

City of Columbus Vendor Services

User Guide

Updated: December 2021

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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 [City of Columbus Vendor Portal](https://columbusvendorservices.powerappsportals.com/) or enter the following address in your browser: <https://columbusvendorservices.powerappsportals.com/>

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



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

City of Columbus Vend... > Sign Up

Name *

First Name Last Name

Email *

Business Email

Business Line *

--Select Business Line--

Company Name * **Federal Tax ID ***

Company Name Federal Tax ID

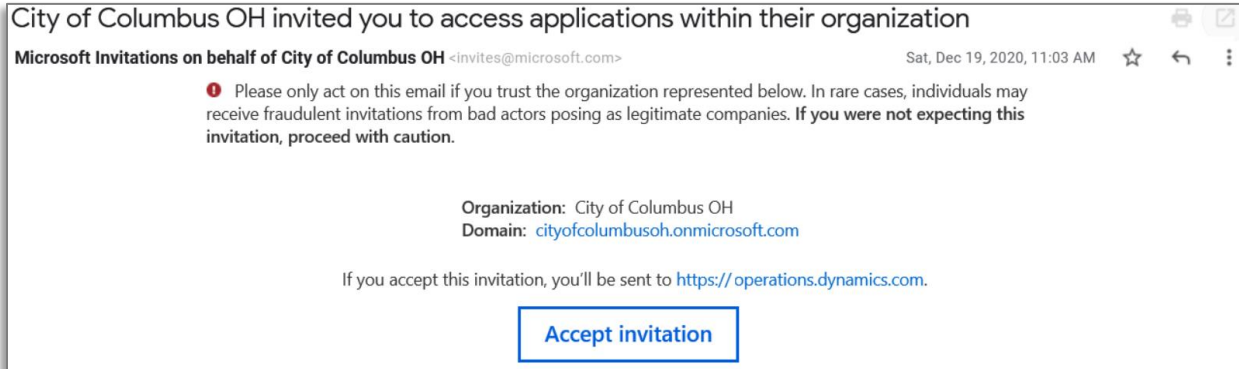
Register

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 invites@microsoft.com. If you do not receive this email, stop and contact Vendor Services at vendorservices@columbus.gov for further assistance.

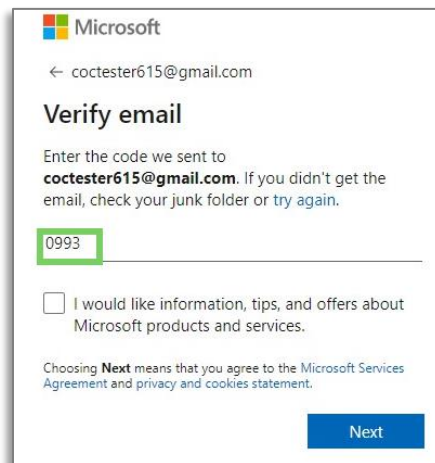
Step 5. Select the **Accept Invitation** button/link in the registration email



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 **NOT** 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.

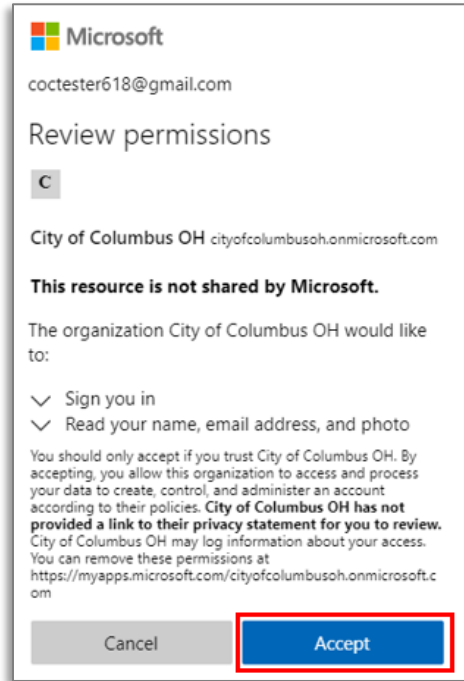
Step 7. After entering your existing password or creating a password if prompted, validate your account using the confirmation code sent to your provided email address.



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

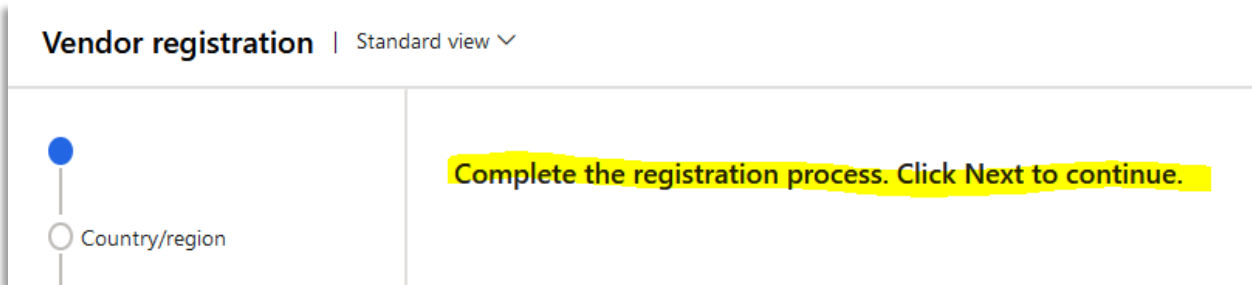
Step 9. Read and accept any **Terms and conditions** and complete any security prompts.

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



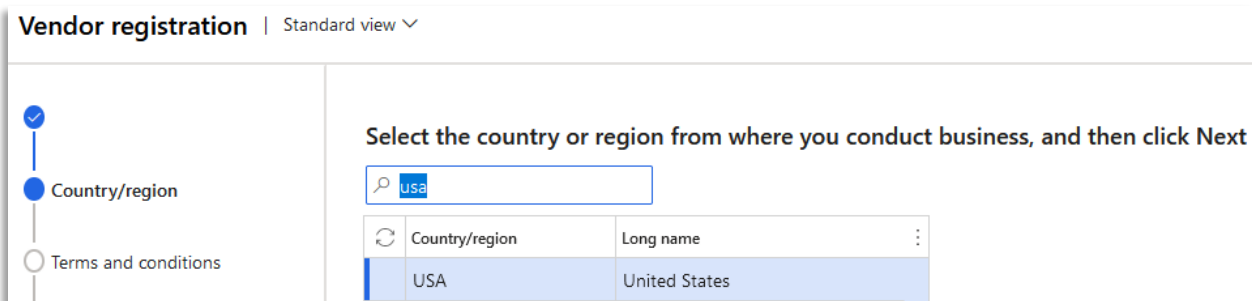
Vendor Registration

Step 11. Select **Next** to begin populating registration.



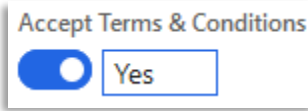
Country/region

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.



Terms and Conditions of Use

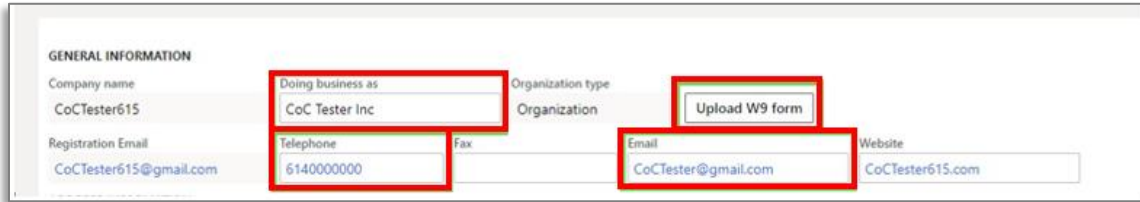
Step 13. Read the Terms and Conditions of Use. Upon your agreement, **click/switch** the button under Accept Terms and Conditions in order to continue.



Accept Terms & Conditions

Yes

Company information



GENERAL INFORMATION

Company name	Doing business as	Organization type	Organization	Upload W9 form
CoCTester615	CoC Tester Inc			
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:

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



ADDRESS INFORMATION

+ Add Edit

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 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

- First name, Middle name (optional), Last name
- Telephone
- 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.

Address same as Business

No

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

- 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.
- Multiple categories can be selected. Selecting a Segment or Family of procurement categories will include all categories listed under the primary category
- Vendors can add additional categories after registration - see [View/Update/Remove Business Procurement Categories](#) for details steps on adding procurement categories.

Select procurement categories for the products or services that your company requests to provide

[Add 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

- Vendors can fill out contract compliance questionnaire at a later date if information is not available – see [Contract Compliance Questionnaire](#)
- Vendors will need to complete contract compliance questionnaire to be eligible to perform work for the City of Columbus**

Vendor registration | Standard view

Questionnaire 1 of 1

1. What date was this company founded?
2. Who is the owner, president or principal of the company?
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?
5. Is EEO 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

Status: Not started

Complete questionnaire View answers Previous questionnaire Next questionnaire

- The **Status** will show as **Finished** when questionnaire is completed

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

- 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 [City of Columbus Vendor Portal](https://columbusvendorservices.powerappsportals.com/) or enter the following address in your browser: <https://columbusvendorservices.powerappsportals.com/>

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



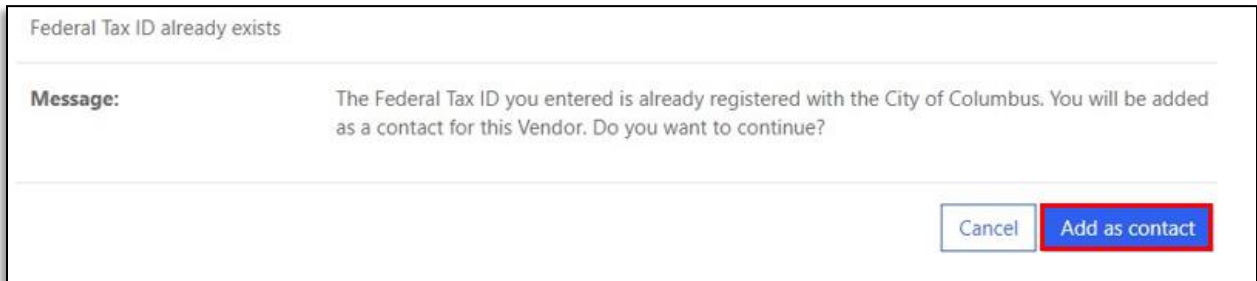
Step 3. Complete the requested registration information fields

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

A screenshot of the registration form on the City of Columbus Vendor Services website. The form is titled "City of Columbus Vendors > Sign Up". It features a blue icon on the left depicting two people at a desk. The form fields are: Name (First Name and Last Name), Email (Business Email), Business Line (a dropdown menu with "--Select Business Line--"), Company Name, and Federal Tax ID. A blue "Register" button is at the bottom, with a link below it that says "Already registered? Click here to login."

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**.

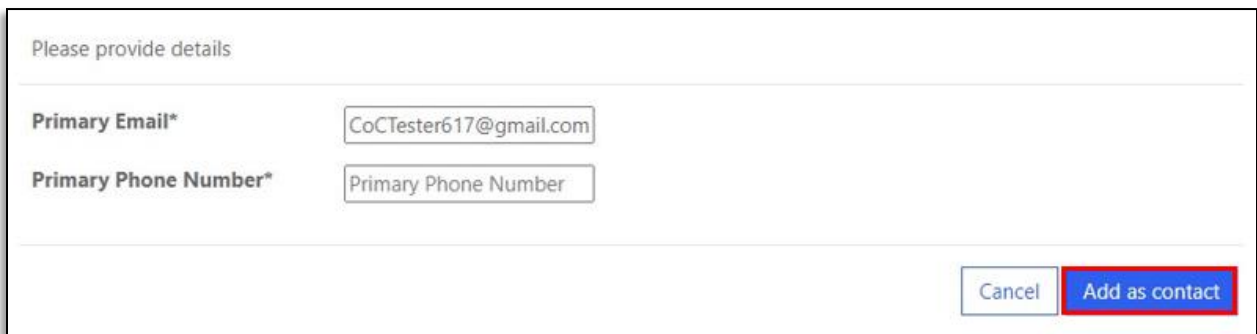


Federal Tax ID already exists

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**



Please provide details

Primary Email* CoCTester617@gmail.com

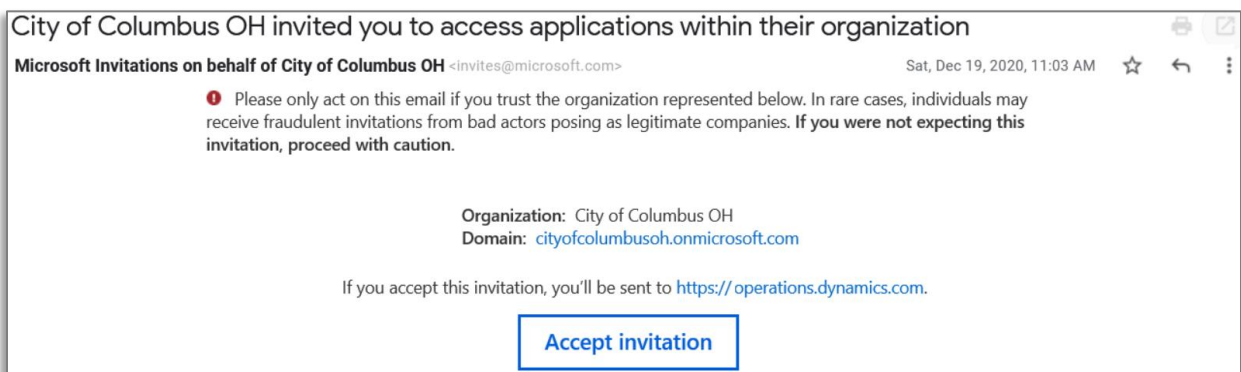
Primary Phone Number* Primary Phone Number

Cancel Add as contact

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 invites@microsoft.com. If you do not receive this email, stop and contact Vendor Services @ vendorservices@columbus.gov for further assistance.



City of Columbus OH invited you to access applications within their organization

Microsoft Invitations on behalf of City of Columbus OH <invites@microsoft.com> Sat, Dec 19, 2020, 11:03 AM ☆ ↶ ⋮

ⓘ 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.

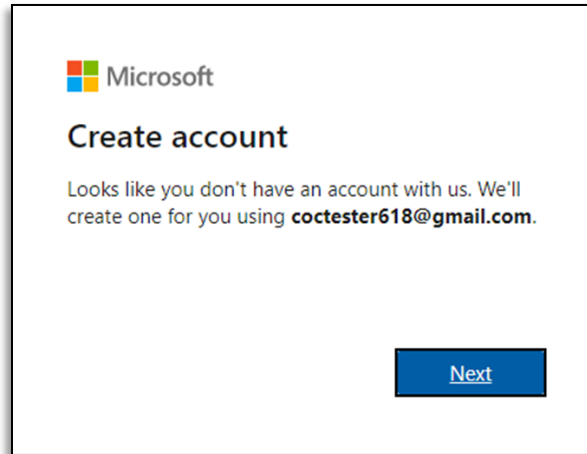
Organization: City of Columbus OH
Domain: cityofcolumbusoh.onmicrosoft.com

If you accept this invitation, you'll be sent to <https://operations.dynamics.com>.

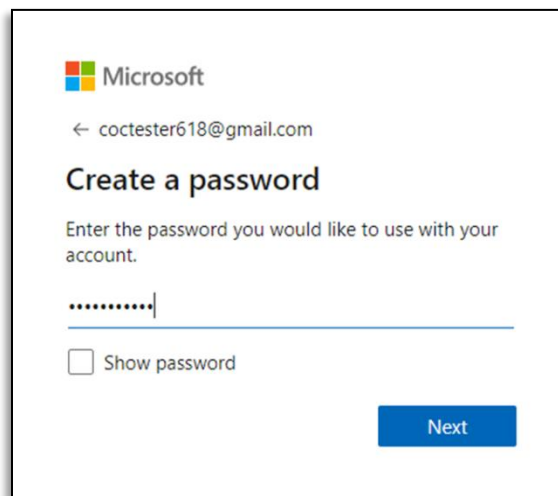
Accept invitation

Step 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 **NOT** 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

Microsoft

← coctester618@gmail.com

Create account

We need just a little more info to set up your account.

Country/region
United States

Birthdate
January 1, 1980

Next

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

Microsoft account

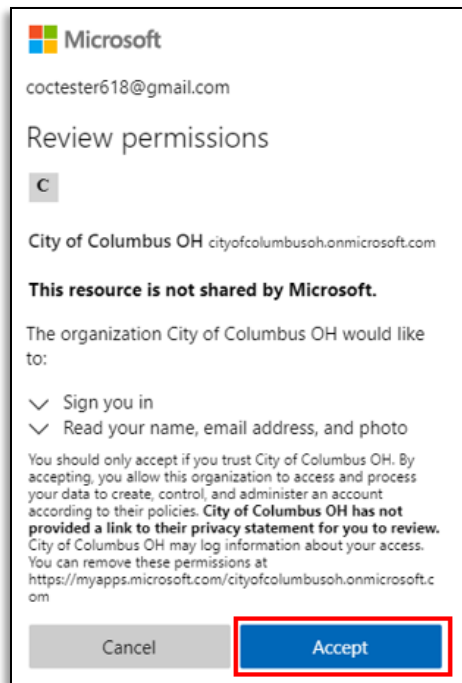
Verify your email address

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**

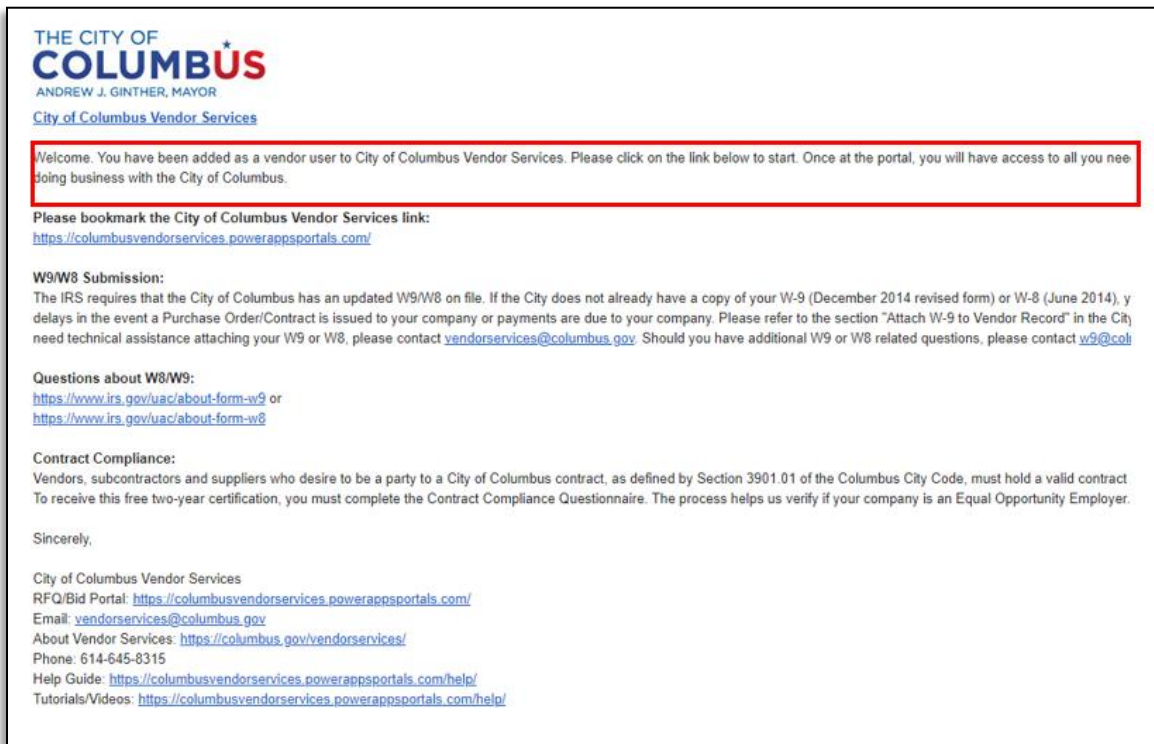
If you didn't request this code, you can safely ignore this email. Someone else might have typed your email address by mistake.

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

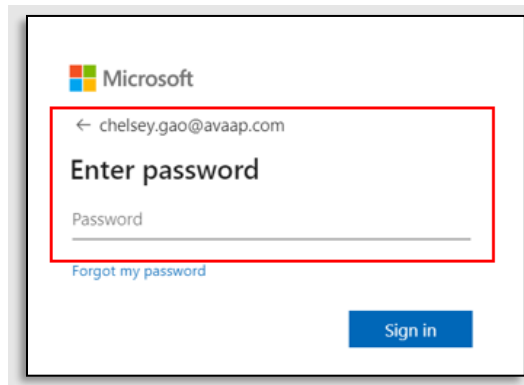
City of Columbus vendors may log into Vendor Services with the documented steps below in the City of Columbus D365 Vendor Portal.

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

Step 2. Click the **Login** button



Step 3. Enter login credentials used during registration.



Step 4. Click the **Sign in** button

Vendor Maintenance

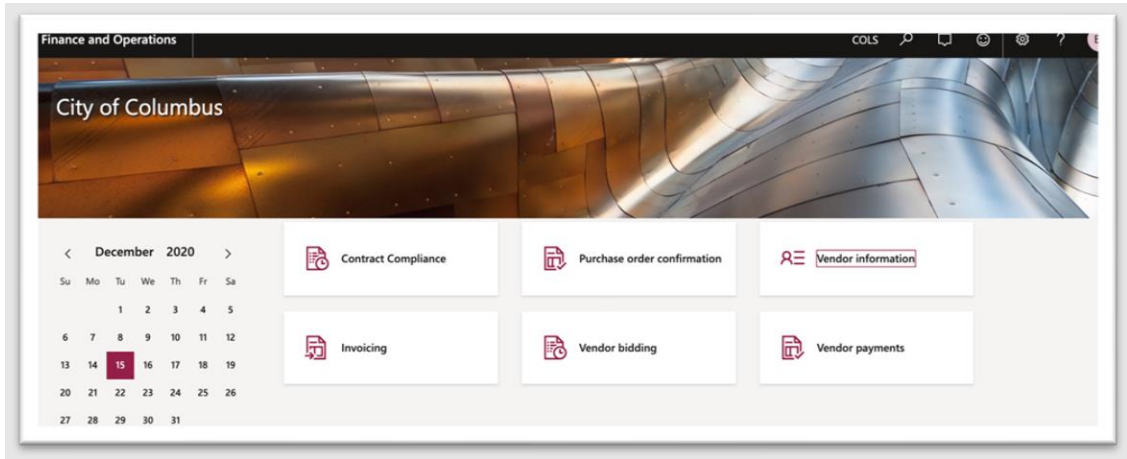
Uploading Attachments to Vendor Record (W9)

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

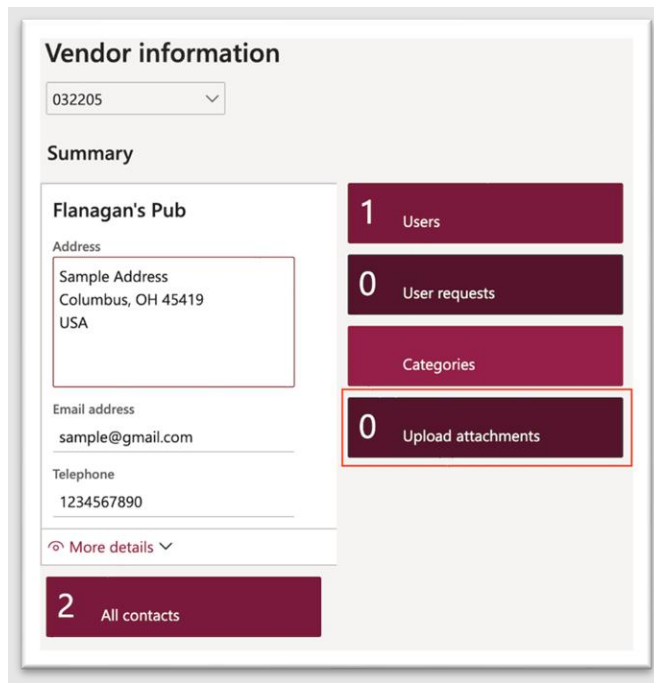
Menu Path: Homepage > Vendor information

Step 1. Login to the City of Columbus Vendor Services Site (See [Logging into City of Columbus Vendor Services](#) for additional Assistance.)

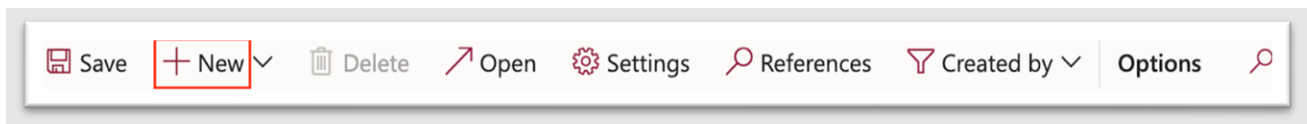
Step 2. Click the **Vendor information** tile



Step 3. Select the **Upload attachments** tile

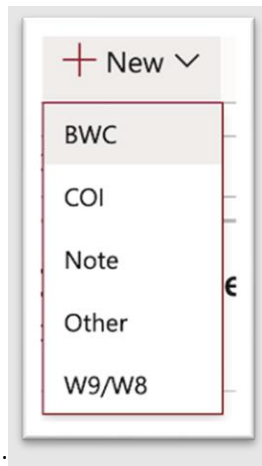


Step 4. Select the **New** button

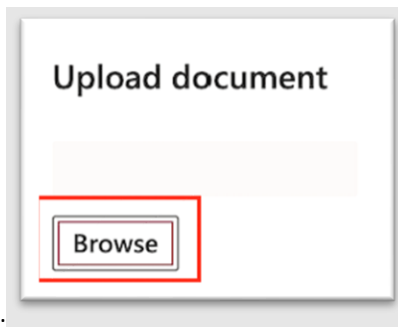


Step 5. Select **W9/W8** from

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

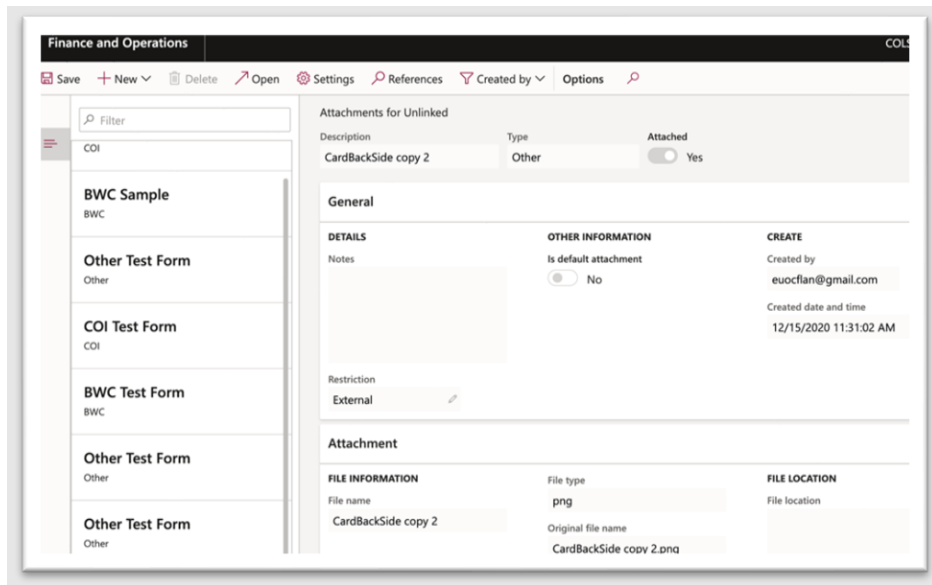


Step 6. Click the **Browse** button



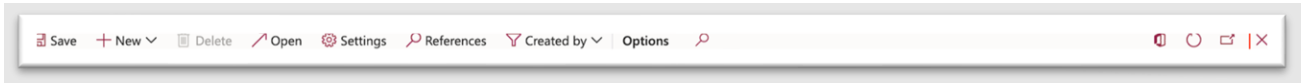
Step 7. Select desired document to upload

Step 8. Document details will appear on screen



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

Step 10. Select the **X** button to close the window



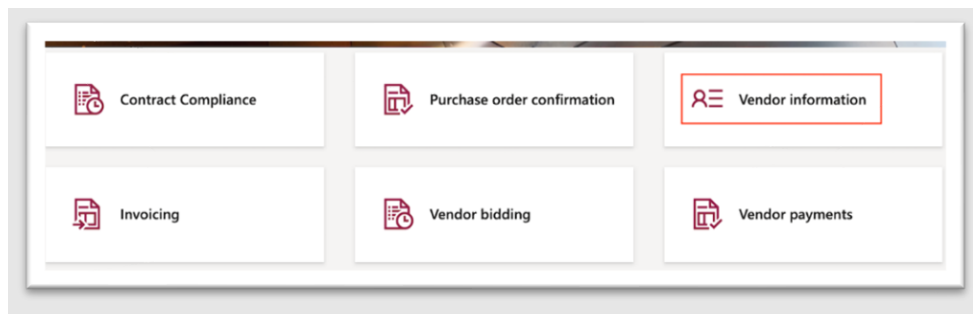
Update your Vendor Profile

Update Address

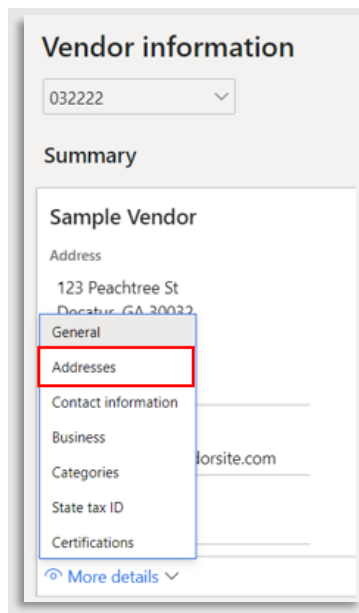
Vendors may update their address with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor information

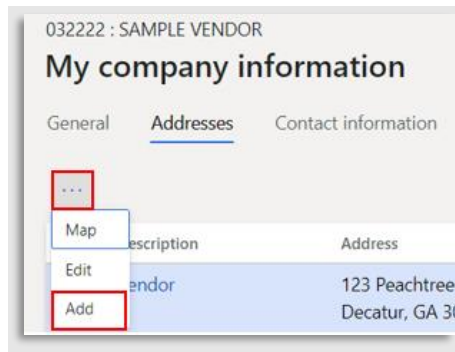
Step 1. Select the **Vendor information** tile from the homepage



Step 2. Select **More Details > Addresses** from the dropdown



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



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.

Step 6. Click the **OK** button

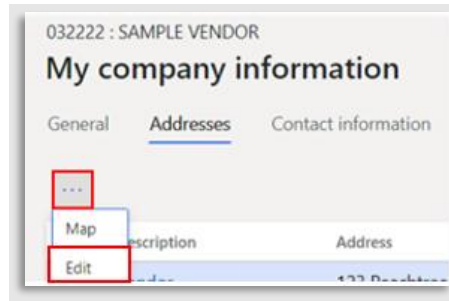
- a. The new address will be displayed in the **Addresses** section.

Name or description	Address	Purpose	Primary ↓
Sample Vendor	123 Peachtree St Decatur, GA 30032 USA	Business;Remit-to	Yes

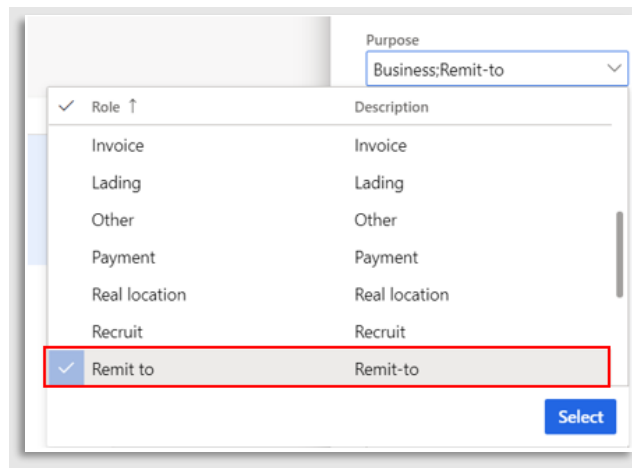
To update the Vendor Remit address information, follow the steps below:

Step 1. Select **Addresses**

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



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



- 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

Country/region
USA

ZIP/postal code
30032

Street
123 Peachtree St

City
Decatur

State
GA

County

OK Cancel

Step 4. Click **OK**

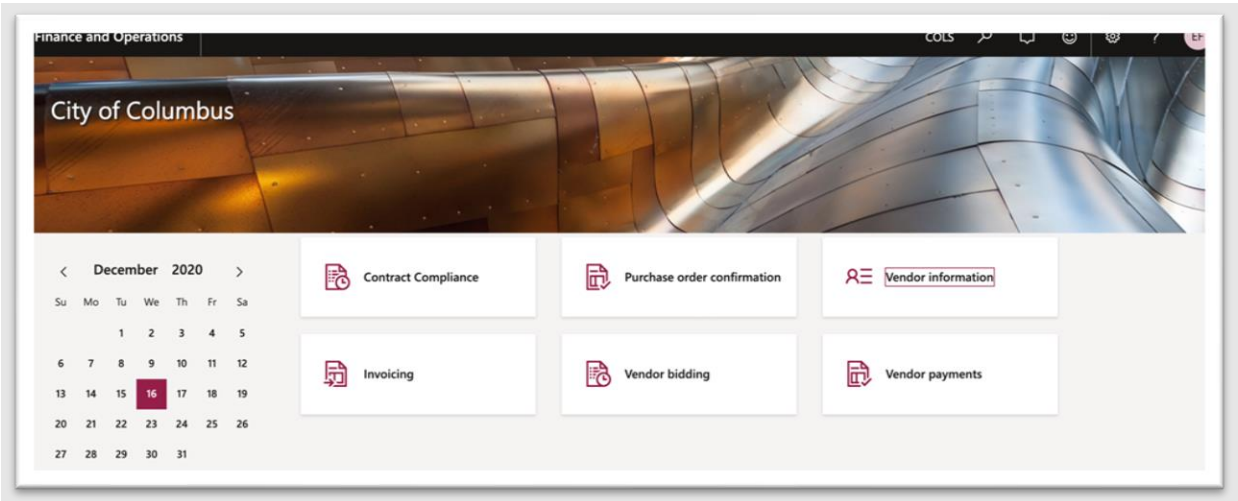
Update Contact Information

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

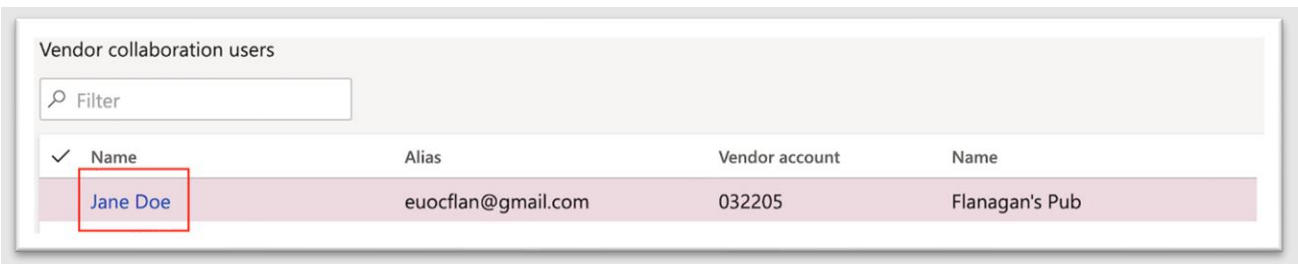
Step 2. Click the **Vendor information** tile



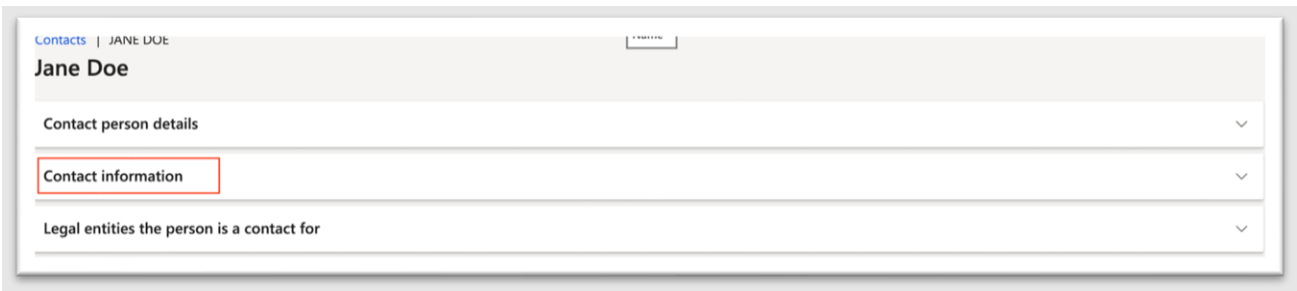
Step 3. Click the **Users** button



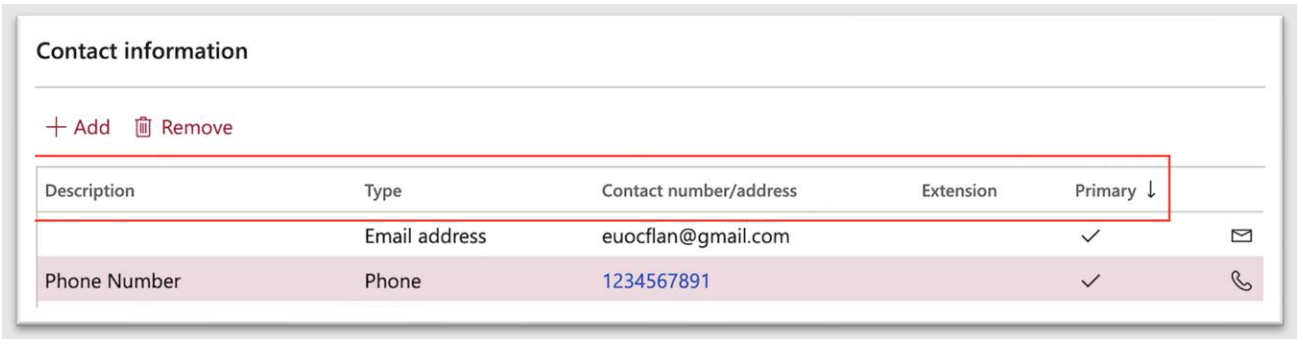
Step 4. Click the blue hyperlink for the desired profile



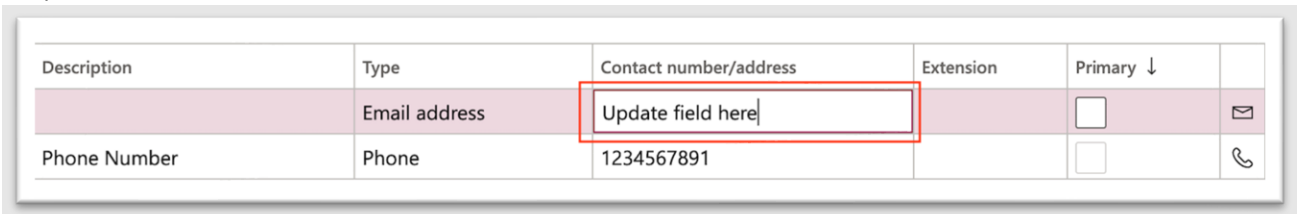
Step 5. Click to expand the **Contact information** section



Step 6. Select field under desired column to edit



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



- 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



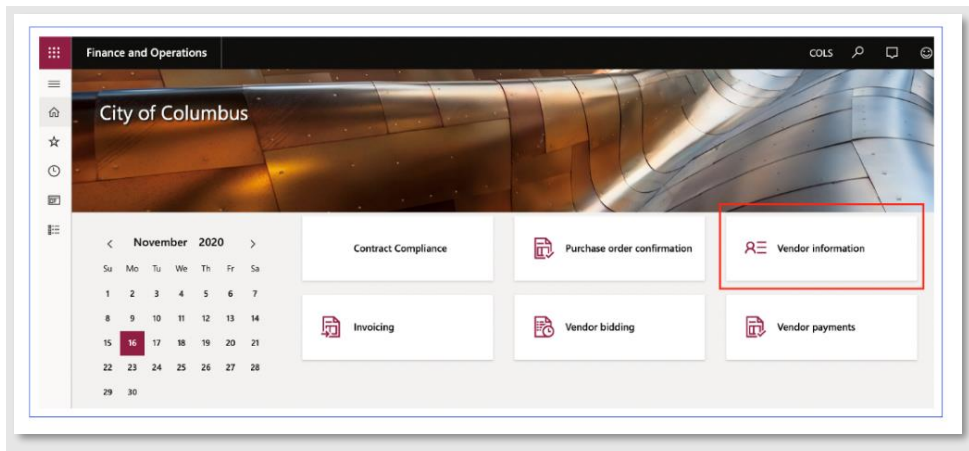
View/Update/Remove Registered Business Procurement Categories

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.

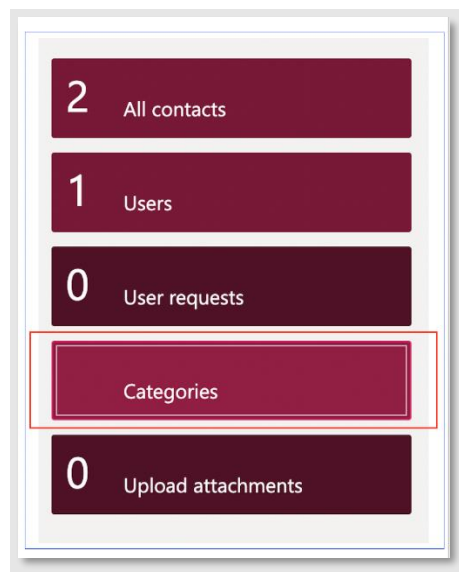
Menu Path: Homepage > Vendor Information

Add Registered Business Procurement Categories

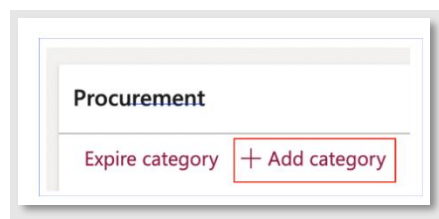
Step 1. Click the **Vendor information** tile



Step 2. Click the **Categories** tile



Step 3. Click the **Add category** button



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

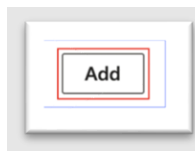
Include sub-categories
 Yes

Filter

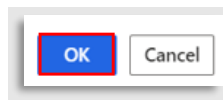
Available categories

- ▾ 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

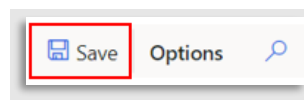
Step 5. Click the **Add** button



Step 6. Click the **OK** button

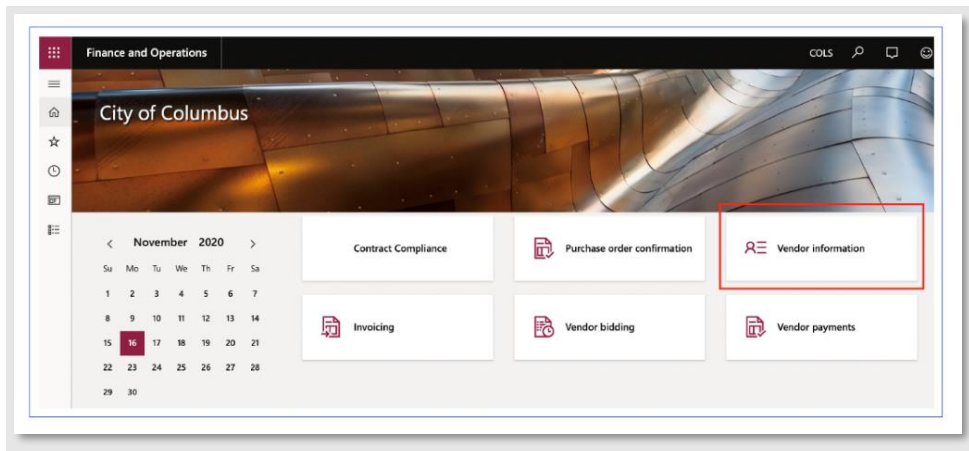


Step 7. Click **Save**

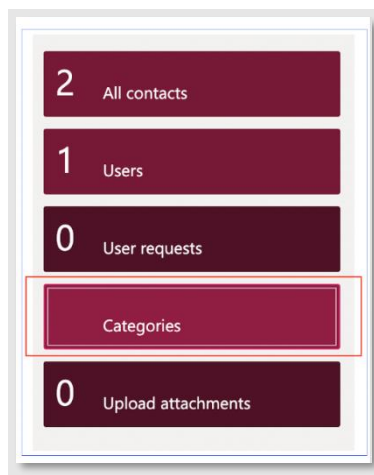


Remove Registered Business Procurement Categories

Step 1. Click the **Vendor information** tile



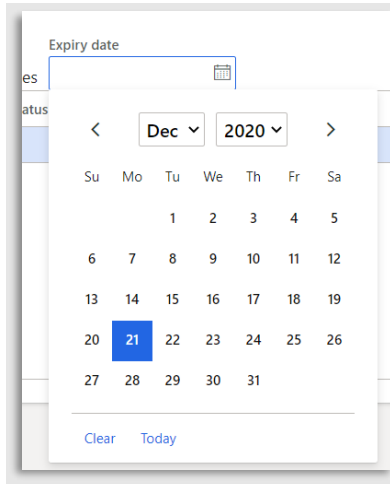
Step 2. Click the **Categories** tile



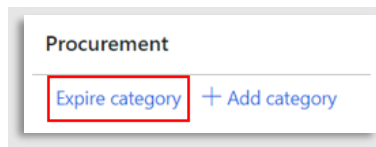
Step 3. Mark all desired categories to remove using the left-hand checkbox

Show as of date		Expiry date		
<input checked="" type="checkbox"/> Show only currently active		<input checked="" type="checkbox"/> Include sub-categories		
<input checked="" type="checkbox"/> Category hierarchy	Category	Vendor category status	Effective ▾	Expiration ▾
<input checked="" type="checkbox"/> Procurement category ...	Air transport of letters and parc...	Approved	12/9/2020	Never

Step 4. Select an **Expiry date** for the category



Step 5. Click **Expire Category**

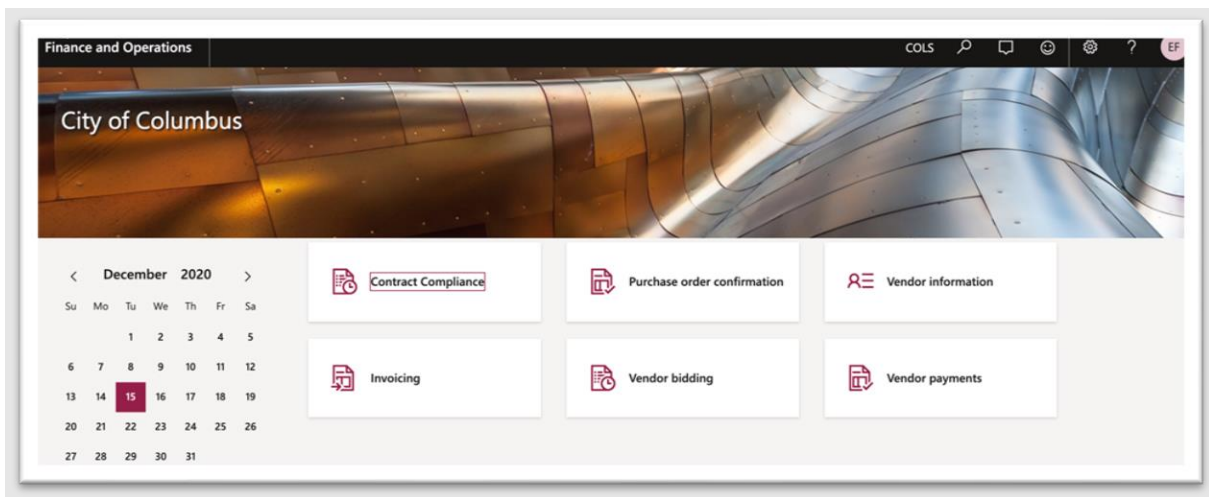


Contract Compliance Questionnaire

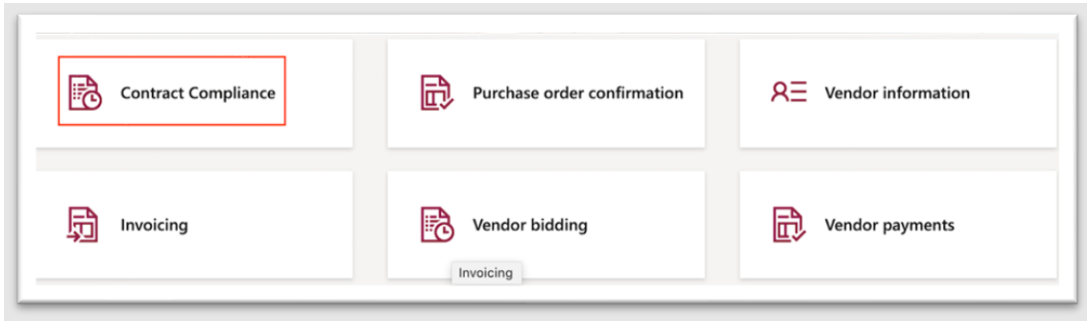
All new City of Columbus vendors are required to complete a questionnaire about their business during the registration process and must complete the EBO questionnaire for contract compliance every two years. Documented below are the steps required in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Contract Compliance

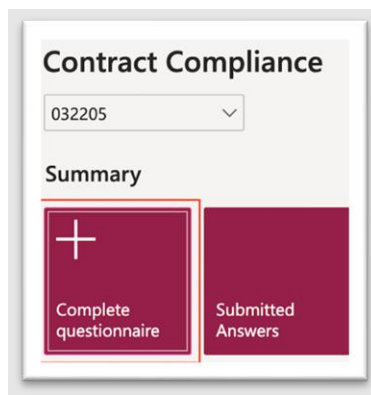
Step 1. Access the Vendor Portal



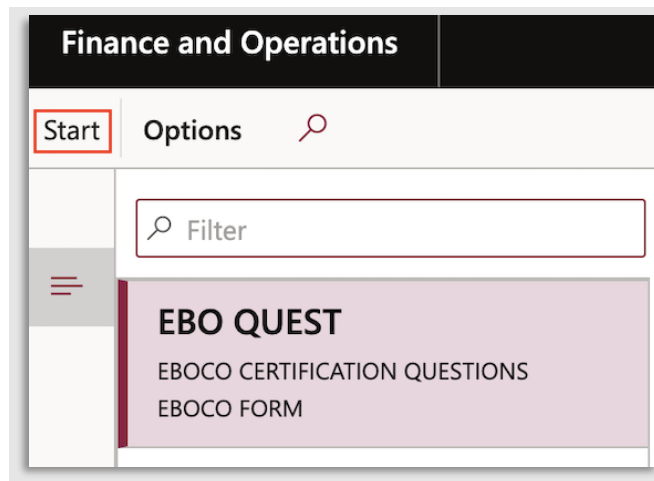
Step 2. Click the **Contract Compliance** tile



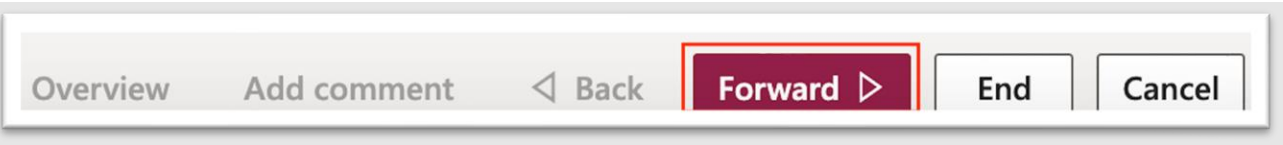
Step 3. Click the **Complete Questionnaire** button



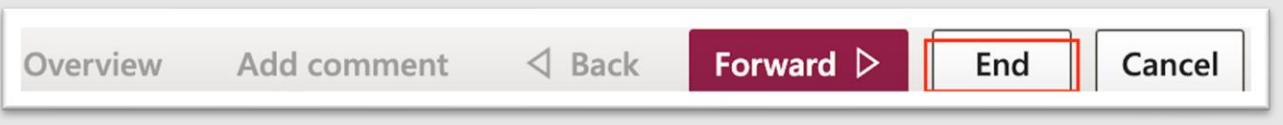
Step 4. Click the **Start** button in the upper left-hand corner



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

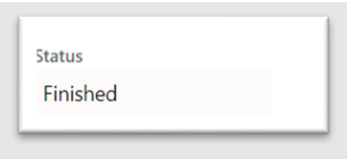


Step 6. Once you have reached and answered the last question, click the **End** button



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

Note: Please allow **5** business days for the Office of Diversity and Inclusion to review the questionnaire submission.

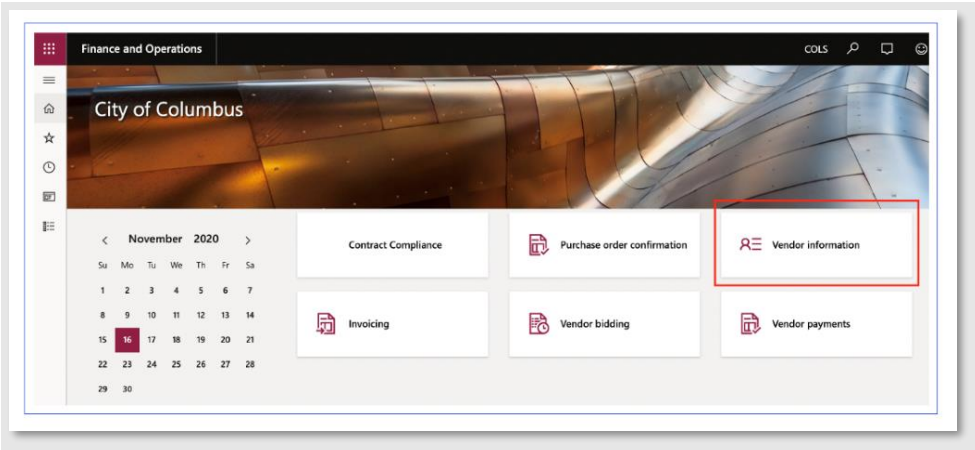


View Vendor Certifications

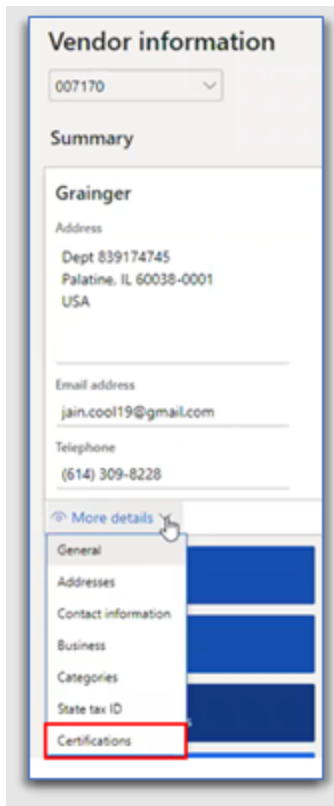
City of Columbus vendors may view vendor certifications with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor information

Step 1. Click the **Vendor information** tile

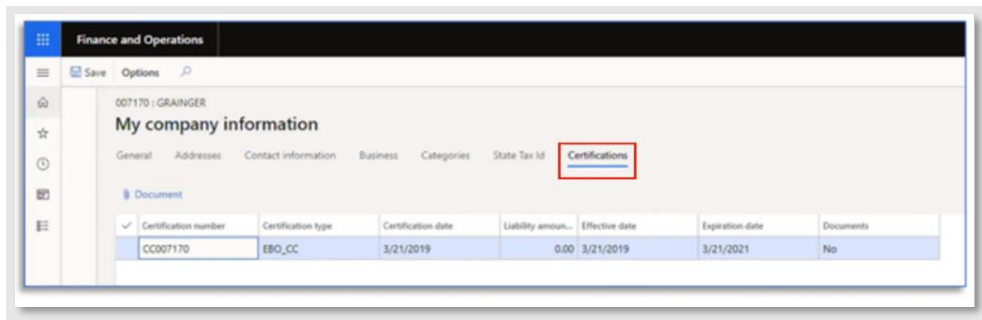


Step 2. Click the **More details** tab underneath the Vendor information Summary area



Step 3. Select **Certifications** from the dropdown menu

Step 4. View **Certifications**

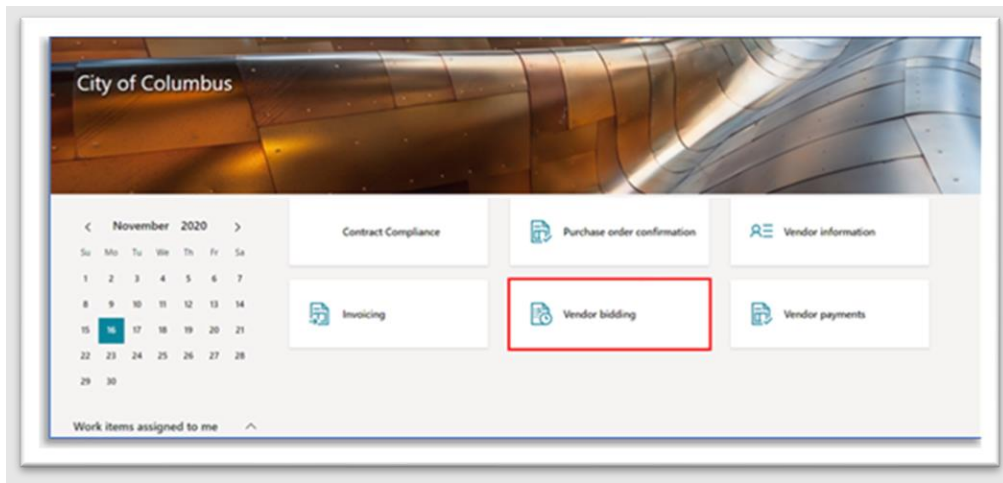


View Bids in Progress

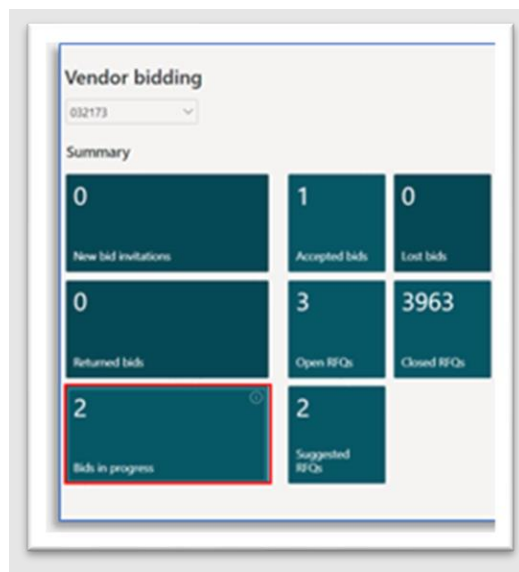
City of Columbus vendors may view bids in progress with the documented steps below in the City of Columbus D365 Vendor Portal. **Note:** Bids In Progress are bids that are in progress by a Vendor but have **not** yet been submitted. To submit a bid, see section [Enter and Submit a Bid](#)

Menu Path: Homepage > Vendor bidding

Step 1. Click on the **Vendor bidding** tile

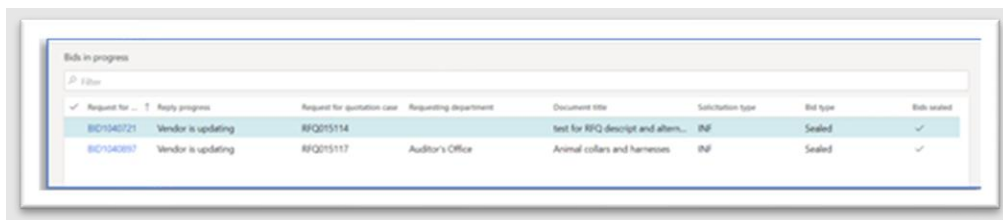


Step 2. Click on the **Bids in progress** tile



Step 3. View the **Bids in Progress** information displayed

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

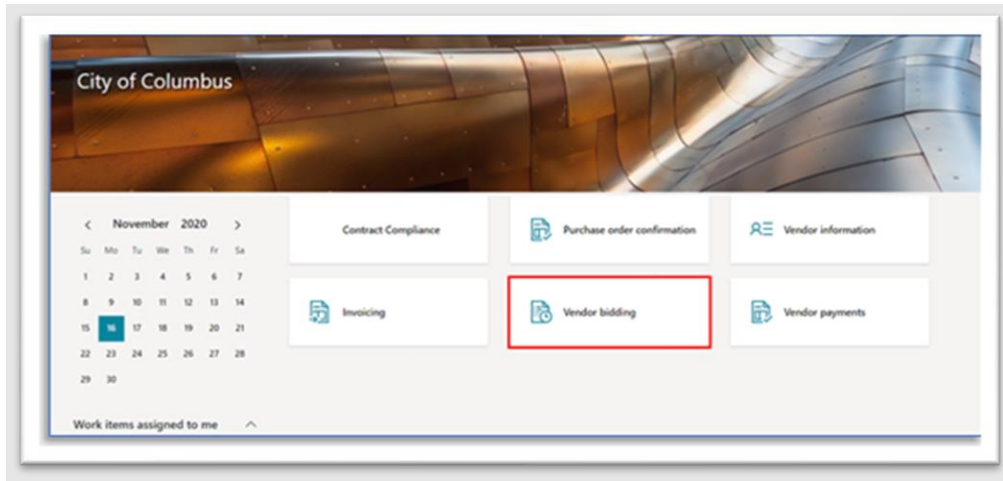


View All Open RFQs

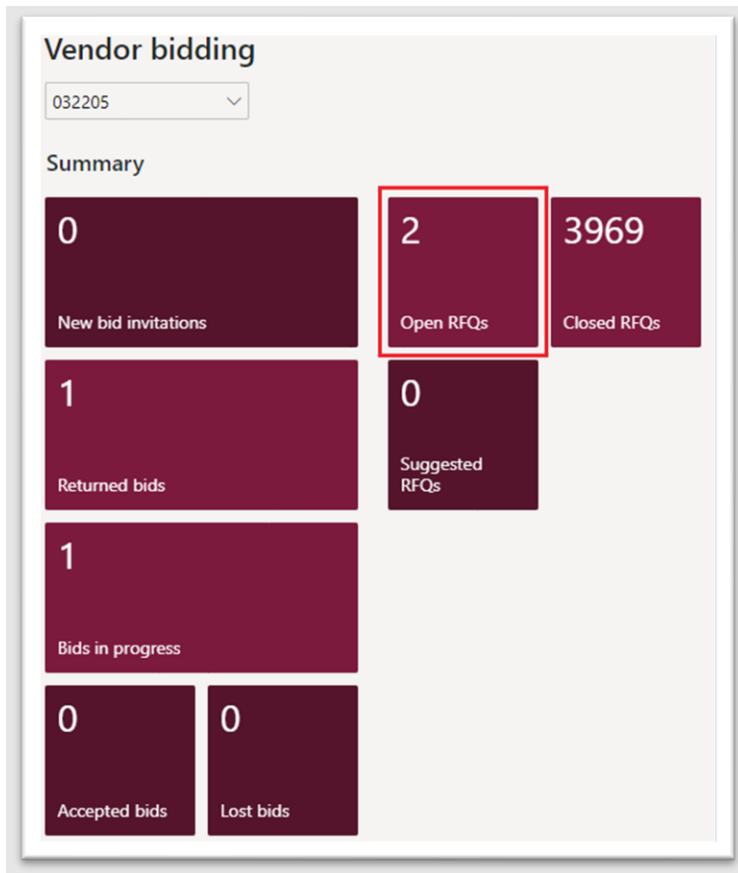
City of Columbus vendors may view all open RFQs with the documented steps below in the City of Columbus D365 Vendor Portal.

Menu Path: Homepage > Vendor bidding

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

Open bids

Procurement category

Request for quotation header

✓ Solicitation ...	Requesting department	Document title	Solicitation type	Expiration date and time
RFQ015117	Auditor's Office	Animal collars and harnesses	INF	12/3/2020 01:00:00 PM
RFQ015129	Rec and Parks	Gym Floor Refinishing 2020 - S...	RFI	11/13/2020 07:00:00 AM

Request for quotation lines

Related information

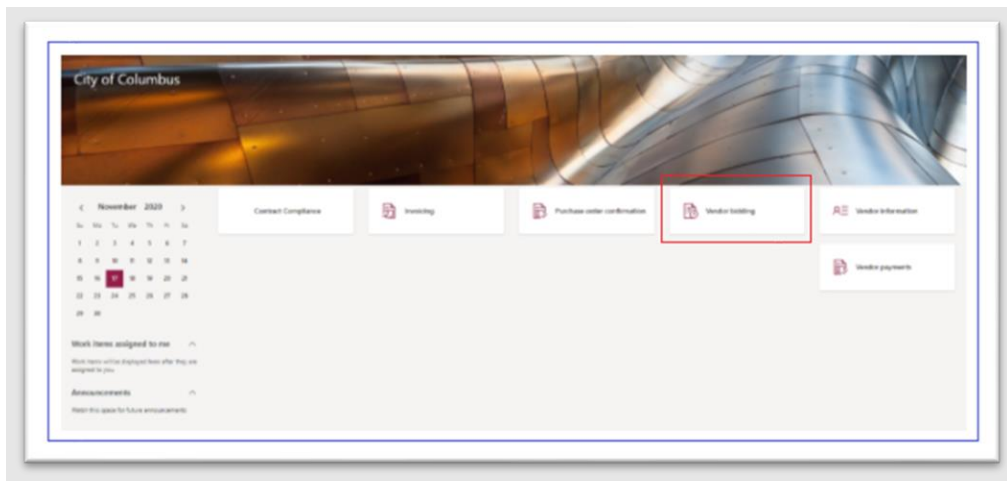
✓	Line number	Line type	Procurement category	Item number	Product name	Quantity	Unit	Currency	Expiration date and time
	10	Category	Animal collars		Remote Training Dog Collar	5.00	PAIR	USD	12/3/2020 01:00:00 PM

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

Closed bids

Procurement category

Request for quotation header

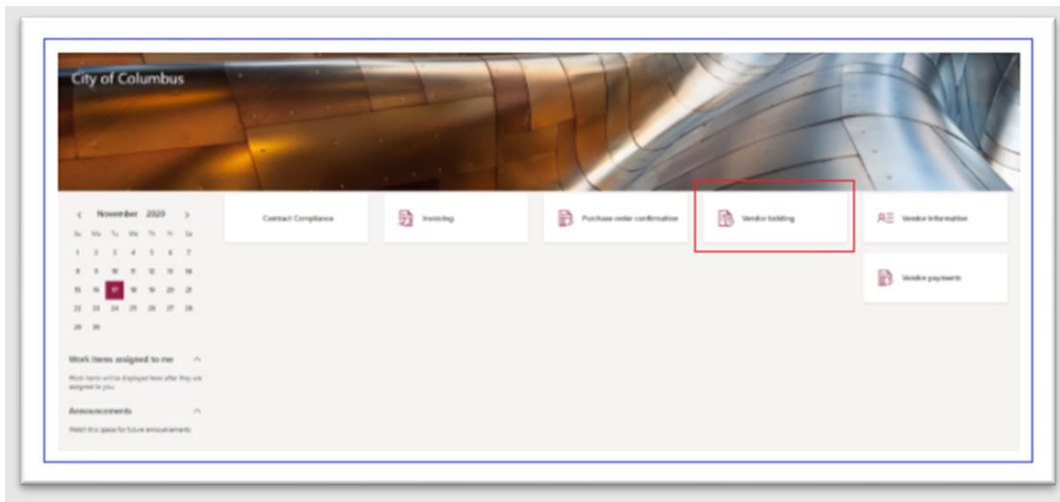
✓ Solicitation ...	↑ Requesting department	Document title	Solicitation type	Expiration date and time ▾
RFQ003353		DOP/Locksmith Services	INF	12/17/2018 02:58:50 PM
RFQ008405		DOW/WQAL - Salt	INF	12/17/2018 03:04:21 PM
RFQ008426		DOW/WQAL - ECD Radiological ...	INF	12/18/2018 02:00:20 PM
RFQ008435		EH-POOL 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
RFQ008711	ELECTRICITY	DOP - 2018 - METAL CABINET F	INF	12/17/2018 02:27:36 PM

Enter and Submit Bid

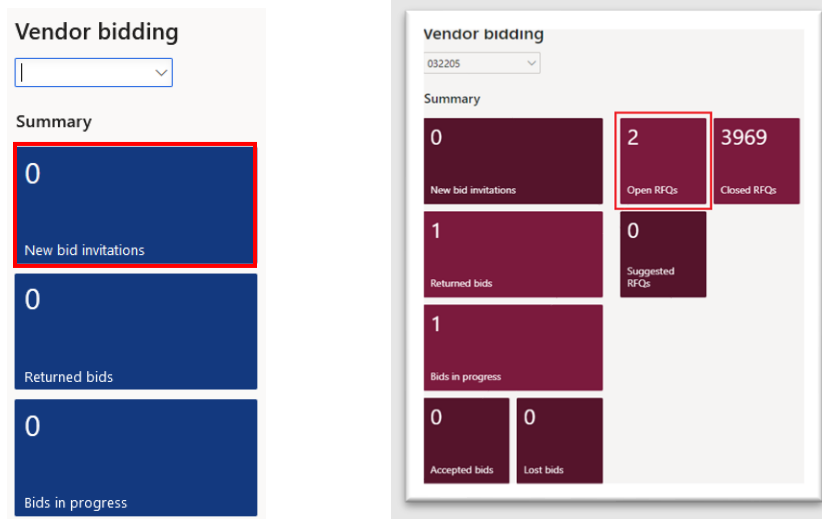
Businesses will be notified via email of new request for quotations matching categories they have registered for. Upon receipt of the email, follow the instructions below to enter and submit a bid in the City of Columbus D365 Vendor Portal.

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)

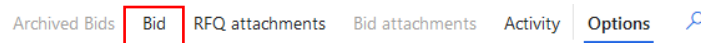
New bid invitations

Standard view ▾

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
BID1834837	Not started	RFQ020162		Supplies	IFB	Sealed	✓	11/29/2021	12/2/2021 1:00:00 PM

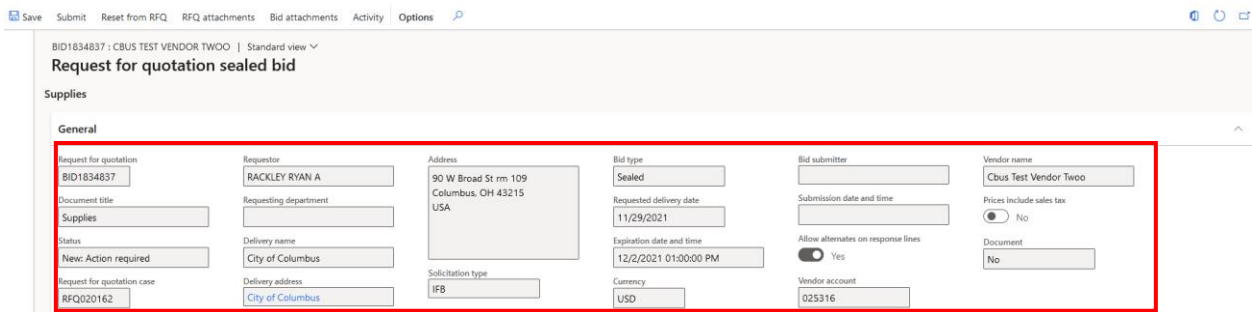
Step 4. Click the **Bid** button on the RFQ details page



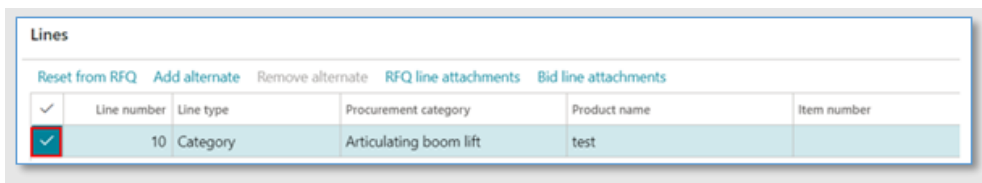
Step 5. If your business was not previously invited to the selected RFQ, a confirmation screen for “Bid for Vendor # created” is displayed confirming the self-invitation to the RFQ. Click the **Close** button.

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**

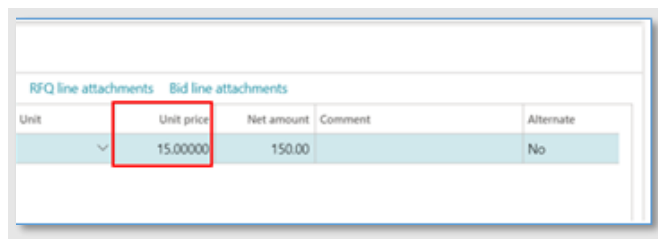


Step 7. In the **Lines** section, select the line for which you would like to enter a bid



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.

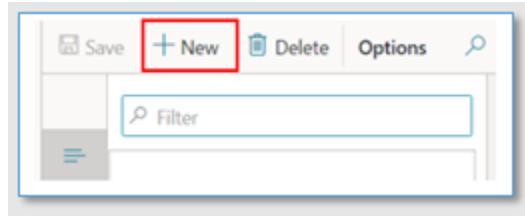


Unit	Unit price	Net amount	Comment	Alternate
✓	15.00000	150.00		No

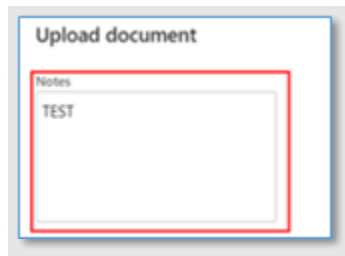
Step 10. Now that you have started a new bid, click **Bid line attachments** to upload supporting documentation

Lines					
	Reset from RFQ	Add alternate	Remove alternate	RFQ line attachments	Bid line attachments
✓	Line number	Line type	Procurement category	Product name	Item number
✓	10	Category	Articulating boom lift	test	

Step 11. Click **New**

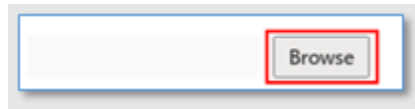


Step 12. Enter a description in the **Text box**

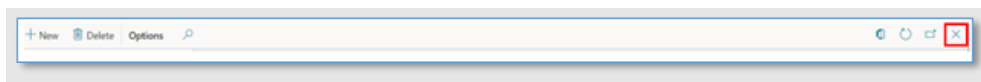


Step 13. Click **Browse** to attach a document from the user desktop

Note: The document must be in **PDF format** and the name of the file must be less than 50 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

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

Step 18. Click the **Yes** button

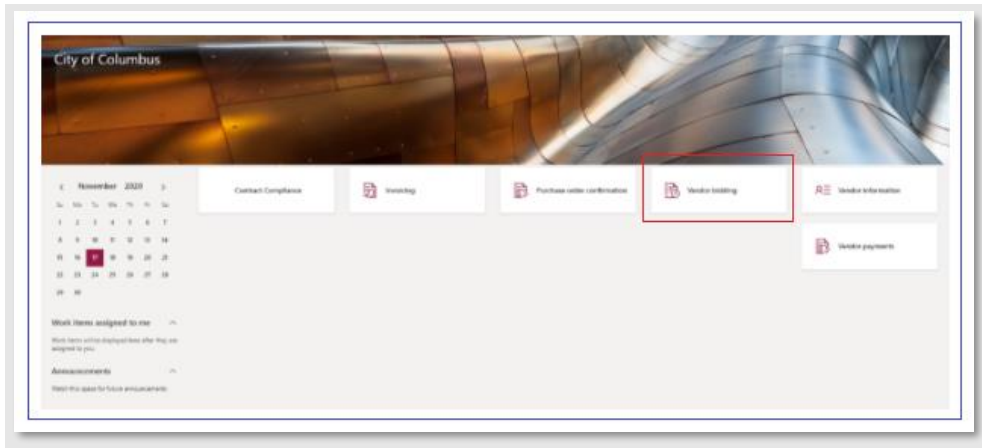
Step 19. The “You have successfully submitted your bid” confirmation screen is displayed. Click the Close button.

View Amendments

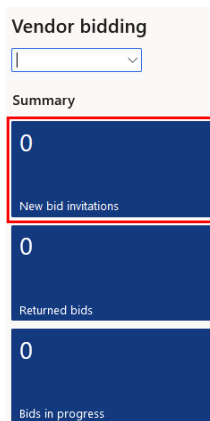
City of Columbus vendors may view amendments or changes made to an amended RFQ and its line items with the documented steps below in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Homepage > Vendor bidding

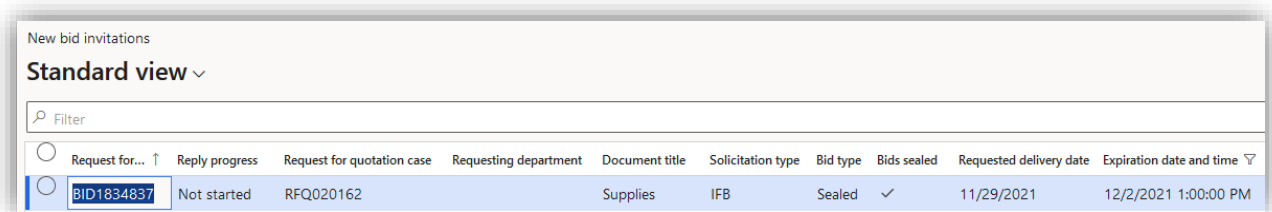
Step 1. Click the **Vendor bidding** tile



Step 2. Click the **New bid invitations** tile



Step 3. In the **New bid invitations** view, select the desired bid by clicking the blue hyperlink **BID#####** number

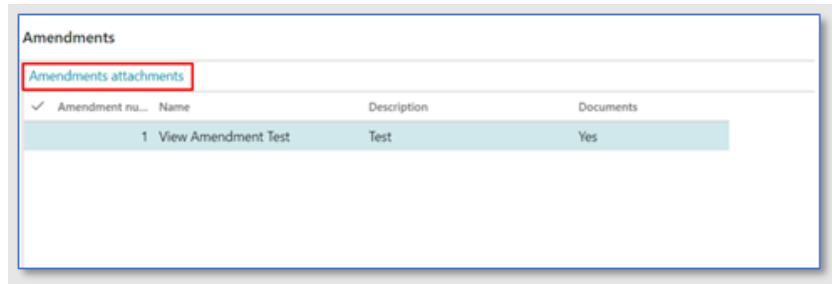


Request for...	Reply progress	Request for quotation case	Requesting department	Document title	Solicitation type	Bid type	Bids sealed	Requested delivery date	Expiration date and time
BID1834837	Not started	RFQ020162		Supplies	IFB	Sealed	✓	11/29/2021	12/2/2021 1:00:00 PM

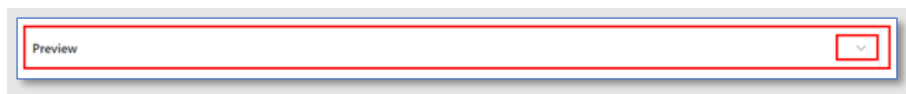
Step 4. Click **Amendments** section to expand the section. Optionally, you can select the down arrow to expand the section if needed.



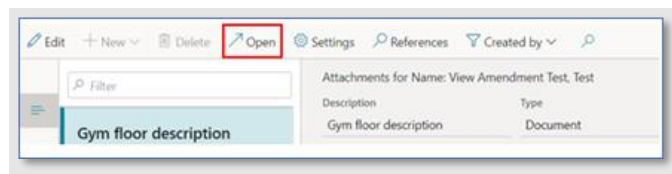
Step 5. Click Amendment attachments



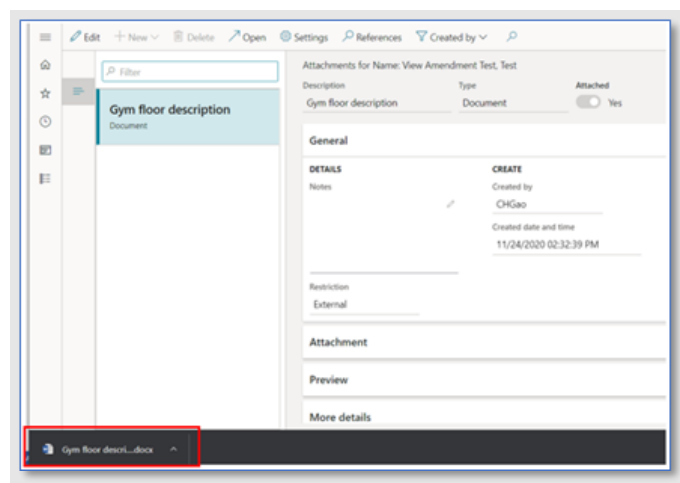
Step 6. To preview the attachment, select the **preview** section. Optionally, you can select the down arrow to expand the section if needed.



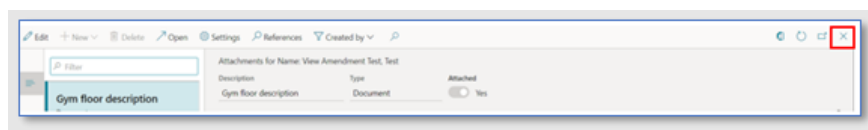
Step 7. To view the full attachment, click **Open** on the top ribbon



Step 8. Validate the file opens and downloads



Step 9. Click the X button to close the window



Step 10. Expand the **Line Details** section

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

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

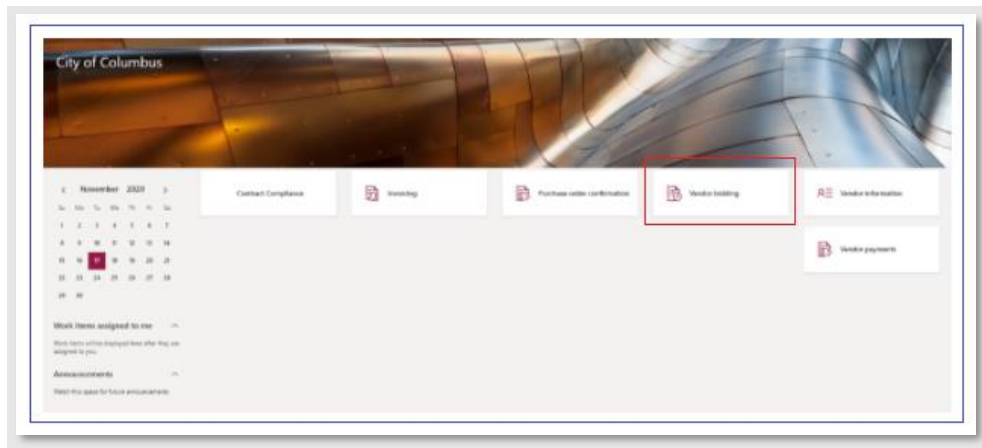
Step 11. To be considered for the Amended RFQ, [you must follow the steps outlined above to Enter and Submit bid](#)

Add Alternate Bid on an Item

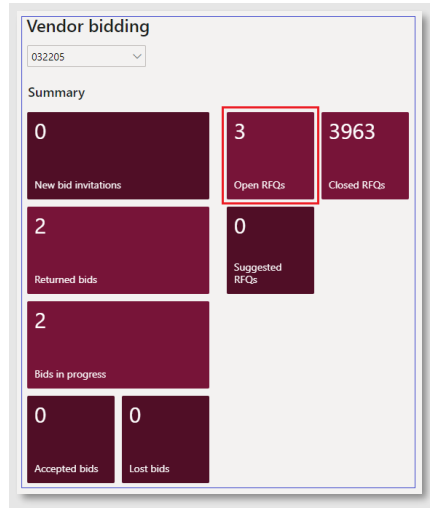
City of Columbus vendors may add an alternative bid with the documented steps below from the City of Columbus D365 Vendor Portal. **Most requests for quotations allow vendors to submit alternate bids.**

Access Via Menu Path: Home page > Vendor bidding

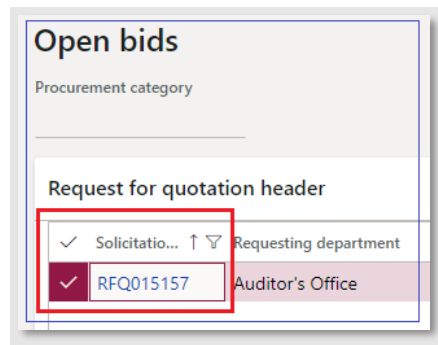
Step 1. Click the **Vendor bidding** tile



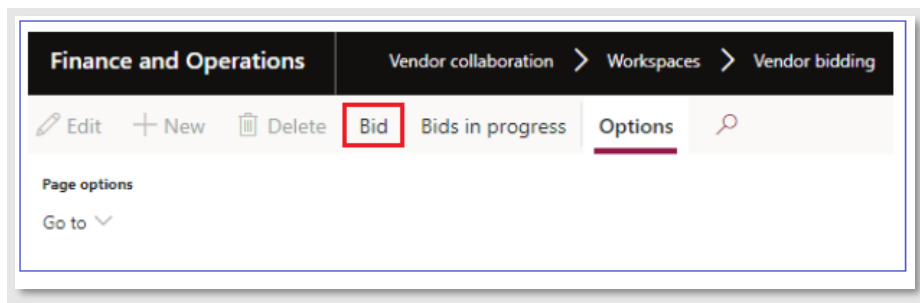
Step 2. Click the **Open RFQs** or **New Bids Invitations** tile



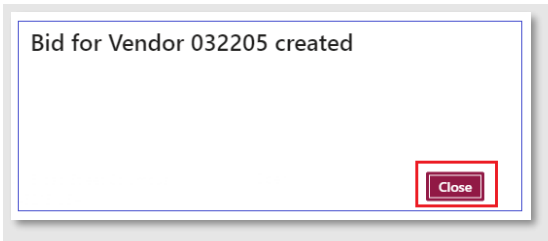
Step 3. Select the desired RFQ you would like to open by clicking the blue hyperlink number (RFQ##### if looking under Open bids or BID##### if looking under New Bid Invitations)



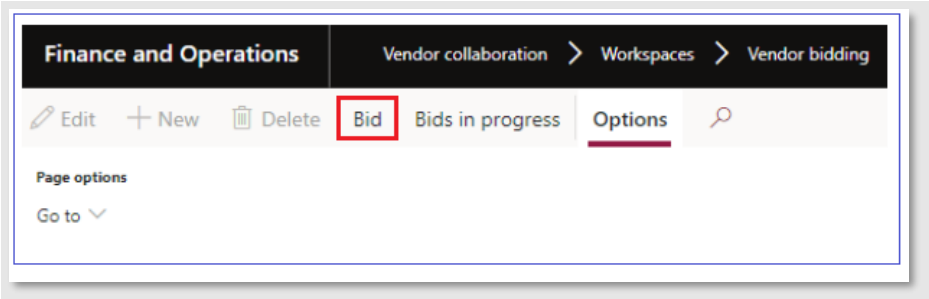
Step 4. Click the **Bid** button to add an alternative bid



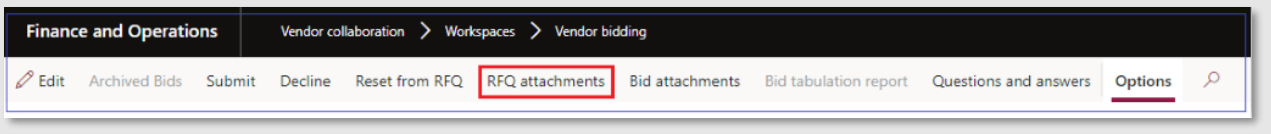
Step 5. If your business was not previously invited to the selected RFQ, a confirmation screen for “Bid for Vendor # created” is displayed confirming the self-invitation to the RFQ. Click the **Close** button.



Step 6. Click the Bid button



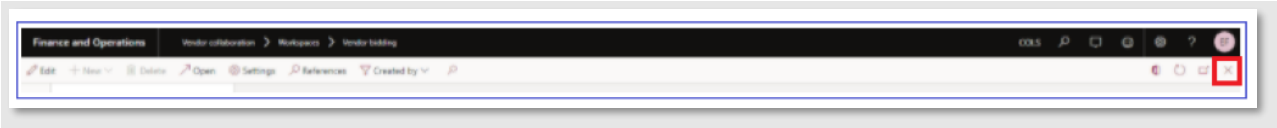
Step 7. To look at previous bid info, click the RFQ attachments button in the top ribbon



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



Step 9. Click the X button to close window



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

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	
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 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	
20	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

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**.

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	
10	Category	Boys athletic wear	Supplies		10.00	EA	10.00000	100.00	

Line details

IDENTIFICATION	REQUESTED AMOUNTS	REPLY AMOUNTS	REQUESTED DETAILS	REPLY DETAILS	Lead time
----------------	-------------------	---------------	-------------------	---------------	-----------

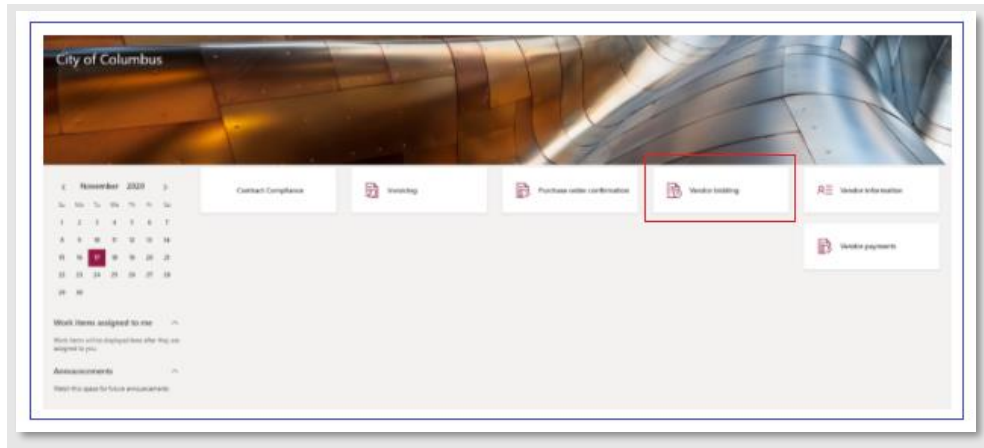
Step 14. Click the **Save** button in the top ribbon to save changes without submitting. To Submit the bid, be sure to follow the steps outlined in the section [Enter and Submit Bid](#).

Complete RFQ Bid Questionnaire

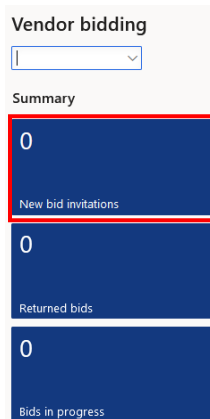
RFQs may require a vendor to complete questionnaires as part of the bid process with the documented steps below in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Home page > Vendor bidding

Step 1. Click the **Vendor bidding** tile



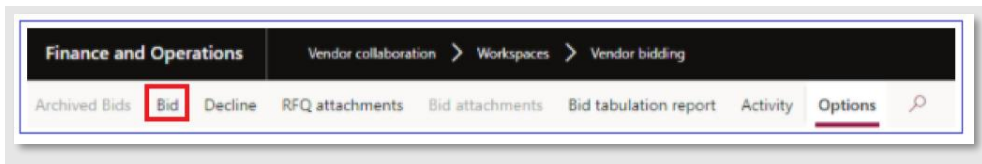
Step 2. Click on **Open RFQs** or **New bid invitations** titles



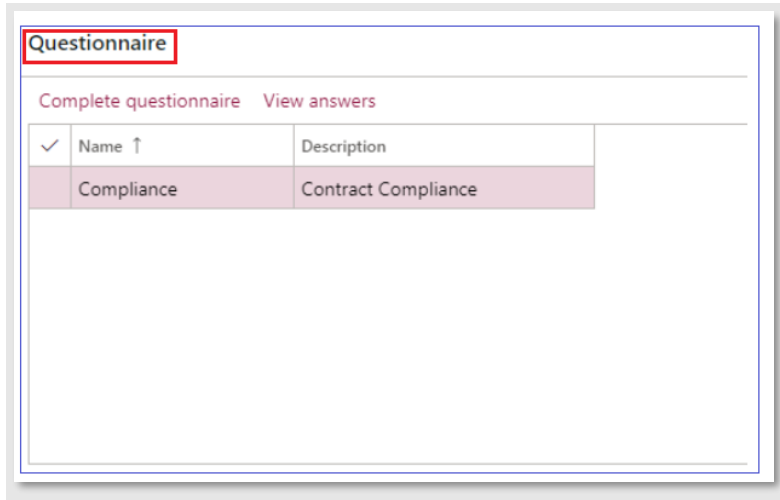
Step 3. Select the desired RFQ you would like to open by clicking the blue hyperlink number (**RFQ#####** if looking under Open RFQs or **BID#####** if looking under New Bid Invitations)

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

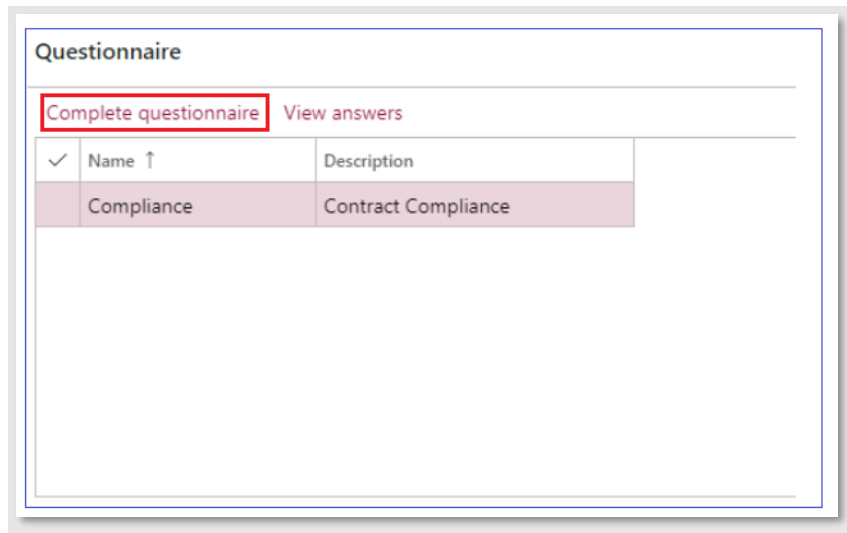
Step 4. Click the **Bid** button in the top ribbon



Step 5. Click **Questionnaire** to expand the section



Step 6. Click the **Complete questionnaire** button



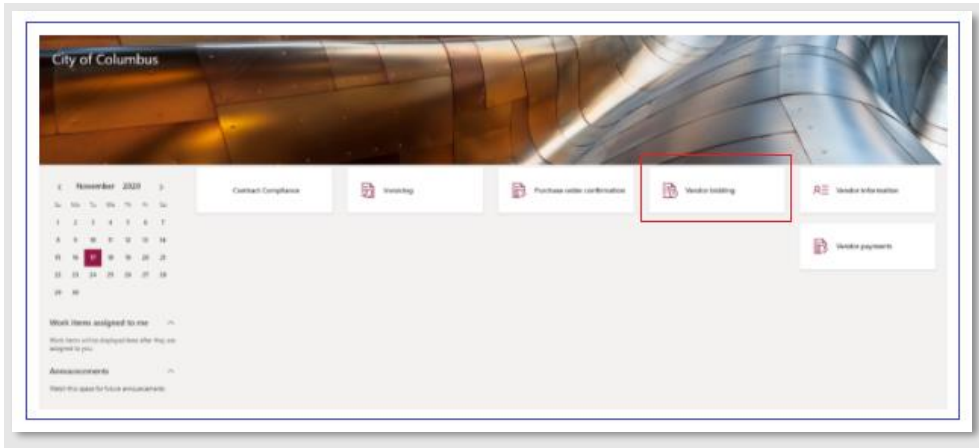
Step 7. Answer each question, select the **Forward** button to proceed through the questions

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

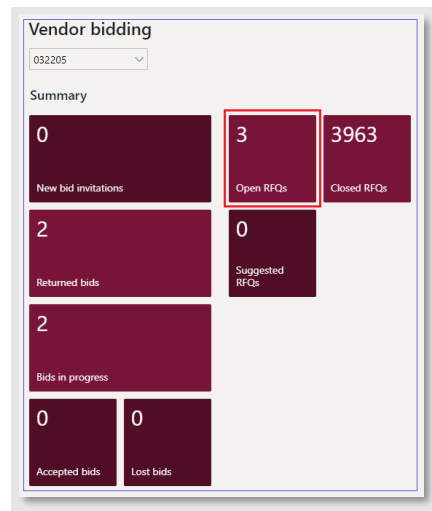
Submit Vendor Question Regarding RFQ

Access Via Menu Path: Home page > Vendor bidding

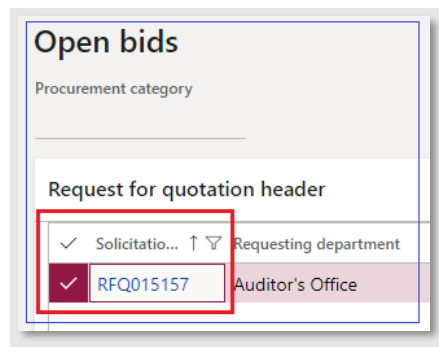
Step 1. Click the **Vendor bidding** tile



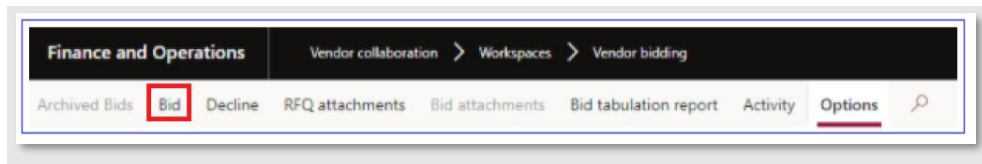
Step 2. Select **Open RFQs** or **New Bid invitations** tile



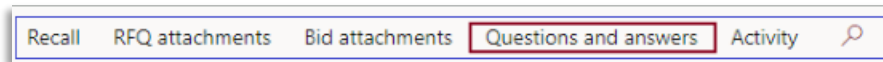
Step 3. Select the desired RFQ you would like to open by clicking the blue hyperlink RFQ number (Select the desired RFQ you would like to open by clicking the blue hyperlink number (**RFQ#####** if looking under Open RFQs or **BID#####** if looking under New Bid Invitations))



Step 4. Click the **Bid** button in the top ribbon



Step 5. Click the **Question and answers** button top ribbon



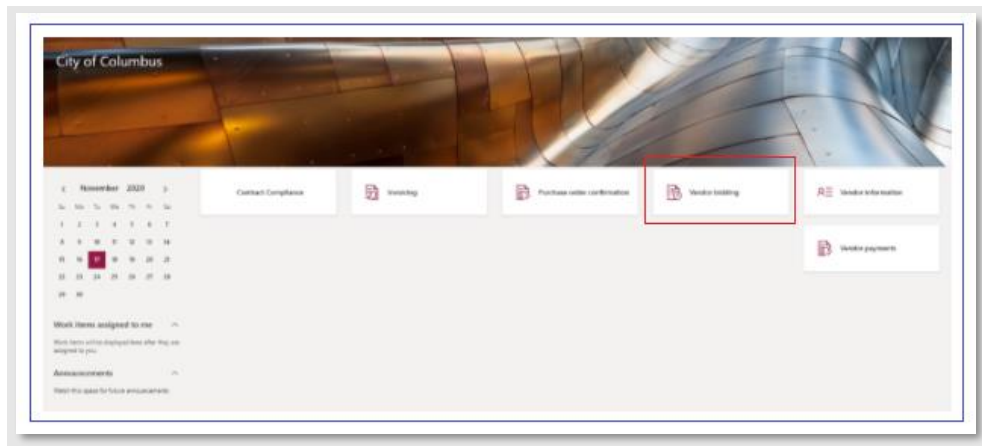
Step 6. Click the **Ask a question** button

Step 7. Click the **Save** button

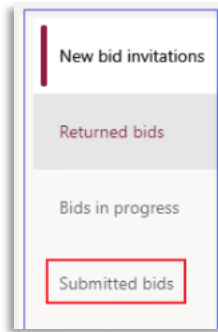
View Vendor Questions and Answers

Access Via Menu Path: Home page > Vendor bidding

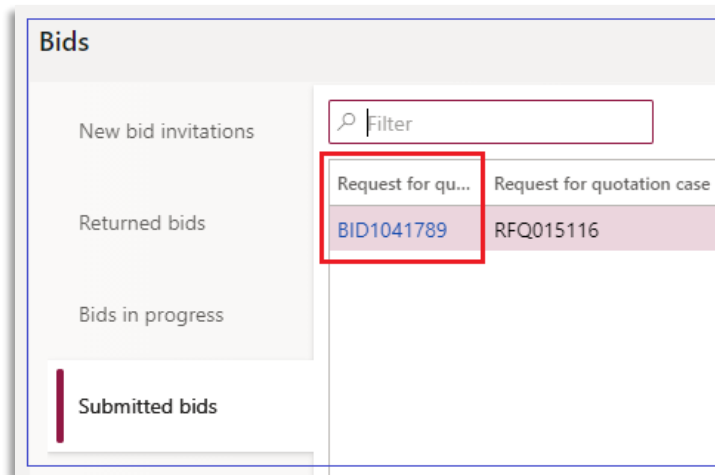
Step 1. Click the **Vendor bidding** tile



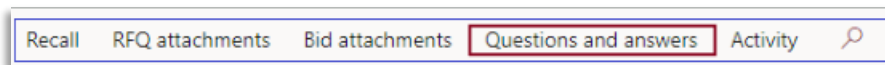
Step 2. Click the **Submitted Bids** tab



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



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



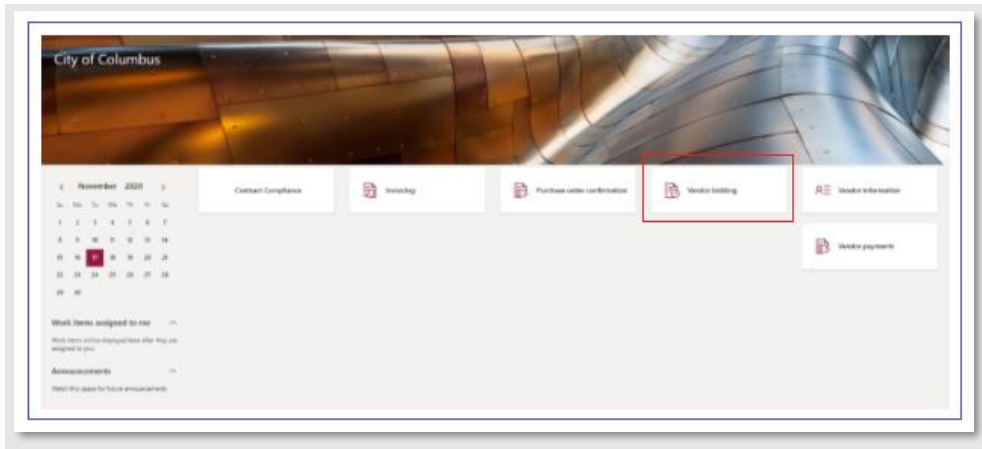
Step 5. View vendor questions and answers

Recall a Bid

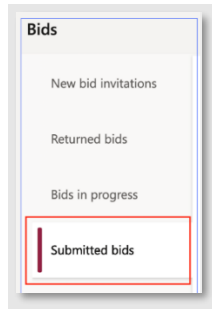
Bids may be recalled prior to the bid expiration date as necessary to make corrections or updates. A vendor may recall their bid in order to update their bid, add attachments, add alternative bids, etc. with the documented steps below in the City of Columbus D365 Vendor Portal. A bid **cannot** be recalled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

Access Via Menu Path: Home page > Vendor bidding

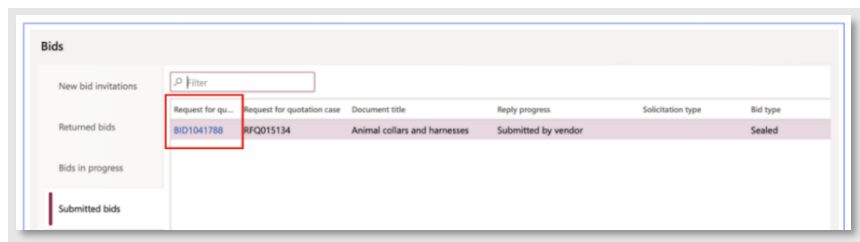
Step 1. Click the **Vendor bidding** tile



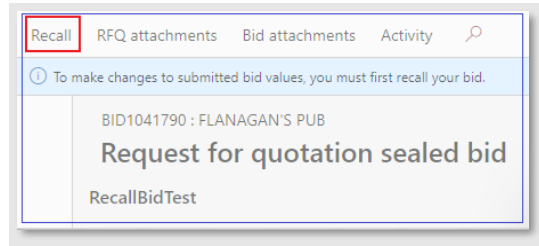
Step 2. Click the **Submitted Bids** tab



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



Step 4. Click the **Recall** button



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 [Enter and Submit bid](#) to submit a new bid submission.

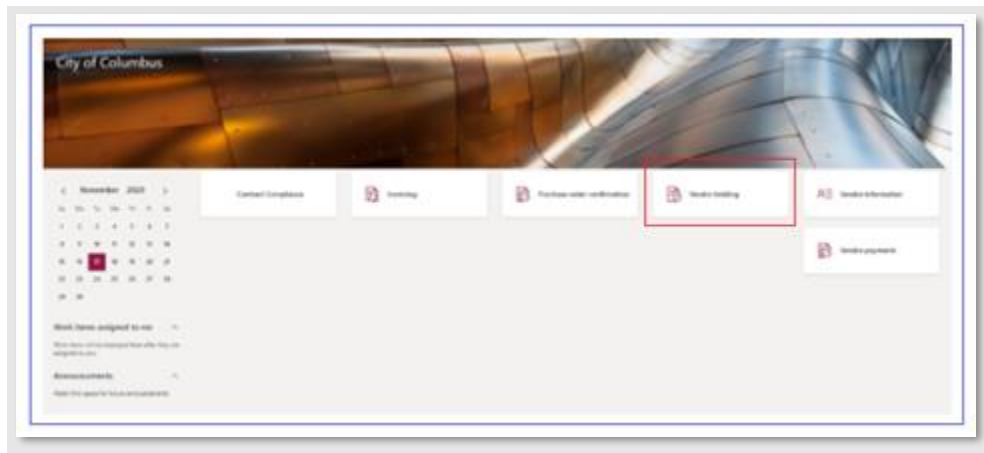
View or Add Attachments

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.

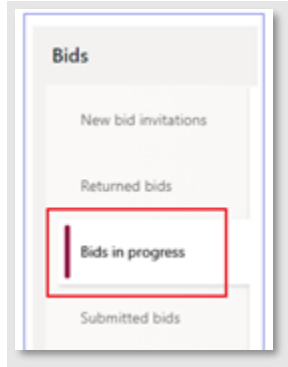
Access Via Menu Path: Home page > Vendor bidding

View Attachments

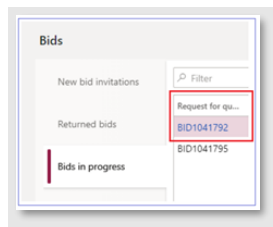
Step 1. Click the **Vendor Bidding** tile



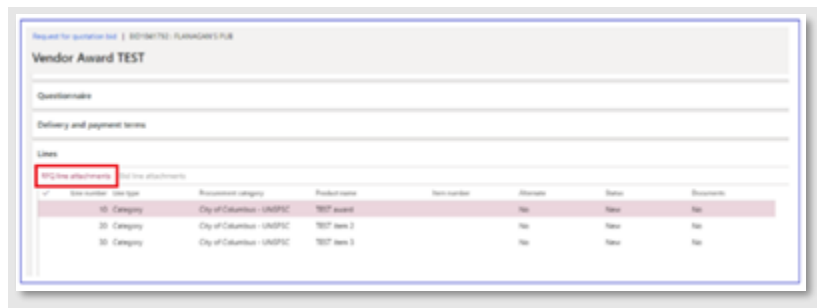
Step 2. Click the **Bids in progress** tab



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



Step 4. Click **RFQ Line attachments** in the Lines section

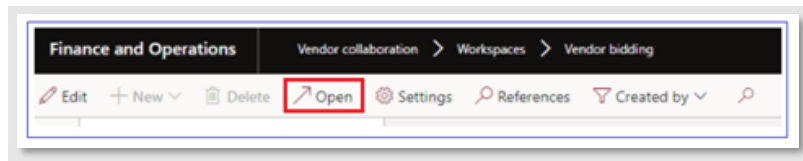


Step 5. To preview the attachment, select the **Preview** section. Optionally, you can select the down arrow to expand the section if needed.

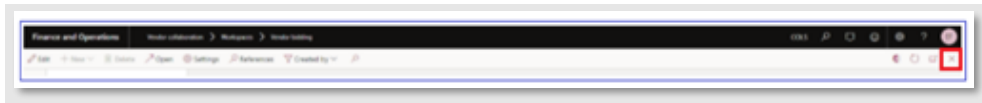


Step 6. Click **Open** on the top ribbon to validate file can be downloaded and viewed properly on vendor device

- a. The attachment will be displayed

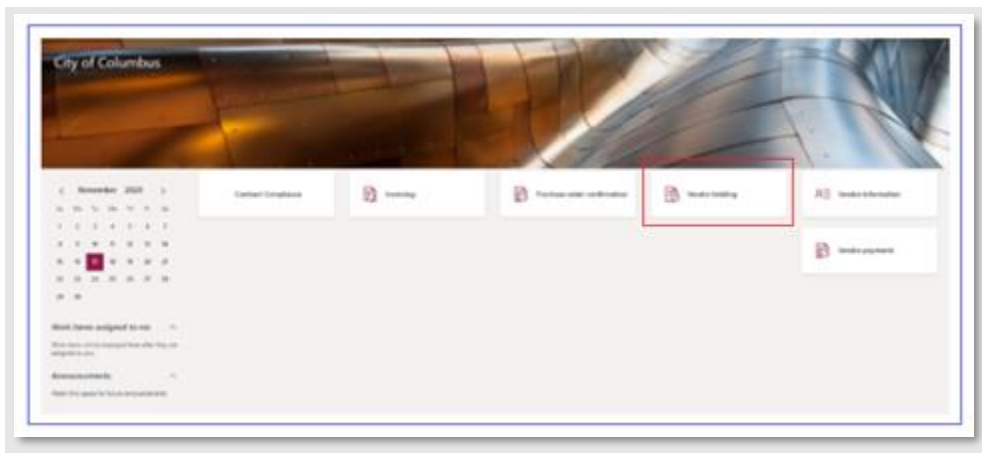


Step 7. Once you have viewed the attachment, click the **X** button to close the attachment



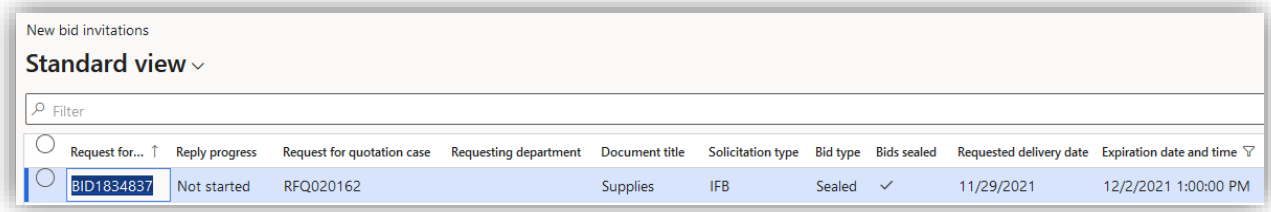
Add Attachments

Step 1. Click the **Vendor bidding** tile



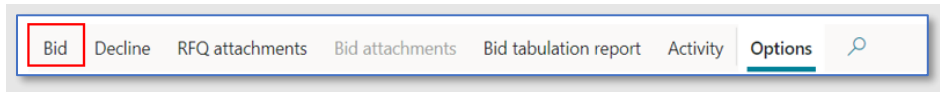
Step 2. Click **New bid invitations**

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

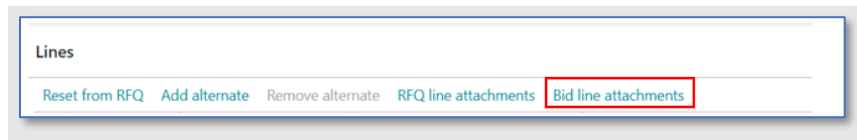


Request for...	Reply progress	Request for quotation case	Requesting department	Document title	Solicitation type	Bid type	Bids sealed	Requested delivery date	Expiration date and time
BID1834837	Not started	RFQ020162		Supplies	IFB	Sealed	✓	11/29/2021	12/2/2021 1:00:00 PM

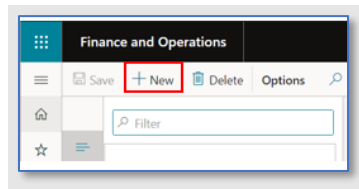
Step 4. Click **Bid**



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

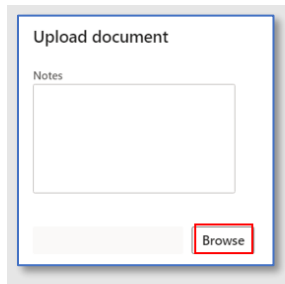


Step 6. Click **New**

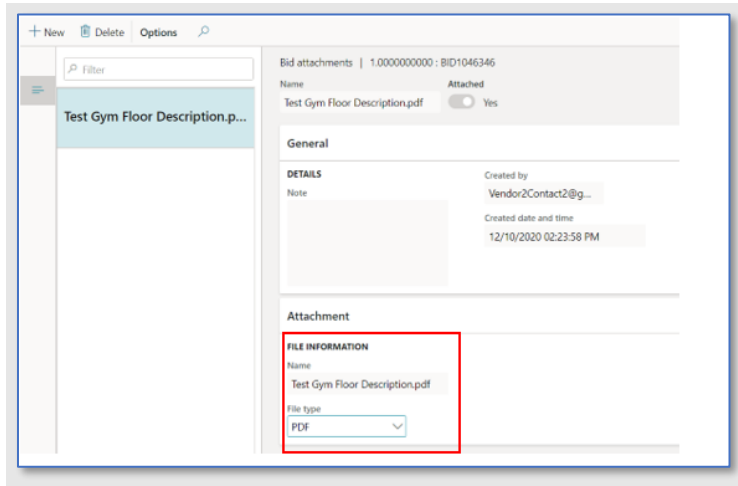


Step 7. Click **Browse** and select a file from your desktop to attach

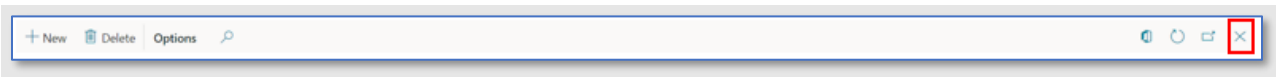
a. **Note: Only PDF documents can be uploaded and accepted for bids**



Step 8. View the attached file is correct

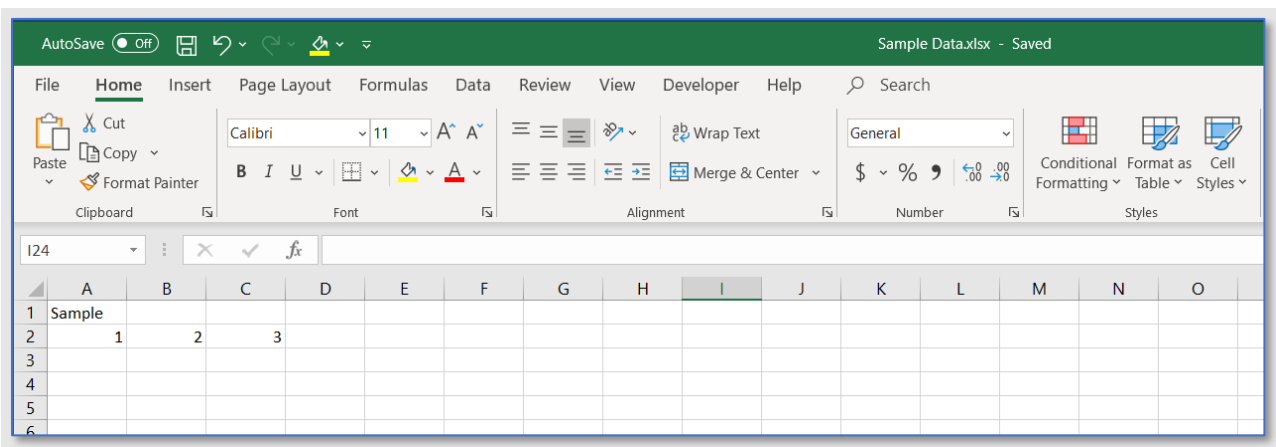
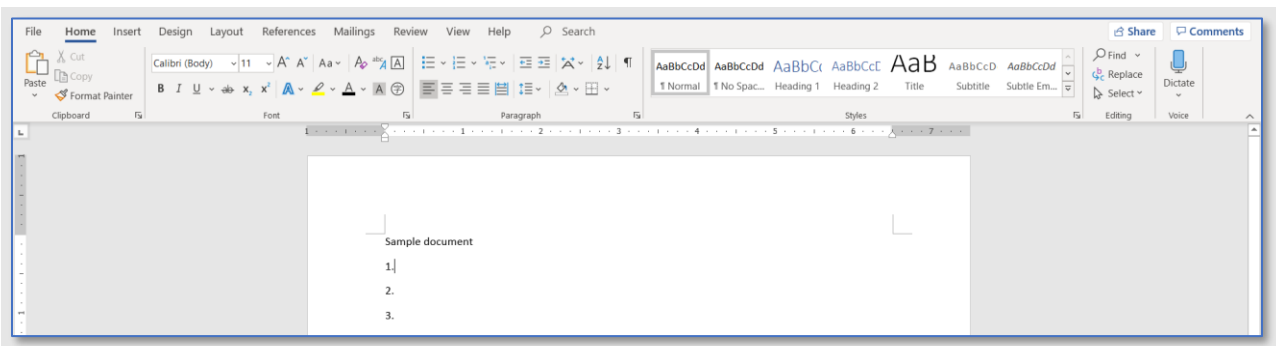


Step 9. Click X to exit

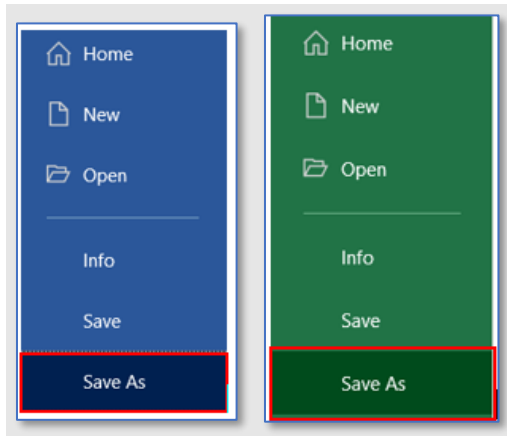
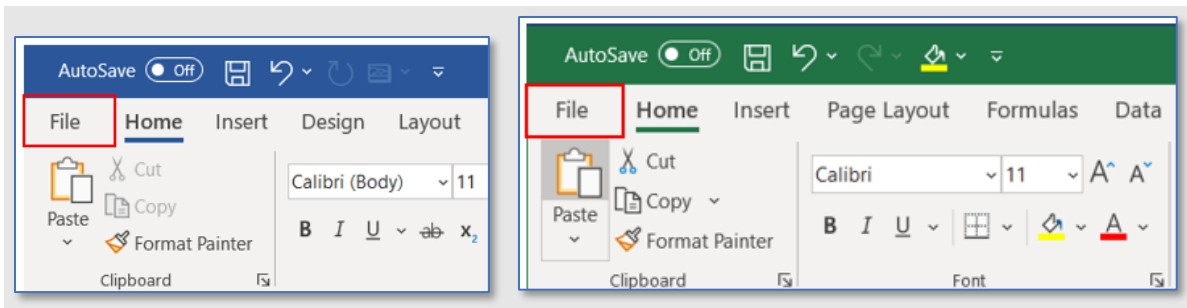


Save File as PDF

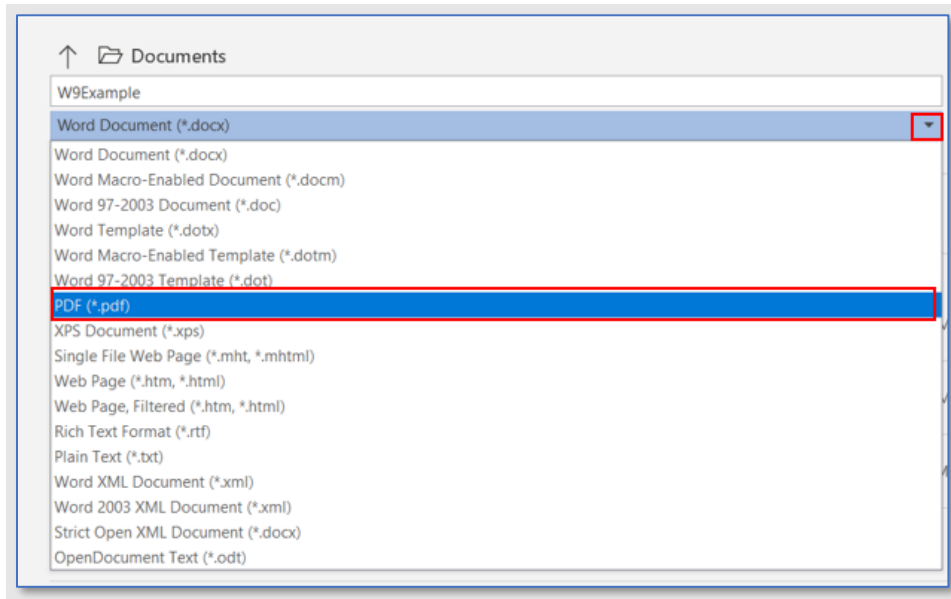
Step 1. Open or create the desired Word or Excel document to save as a PDF

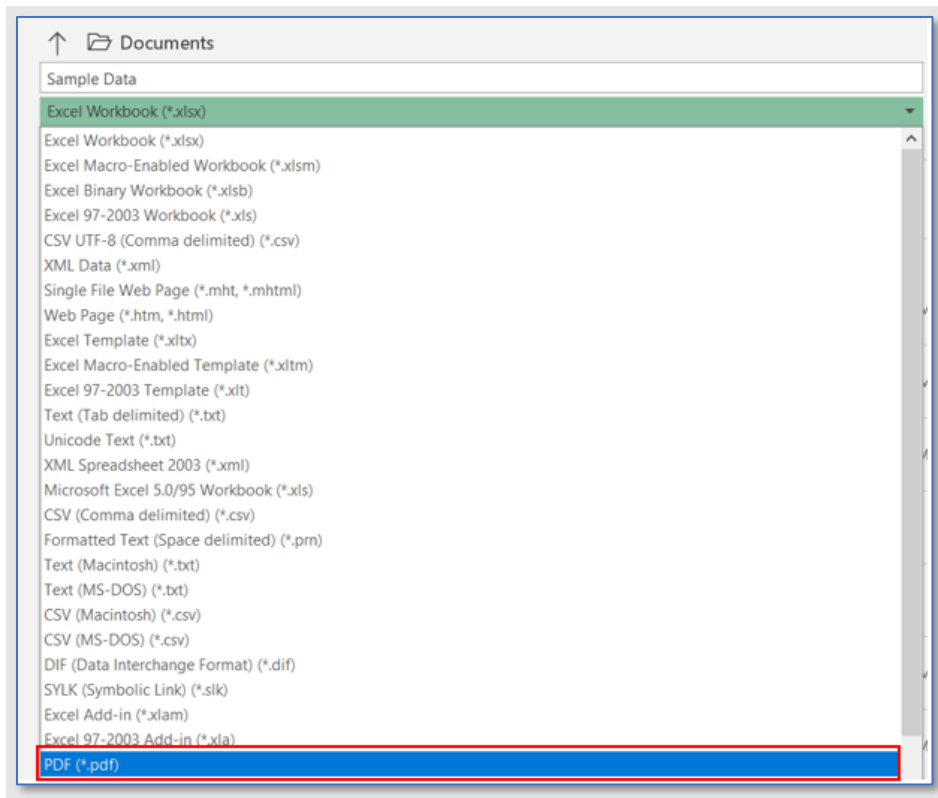


Step 2. Click File > Save As



Step 3. Select PDF from the file type dropdown

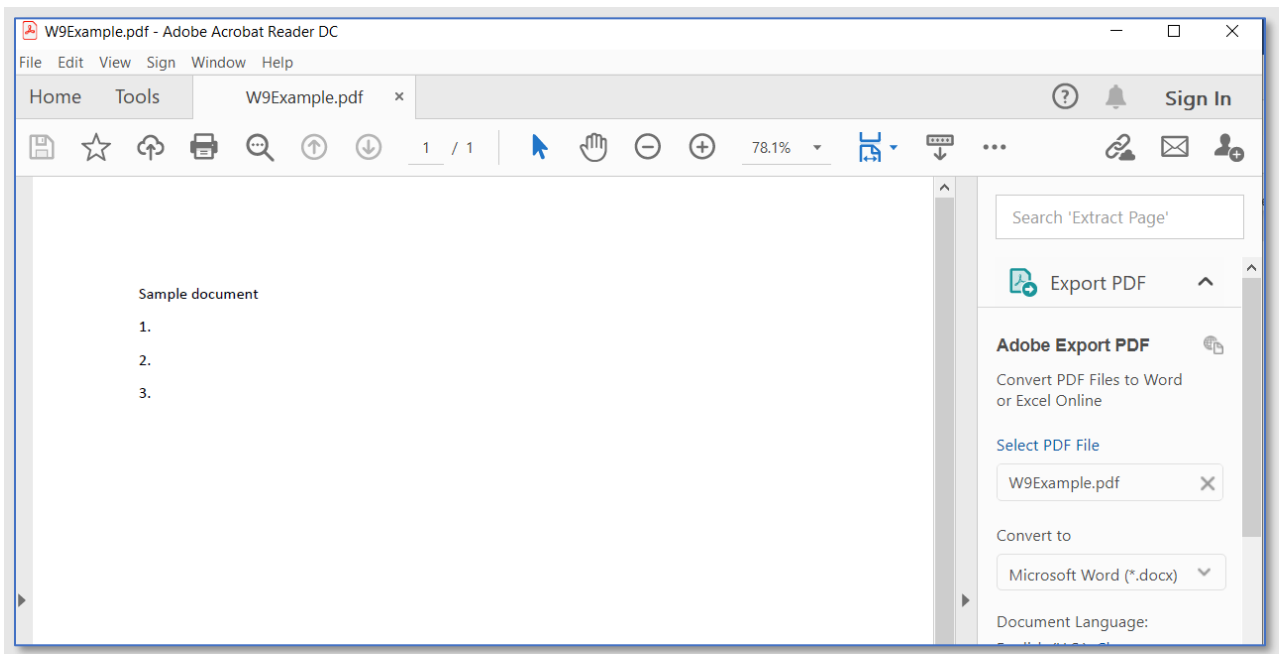


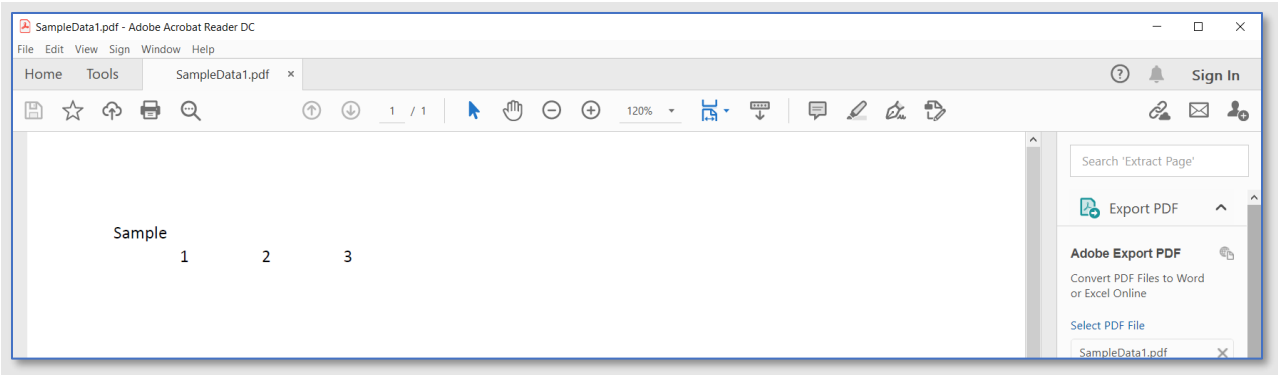


Step 4. Click Save



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



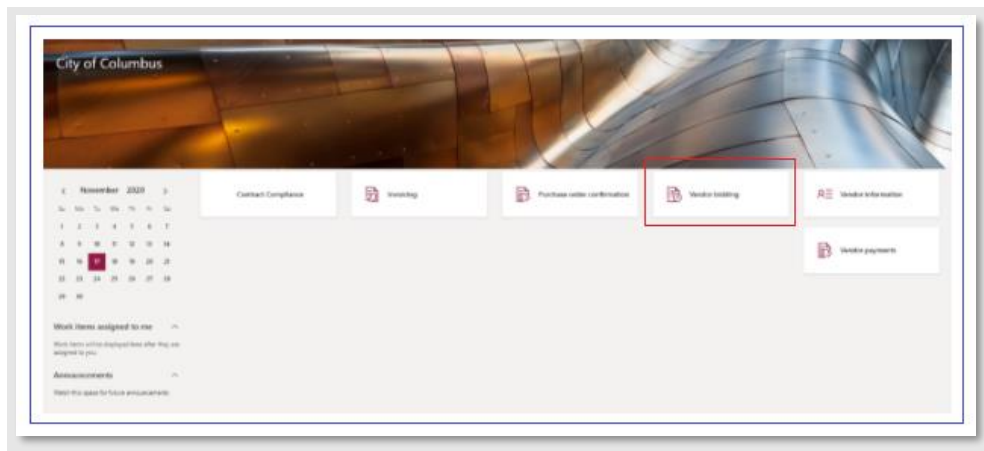


View Archived Bids

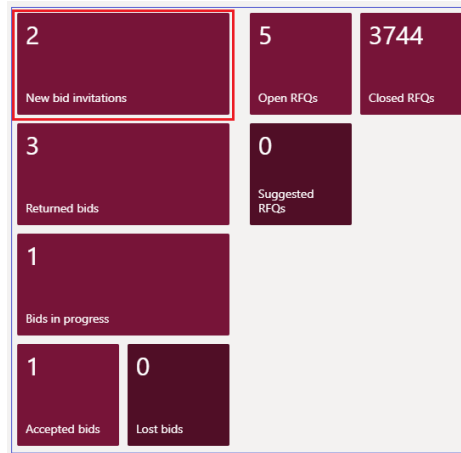
Vendors may view bids that have previously been submitted after the expiration date has passed through the Archived Bids function with the documented steps below in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Home page > Vendor bidding

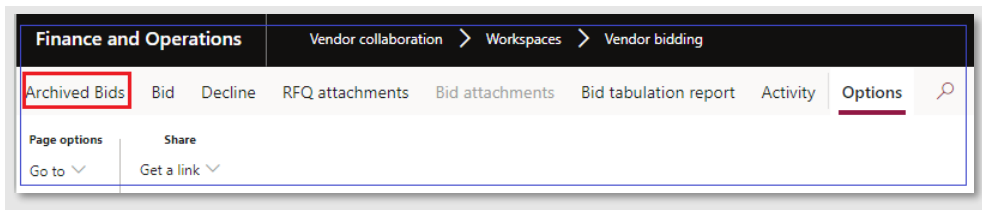
Step 1. Click the **Vendor bidding** tile



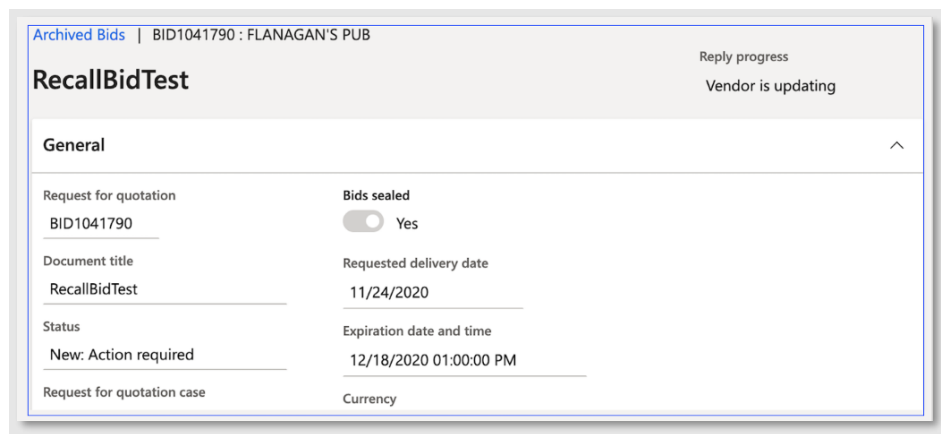
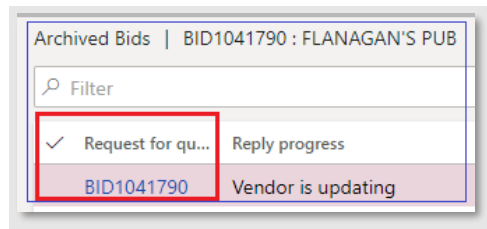
Step 2. Click the **New bid invitations** tile



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



Step 5. Click the X button to close the screen

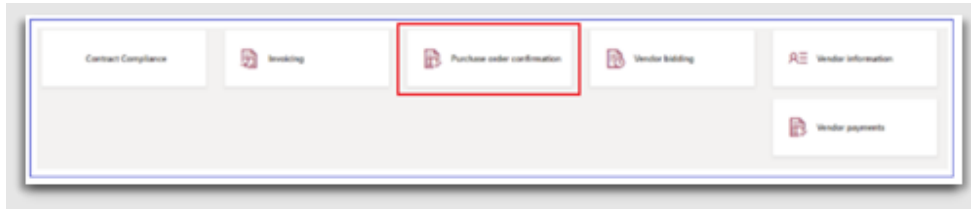
View and Print Purchase Orders

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 [Update Contact Information](#) 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**.


Finance and Operations COLS

Options 

Standard view 

Purchase order confirmations

Overview Lines

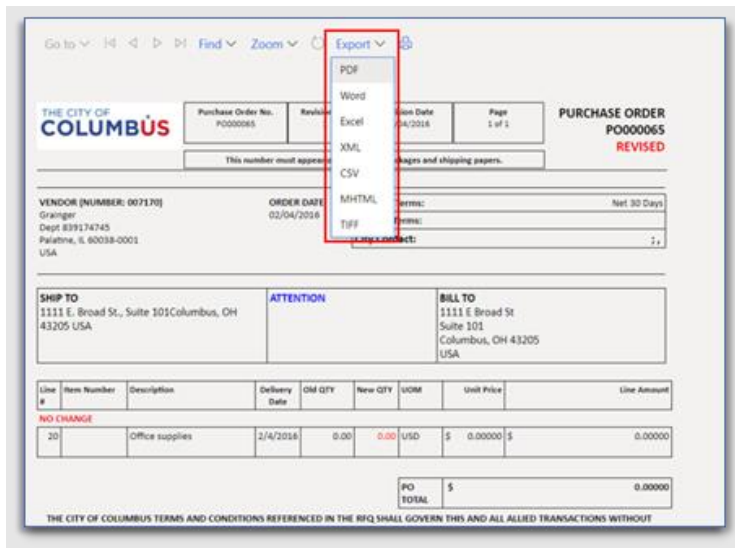
Preview/Print  Purchase order request

<input type="radio"/>	Invoice account	Purchase order	Purchase journal	Accounting date	Date	Buyer group	Cur...	Amount	Order send status
<input checked="" type="checkbox"/>	034412	PO290096	PO290096-2	9/30/2021	9/30/2021		USD	10,850.00	Waiting
<input type="checkbox"/>	034412	PO290109	PO290109-1	10/5/2021	10/5/2021		USD	2,500.00	
<input type="checkbox"/>	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.

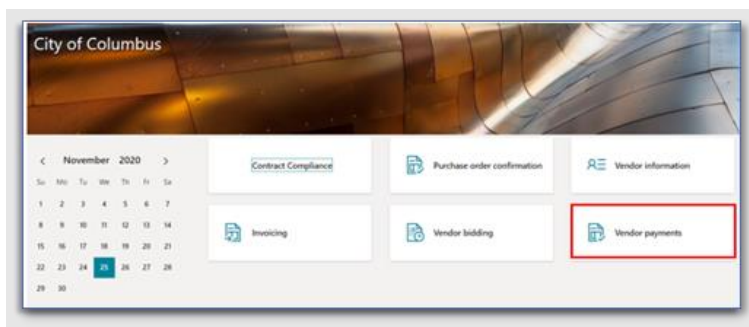


View Payment Status and Payment Information

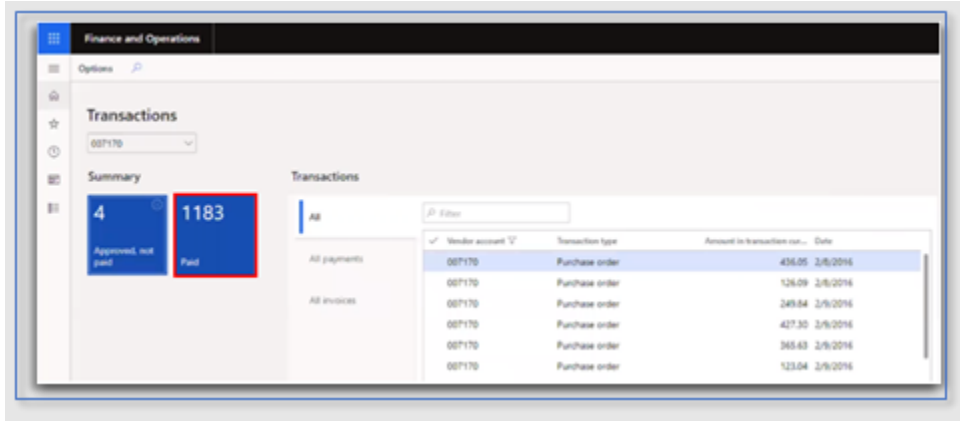
Vendors may view the status of all payments they have made as well as information such as check number, recipient, and date for each payment made and the details of the Purchase Order the payment was made towards with the documented steps below in the City of Columbus D365 Vendor Portal.

Access Via Menu Path: Home page > Vendor payments

Step 1. Click the **Vendor Payments** tile on the homepage

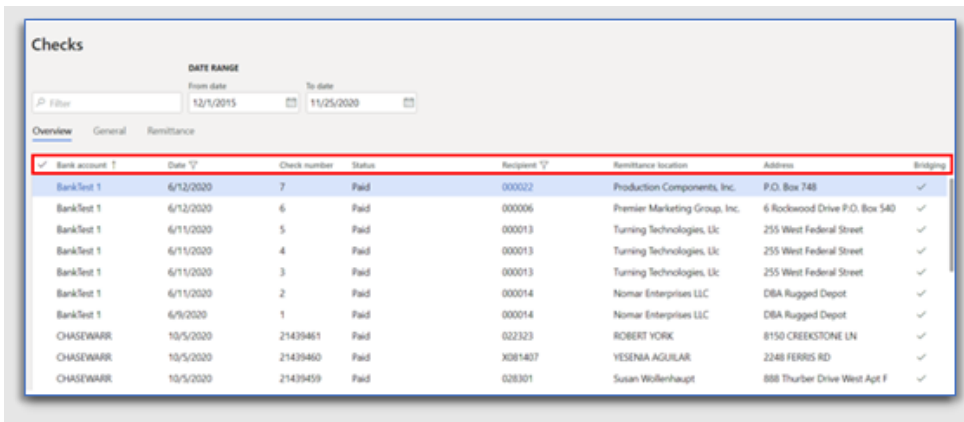


Step 2. Click on the Paid tile



Step 3. The Invoices/Checks page is displayed. The following information will be listed for the vendor:

- Bank account
- Date
- Check number
- Status
- Recipient
- Currency
- Amount



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

Bank account	Date	Check number	Status	Recipient	Remittance location	Address	Bridging
BankTest 1	6/12/2020	7	Paid	000022	Production Components, Inc.	P.O. Box 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	6/5/2020	1	Paid	000014	Nomar Enterprises LLC	DBA Rugged Depot	✓
CHASEWARR	10/5/2020	21439461	Paid	022323	ROBERT YORK	8150 CREEKSTONE LN	✓

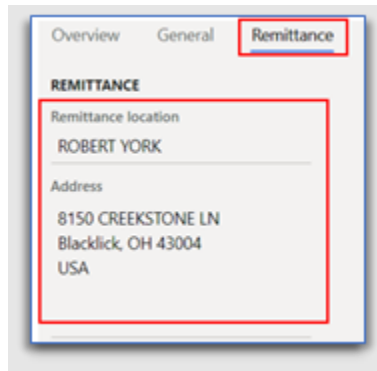
Step 5. Click the **General Tab** to view payment details for the payment line selected

- 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

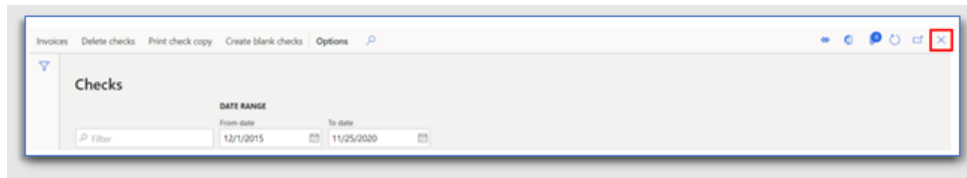
Bank account	Recipient type	Voucher	Reason comment	Created date and time
CHASEWARR	Vendor	APPY140849...		11/19/2020 02:34:47 PM
Check number	Recipient	Bridging posting	STATUS	Created by
21439461	022323	Yes	Paid	DeepakVQA
Currency	Recipient name	Cleared date	Status	Modified date and time
USD	ROBERT YORK		Paid	11/19/2020 02:34:47 PM
Amount	Company accounts	Reason code	Date	Modified by
240.00	cols		10/5/2020	DeepakVQA
			Voucher	
			APPY140849...	

Step 6. Click the **Remittance Tab**

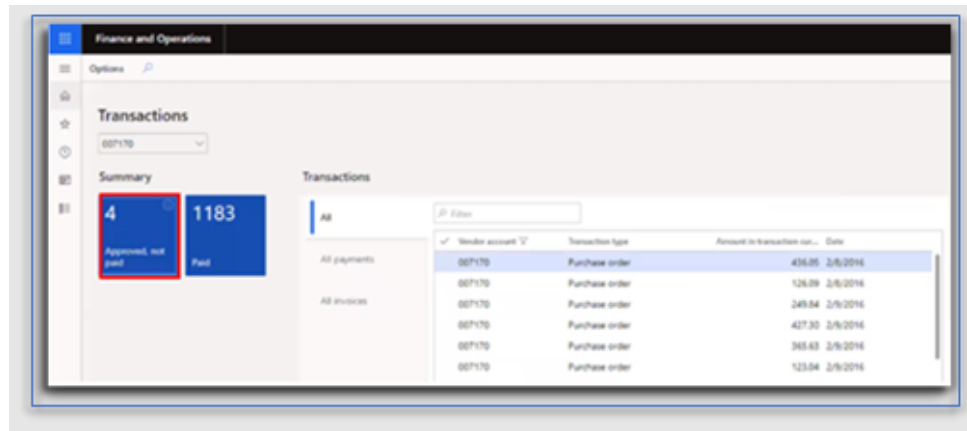
Step 7. View the Vendor **Remittance Location** and **Address** for the payment line selected



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



Step 9. Click on the **Approved, not paid** tile



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 #	Purchase order	Date	Due date	Invoice status
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

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

All purchase orders
PO209974 : 007170 - Grainger

Lines Header Invoiced Confirmed

Purchase order header

Purchase order lines

Line number	Item number	Product name	Procurement category	Variant number	CW quantity	CW unit
10		CARHARTT, J140-BRN XLG TLLT...	Protective coats			
20		CARHARTT, R41-BRN 40 36TK37...	Protective covers			

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