus Vendor Portal</u> or enter the following address in your browser: <u>https://columbusvendorservices.powerappsportals.com/</u>

Step 2. Click the Sign Up button in the top black ribbon



Step 3. Complete the requested registration information fields

- a. First Name
- b. Last Name
- c. Business Email (Use An Individual Work Email Address ie. person@company.com)
- d. Business Line
- e. Company Name
- f. Federal Tax ID
 - a. Use the **Federal Tax ID** # that is associated with your business and previous vendor account



Step 4. Click Register

Step 5. If the Vendor Account is located, a message will appear stating that the Federal Tax ID already exists. Select **Add as contact**.

Federal Tax ID already	exists
Message:	The Federal Tax ID you entered is already registered with the City of Columbus. You will be added as a contact for this Vendor. Do you want to continue?
	Cancel Add as contact

Step 6. Validate your primary e-mail address and phone number. Select Add as contact

Primary Email*	CoCTester617@gmail.com	
Primary Phone Number*	Primary Phone Number	

E-mail Confirmation, Account Creation and Activation

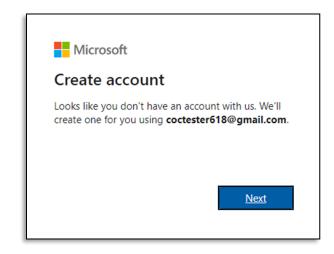
Step 7. Check your work e-mail address for a Microsoft e-mail for account activation. Click the **Accept Invitation** button/link.

Note: Please allow up to 15 minutes for email to arrive. Please be sure to check your SPAM/Junk Folder(s) for the email that will arrive from <u>invites@microsoft.com</u>. If you do not receive this email, stop and contact Vendor Services @ <u>vendorservices@columbus.gov</u> for further assistance.

City of Columbus OH invited you to access	applications within their o	organization	8	Z
Microsoft Invitations on behalf of City of Columbus OH <invites@n< th=""><th>nicrosoft.com></th><th>Sat, Dec 19, 2020, 11:03 AM</th><th>4</th><th>:</th></invites@n<>	nicrosoft.com>	Sat, Dec 19, 2020, 11:03 AM	4	:
Please only act on this email if you trus receive fraudulent invitations from bad act invitation, proceed with caution.	5			
Domain	ation: City of Columbus OH : cityofcolumbusoh.onmicrosoft.com on, you'll be sent to https://operations.d	vnamics com		
	Accept invitation	namescon.		

Step 8. If the email address used during registration is located as an existing Microsoft Account, you will be prompted to sign in to that account. Otherwise, as shown below, follow the on screen step to create a new Microsoft account for the email address used during registration.

Note: If your business email is setup with Microsoft active directory services, **your account password may be your email/work/network password for your business**. For security purposes, we do <u>NOT</u> have access to any passwords. Passwords are managed between you and Microsoft or your business. We are unable to reset any passwords. If you create a new Microsoft account, be sure to setup account recovery steps with Microsoft accordingly so you can reset the password if needed.



Step 9. Create a password and click the Next button



Step 10. Select a Country/region and Birthdate and click the Next button

← coctester618	3@amail.co	m		
	-			
Create aco	count			
We need just a l	ittle more i	info to se	t up your	
account.				
				~
Country/region				~
Country/region United States	• 1	~	1980	~

Step 11. Enter in the Security Code e-mailed by Microsoft when prompted

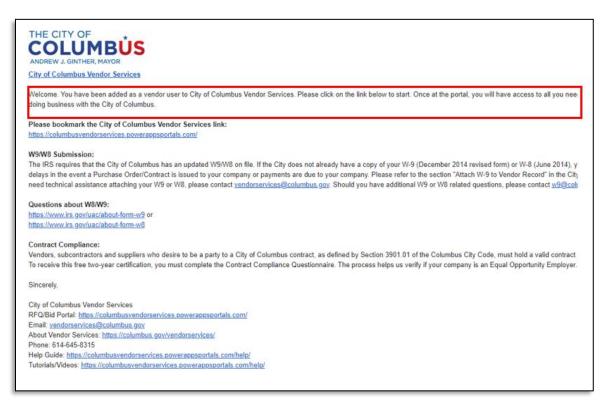
Microsoft account
Verify your email address
To finish setting up your Microsoft account, we just need to make sure this email address is yours.
To verify your email address use this security code 8325
If you didn't request this code, you can safely ignore this email. Someone else might have typed your email address by mistake.

Step 12. Review permissions and select Accept



Step 13. The user will receive an e-mail from City of Columbus confirming they have been added as a vendor

a. The User Registration Process is complete and the user is linked to an existing vendor account



Logging into City of Columbus Vendor Services

City of Columbus vendors may log into Vendor Services with the documented steps below in the City of Columbus D365 Vendor Portal.

Step 1. Navigate to the <u>City of Columbus Vendor Portal</u> or enter the following address in your browser: <u>https://columbusvendorservices.powerappsportals.com/</u>

Step 2. Click the Login button



Step 3. Enter login credentials used during registration.

Microsoft	
← chelsey.gao@avaap.com	
Enter password	
Password	
Forgot my password	
	Sign in
	Sign in

Step 4. Click the Sign in button

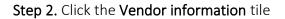
Vendor Maintenance

Uploading Attachments to Vendor Record (W9)

City of Columbus vendors may add attachments to their Vendor Profile with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor information

Step 1. Login to the City of Columbus Vendor Services Site (See <u>Logging into City of Columbus</u> <u>Vendor Services</u> for additional Assistance.)

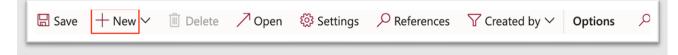


Cit	ty c	of C	olı	ım	bu	s							
< Su		ecem Tu				> 59	Ē	Contract Compliance	Ē	Purchase order confirmation	RE	Vendor information	
		1	2	3	4	5							
6	7	8	9	10	11	12	扇	Invoicing	B	Vendor bidding	Ð	Vendor payments	
	14	15	16	17	18	19		200000000000 0 00			E V	19202000505000000	
13				24	25	26							
13 20	21	22	25	24	2.5								

Step 3. Select the Upload attachments tile

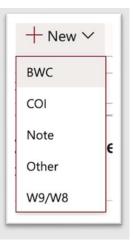
Summary	
Flanagan's Pub	1 _{Users}
Sample Address Columbus, OH 45419 USA	0 User requests
	Categories
Email address sample@gmail.com	0 Upload attachments
Telephone 1234567890	L
ন্স More details 🗸	

Step 4. Select the New button



Step 5. Select W9/W8 from

a. Note: Vendors can submit W9/W8 forms from this area



Step 6. Click the Browse button

Upload document
Browse

Step 7. Select desired document to upload

Step 8. Document details will appear on screen

	open 🚳 Settings 🔎 References 🕤	Created by V Opti	ons 🔎	
P Filter	Attachments for Unlinked			
COL	Description	Туре	Attached	
coi	CardBackSide copy 2	Other	Yes	
BWC Sample	General			
	DETAILS	OTHER I	NFORMATION	CREATE
Other Test Form	Notes	Is default	t attachment	Created by
Other			No	euocflan@gmail.com
				Created date and time
COI Test Form				12/15/2020 11:31:02 A
	Restriction			
BWC Test Form	External 0			
Other Test Form	Attachment			
Other	FILE INFORMATION	File type		FILE LOCATION
	File name	png		File location
Other Test Form	CardBackSide copy 2	Original	file name	
Other			ckSide copy 2.png	

Step 9. You will see the attachment listed on the screen

Step 10. Select the X button to close the window

🗟 Save 🕂 New 🗸 🗉 Delete 🖊 Open 🛞 Settings 🖓 References 🍸 Created by 🗸 🛛 Options 🔎

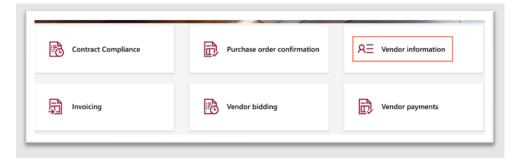
Update your Vendor Profile

Update Address

Vendors may update their address with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor information

Step 1. Select the Vendor information tile from the homepage



Step 2. Select More Details > Addresses from the dropdown

Vendor info	rmation
032222	\sim
Summary	
Sample Vendor	r
Address	
123 Peachtree St	
General	
Addresses	
Contact information	
Business	
Categories	lorsite.com
State tax ID	
Certifications	

Step 3. Click the three dots in the left-hand corner to select Add from the dropdown

o o ta ta ta ta ta ta	ample vendo	R nformation
General	Addresses	Contact information
	escription	Address
Edit Add	endor	123 Peachtree Decatur, GA 3

Step 4. Select the Purpose of the address.

Step 5. Enter an address for your business using the Country, Street, Zip Code, City, and State fields.

Location ID		
000230822		
Name or description		
Sample Vendor		
Purpose		
Business;Remit-to	~	
Country/region		
USA \sim		
ZIP/postal code		
30032 ~		
Street		
123 Peachtree St		
City		
Decatur	\sim	
State		
ga \sim		
County		
	\sim	

Step 6. Click the OK button

a. The new address will be displayed in the Addresses section.

General Addresses Contact information Name or description Address Sample Vendor 123 Peachtree Decatur, GA 30	Business Categ		
Sample Vendor 123 Peachtree Decatur, GA 30		egories State Tax Id	Certifications
Decatur, GA 3		Purpose	Primary ↓
USA		Business;Remit-to	Yes

To update the Vendor Remit address information, follow the steps below:

Step 1. Select Addresses

Step 2. Click the three dots in the left-hand corner to select Edit button from the dropdown

	mpany ii	^R nformation
General	Addresses	Contact information
Мар	escription	Address
Edit	a day	122 December

Step 3. From the Purpose dropdown list, select Remit to

	Purpose Business;Remit-to ~
✓ Role ↑	Description
Invoice	Invoice
Lading	Lading
Other	Other
Payment	Payment
Real location	Real location
Recruit	Recruit
Remit to	Remit-to
	Select

- a. Update the **Company Contact Information** as necessary:
 - a. Country/region
 - b. Zip/postal code
 - c. Street
 - d. City
 - e. State
 - f. Leave County blank

Edit address
Location ID
000230822
Name or description
Sample Vendor
Purpose
Business;Remit-to \lor
Country/region
USA 🗸
ZIP/postal code
30032 ~
Street
123 Peachtree St
City
Decatur 🗸
State
GA 🗸
County
~
OK Cancel

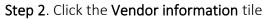
Step 4. Click OK

Update Contact Information

Vendors may update contact information in the Vendor Portal with the documented below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor information

Step 1. Access the Vendor Portal



City		1			bu	s		
۲ Su ۱			iber _{We}			> Sa	Contract Compliance	Purchase order confirmation
6 13	7 14	8	2 9 16	10	11		Invoicing	Vendor bidding Vendor payments
			23 30		25	26		

Step 3. Click the Users button

1	Users
0	User requests
	Categories
0	Upload attachments

Step 4. Click the blue hyperlink for the desired profile

endor collaboration users				
P Filter				
V Name	Alias	Vendor account	Name	
Jane Doe	euocflan@gmail.com	032205	Flanagan's Pub	

Step 5. Click to expand the Contact information section

Jane Doe	L MARTINE	
Contact person details		~
Contact information		~
Legal entities the person is a contact for		~

Step 6. Select field under desired column to edit

Contact information					
+ Add 🛍 Remove					
Description	Туре	Contact number/address	Extension	Primary ↓	
	Email address	euocflan@gmail.com		\checkmark	P

Step 7. Click in cell block to edit desired field information

Description	Туре	Contact number/address	Extension	Primary ↓	
	Email address	Update field here			
Phone Number	Phone	1234567891			C

a. If multiple contacts are provided, select the **Primary** checkbox for the vendor contact that will be listed as the primary contact.

Step 8. Click the X button to save information and close the Vendor information screen



View/Update/Remove Registered Business Procurement Categories

City of Columbus vendors may view, update, and remove registered business procurement categories with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor Information

Add Registered Business Procurement Categories

Step 1. Click the Vendor information tile

	- 546	-			11						4	
Ci	ty o	of (Coli	um	bus			· · ·	-			
						F				THE	1.	
1										9/1		
< Su	N Mo	oven Tu		202 Th	0 Fr	> Sa		Contract Compliance	Ð	Purchase order confirmation	RE	Vendor information
1	2	3	4	5	6	7						
8	9	10	11	12	13	14	B	Invoicing	R	Vendor bidding	Ð	Vendor payments
15	16	17	18	19	20	21	49	intering	20	tonitor bracking	田令	
22	23	24	25	26	27	28						
29	30											

Step 2. Click the Categories tile

2	All contacts
1	Users
0	User requests
	Categories
0	Upload attachments
,	

Step 3. Click the Add category button

Procurement	
Expire category	+ Add category

Step 4. View and select a category from the list of Available categories

Procurement category selection
Select one or more procurement categories
PARAMETERS
Vendor account
032205
Vendor name
Flanagan's Pub
Filter Available categories
 City of Columbus - UNSPSC
Apparel and Luggage and Personal Care Products
Building and Construction Machinery and Accessories
Building and Facility Construction and Maintenance Services
Chemicals including Bio Chemicals and Gas Materials
Cleaning Equipment and Supplies

Step 5. Click the Add button

	Add
Step 6. Click the OK button	
	OK Cancel
Step 7. Click Save	
	Save Options $>$

Remove Registered Business Procurement Categories

Step 1. Click the Vendor information tile

	Financ	1					1.			-			cols P 📮
ລ	Ci	ty o	of C	Col	um	bu	5	and the second s	- hale		h		
¢							12					1/	
Ð						-	100						
2											1/1/	-	
88	<	N	oven	nber	202	0	>		Contract Compliance	Ð	Purchase order confirmation	RE	Vendor information
	Su	Mo	Tu	We	Th	Fr	Sa			_			
	1	2	3	4	5	6	7						
	8	9	10	11	12	13	14	B	Invoicing	R	Vendor bidding	B	Vendor payments
	15	16	17	18	19	20	21	40		20		田令	
	22	23	24	25	26	27	28						
	29	30											

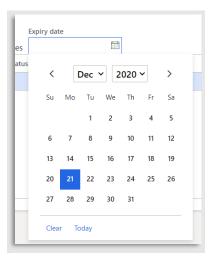
Step 2. Click the Categories tile

2	All contacts
1	Users
0	User requests
	Categories
0	Upload attachments
_	

Step 3. Mark all desired categories to remove using the left-hand checkbox

	Show as of date	E	xpiry date	
Show only currently active	🗸 In	clude sub-categories	63	
 Category hierarchy 	Category	Vendor category status	Effective ∇	Expiration \heartsuit
Procurement category	Air transport of letters and parc	Approved	12/9/2020	Never

Step 4. Select an Expiry date for the category





Procurement	
Expire category	+ Add category

Contract Compliance Questionnaire

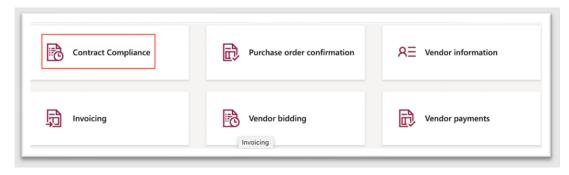
All new City of Columbus vendors are required to complete a questionnaire about their business during the registration process and must complete the EBO questionnaire for contract compliance every two years. Documented below are the steps required in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Contract Compliance

Step 1. Access the Vendor Portal

Finance and Operations			دەنە २ 📮 😂 ؟ 🖪
City of Columbus			
< December 2020 Su Mo Tu We Th Fr	> Contract Compliance	Purchase order confirmation	RE Vendor information
1 2 3 4 6 7 8 9 10 11 13 14 <mark>15</mark> 16 17 18		Vendor bidding	Vendor payments
20 21 22 23 24 25 27 28 29 30 31	26		

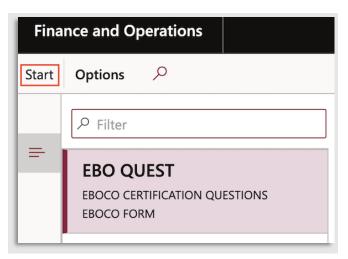
Step 2. Click the Contract Compliance tile



Step 3. Click the Complete Questionnaire button

032205	\sim
ummary	
+	

Step 4. Click the <u>Start</u> button in the <u>upper left-hand corner</u>



Step 5. Proceed through the Questionnaire answering each question and selecting **Forward** to continue



Step 6. Once you have reached and answered the last question, click the End button



Step 7. The status of the questionnaire will be updated to Finished.

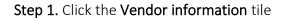
Note: Please allow <u>5</u> business days for the Office of Diversity and Inclusion to review the questionnaire submission.

Status		
Finished		

View Vendor Certifications

City of Columbus vendors may view vendor certifications with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor information



	36	-			- 12	1	1.1				6	-1/-
Ci	ty o	of (Coli	um	bu	s						
					-	-				1	1	1-
											-	
<	N	oven	nber	202	0	>		Contract Compliance	Ð	Purchase order confirmation	RE	Vendor information
Su	Mo	Tu	We	Th	Fr	Sa						
1	2	3	4	5	6	7						
8	9	10	11	12	13	14	ħ	Invoicing	R	Vendor bidding	R	Vendor payments
15	16	17	18	19	20	21	49		-0		ЩŞ	remer payments
22	23	24	25	26	27	28						
29	30											

Step 2. Click the More details tab underneath the Vendor information Summary area

١	/endor information
	007170 ~
	Summary
	Grainger
	Address
	Dept 839174745 Palatine. IL 60038-0001 USA
	Email address
	jain.cool19@gmail.com
	Telephone
	(614) 309-8228
1	More details
Γ	General
L	Addresses
L	Contact information
	Business
	Categories
	State tax ID
Г	Certifications

Step 3. Select Certifications from the dropdown menu

Step 4. View Certifications

	Save Op	tions ,0						
â ☆ ⊙	My Gen	170 : GRAINGER / company inf eral Addresses Document		Business Categories	State Tax Id	entifications		
83								
1		Certification number	Certification type	Certification date	Liability amoun	Effective date	Expiration date	Documents

View Bids in Progress

City of Columbus vendors may view bids in progress with the documented steps below in the City of Columbus D365 Vendor Portal. **Note**: Bids In Progress are bids that are in progress by a Vendor but have <u>not</u> yet been submitted. To submit a bid, see section <u>Enter and Submit a Bid</u>

Menu Path: Homepage > Vendor bidding

Step 1. Click on the Vendor bidding tile

						P					1	
										4	/	
<	N	overni	ber	202	0	>		Contract Compliance	R	Purchase order confirmation	RE	Vendor information
Su.	Mo	74	Vie.	Th	ħr.	54			CL.			
1	2	3	4	5	6	7						
	9	10		12	13	34	5	Invoicing	B	Vendor bidding	R	Vendor payments
15	*	17	18	19	20	21	-64				E .	
22	23	24	25	26	27	28			_			
29	30											

Step 2. Click on the Bids in progress tile

032173 ~		
Summary		
0	1	0
New bid invitations	Accepted bids	Lost bids
0	3	3963
Returned bids	Open RFQs	Closed RFQs
2 [©]	2	
Bids in progress	Suggested RFQs	

Step 3. View the Bids in Progress information displayed

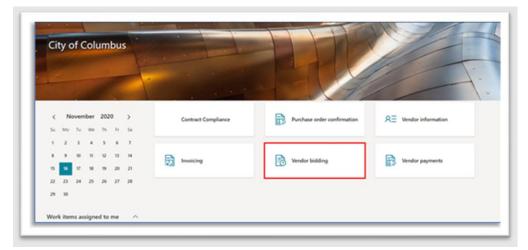
a. To view additional information for the bid, click the blue **BID#######** hyperlink

P titur							
✓ Reporter.	1. App propriet	Report for potation care	Requesting department	Document title	Solution type	Bid type	Eth stated
801040721	Vendor is updating	RFQ015114		test for RFQ descript and altern	N	Sealed	~
801040897	Vendor is updating	RFQ015117	Auditor's Office	Animal collars and harmesses	N	Sealed	~

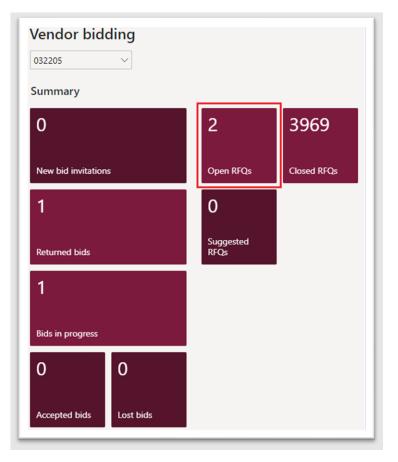
View All Open RFQs

City of Columbus vendors may view all open RFQs with the documented steps below in the City of Columbus D365 Vendor Portal.

Step 1. Click the Vendor bidding tile on the homepage



Step 2. Click the Open RFQs tile



Step 3. From the Open Bids page, view list of Open Bids

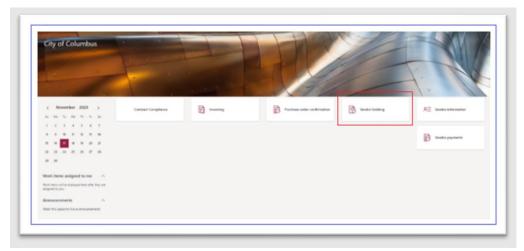
	Solicitation T	Requesting department	Document title	Solicitation type	Expiration date and time ∇				
ş	RFQ015117	Auditor's Office	Animal collars and harnesse	s INF	12/3/2020 01:00:00 PM				
F	RFQ015129	Rec and Parks	Gym Floor Refinishing 2020	– S RFI	11/13/2020 07:00:00 AM				
	est for quotat								
	ed information	~	Procurement category II	em number	Product name	Quantity	Unit	Currency	Expiration date and time

View Closed RFQs

City of Columbus vendors may view closed RFQ with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor bidding

Step 1. Click the Vendor bidding tile



Step 2. Click the Closed RFQs tile



Step 3. From the Closed Bids page, view list of Closed Bids

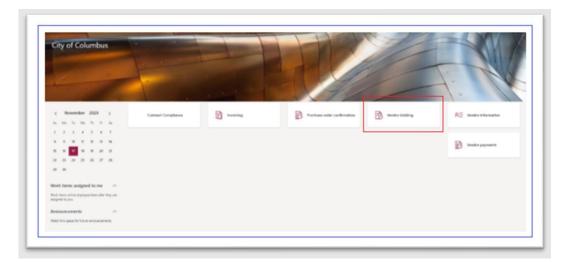
cure	ement category				
equ	Solicitation 1		Document title	Solicitation type	Expiration date and time ∇
	RFQ003353		DOP/Locksmith Services	INF	12/17/2018 02:58:50 PM
	RFQ008405		DOW/WQAL - Salt	INF	12/17/2018 03:04:21 PM
	RFQ008426		DOW/WQAL - ECD Radiological	INF	12/18/2018 02:00:20 PM
	RFQ008435		EH-POOL CHEMICALS	INF	12/27/2018 01:55:08 PM
	RFQ008447		DOW/WQAL - Kimax glass drain	INF	12/18/2018 02:01:44 PM
	RFQ008696		DOSD-Surveillance Lab Purge &	INF	12/27/2018 02:15:25 PM
		FLECTRICITY	DOP - 2018 - METAL CABINET F	INF	12/17/2018 02·27·36 PM

Enter and Submit Bid

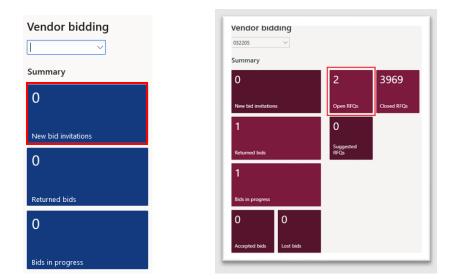
Businesses will be notified via email of new request for quotations matching categories they have registered for. Upon receipt of the email, follow the instructions below to enter and submit a bid in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Homepage > Vendor bidding

Step 1. Click the Vendor bidding tile



Step 2. Click the **New Bid Invitations** for RFQs that your business has been matched based on procurement categories. Otherwise, select **Open RFQs** to view all open solicitations.



Step 3. Select the desired RFQ you would like to open by clicking the blue hyperlink number (RFQ###### if looking under Open bids or BID###### if looking under New Bid Invitations)

		oid invitations ndard vie	W ~								
2	ρ _{Fi}	lter									
Г	0	Request for ↑	Reply progress	Request for quotation case	Requesting department	Document title	Solicitation type	Bid type	Bids sealed	Requested delivery date	Expiration date and time \bigtriangledown
	0	BID1834837	Not started	RFQ020162		Supplies	IFB	Sealed	~	11/29/2021	12/2/2021 1:00:00 PM

Step 4. Click the Bid button on the RFQ details page



Step 5. If your business was not previously invited to the selected RFQ, a confirmation screen for "Bid for Vendor # created" is displayed confirming the self-invitation to the RFQ. Click the Close button.

Step 6. Confirm all the RFQ details displayed are correct to vendor preference

- a. Status
- b. Requestor
- c. Delivery Name
- d. Delivery Address
- e. Address
- f. Requested Delivery Date
- g. Expiration Date
- h. Vendor Account
- i. Vendor Name

BID1834837 : CBUS TEST VENDOR	THOO I Genderly and					
Request for quotation						
ipplies						
General						
Request for quotation	Requestor	Address	Bid type	Bid submitter	Vendor name	
BID1834837	RACKLEY RYAN A	90 W Broad St rm 109	Sealed		Cbus Test Vendor Twoo	
Document title	Requesting department	Columbus, OH 43215 USA	Requested delivery date	Submission date and time	Prices include sales tax	
Supplies		USA	11/29/2021		No No	
Status	Delivery name		Expiration date and time	Allow alternates on response lines	Document	
New: Action required	City of Columbus		12/2/2021 01:00:00 PM	Yes	No	
Request for quotation case	Delivery address	Solicitation type	Currency	Vendor account		
RFQ020162	City of Columbus	IFB	USD	025316		

Step 7. In the Lines section, select the line for which you would like to enter a bid

Lines					
Reset	from RFQ Ad	d alternate Remov	ve alternate RFQ line attachments Bio	f line attachments	
~	Line number	Line type	Procurement category	Product name	Item number
~	10	Category	Articulating boom lift	test	

Step 8. In the bid row selected, enter a bid amount in the Unit Price field.

Unit		nts Bid line at	Net amount	Comment	Alternate
PTHS				comment	
	~	15.00000	150.00		No

Step 10. Now that you have started a new bid, click **Bid line attachments** to upload supporting documentation

Lines						
Reset	from RFQ Ad	d alternate Remove alte	mate RFQ line attachments	Bid li	ine attachments	
~	Line number	Line type	Procurement category		Product name	item number
~	10	Category	Articulating boom lift		test	

Step 11. Click New

Save	e	+ New	🔋 Delete	Options	٩
	۶	Filter			ור
=					=1

Step 12. Enter a description in the Text box

Votes		
TEST		

Step 13. Click Browse to attach a document from the user desktop

Note: The document must be in PDF format and the name of the file must be less than <u>50</u> characters in length.



Step 14. Once you have successfully uploading supporting bid documentation, click **X** button to exit



Step 15. Expand the Line details section and ensure all details are correct

DENTIFICATION	REPLY AMOUNTS	REPLY DETAILS
duct name	Unit	Vendor's item number
TEST-1	~	
ocurement category	Quantity	Delivery date
Advertising	10.00	11/30/2020
Item number	Unit price	Item description
	15.00000	TEST-1
ne number	Price unit	
10	0.00	
atus	Charges on purchases	
New	0.00000	Comment

Step 16. Repeat adding attachments and pricing for all remaining lines in the solicitation. **Step 17.** Click the **Submit** button

Finance and Oper	ations v	endor collaboration 📏	Workspaces 📏 V	endor bidding			
Save Submit	Reset from RFQ	RFQ attachments	Bid attachments	Questions and answers	Activity	Options	P

Step 18. Click the Yes button

	Do you want to submit your bid? Until the
	expiration date, you can use the Recall action to update the bid that you submit.
	Click Yes to submit the bid.
	Yes No
-	Bid type

Step 19. The "You have successfully submitted your bid" confirmation screen is displayed. Click the Close button.

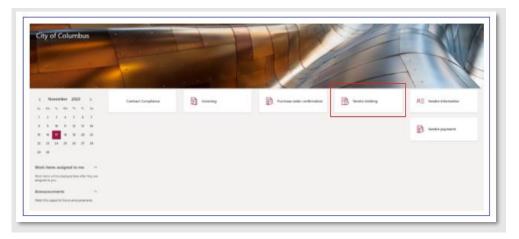
You have successfully submitted your bid.	
Do not tell me again	10
Close	
Bid submitter	d

View Amendments

City of Columbus vendors may view amendments or changes made to an amended RFQ and its line items with the documented steps below in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Homepage > Vendor bidding

Step 1. Click the Vendor bidding tile



Step 2. Click the New bid invitations tile

Vendor bidding
Summary
0
New bid invitations
0
Returned bids
0
Bids in progress

	oid invitations ndard vie	W ~								
P Fi	lter									
0	Request for ↑	Reply progress	Request for quotation case	Requesting department	Document title	Solicitation type	Bid type	Bids sealed	Requested delivery date	Expiration date and time
0	BID1834837	Not started	RFQ020162		Supplies	IFB	Sealed	\checkmark	11/29/2021	12/2/2021 1:00:00 PM

Step 4. Click **Amendments** section to expand the section. Optionally, you can select the down arrow to expand the section if needed.

Amendments	🗸

Step 5. Click Amendment attachments

mendments attachments			
 Amendment nu Name 	Description	Documents	
1 View Amendment Test	Test	Yes	

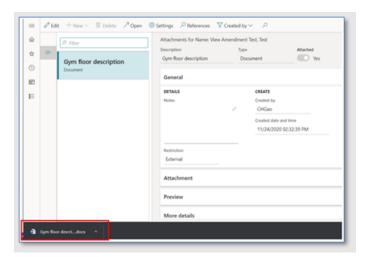
Step 6. To preview the attachment, select the **preview** section. Optionally, you can select the down arrow to expand the section if needed.

Г		
	Preview	~
14		

Step 7. To view the full attachment, click Open on the top ribbon

Ed	Bit + New ∨ 🖹 Delete 🗡 Ope	en 💿 Settings 🔑 References 🕤	7 Created by ∽
	P Filter	Attachments for Name: View Description	Amendment Test, Test
	Gym floor description	Gym floor description	Document

Step 8. Validate the file opens and downloads



Step 9. Click the X button to close the window

Ø Edit	+New∽ 🛞 Delete ZOpen	⊕ Settings	Created by 🗸 🔎		0 O 🖬 🗙
	P Filter	Attachments for Name: View A	Amendment Test, Test Type	Allached	
1	Gym floor description	Gym floor description	Document	C Vis	

Step 10. Expand the Line Details section

a. Verify any changes in Quantity, Unit Price, etc.

IDENTIFICATION	REQUESTED AMOUNTS	REQUESTED DETAILS
Product name	Unit	Vendor's item number
Recall Bid TEST	PAIR	
Procurement category	Quantity	Requested delivery date
City of Columbus - UNSPSC	5.00	11/24/2020
Item number	Unit price	Item description
	0.00000	Recall Bid TEST
ine number	Price unit	
10	0.00	
Status	Charges on purchases	
New	0.00000	

Step 11. To be considered for the Amended RFQ, <u>you must follow the steps outlined above to</u> <u>Enter and Submit bid</u>

Add Alternate Bid on an Item

City of Columbus vendors may add an alternative bid with the documented steps below from the City of Columbus D365 Vendor Portal. **Most requests for quotations allow vendors to submit alternate bids.**

Access Via Menu Path: Home page > Vendor bidding

Step 1. Click the Vendor bidding tile



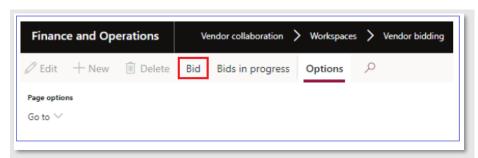
Step 2. Click the Open RFQs or New Bids Invitations tile

Vendor bidding		
032205 ~		
Summary		1
0	3	3963
New bid invitations	Open RFQs	Closed RFQs
2	0	
Returned bids	Suggested RFQs	
2		
Bids in progress		
0 0		
Accepted bids Lost bids		

Step 3. Select the desired RFQ you would like to open by clicking the blue hyperlink number (RFQ###### if looking under Open bids or BID####### if looking under New Bid Invitations)

Open bids	
Procurement category	
Request for quotati	ion header
✓ Solicitatio ↑ ▽	Requesting department
RFQ015157	Auditor's Office
	1

Step 4. Click the Bid button to add an alternative bid



Step 5. If your business was not previously invited to the selected RFQ, a confirmation screen for "Bid for Vendor # created" is displayed confirming the self-invitation to the RFQ. Click the Close button.



Step 6. Click the Bid button

Financ	e and Ope	erations	Ve	ndor collaboration	>	Workspaces	>	Vendor bidding
🖉 Edit	+ New	🗓 Delete	Bid	Bids in progress		Options	Q	
Page optio Go to ∨	ns							
0010								

Step 7. To look at previous bid info, click the RFQ attachments button in the top ribbon

Finan	ce and Operation	ons	Vendor col	llaboration 〉 Worl	ospaces 💙 Vendor bio	lding				
🖉 Edit	Archived Bids	Submit	Decline	Reset from RFQ	RFQ attachments	Bid attachments	Bid tabulation report	Questions and answers	Options	Q

Step 8. To preview the attachment, select the preview section. Optionally, you can select the down arrow to expand the section if needed.

Preview		
Gym floor description		
PAGE 1 OF 1	75% 🗐 •	×
		I

Step 9. Click the X button to close window

Finance and Operations	Voxdor collidionation 🔰 Workspeces 🗦 Voxdor balding	0015	<i>a</i>	Q	0	۲	?	0
🖉 Edit — Hear 🗸 🛞 Deleta	Alopen ⊗ Settings P References ♥ Created by ∨ P					0	0 =	×
								_

Step 10. Click to select the desired line number in the Lines section to enter a new bid

Reset from RFQ_Add alternate Remove alternate RFQ line attachments Bid line attachments												
/ Lin	e number line type	Procurement category	Product name	Rem number	Quantity	Unit	Unit price	Net amount	Comment			
1	10 ategory	Trees and shrubs	oak trees		25.00	EA 🗸 🗸	0.00000	0.00				
	20 Category	Trees and shrubs	Rose Bushes		50.00	EA	0.00000	0.00				

Step 11. Click the Add alternate button

a. A new row will be created

Line	s										
Res	et from RFQ	Add alternate	Remove alter	mate RFQ line attachments Bid I	ine attachments						
~	Line number	er Line type		Procurement category	Product name	Item number	Quantity	Unit	Unit price	Net amount	Comment
~	1	0 Category		Trees and shrubs	oak trees		25.00	EA \sim	0.00000	0.00	
	2	0 Category		Trees and shrubs	Rose Bushes		50.00	EA	0.00000	0.00	

Step 12. In the Unit price column, enter a new unit price

Lines									
Reset from RFQ	Add alternate Remove	alternate RFQ line attachments	Bid line attachments						
Line number	Line type	Procurement category	Product name	Item number	Quantity	Unit	Unit price	Net amount	Comment
10	Category	Trees and shrubs	oak trees		25.00	EA	0.00000	0.00	
10	Category	Trees and shrubs	Insert name here		25.00	EA 🗸 🗸	10.00000	250.00	
20	Category	Trees and shrubs	Rose Bushes		50.00	EA	0.00000	0.00	

Step 13. In the **Product name** column, update field with the desired text. Additional details can also be added to the **Comment** field or under the section **Line details**.

Reset	from RF	Q Add alte	ernate Remove alt	ernate RFQ line attachments Bi	d line attachments						
0	C	Line number	Line type	Procurement category	Product name	Item number	Quantity	Unit	Unit price	Net amount	Comment
		10	Category	Boys athletic wear	Supplies		10.00	EA	5.00000	50.00	
0		10	Category	Boys athletic wear	Supplies		10.00	EA \checkmark	10.00000	100.00	

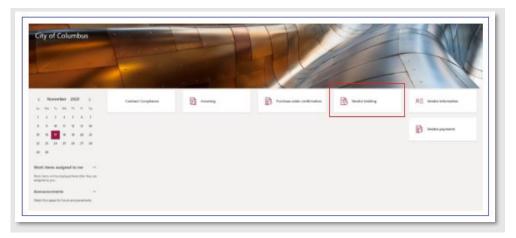
Step 14. Click the **Save** button in the top ribbon to save changes without submitting. To Submit the bid, be sure to follow the steps outlined in the section <u>Enter and Submit Bid</u>.

Complete RFQ Bid Questionnaire

RFQs may require a vendor to complete questionnaires as part of the bid process with the documented steps below in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Home page > Vendor bidding

Step 1. Click the Vendor bidding tile



Step 2. Click on Open RFQs or New bid invitations titles

Vendor bidding
Summary
0
New bid invitations
0
Returned bids
0
Bids in progress

Step 3. Select the desired RFQ you would like to open by clicking the blue hyperlink number (**RFQ#######** if looking under Open RFQs or **BID#######** if looking under New Bid Invitations)

ĺ	New bid invitations								
	Standard view \sim								
	P Filter								
	C Request for ↑ Reply progress	Request for quotation case	Requesting department	Document title	Solicitation type	Bid type	Bids sealed	Requested delivery date	Expiration date and time ∇
	BID1834837 Not started	RFQ020162		Supplies	IFB	Sealed	~	11/29/2021	12/2/2021 1:00:00 PM

Step 4. Click the Bid button in the top ribbon

Finance and Operations	Vendor collaboration 💙 Workspaces	> Vendor bidding			
Archived Bids Bid Decline	RFQ attachments Bid attachments	Bid tabulation report	Activity	Options	Q

Step 5. Click Questionnaire to expand the section

	Questionnaire				
Con	nplete questionnaire Vi	ew answers			
~	Name ↑	Description			
	Compliance	Contract Compliance			
			,		

Step 6. Click the Complete questionnaire button

✓ Name ↑	e ↑ pliance	Description Contract Compliance	
C 1	pliance	Contract Compliance	
Complia			

Step 7. Answer each question, select the Forward button to proceed through the questions

Step 8. After answering the last question, click the End button

Submit Vendor Question Regarding RFQ

Access Via Menu Path: Home page > Vendor bidding

Step 1. Click the Vendor bidding tile

City of Columbus				11/1	
				10	
A Comments					1. 10
			4.4		
	and the second se			The second s	
c November 2020 >	Curtual Compliance	Di weenteg	Portase unter continuation	R Vestor building	RE Vendor solo matter
					A Province and
1.1.1.1.1.1.1					_
					B Vente payment
n + <mark>1</mark> + + 2 2					
Work Heres assigned to me					
West here with a depicted has after leng one adopted to pro-					
Annamenerts					
Test to get for being propositions					

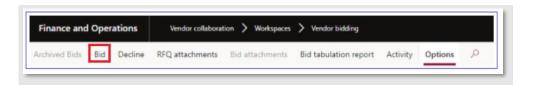
Step 2. Select Open RFQs or New Bid invitations tile

Vendor bidding		
032205 ~		
Summary		ı
0	3	3963
New bid invitations	Open RFQs	Closed RFQs
2	0	
Returned bids	Suggested RFQs	
2		
Bids in progress		
0 0		
Accepted bids Lost bids		

Step 3. Select the desired RFQ you would like to open by clicking the blue hyperlink RFQ number (Select the desired RFQ you would like to open by clicking the blue hyperlink number (**RFQ#######** if looking under Open RFQs or **BID#######** if looking under New Bid Invitations)

C	Эре	en bids	
Р	rocure	ment category	
_			_
	Reg	uest for quotati	on header
F		1	
	\checkmark	Solicitatio 1 🍸	Requesting department
	\checkmark	RFQ015157	Auditor's Office
L		·J	

Step 4. Click the Bid button in the top ribbon



Step 5. Click the Question and answers button top ribbon



Step 6. Click the Ask a question button

Step 7. Click the Save button

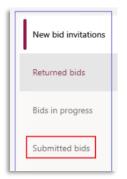
View Vendor Questions and Answers

Access Via Menu Path: Home page > Vendor bidding

Step 1. Click the Vendor bidding tile

City of Columbus			and the second		
					- 41
	-			1-	7. 14
and the second			1 7 10	-	1. 11
c November 2020 3	Curtual Compliance	Di weenteg	Portase unter continuation	R Vestoriestry	RE Versitier to for treatment
		1. The second			
1.1.1.1.1.1.1					
					B Venter payment
Kork items assigned to me					
lint here within displayed land after they are segmed to put.					
enamerers o					
NOT THE MARK TO THE PRODUCT AND					

Step 2. Click the Submitted Bids tab



Step 3. In the **Submitted bids** grid, select the desired **BID######** you would like by clicking the blue hyperlink number.

Bids		
New bid invitations	₽ Filter	
	Request for qu	Request for quotation case
Returned bids	BID1041789	RFQ015116
Bids in progress		•
Submitted bids		

Step 4. Click Questions and answers button in the top ribbon



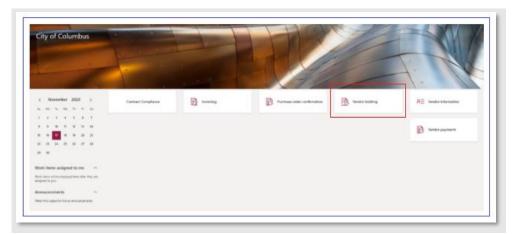
Step 5. View vendor questions and answers

Recall a Bid

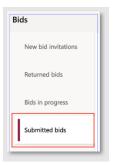
Bids may be recalled prior to the bid expiration date as necessary to make corrections or updates. A vendor may recall their bid in order to update their bid, add attachments, add alterative bids, etc. with the documented steps below in the City of Columbus D365 Vendor Portal. A bid **cannot** be recalled after the bid expiration date.

Access Via Menu Path: Home page > Vendor bidding

Step 1. Click the Vendor bidding tile

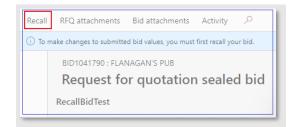


Step 2. Click the Submitted Bids tab



Step 3. In the Submitted bids grid, select the desired RFQ you would like to recall by clicking the blue hyperlink RFQ number

Bids						
New bid invitations	P Filter					
	Request for qu	Request for quotation case	Document title	Reply progress	Solicitation type	Bid type
Returned bids	BID1041788	RFQ015134	Animal collars and harnesses	Submitted by vendor		Sealed
Bids in progress	L	1				
Submitted bids						



Step 5. Click the Yes button to recall the vendor bid. Reminder:

Note: Recalling your Bid removes your submission from consideration. To be considered for the RFQ, you must follow the steps in the section <u>Enter and Submit bid</u> to submit a new bid submission.

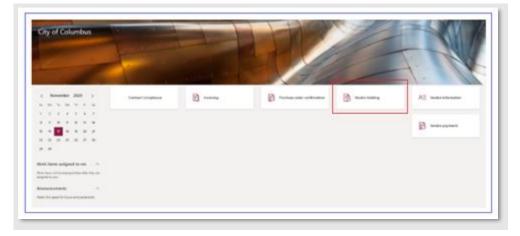
View or Add Attachments

Vendors may attach appropriate documentation to each bid line in an RFQ and view any relevant attachments regarding an RFQ with the documented steps below in the City of Columbus D365 Vendor Portal.

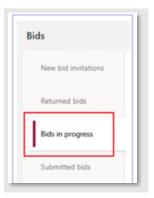
Access Via Menu Path: Home page > Vendor bidding

View Attachments

Step 1. Click the Vendor Bidding tile



Step 2. Click the Bids in progress tab



Step 3. In the **Bids in progress** grid, select the desired RFQ you would like to open by clicking the blue hyperlink number (**BID#######**)

Bids	
New bid invitations	P Filter
	Request for qu
Returned bids	BID1041792
Bids in progress	BID1041795
•	

Step 4. Click RFQ Line attachments in the Lines section

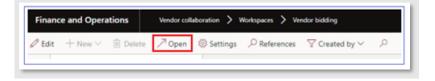
).est	formality							
	ry and paym	and large						
ines		-						
64	ing attachment	Ind ine attachments						
Υ.	Los norther	Une Type	Recomment category	Product stame	hern number	Attornatio	Same	boursen
	10	Caregory	Ory of Calumbus - UNSPSC	707 august		100	New	No
	30	Campoy	City of Calumbus - UNSPSC	7857 mm 2		740	New	No.
		Campony	Og of Calumbus - UNDFSC	107 mm 1		100	Tanu .	Tan.

Step 5. To preview the attachment, select the **Preview** section. Optionally, you can select the down arrow to expand the section if needed.

Preview	Gyn flor Assrytion		
a ~	GE 1 OF 1	235 B	• 2

Step 6. Click **Open** on the top ribbon to validate file can be downloaded and viewed properly on vendor device

a. The attachment will be displayed

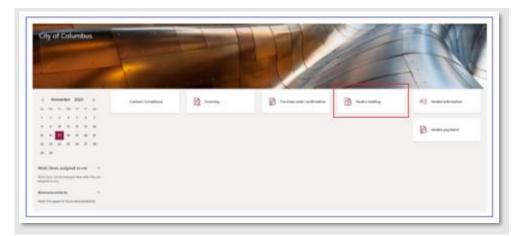


Step 7. Once you have viewed the attachment, click the X button to close the attachment

Finance and Operations . Instruction	ma P 🖸 🛛 🔿 🎯
Zim they Elma Zime Clamp Statement Toutility S	€ C G <mark>×</mark>

Add Attachments

Step 1. Click the Vendor bidding tile

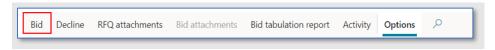


Step 2. Click New bid invitations

Step 3. Select the desired RFQ you would like to open by clicking the blue hyperlink number (**BID######**)

ĺ	New bid invitations Standard view ~								
	P Filter								
	○ Request for ↑ Reply progress	Request for quotation case	Requesting department	Document title	Solicitation type	Bid type	Bids sealed	Requested delivery date	Expiration date and time $ \heartsuit $
	BID1834837 Not started	RFQ020162		Supplies	IFB	Sealed	\checkmark	11/29/2021	12/2/2021 1:00:00 PM

Step 4. Click Bid



Step 5. In the Lines section, click Bid line attachments

Lines
Reset from RFQ Add alternate Remove alternate RFQ line attachments Bid line attachments

Step 6. Click New

	Finance and Operations								
≡	🗟 Save	$+_{\rm New}$	📋 Delete	Options	Q				
ŵ		• Filter							
☆	=				-				

Step 7. Click Browse and select a file from your desktop to attach

a. Note: Only PDF documents can be uploaded and accepted for bids

Upload document	
Notes	
	Browse

Step 8. View the attached file is correct

P Filter	Bid attachments 1.0000000000	: BID1046346
2 THM	Name	Attached
Test Gym Floor Description.p	Test Gym Floor Description.pdf	Yes
	General	
	DETAILS	Created by
	Note	Vendor2Contact2@g
		Created date and time
		12/10/2020 02:23:58 PM
	Attachment	
	FILE INFORMATION	
	Name	
	Test Gym Floor Description.pdf	
	File type	

Step 9. Click X to exit



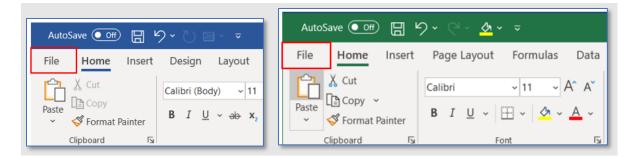
Save File as PDF

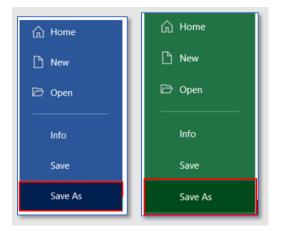
Step 1. Open or create the desired Word or Excel document to save as a PDF

File Home Insert Design Layout Reference	nces Mailings Review View Help 🔎 Search		🖻 Share 🛛 🖓 Comments
Copy		bCcDd AaBbCcDd AaBbCc AaBbCc AaBbCc AaBbCc AaBbCc AaBbCc AaBbCc AaBbCc AaBbCc AaBbC AaBbC	CcD AaBbCcDd ↓ tele Subtle Em
Clipboard Fu Font	Fsi Paragraph Fsi	Styles	Fa Editing Voice A
	Sample document 1, 2, 3,		-

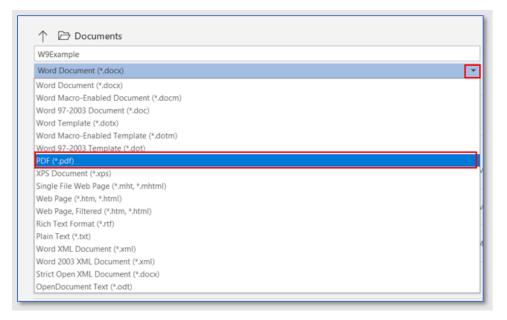
A	AutoSave 💽 街 🏷 Y V V 🖉 Y 🔻												Sampl	e Data.xlsx	- Saved		
Fil	le	Hor	ne	Insert	Page	Layout	Formulas	Data	Review	View	Developer	Help	,∕⊃ Searc	h			
$\begin{array}{c c c c c c c c c c c c c c c c c c c $																	
	C	lipboar	rd	5		Fo	nt	۲		Align	ment	دا ا	Nun	nber	l⊇	Styles	
124			-	: ×	~	f _x											
		А		В	С	D	E	F	G	Н	1	J	К	L	М	N	0
	Sam	ple															
2		1		2	3	3											
3																	
4																	
2 3 4 5																	
6																	

Step 2. Click File > Save As





Step 3. Select PDF from the file type dropdown

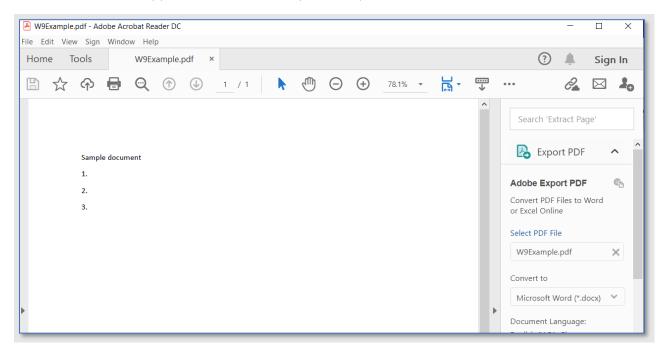


Sample Data	
Excel Workbook (*.xlsx)	•
Excel Workbook (*.xlsx)	·
Excel Macro-Enabled Workbook (*.xlsm)	
Excel Binary Workbook (*.xlsb)	
Excel 97-2003 Workbook (*.xls)	
CSV UTF-8 (Comma delimited) (*.csv)	
XML Data (*.xml)	
Single File Web Page (*.mht, *.mhtml)	
Web Page (*.htm, *.html)	
Excel Template (*.xltx)	
Excel Macro-Enabled Template (*.xltm)	
Excel 97-2003 Template (*.xlt)	
Text (Tab delimited) (*.txt)	
Unicode Text (*.txt)	
XML Spreadsheet 2003 (*.xml)	
Microsoft Excel 5.0/95 Workbook (*.xls)	
CSV (Comma delimited) (*.csv)	
Formatted Text (Space delimited) (*.prn)	
Text (Macintosh) (*.txt)	
Text (MS-DOS) (*.txt)	
CSV (Macintosh) (*.csv)	
CSV (MS-DOS) (*.csv)	
DIF (Data Interchange Format) (*.dif)	
SYLK (Symbolic Link) (*.slk)	
Excel Add-in (*.xlam)	
Excel 97-2003 Add-in (*.xla)	

Step 4. Click Save



a. The PDF will appear and be saved to your computer



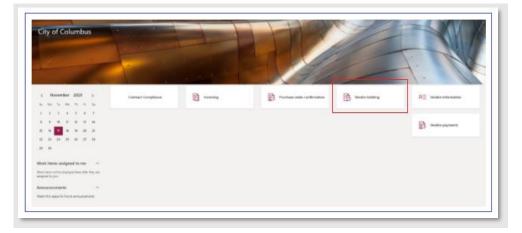
BampleData1.pdf - Adobe Acrobat Reader DC	- 🗆 ×
File Edit View Sign Window Help	
Home Tools SampleData1.pdf ×	🕐 🌲 Sign In
	<i>k</i> 🖂 🚣
Sample 1 2 3	Search 'Extract Page' Export PDF Adobe Export PDF Convert PDF Files to Word or Excel Online Select PDF File SampleData1.pdf X

View Archived Bids

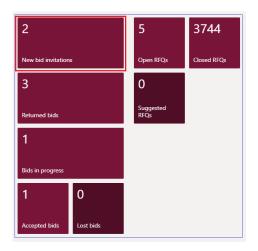
Vendors may view bids that have previously been submitted after the expiration date has passed through the Archived Bids function with the documented steps below in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Home page > Vendor bidding

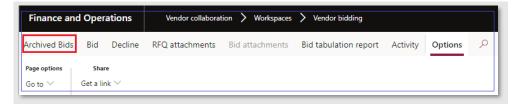
Step 1. Click the Vendor bidding tile



Step 2. Click the New bid invitations tile



Step 3. Click Archived Bids in the top ribbon and view all available Archived Bids in the grid



Step 4. Select desired **Request for quotation** in the grid by clicking the blue hyperlink to view additional details

	Archived Bids BID1041790 : FLANAGAN'S PUB	
	P Filter	
	Request for qu Reply progress BID1041790 Vendor is updating	
Archived Bids BID1041790 : RecallBidTest	FLANAGAN'S PUB Reply progress Vendor is updating	
General		^
Request for quotation BID1041790	Bids sealed Yes	
Document title RecallBidTest	Requested delivery date 11/24/2020	
Status New: Action required	Expiration date and time 12/18/2020 01:00:00 PM	
Request for quotation case	Currency	

Step 5. Click the X button to close the screen

View and Print Purchase Orders

Vendors may view confirmed purchase orders, attachments, and print PO confirmations with the steps documented below in the City of Columbus D365 Vendor Portal.

Vendors will receive an email notification when a purchase order has been issued. This email will be sent to the email address associated with the vendor's account. See the section <u>Update</u> <u>Contact Information</u> to change the email address associated with your vendor record.

Access Via Menu Path: Home page > Purchase order confirmation

Step 1. Click the purchase order confirmation tile



Step 2. Purchase Order Confirmations Journal will open. Highlight desired Purchase Order and select **Print/Preview**. Select **Original Preview**.

Finan	Finance and Operations 0										
Options	, ,0										
Y	Standard view \checkmark Purchase order Overview Lines Preview/Print \sim Purch	r confirmations									
	Invoice account	Purchase order	Purchase journal	Accounting date	Date	Buyer group	Cur	Amount Order send status			
	034412	PO290096	PO290096-2	9/30/2021	9/30/2021		USD	10,850.00 Waiting			
	034412	PO290109	PO290109-1	10/5/2021	10/5/2021		USD	2,500.00			
	034412	PO290110	PO290110-1	10/6/2021	10/6/2021		USD	1,890.00			

Step 3. The PO confirmation will be displayed

Step 4. Select the Export dropdown list

Step 5. Select a file type from the dropdown to download the PO confirmation. Once downloaded to your local computer the PO confirmation can be printed.

				We	ed .					
COLUMBUS		Purchase Order N P0000065	in.	Revision Exc	el i	kon Date 14/2018		Pag		PURCHASE ORDER PO000065 REVISED
		This nuted	ier mint i			kages and	f shippi	ing papers.	·)	REVISED
						-	_	_	_	
VENDOR (NUMBER: 0071 Grainger	170)		08DE8	CAPIE E	(TML	erms:				Net 30 Days
Dept 839174745 Palatine, IL 60038-0001			10000	T∉		rima:	_			t.
1111 E. Broad St., Suite	e 101Colurr	nbus, OH	ATTEN	TION			Suite	E Broad		
	e 101Colur		leikery	TION ONI QTY	New QTV	LOM	1111 Suite Colu USA	E Broad 101		Line Amou
1111 E. Broad St., Suite 43205 USA USA					New QTV	UOM	1111 Suite Colu USA	E Broad 101 mbus, OF		Cine Anton
1111 E. Broad St., Suite 43205 USA Line frem Number Dess # NO CHANGE		6	leikery			USD	1111 Suite Colu USA	E Broad 101 mbus, OF	43205	Line Amou 0.0000
1111 E. Broad St., Suite 43205 USA Line htm Number Desc NO CHANGE	cription.	6	belivery Date	aw an		line -	1111 Suite Colu USA	E Broad 101 mbus, OF	43205	7/65/65

View Payment Status and Payment Information

Vendors may view the status of all payments they have made as well as information such as check number, recipient, and date for each payment made and the details of the Purchase Order the payment was made towards with the documented steps below in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Home page > Vendor payments

Step 1. Click the Vendor Payments tile on the homepage



Step 2. Click on the Paid tile

=	Options P				
⇔ ☆ ©	Transactions	Transactions			
	4 [°] 1183	A8	P film		
	Approved.net paid Paid	All payments	✓ Vender account V 087170	Transaction type Purchase order	Amount in transaction car Date 436.05 2/8/2016
		All invoices	007170	Purchase order Purchase order	126.09 2/8/2016 249.84 2/9/2016
			007170	Purchase order Purchase order	427.30 3/9/2016 345.43 3/9/2016

- **Step 3.** The **Invoices/Checks** page is displayed. The following information will be listed for the vendor:
 - a. Bank account
 - b. Date
 - c. Check number
 - d. Status
 - e. Recipient
 - f. Currency
 - g. Amount

P Filter	DATE RANGE From date 12/1/2015	To dete 11/25/	2020 [11]				
venkew General	Remittance	Check number	Status	Recipient 🖓	Remittance location	Address	Bridge
BankSest 1	6/12/2020	7	Paid	000022	Production Components, Inc.	P.O. 8ox 748	~
BankTest 1	6/12/2020	6	Paid	000006	Premier Marketing Group, Inc.	6 Rockwood Drive P.O. Box 540	~
BankTest 1	6/11/2020	5	Paid	000013	Turning Technologies, Llc	255 West Federal Street	~
BankTest 1	6/11/2020	4	Paid	000013	Turning Technologies, Llc	255 West Federal Street	~
BankTest 1	6/11/2020	3	Paid	000013	Turning Technologies, Uc	255 West Federal Street	~
BankTest 1	6/11/2020	2	Paid	000014	Nomar Enterprises LLC	DBA Rugged Depot	~
BankTest 1	6/9/2020	1	Paid	000014	Nomar Enterprises U.C.	DBA Rugged Depot	~
CHASEWARR	10/5/2020	21439461	Paid	022323	ROBERT YORK	8150 CREEKSTONE LN	~
CHASEWARR	10/5/2020	21439460	Paid	X081407	YESENIA AGUILAR	2248 FERRIS RD	~
CHASEWARR	10/5/2020	21439459	Paid	028301	Susan Wollenhaupt	888 Thurber Drive West Apt F	~

Step 4. From the table, select the desired payment line

Checks							
	DATE RANGE						
	From date	To date					
P Filter	12/1/2015	E3 11/25/	2020 [2]				
Overview General	Remittance						
✓ Bank account 1	Date 🖓	Check number	Status	Recipient V	Remittance location	Address	Bridgin
BankTest 1	6/12/2020	7	Paid	000022	Production Components, Inc.	P.O. 8ox 748	~
BankTest 1	6/12/2020	6	Paid	000006	Premier Marketing Group, Inc.	6 Rockwood Drive P.O. Box 540	~
BankTest 1	6/11/2020	5	Paid	000013	Turning Technologies, Llc	255 West Federal Street	~
BankTest 1	6/11/2020	4	Paid	000013	Turning Technologies, Llc	255 West Federal Street	~
BankTest 1	6/11/2020	3	Paid	000013	Turning Technologies, Llc	255 West Federal Street	~
BankTest 1	6/11/2020	2	Paid	000014	Nomar Enterprises LLC	DBA Rugged Depot	~
BankTest 1	6/9/2020	1	Paid	000014	Nomar Enterprises LLC	DBA Rugged Depot	~
CHASEWARR	10/5/2020	21439461	Paid	022323	ROBERT YORK	8150 CREEKSTONE UN	~

Step 5. Click the General Tab to view payment details for the payment line selected

- a. Bank account
- b. Check number
- c. Currency
- d. Amount
- e. Recipient type
- f. Recipient
- g. Recipient name
- h. Company accounts
- i. Voucher
- j. Reason code
- k. Reason comment

Checks				
	DATE RANGE			
	From date	To date		
P Filter	12/1/2015	11/25/2020		
Overview General	Remittance			
Bank account	Recipient type	Voucher	Reason comment	Created-date and time
CHASEWARR	Vendor	APPY140649		11/19/2020 02:34:47 PM
Check number	Recipient	Bridging posting		Created by
21439461	022323	C Yes	Status	DeepakVOA
Currency	Recipient name	Cleared date	Paid	Modified date and time
USD	ROBERT YORK			11/19/2020 02:34:47 PM
Amount	Company accounts	Reason code	Dute 10/5/2020	Modified by
240.00	cols			DeepakVOA.
			Voucher	
			APPY140849	

Step 6. Click the Remittance Tab

Step 7. View the Vendor Remittance Location and Address for the payment line selected



Step 8. Click the X to exit out of the page

	Print check copy Create blank checks	Options >		• 0 P O =
7 Checks				
CHECKS				
	DATE RANGE			
	From date	To-date		
P Filter	12/1/2015	E3 11/25/2020	co	

Step 9. Click on the Approved, not paid tile

-	Options P				
\$ \$	Transactions				
82	Summary	Transactions			
	4 [©] 1183	~	P film		
			✓ Wester account V	Transaction type	Amount in transaction cur Date
	Approved, not paid Paid	All payments	007170	Purchase order	436.05 2/8/2016
			007170	Purchase order	126.09 2/6/2016
		All invoices	007170	Purchase order	249.84 2/9/2016
			007170	Purchase order	427.30 2/9/2016
			007170	Purchase order	345.63 2/9/2016
			007179	Purchase order	123.04 2/9/2016

Step 10. The **Approved, not paid** transactions page is displayed. The following information will be listed for the vendor:

- a. Invoice #
- b. Purchase order #
- c. Invoice date
- d. Invoice due date
- e. Invoice status (paid versus unpaid)
- f. Vendor account number

/ Invoice 1	Purchase order	Date	Due date	Invoice status
9426662251	PO209974	2/11/2020	2/28/2020	Unpaid
9426697307	PO206422	2/11/2020	2/28/2020	Unpaid
9426981370	PO210913	2/11/2020	2/28/2020	Unpaid
DVTest-0007	PO212604	9/4/2020	10/4/2020	Unpaid

Note: The vendor can view **Purchase order** details by clicking the **PO** link in a selected Payment line

9426662251	PO209974	2/11/2020	2/28/2020	Unpaid
9426697307	PO208422	2/11/2020	2/28/2020	Unpaid
9426981370	PO210913	2/11/2020	2/28/2020	Unpaid
DVTest-0007	PO212604	9/4/2020	10/4/2020	Unpaid

Purcha	se order header							~
Purcha	se order lines							
+ Add	f line 👈 Add lines	Add products	B Remove	Purchase order line 🛩 - Financials 🗸	Inventory Y Product and supply S	✓ Update line ✓ Work details		
√ т.	Budget check r	Line number	Item number	Product name	Procurement category	Variant number	CW quantity CW unit	
	0	10		CARHARTT, J140-BRN XL	G TLLT Protective coats			
	0	20		CARHARTT, R41-BRN 40	36TK37 Protective coveralls			

Vendor Portal Support

Registration Questions?

Existing City Vendors

Have you previously done business with the City of Columbus using the previous Vendor Services portal? If so, we ask that all vendors re-register using your primary work address. We no longer require the use of a third-party email provider like google or yahoo. Select Sign Up at the top of the page to get started.

New to Doing Business with Columbus?

Registering is quick and easy. You will need your primary work email address, Tax ID/EIN and a copy of your W9. Select Sign Up at the top of the page to get started.

Still need help? Reach us by email or phone

Email: vendorservices@columbus.gov Phone: 614-645-8315