City of Columbus Vendor Services
User Guide
March 2019
Vendors Registered Before 03/09/2019 – Action Required

As of 03/09/2019, Vendor Services has changed the login process. Vendor that were registered prior to 03/09/2019 will need to update their account in order to continue to access Vendor Services. All active vendor users on 03/09/2019 will be sent an activation email with detailed instructions on how to update their account. Please follow the detailed instructions or follow the step by step video at http://www.columbus.gov/vendorservices or contact vendorservices@columbus.gov for assistance.

Accounts Used To Login To Vendor Services

City of Columbus Vendor Services requires vendor users to use a Google, Microsoft, LinkedIn, or Auth0 account to login. An Auth0 account allows you to link your business email directly with Vendor Services rather than use a third party email provider.

To establish an Auth0 account during registration:

1. Select the Sign Up tab from the Authentication Screen during Registration.
2. Enter your business email address in the bottom section of the sign up box as shown to the right.
3. Create a unique password for Vendor Services. This password is only for Vendor Services.
4. Click Signup
5. You will receive an email verification by email. Click on the verification link to confirm your email address.

Private Browsing Recommended With Vendor Services

We advise that you use Private Browsing when using our site. Using private browsing will help to prevent log in confusion for those vendors who use multiple email accounts in their browser. Vendor services will always prompt for your email provider when using Private Browsing so you are always in control of which account you are using when signing in. Use these keyboard shortcuts to activate private browsing:

**Internet Explorer: Control + Shift + P**

**Firefox: Control/Command + Shift + P**

**Chrome: Control/Command + Shift + N**
Vendor Portal Administrators

City of Columbus Vendor Services requires each vendor to have a Vendor Portal Administrator. The first contact added when a vendor registers will, by default, become the Vendor Portal Administrator. The Vendor Portal Administrator is responsible for maintaining additional users and contacts associated with the vendor’s account. Additional instructions are available below.

Register New Vendor

City of Columbus Vendor Services requires users to use a Google, Microsoft, LinkedIn, or Auth0 account to login. For information on how to create an Auth0 account, see the above section titled Accounts Used To Login To Vendor Services. If you prefer to use a Google, Microsoft, or LinkedIn account, please create an account with one of these providers before beginning vendor registration. You will use this account to access the City of Columbus Vendor Services site in the future.

Please make a note of the account in your records to ensure future successful login.

1. In a private web browser (see Private Browsing Recommended for Vendor Services Section), open the Vendor Services website http://vendors.columbus.gov/sites/public.
   Note: Internet Explorer is the preferred browser for accessing Vendor Services. Select the click here link located under the New Users Section.

2. The following message will be displayed to redirect you to Auth0 authentication:

   ![Auth0 Authentication Message]

3. Select OK to continue.
   Note: Our site uses a pop-up when registering. Please allow pop ups from our website.

4. You will be prompted to sign using Google, Microsoft, LinkedIn, or Auth0 account. Select the account you wish to use to sign in. (If you wish to create an Auth0 account, see the section above regarding Accounts Used To Login To Vendor Services)

5. You will be prompted to sign into your account.

6. Complete sign-in as directed.

7. You may see the following message. Select Allow to continue.
8. Once you have signed in select Register me to register a new vendor account.
9. Terms and Conditions of Use will be displayed. Please read the terms and conditions and place a checkmark next to “Check to acknowledge and agree”. Select Next.
10. Enter your Federal Tax Identification Number. Select Next.

The following message is displayed if the vendor you are trying to register is already registered with the City of Columbus.

If this message is displayed, you may still add yourself as a new vendor contract. Select Yes to add yourself as a new vendor contact and refer to the Section Register New Vendor Contact (Existing Vendor).

11. You are now prompted to enter company and contact information. Complete all applicable fields and select Next. See Notes below.

Company and Contact Information Notes

- Ensure that you enter the company’s email address and not your email address under company information. This email address will be used by the City to notify vendors of procurement opportunities.
- Ensure that you enter your email address under the contact column as this email address will be used to further communicate with you during the registration process.
- Entering the zip code first will populate City and State information for you automatically.
- Selecting “Same as Company” under the contact information column will populate company address information for you in the Contact column.

12. The Business Information screen is displayed. Indicate if you are:
   a. Minority owned
      i. Ethnic origin
b. Woman owned
c. A small business
d. Locally owned

13. Indicate the type of Tax ID you are providing during registration.

14. Indicate the number of employees for your business.

15. Select a line of business, then select **Next**.

16. You are now prompted to select Procurement Categories that pertain to your vendor.

a. Enter a category search value and select **Search**.

b. Search results will be displayed on the left side of the screen. Select the corresponding category from the list.

c. The right hand side of the screen will show the selected value in the list of categories. Place a checkmark next to the value to associate this category with your vendor.

d. Repeat steps a-c until all categories you wish associated with the vendor are selected.

17. Select **Finish**.

18. You will see the message “Your registration has been received by City of Columbus Vendor Services”. This completes the initial vendor registration process but additional steps are needed before you can login into the vendor portal. See Vendor User Account (New Vendor) Section below.

**Before you can access the Vendor Portal, a verification step will take place.**

**After verification, you will receive an e-mail from the City regarding your registration.**

**We strive to complete these verifications quickly. In most instances, you should receive communication from the City within one business day. If you have not received communication within two business days, please contact us at vendorservices@columbus.gov.**

19. After verification, you will receive an email indicating that you have been added as a vendor and now have access to the City of Columbus Vendor Services site.

20. The registration process is complete.
Logging into City of Columbus Vendor Services

1. In a private web browser (see Private Browsing Recommended for Vendor Services Section), open, http://vendors.columbus.gov/sites/public.
   Note: Internet Explorer is the preferred browser for accessing Vendor Services.
2. Select the click here link located under the Registered Users Section.
3. You will be prompted to sign in using a Google, Microsoft, LinkedIn, or Auth0 email address and password.
4. Complete sign-in as directed.
5. Upon, successful login, the Vendor Services site will be displayed.

For assistance with logging into Vendor Services, please contact vendorservices@columbus.gov. We strive to respond to inquiries in a timely fashion. In most instances, you should receive communication from the City within a half business day.

Vendor Maintenance

Register New Vendor Contact (Existing Vendor)

City of Columbus Vendor Services requires users to use a Google, Microsoft, LinkedIn, or Auth0 account to login. For information on how to create an Auth0 account, see the section titled Accounts Used To Login To Vendor Services. If you prefer to use a Google, Microsoft, or LinkedIn account, please create an account with one of these providers before beginning vendor registration. You will use this account to access the City of Columbus Vendor Services site in the future.

Please make a note of the account in your records to ensure future successful login.

1. In a private web browser (see Private Browsing Recommended for Vendor Services Section), open, http://vendors.columbus.gov/sites/public.
   Note: Internet Explorer is the preferred browser for accessing Vendor Services.
2. Select the click here link located under the New Users Section.
3. The following message will be displayed to redirect you to Auth0 for authentication:
4. Select OK to continue.
   Note: Our site uses a pop-up when registering. Please allow pop ups from our website.
5. You will be prompted to sign using Google, Microsoft, LinkedIn, or Auth0 account. Select the account you wish to use to sign in. (If you wish to create an Auth0 account, see the section above regarding Accounts Used To Login To Vendor Services)

6. You will be prompted to sign into your account.

7. Complete sign-in as directed.

8. You may see the following message. Select Allow to continue.

9. Once you have signed in, search for your company by entering the vendor name or federal tax id. Select Search. (Dashes are not required when searching the tax id.)

   If searching by federal tax id you must enter the full tax id in order to return results.

   If searching by vendor name, you may enter partial values i.e. Supp will return Support Systems, Support Solutions, etc...

10. Vendors matching your search criteria will be displayed. Highlight the correct vendor to proceed. Select Use the selected company. Note: Make a note of the Vendor Portal Administration for the selected vendor as you may need to contact them later.

11. Terms and Conditions of Use will be displayed. Please read the terms and conditions and place a checkmark next to “Check to acknowledge and agree” if it is not already selected. Select Next.

12. You are now prompted to enter your contact information. Complete all applicable fields and select Finish. See Notes below.

   Company and Contact Information Notes
   • Verify the Contact name field contains your first and last name.
   • Selecting “Same as Company” under the contact information column will populate company address information for you in the Contact column.

13. You will see a message indicating “Your registration has been received.”

14. The Vendor Portal Administrator (that you noted in step 10) is responsible for verifying your account. Please contact this individual to continue the registration process.
Attach W-9 to Vendor Record

Please provide the City of Columbus a W-9 in a timely fashion and provide updated W-9’s as requested. A vendor will be placed on “Hold for Payments” until a W-9 is received and reviewed by the City Auditor’s Office.

1. Login to the City of Columbus Vendor Services Site (See “Logging into City of Columbus Vendor Services” for additional Assistance.)
2. Select Profile from the Common menu located on the left navigation bar.
3. Your vendor profile will be displayed. Select Attachments.

5. The Add Document window will display.
6. Enter a Description. For example: 2017 W9 XYZ, Co.
7. Select W9/W8 in the Type field.
8. Select Browse and locate the applicable document.
9. Select OK.
10. You will be returned to the Attachments page. Verify your W9 appears in the list of documents.
11. W9’s are typically processed in one to two business days.

Update your Vendor Profile
1. Login to the City of Columbus Vendor Services Site (See “Logging into City of Columbus Vendor Services” for additional Assistance.)
2. Select Profile from the Common menu located on the left navigation bar.
3. Your vendor profile will be displayed. Select Edit.

Update Address
1. Select Address. This will expand the Address section.
2. Select Add.
3. Enter an additional address for your business and select Save and Close.
4. Select Address again to minimize the Address section.
5. Select Close to exit the vendor profile.

Update Contact Information
1. Select Contact Information. This will expand the Contact Information section.
2. Highlight the contact information line you wish to update and select the Details button.
3. Select Edit on the View contact information screen.
4. Update the information accordingly and select Save and Close.

Add Attachments to your Vendor Profile
1. Login to the City of Columbus Vendor Services Site (See “Logging into City of Columbus Vendor Services” for additional Assistance.)
2. Select Profile from the Common menu located on the left navigation bar.
3. Select Attachments.
5. Enter a description for the document.
6. Select Document from the Type field pick-list.
7. Select Choose File.
8. Navigate and attach your document
9. Select OK.
10. You will see the attachment listed on the screen.
11. Select Close.
12. Select Close again to close the Vendor Profile.

Create Category (UNSPSC Codes) Request
City of Columbus Vendor Services converted NIGP codes associated with your vendor account to UNSPSC codes. It is likely you will want to add additional UNSPSC codes to your account. UNSPSC Codes are called categories within Vendor Services. Bid notifications you receive as a vendor are based on categories associated with your vendor account. A category request allows you to add new categories.
1. Login to the City of Columbus Vendor Services Site (See “Logging into City of Columbus Vendor Services” for additional Assistance.)

2. First, view categories associated with your vendor account by selecting **Profile** from the Common menu located on the left navigation bar.

3. Select **Category Information** to expand the Category Information section.

4. After viewing categories associated with your vendor account, select **Close** to close the Vendor Profile.

5. Select **Category requests** from the Common menu located on the left navigation bar.

6. Select Category request from the upper left hand corner to create a category request.

7. You are now prompted to select Procurement Categories that pertain to your vendor.

   a. Enter a category search value and select Search.
   b. Search results will be displayed on the left side of the screen. Select the corresponding category from the list.
   c. The right hand side of the screen will show the selected value in the list of categories. Place a checkmark next to the value to associate this category with your vendor.
   d. Repeat steps a-c until all categories you wish associated with the vendor are selected.

8. Select **Save and Close**.

9. To submit your request to have your select categories added to your vendor record, select **Submit** located on the yellow bar at the top of the page.

10. Enter a comment if applicable and select **Submit**.
11. Your request will show in the Category Request list with a status of Application Submitted.
12. Return to this screen at a later time to see that the status shows as approved.

Delete Categories associated with your Vendor Account
City of Columbus Vendor Services converted NIGP codes associated with your vendor account to UNSPSC codes. You may want to review and remove UNSPSC codes from your account that are not applicable. UNSPSC Codes are called categories within Vendor Services. Bid notifications you receive as a vendor are based on categories associated with your vendor account.

1. Login to the City of Columbus Vendor Services Site (See “Logging into City of Columbus Vendor Services” for additional Assistance.)
2. Select Profile from the Common menu located on the left navigation bar.
3. Select Edit.
4. Select Category Information to expand the Category Information section.
5. Select the category you wish to remove. The row will be highlighted.
6. Select Remove.

Approving Additional Vendor Contacts
Additional vendor contacts may use the “Register New Vendor Contact” process to associate themselves as a contact for your vendor and gain access to Vendor Services. The Vendor Administrator is responsible for approving and creating a user account for these individuals.

Note: Only Vendor Portal Administrators may complete this function.

1. Login to the City of Columbus Vendor Services Site (See “Logging into City of Columbus Vendor Services” for additional Assistance.)
2. Select Unconfirmed vendor contacts from the Common menu located on the left navigation bar.
3. Place a checkmark next to the contact you wish to confirm and select Create Vendor Contact.
4. Verify and update first name, last name, and job title information as applicable. Select Create.
5. The Edit Contact screen is displayed allowing you to view and/or update address and contract information, and user roles for the vendor contact. Update this information as appropriate and select Save and Close.
6. Select Contacts from the Common menu located on the left.
7. Place a checkmark next to the contact you want to make a vendor user and select Add Vendor User from the top navigation bar.
8. The following window is displayed. Update User Role to “Vendor (external) – Public sector”. Select Save and Close.
9. The following window is displayed. Select **Submit**.

![Create new user request](image)

10. Enter any applicable comments and select **Submit**.

11. An email notification will be sent to the newly created contact with a link to access Vendor Services.

   ![View user request - Request ID: 000051, Shawny Test](image)

   You can check the status of a user’s account by selecting User Requests from the Common menu located on the left navigation bar. The Status column will display “Authentication pending” or “Completed” for each user.

12. The user registration process is complete.

**EBO Questionnaire**

1. Login to the City of Columbus Vendor Services Site (See “Logging into City of Columbus Vendor Services” for additional Assistance.)

2. Selecting **Questionnaires** from the Common menu located on the left navigation bar.

3. You will see a questionnaire named EBO Quest.

4. Select the questionnaire.
5. Question 1 will be displayed.
6. Answer question 1 and select Forward.
7. Proceed through the questionnaire answering each question and selecting Forward to continue.
8. Once you have reached and answered the last question select End.
9. The Status for the questionnaire will be updated to Finished.

Complete and Submit a Bid for an RFQ

Vendors Portal Administrators will be notified via email of new requests for quotations matching categories they have registered for. Upon receipt of the email, follow the instructions below to review and submit a bid.

You may also bid on open requests for quotations that do not match categories you have registered for. See Bid on RFQ when Vendor not registered for the RFQ bid category for additional assistance.

1. Login to the City of Columbus Vendor Services Site (See Logging into City of Columbus Vendor Services for additional assistance.)
2. Select Requests for quotations from the My Documents menu located on the left navigation bar.
3. A list of requests for quotations matching categories you have registered for will be displayed. Any bids that you recalled will also be here. If you recall a bid, you MUST take action and Bid and Submit or that bid will not be considered.
4. Highlight the request for quotation you wish to bid.
5. If the RFQ has Header attachments, view these documents. (See View Request for Quotation Attachments for additional assistance.)
6. Select the Request for quotation BID ID to view the request for quotation.
7. Review the following bid sections:
   a. General
   b. Request for quotation description
   c. Bidding guidance items
   d. Lines.
      i. Highlight each line and select details to view specifications.
      ii. View Request for Quotation Line Attachments (if applicable).
   e. Amendments (if applicable)
   f. Delivery/payment terms
8. When ready to bid RFQ lines, Select Bid.
9. Locate the Lines section.
10. Highlight a line and select Detail.
11. Enter unit price in Quantity tab and comment if applicable and select Save and Close.
12. Repeat for each line within the RFQ.
13. Review your bid information and select Submit. Bid is not valid until Submit has been selected. Note: Once a bid has been submitted, the bid is sealed and both you and Vendor Services cannot see the bid until it is unsealed. See next section for other actions that can be taken.
Vendors may also complete the following actions for Bids:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Bid Questionnaire</td>
<td>RFQs may require a vendor to complete questionnaires as part of the bid process.</td>
</tr>
<tr>
<td>Add Vendor Questions</td>
<td>For requests for quotations that allow vendors to submit questions, the vendor may submit one or more question. Note that it is the vendor’s responsibility to return to Vendor Services to view question responses prior to the bid expiration date.</td>
</tr>
<tr>
<td>Recall a bid</td>
<td>Bids may be recalled prior to the bid expiration date as necessary to make corrections or updates.</td>
</tr>
<tr>
<td>Alternate bid for an item</td>
<td>Most requests for quotations allow vendors to submit alternate bids.</td>
</tr>
<tr>
<td>Add Attachments to a bid line</td>
<td>Vendors may attach appropriate documentation to each bid line.</td>
</tr>
</tbody>
</table>

### Add Attachments to a Bid Line

1. Navigate to My Documents → Requests for quotations or Public Documents → Open requests for quotations.
2. Select the request for quotation that you wish to add attachments too.
3. Select the line you wish to add an attachment too.
4. Select Attachments menu option.
5. Select Upload document.
6. Enter a Document description.
7. Select File as the Document type.
8. Select Browse to locate your file.
9. Select OK.
10. Repeat until all applicable documents have been attached.
11. Select Close.

### View Amendments

1. Navigate to My Documents → Requests for quotations or Public Documents → Open requests for quotations.
2. Select the request for quotation that you wish to view the amendment for.
3. Locate the Amendments section of the RFQ and select to expand the section.
4. RFQ Amendments will be displayed.
5. For RFQ Amendments that include an attachment, highlight the applicable amendment and select View attachment.

Adding an Alternate Bid on an item
1. Navigate to My Documents → Requests for quotations or Public Documents → Open requests for quotations.
2. Select the requests for quotations.
3. Locate the Lines section and expand the section.
4. Select the line you wish to add an alternate.
5. Select Add alternate.
6. Select the new line item and enter the following:
   a. Product Name
   b. Quantity
   c. Unit Price
   d. Comment (if applicable)
   e. Attachment (if applicable)
7. Repeat as necessary for applicable line items.

Complete Bid Questionnaire
1. If the RFQ has an associated questionnaire, navigate to My Documents → Requests for quotations
2. Select the request for quotation that you wish to complete a bid questionnaire for.
3. Locate the Questionnaire section of the RFQ and select to expand the section.
4. Select Complete Questionnaire and follow on screen instructions.
5. Once you have completed the questionnaire, the status of the questionnaire will indicate Completed.

Add Vendor Question
1. Navigate to My Documents → Requests for quotations
2. Select the requests for quotations that you wish to submit a question for.
3. Locate the Vendor Questions section of the RFQ and select to expand the section.
4. Select Add.
5. Enter your question into the question field.
6. Select Save.

View Vendor Question Answers
1. Navigate to My Documents → Requests for quotations
2. Select the request for quotation that you wish to view vendor questions and answers for.
3. Locate the **Summary questions and answers** section of the RFQ and select to expand the section.
4. View submitted vendor questions and answers.

**Recall a Bid**
A vendor may recall their bid in order to update their bid, add attachments, add alternative bids, etc... **A bid cannot be recalled after the bid expiration date.**

1. Navigate to My Documents → Requests for quotations
2. Select the request for quotation that you wish to recall.
3. Select the **Recall** menu option located at the top of the screen.
4. The message ‘Are you sure you want to recall this bid?’
5. Select **Yes** to recall the bid.
6. Select **No** to return to the RFQ without recalling the bid.

   Note: After a bid has been recalled, it is considered **not submitted**. If you wish to have the bid considered, you must follow the steps outlined in the section [Complete and Submit a bid for an RFQ](#) above to submit the bid.

**View Request for Quotation Attachments**
Each RFQ may have one or more attachments. These are documents that are attached to the Request for Quotation and provide additional information specific to the RFQ. Examples include: reference forms, specifications, drawings, etc...

1. Navigate to My Documents → Requests for quotations or Public Documents → Open requests for quotations.
2. Place a checkmark next to the request for quotation that you wish to view attachments for.

   **RFQs that have documents (attachments) associated with them will have a checkmark in the Document column.**

3. Select **Attachments → Attachments** from the top menu.
4. A list of attachments is displayed.
5. Select the attachment you wish to view and select the file name to open or select **Open document** from the top menu.
6. The document will open.
7. Select **Close** to close the Attachments screen.
View Request for Quotation Line Attachments

These are documents that are attached to the Request for Quotation line and provide specific information about a product or service. An example could be travel procedures and guidelines.

1. Navigate to My Documents   Requests for quotation or Public Documents   Open requests for quotation.
2. Open the request for quotation that you wish to view attachments for by clicking on the link that starts BID.

   RFQ Lines that have documents (attachments) associated with them will have a checkmark in the Document column.

3. Locate the Lines section and expand if not already open.
4. Highlight the line you wish to view attachments for.
5. Select Attachments from the Lines menu.
6. A list of attachments is displayed.
7. Select the attachment you wish to view and select the file name to open or select Open document from the top menu.
8. The document will open.
9. Select Close to close the Attachments screen.

Bid on RFQ when Vendor not registered for the RFQ bid category

1. Login to the City of Columbus Vendor Services Site (See “Logging into City of Columbus Vendor Services” for additional Assistance.)
2. Select Open requests for quotations from the Public documents menu located on the left navigation bar.
3. All open requests for quotations will be displayed.
4. To view additional information for an RFQ, select the RFQ number.
5. Select Bid.
6. See Complete and Submit Bid for an RFQ Section.

View Open Requests for Quotations

Unregistered vendors can view open requests for quotations by completing the following steps.

1. In a private web browser (see Private Browsing Recommended for Vendor Services Section), open the Vendor Services website http://vendors.columbus.gov/sites/public.
2. Select Open Requests for Quotations located under Public Documents.
3. A list of open RFQs will be displayed.
4. To view additional information, select the RFQ number.

**View Confirmed Purchase Orders**

Vendors will receive 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.

1. Login to the City of Columbus Vendor Services Site (See Logging into City of Columbus Vendor Services for additional Assistance.)
2. Select **My purchase order confirmations** located under My documents.
3. Select the purchase order from the list or enter the purchase order number into the filter box located on the right hand side above the purchase order list, select Purchase Order (*Note: this defaults to purchase order confirmation, you will need to change*) from the drop-down list and select →.

<table>
<thead>
<tr>
<th>Purchase order confirmation</th>
<th>Invoice account</th>
<th>Purchase order</th>
<th>Date</th>
<th>Currency</th>
<th>Amount in transaction currency</th>
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<tbody>
<tr>
<td>013034</td>
<td>013903</td>
<td>PO001093</td>
<td>1/20/2014</td>
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<td>PO000877</td>
<td>1/20/2014</td>
<td>USD</td>
<td>300.00</td>
</tr>
</tbody>
</table>

4. To view the purchase order, ensure the purchase order you wish to view is selected and select **Attachments**.

5. Select **TCM Document Explorer** to view the Purchase Order. **DO NOT SELECT ATTACHMENTS.**
6. Your purchase order documentation will load. Please note there may be more than 1 document available for viewing. Please ensure that the latest purchase order document is selected on the left-hand side.
7. To print your PO, select the printer icon from the menu located at the top of the document displayed.

Revision History

<table>
<thead>
<tr>
<th>Description</th>
<th>Date</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Section “View Confirmed Purchase Orders”</td>
<td>3/1/2016</td>
<td>Cheryl Reed</td>
</tr>
<tr>
<td>Add Section “Attach W9” to Vendor Record</td>
<td>7/14/2017</td>
<td>Cheryl Reed</td>
</tr>
<tr>
<td>Updated Document To Note Changes To Login Process For Auth0. Included Updates With Private Browsing And Text Updates</td>
<td>03/06/2019</td>
<td>Ryan Rackley</td>
</tr>
</tbody>
</table>