BI-STATE DEVELOPMENT

iSupplier User Guide

Revised August 2021
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SECTION ONE: Introduction

BSD’s iSupplier Portal enables web-based communication between BSD and its suppliers. Using this function will allow you to:

- View your purchase orders, both active and historical
- Submit change requests on active purchase orders
- View BSD receipts against your purchase orders
- View BSD payments to you
- View and quote on active solicitations
- Receive notices of new solicitations of interest to you
- View the winning quotes on solicitations not awarded to you
- Print and/or communicate our solicitations to others

The iSupplier Portal [http://www.bistatedev.org](http://www.bistatedev.org) is available to you 24 hours a day, 7 days a week at no cost to you. It provides a central location for storing past quotes and purchase orders with BSD and gives you access to this information. It reduces phone calls, paperwork, fax time and e-mails between you and BSD.

In this guide you’ll learn to:

- Register in iSupplier and manage your user account
- Access and respond to solicitations
- View solicitation results
- Request a change in an active purchase order
- “Sign up” to receive notifications of new solicitations of interest to you
- Review payment information
- Troubleshoot problems regarding your browser settings
SECTION TWO: Registering

New Suppliers

If you are a new supplier you may register by going to our website http://www.bistatedev.org. Choose Vendor Resources, then choose Procurement Opportunities. Click on the New Supplier Registration link located under the iSupplier heading. When you click on the link it will take you to a screen as follows. Any field with an * is mandatory. It is required to have your company’s legal name, Tax Country, Federal Tax ID number (or if doing business as an individual your SSN), and a contact person with an e-mail address. Once you are a supplier multiple people at your organization can have access to the iSupplier portal. Send an email to procurement@bistatedev.org with the email addresses of the individuals needing access.
Tip: Click on the magnifying glass to the right of the Tax Country field to select the proper Tax Country.

While a phone number is not a mandatory entry it would be useful to us if there is a problem with your registration.

If you have any problems with registering send an email to procurement@bistatedev.org with details of your issue.
After registering you will receive an e-mail from Workflow containing your temporary password. You will be prompted to change this temporary password the first time you log in.
Passwords

- Are case sensitive (including the temporary password)
- Must be at least 12 characters long
- Must contain both upper and lower case letters
- Must contain a number, and a special character
- Expires every 60 days
- Cannot be reused for 180 days.

FYI your account will be locked after three unsuccessful login attempts. If this happens, it will be necessary to request a new password to reset the system. You can request a new password from the log in screen by clicking on “Forgot your user ID or Password” link just below the login button. You will be asked to enter your user ID (which is your e-mail address). You will receive an email with a link enabling you to reset your password.
Existing Suppliers

Existing suppliers can be invited by a BSD Employee. You will receive an e-mail from Workflow:

Click on this link to be taken to the registration page.
The registration page will look like this. Your e-mail address will be your user name; all fields with an asterisk are mandatory. After you have completed the form, click on the Submit button.

After you fill out the mandatory fields and click submit, you will receive an email from Workflow with a link to log on.
The log in page will look like this. Your user name is your full e-mail address. Enter password and click login.

Click on the link and it will take you to your log on page

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You may receive an invitation to register for iSupplier through a solicitation.

As an unregistered supplier you cannot respond to the solicitation until you register. Click on this link to be taken to the registration page.
The registration page will look like this. Your e-mail address will be your user name; all fields with an asterisk are mandatory. After you have completed the form, click on the Submit button.
After submitting your registration you will receive this confirmation page.
To get to the iSupplier portal click on the Reset Your Password link. You will be prompted to change this temporary password the first time you log in.
Passwords . . .

- Are case sensitive (including the temporary password)
- Must be at least 12 characters long
- Must contain both upper and lower case letters
- Must contain a number, and a special character
- Expires every 60 days
- Cannot be reused for 180 days.

FYI your account will be locked after three unsuccessful login attempts. If this happens, it will be necessary to request a new password to reset the system. You can request a new password from the log in screen by clicking on “Forgot your user ID or Password” link just below the login button. You will be asked to enter your user ID (which is your e-mail address). You will receive an email with a link enabling you to reset your password.
SECTION THREE: Accessing a Solicitation

You may view (and respond) to any open BSD solicitation if you are a registered user of iSupplier. When a BSD buyer creates a solicitation they have the option of inviting a supplier to participate. Suppliers who are invited receive an e-mail notification:
Invited suppliers are requested to acknowledge their participation (you have a yes or no option). To do so, click on the Please click here to Respond link.

If you want to view the solicitation before deciding if you want to participate you can view the solicitation by clicking on Negotiation Details link.
If you are not a registered iSupplier user you cannot view nor can you acknowledge participation without enrolling. Click on the Respond to Invitation link and you will be taken directly to the registration page.
If you are a registered iSupplier user you will receive an FYI notification if a solicitation is published that contains a line with an item associated with a NAICS category for which you have registered (more on how to do this later). If so you will receive an e-mail notification like this:
This e-mail notification is not an invitation but rather an FYI e-mail notification. It does not ask you to indicate participation.

To view the requisition click on the link; it will take you to a log in page and once you log in, it will take you directly to the referenced solicitation.
As a registered supplier you have access to view all open solicitations.

Log into iSupplier. From your Navigator page click on BSD Solicitations.

(Note that any invitations to participate in a solicitation are on your Worklist displayed on the right hand side of the page. To go directly to one of these solicitations just click on the Subject field.)
Then click on Solicitations Home Page
From the Solicitations Home Page change the Search Open negotiations from “Title” to “Number” using the pull down box.
Enter the number of the solicitation you want to view in the box and press “Go”.

If you enter a “1” in this box and press “Go”, all open solicitations will display. All solicitations are sequentially numbered and we are in the 100,000 series. After we have used all of the “1”s you will need to enter a “2” and eventually a “3”. If you look at the numbers of the solicitations (Negotiation Number) in your Worklist you can see what the beginning number should be.
Click on the radio select button and you can view the solicitation by clicking on its number.
SECTION FOUR: Solicitation Contents

Each solicitation has three components:

- **Header**: This contains the solicitation title, open and close dates, buyer identity, any special instructions concerning the solicitation and any documents pertaining to the solicitation.

- **Lines**: This contains the list of BSD items included in the solicitation. It will contain quantity, need-by date, how the quotes will be ranked and drill down capability to view item. Specifications and vendor part numbers if this is a solicitation for inventory parts.

- **Controls**: This contains the response rules for the solicitation.

If you are invited to participate in a solicitation the e-mail you receive will request you to declare your interest in quoting. We ask you to do this because we can then monitor your response if you indicate you will respond (the buyer might even send you a reminder e-mail). If you indicate you do not want to participate it alerts the buyer that they need not contact you about that solicitation.

If you receive an FYI notification you will not be asked to declare your interest in quoting. You do not need to contact the buyer if you choose to not participate.
The solicitation Header view looks like this:

Scrolling down in the header screen, you can see the Notes and Attachments section contains information pertinent to the entire solicitation (in the line section the information is line-specific). If there is a Scope of Work or Representation and/or Certification forms to be completed and returned with your quote they will be located here.

You access the different sections of the solicitation by clicking on the different tabs: Header, Lines and Controls.
QC SPEC INFORMATION TAKES PRECEDENCE OVER MFG/VEHOR ITEM INFORMATION LINKS. WE WILL BE CORRECTING THE MFG/VEHOR INFORMATION COLUMN LINK TO READ: HISTORIC PURCHASE INFORMATION. DO NOT RELY SOLELY ON THIS LINK. YOU MUST CHECK THE QC SPEC WHEN THERE IS A SPEC AVAILABLE.

PLEASE QUOTE YOUR BEST PRICE AND DELIVERY ON THE FOLLOWING ITEM(S). AWARD WILL BE MADE TO THE LOWEST RESPONSIVE, RESPONSIBLE BIDDER WHOSE QUOTE CONFORMS TO SPECIFICATIONS AND DELIVERY REQUIREMENTS. QUOTE MAY BE AWARDED BY INDIVIDUAL ITEM OR IN COMBINATIONS AS IS DETERMINED TO BE IN THE BEST INTEREST OF METRO. PLEASE INDICATE MANUFACTURER/SHIPPER PART NUMBER QUOTED.

ADDITIONAL NOTES:
DO NOT OFFER SUBSTITUTES WITHOUT ATTACHING A NOTE TO THE RFQ AND/OR HAVING PRIOR APPROVAL.
PLEASE INDICATE WHICH MFG/BRAND AND OR PART NUMBER THAT YOU ARE QUOTING IF MULTIPLE PART NUMBERS ARE LISTED IN THE SPEC.

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Description</th>
<th>Category</th>
<th>Last Updated By</th>
<th>Last Updated</th>
<th>Usage</th>
<th>Update</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>No results found.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Actions: Online Discussions

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The solicitation Lines view contains a list of all items on the solicitation and includes the quantity and due date:

To view a specification or other attachment for an inventory item click on the Line description.

NOTE: ITEM SPECIFICATIONS ARE UPDATED FREQUENTLY (MORE THAN MFG/VENDOR PART NUMBERS. WE SUGGEST YOU ALWAYS REVIEW THE SPECIFICATIONS BEFORE BIDDING!

If you are bidding on an inventory part, the list of manufacturers’ part numbers can be displayed by clicking “Click Here”. NOTE: WHILE WE ATTEMPT TO KEEP THESE PART NUMBERS CURRENT THEY ARE NOT ALWAYS SO. BE SURE TO VIEW ITEM SPECIFICATIONS FOR THE MOST RECENT INFORMATION ABOUT THE PART.
After you click on a line description,

<table>
<thead>
<tr>
<th>Notes and Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seq</td>
</tr>
<tr>
<td>10</td>
</tr>
</tbody>
</table>

If there are further notes and attachments clicking on the line description will display this information.

To return to the line view, click on the RFQ link.
Most inventory items contain a list of acceptable part numbers from multiple manufacturers and/or distributors:

Most inventory items have manufacturers’ part numbers available. Click on Click Here to display these numbers.
This displays part numbers.

NOTE: BE SURE TO VIEW SPECIFICATIONS AS WELL AS PART NUMBERS. SPECIFICATIONS WILL ALWAYS HAVE MORE CURRENT INFORMATION.

To return to the line view, click on the RFQ link.
The Controls view contains the parameters of the solicitation:

These are parameters defined by the Buyer; you cannot change them.

In this case the negotiation is NOT limited to invited suppliers, suppliers can respond to selected lines only (not required to respond to all lines), suppliers are NOT required to quote full quantities on each line and suppliers can respond multiple times (redo your quote). Additionally, this quote can be closed early or extended at the Buyer’s discretion.
SECTION FIVE: Creating a Quote

NOTE THAT IF YOU HAVE ANY QUESTIONS OR NEED HELP IN CREATING A QUOTE CONTACT: procurement@bistatedev.org

All functions you can perform on the solicitation are in the Actions field. Use the pull down window to display available actions, highlight the applicable function and then press the GO button at the right of the field. In this instance we are going to Create Quote.
Before you create a quote you must accept BSD’s Terms and Conditions. These are the same Terms and Conditions that will appear on your purchase order should you win this solicitation. If a separate contract is issued and signed, those contract provisions take precedence over these purchase order provisions.

To view the Terms and Conditions click on the underlined Terms and Conditions.

You must accept the Terms and Conditions to create a quote for this solicitation. Click in the Accepted Terms and Conditions checkbox, then click the Accept button.
We are at the Header level of your quote.

If you quote will be valid only for certain period of time, click on the calendar to the right of the “Quote Valid Until” field. Move the calendar until the appropriate month/year is displayed and click on the appropriate date.

You may also enter a Reference Number (perhaps your internal quote number) and a Note to Buyer.

You may also add attachments here at the quote header level. These attachments can be text notes or documents. A little later we’ll discuss adding attachments at the line level.
After entering the Header information, click on the Lines tab.
Enter your unit price in the Quote Price field (do not use a dollar or comma character) and hit the Tab key on your keyboard. The Quote Quantity will default from BSD’s Target Quantity and the Promise Date will default from the last date in BSD’s Need By date range. These fields can be changed by you and should be if you are quoting less than the requested quantity (you cannot quote more) or if you cannot make delivery by this date. **IF YOU DON’T CORRECT THIS INFORMATION YOU MAY BE COMMITTING TO SOMETHING YOU CANNOT ACCOMPLISH!**

If there is more than one line continue down each row, entering your quote price. If you are “no quoting” a line DO NOT PUT ANYTHING IN THAT ROW! If you accidentally enter something in a row that you do not wish to quote, use your Delete key to remove that information. Spacing over the data does not clear the field.

At any time you can use the Cancel button but this will remove any entries made since the last time the quote was saved.
If you want to make a line specific note or attachment, click on the Update icon (pencil) on the appropriate line. In this case we’re going to make a note about this first line item.
If you want to add a text message to the Buyer about this line just type it in the Note to Buyer field. In this instance we are making a note regarding lead time.
If you need to attach a document (new specification, etc.) you can do so by clicking on the Add Attachments button.
The Title and Description field are not mandatory but are meant to describe the nature of your attachment (i.e. New Specification). If you have file to attach (MS Word Document, Excel Document, or PDF file, etc.) select the type File and click on the Browse button to the right to locate and attach your file.

If you only have one document to attach, click on the Apply button. If you want to attach additional documents, click on the Add Another button. Once you click on the Apply button you will be returned to your quote.
In this example we have quoted the line but we need to enter the Promise Date on Line 1. Click on the calendar icon to the right of the Promise Date field. The Promise Date must be entered on each line you are quoting.
You can change the month and the year by using the pull down boxes next to those fields. Once you display the correct month and year, click on the day you want.
In this case, we have entered the Promise Date as 03-Sep-2021.

If you wish to work on your quote later, click on the Save Draft button.

If you have completed your quote click on the Continue button to submit your quote now.

If you do decide to Save Draft your quote is NOT complete. You must go back into your draft to complete this quote. IF YOU HAVE ANY QUESTIONS OR NEED HELP CONTACT: procurement@bistatedev.org
Here is your completed quote. Any “no quoted” lines will not be listed.

If you want to save the quote for later review click on Save Draft.

If you have finished and wish to submit your quote, click on the Submit button. Remember back on the Controls section the option “Suppliers are allowed to provide multiple responses”? This solicitation had this selected and it means even though you submit this quote you can revise it if you do so before the solicitation closes.

If you do decide to revise your quote and need help contact: procurement@bistatedev.org
You will receive a confirmation screen that your quote has been submitted. A unique number is assigned to this quote.

Click on Return to Sourcing Home Page to be returned to the Solicitations Home Page.
We are now at your Solicitations Home Page. From this page you can view your quotations (if a quote you are looking for is not displayed, click on Full List). If you want to change a quote (where the controls allow) you do so by clicking on your Response Number.

This is also where your draft responses can be accessed for completion and submission.
How to Change a Quote

Once a solicitation has closed, you cannot change your quote but up until that time you can either change your existing quote or enter a new quote. You enter a new quote exactly as you entered your original quote. Entering a new quote automatically replaces your existing quote but the original one is available to you in an archived status. If you opt to change your quote the quote history is not available.

To change a quote, go to your Solicitations Home Page.
From your Active and Draft Responses, click on the Full List button if you have submitted numerous quotes and the one you want to change is not on the short list.
Select the quote you wish to change by clicking in the round box to the left of the Response Number. Note that this is an active solicitation as there is time remaining in the solicitation.

Click on the Revise button.
The Quote price, Quantity and Promise Date are all available for revision. Key over the existing data with the corrected information and click on Save Draft for later submission or click on Continue to submit your revisions.
When you click on the Continue Button it will display only the line(s) you have changed.

Again, you can click on the Save Draft Button for later submission or you can click on the Submit button to finish.

If you need help contact: procurement@bistatedev.org
You will receive a Confirmation screen that the revised quote has been submitted.
SECTION SIX: Printing and Communicating a Solicitation

You may wish to have a printed copy of the solicitation for your files or you may want to electronically send a copy of the solicitation to someone else in your organization.

When you print a solicitation the line specifications and the manufacturers part numbers print under each line identified as Additional Line Information. The Terms and Conditions print but other attachments do not.
Using the pull down menu in the Action field select Printable View and press the Go Button.
You will get a window like this at the bottom of the screen. You can save the solicitation to your computer or open the solicitation to either print or e-mail the document.

Click on the Open button.
The document can be handled like any Adobe PDF file. Using the icons at the top of the screen you can print, save or e-mail the solicitation.
SECTION SEVEN: How to Display the Winning Response

If you have competed unsuccessfully on a solicitation you may review the winning bid as well as the bid you submitted. This is only viewable AFTER a purchase order has been given to another supplier.
From the Sourcing homepage view Your Active and Draft Responses. NOTE: You may need to Press Full List in order to display older solicitations.

Click on the Negotiation Number of the solicitation you wish to view.
The solicitation will display. Click on the Lines tab of the solicitation.
The screen will display the Best Price.
If the Best Price Column displays “Blind” the award has not been made.
If you wish to view the quote you submitted, return to the Solicitation Home Page and click on your Response Number.
This screen displays the price you quoted.
SECTION EIGHT: Managing Your iSupplier Account

Registering for Products

Once you’ve enrolled in BSD’s iSupplier you can use the system to register for products and services which your company would like to furnish BSD. BSD uses an abbreviated version of the NAICS (North American Industry Classification System) codes to classify the products or services on their solicitations. You may log into the system and select those NAICS codes of interest to you to receive an e-mail notification when a solicitation is issued for item(s) associated with these codes.

For many of our inventory suppliers we have “preloaded” category codes. The categories loaded were based on the categories of items BSD issued purchase orders to you during calendar 2010. We have a program in place that will send an e-mail FYI notification to you when a solicitation is created for these products or services even though you were not specifically invited by the Buyer. We encourage you to maintain these categories to insure that you receive a notification whenever a solicitation is issued that might be of interest to you. You may add or delete categories as you prefer.

Log into the system using your user ID (your e-mail address) and your password.

If you would prefer not to receive these FYI notifications, please notify BSD by sending an e-mail to procurement@bistatedev.org.
From the Navigator Page select BSD iSupplier Full Access w/o Bank
Click on the Admin tab.
Click on Products and Services
To delete a Category click on the Select box next to the category and then click on the Remove button.
Confirmation

The following Product and Service categories have been removed from your profile.

- Motor Vehicle Transmission and Power Train Parts Manufacturing: Transmission

To continue, click on the Return to Products and Services link.
To Add Categories, click on the Add button.
Click on the Applicable box to select a product or service. You may select multiple products from multiple pages before clicking the Apply button. When you have added all desired products or services, click on the Apply button. Note that some categories have Sub Categories.
Sub Categories were created in most cases to further define the category. Click on the icon in the View Sub-Categories field to display the sub-categories.
Sub Categories were created in most cases to further define the category. In this instance Category 333618 Engine Equipment Manufacturing was further defined by creating sub categories of Inventory, NAVISTAR AND CUMMINS.

If you select 333618 as your category you will receive FYI notifications of solicitations regardless of the sub category associated with the item. If you select category 333618.CUMMINS you will only receive FYI notifications of solicitations on Cummins equipment. IF YOU SELECT A SUB-CATEGORY YOU MUST CLICK ON APPLY IN THIS SCREEN OR YOUR SELECTION WILL BE LOST.

Click on Return to Parent Category if you want to resume your search and selection.
Confirmation

The following Product and Service categories have been added to your profile.

• Engine Equipment Manufacturing.7.3 Engine

Return to Products and Services

After clicking on Apply you will see a confirmation page listing all of your new selections.

Click on Return to Products and Services to view your entire list or to modify your choices.
Once you have completed modifying your category codes they are submitted to the Program Administrator for review and approval.

From this screen you can remove Products and Services or you can click on Add to access the NAICS list again. Using the preceding process you can add additional codes.

To return to the Navigator page, click on the Home link.
Maintaining Business Classifications

If your business qualifies, you can register certain statuses in iSupplier. For more information about BSD’s Supplier Diversity Program, we urge you to go our website at https://www.bistatedev.org/vendor-resources. BSD contact information for the Supplier Diversity Department is available on this site if you need assistance.

From the Admin tab select Business Classifications
You may select all applicable classifications by clicking in the Applicable box. The Minority Owned classification has a pull down box to further define the classification; click to highlight the correct entry. Entering the Certificate Numbers, Certifying Agencies and Expiration Date when available will facilitate our confirmation.

All submissions are reviewed and approved by BSD’s Supplier Diversity Department.
Maintaining Your Addresses

Your company may have multiple addresses, i.e. one address where purchase orders should be directed but another where payments should be sent. You have the ability to maintain these addresses. NOTE: Any changes you make in your addresses must be reviewed and approved by BSD before acceptance.

Home

From your Navigator page select BSD iSupplier Full Access w/o Bank. This will take you to your Home Page.
Click on the Admin tab.
This will display the addresses BSD has associated with you. You may choose to edit an address by clicking on the Update icon (a pencil). We are going to review and update the “Test Upgrade” address.
If you wish to correct address you do so by keying over the existing information or adding additional information (such as phone or e-mail if none exists).

Use the Note field to add an explanation to any changes. It is helpful also to define the function of this address by selecting one or more of the selections (Purchasing Address, Payment Address and RFQ Only Address).

Once you have completed your changes, click on the Save button or click on the Cancel button to return to the address list.
You will receive a confirmation page that your changes have been registered.

All changes are reviewed and approved by BSD's Program Administrator before being accepted.

If we have questions you may be contacted to clarify.
You can also create a new Address. Click on the Create button.
A new address template will appear.
Complete the information; all fields with an * are mandatory fields. A purpose for the address was selected and a note explaining the use of the site was entered.

Click on Save. You will receive a confirmation screen.
SECTION NINE: Purchase Orders

Viewing your Purchase Orders

Go to your Home Page.

To view your BSD Purchase Orders click on the Orders tab
All POs issued to you since 2004 will display.

You can sort the data by Order Date by clicking on the column header. Clicking a second time on the column header will reverse the sequence of the sort.

Because of data conversion issues when BSD went to Oracle, some POs will have no Order Date. These will appear at the top of the list when displaying most recent first. Scroll down until the Order Date field populates with current purchase orders.

By clicking on the Export button you can view the list in an Excel spreadsheet format. When you Export it transfers all pages, not just the displayed page.

You can display detail of both open and closed purchase orders. To display a purchase order click on the PO Number.
At the top of the displayed screen will be the purchase order head information and a summary.
The purchase order lines display when you scroll down.
Click on Show All Details to view line information.
The line details display; click on Return to Orders: Purchase Orders to return to your PO list.
There are additional views you can select. In the Actions Box use the pull down menu, select an option and click on the Go button. You can view the printed purchase order, see receipts, invoices and payments.

We are not currently using the Shipments option.
Requesting a Change on a Purchase Order

You can request a change in a purchase order issued to you. You can only request changes on open purchase orders and open lines within that purchase order.

To make changes click BSD iSupplier Full Access w/o Bank

To make changes click BSD iSupplier Full Access w/o bank
Click on the PO which you would like to change. Note that only the 5 most recent PO’s will show on this page.

To find other PO’s click on the Full List Button.
This screen will bring up all other PO’s. To search for a certain PO click the Advance Search Button.
Enter the PO number in the search field and click on Go.
Click into the Select circle and then click the Request Changes button.
If you would like to request shipment changes click the arrow under Details

On this screen you can input your Supplier Order Number. You can also make changes to Supplier Item, Price and give a reason. There is also an Additional Change Request box for any comments you would like to make.
This will allow you to Change the Quantity Ordered, Promised Date, Split the delivery. Note that there is also an additional Reason and Action Drop Down for shipments.
The Buyer will be automatically notified of your requested changes.

Note on this example that the quantity was split due to backorders and a new promised date was entered.

When all your changes are made click Submit.
You will receive a confirmation page and a notification will have been to the buyer informing them of your requested change.

**CHANGE REQUESTS ARE NOT VALID UNTIL THE BUYER ACCEPTS THEM!**
SECTION TEN: How to View Payment Information

To inquire about payment information choose BSD iSupplier Full Access w/o Bank. This will take you to the iSupplier Portal Home page.
Click on Payments.
There are several ways to search for a payment. We are going to search for a payment using a purchase order number. Enter the BSD purchase order number in the appropriate field.
As this purchase order has several payments, all are displayed. Any data displayed in blue type with an underline contains a link to view additional information. Click on the link to display this information.

To query additional records clear your purchase order entry and enter another search.
You can also get to the same search screen by clicking on the Finance tab at the top of the screen.
This screen gives you additional search criteria as well as the option of Advance Search.
The Advance Search allows you to set search criteria when you are not certain of the exact data. You have the ability to enter partial invoice numbers, partial purchase order numbers, etc. to assist your search. It is not mandatory that you enter something in each field, however the more you narrow your search the faster the results will display.
You can further customize your search options by adding additional criteria. Select your criteria and click on the Add button to use this in your search. You may add as many fields as you wish.
SECTION ELEVEN: View BSD Receiving Information

Before BSD can process a payment to you a receipt must be performed by the requesting person. You can view receipts against your purchase orders.

Home

Navigator

FromFile BSD iSupplier Full Access w/o Bank
FromFile BSD Solicitations

From your Home Page select BSD iSupplier Full Access w/o Bank to go to the iSupplier Home Page.
Click on the Receipts link located on the right, or click on the Shipments tab at the top of the screen.
If you enter through the Shipments tab, make sure you select the Receipts section. You can then enter the purchase order number in the search field and click on Go.
This purchase order has several receipts, all of which displayed. Any data displayed in blue type with an underline contains a link to view additional information. Click on the link to display this information.

To query additional records clear your purchase order entry and enter another search.
This is the receipt detail for receipt 141632. Notes by the receiver (if any) would be visible here as would return information. You can click on the Defects or Returns icon to view their content (if any).
SECTION TWELVE: BROWSER SETTINGS FOR BSD'S ISUPPLIER PORTAL

If you are not receiving your e-mail notifications or if you are unable to view screens as illustrated in this manual it may be due to some settings on your Internet Browser. We suggest you try the following steps before contacting BSD.

Internet Explorer

iSupplier can be run on Mozilla Firefox and Internet Explorer (versions 9 and below). iSupplier will not run in Internet Explorer 10 unless you are in the Compatibility Mode. If you use Internet Explorer you can determine what version you are running by clicking on the Microsoft link below:


If you are using Internet Explorer 10 you can learn how to turn on the Compatibility Mode by clicking on the Microsoft link below:


Key Browser Settings

**Trusted Site:** It is recommended that the procurement.BSDstlouis.org site be designated as a Trusted Site. The Trusted Sites” zone should have a Medium Security setting. The following steps can be performed to designate procurement.BSDstlouis.org as a Trusted Site:
On your tool bar go to the Tools menu item and select Internet Options.
Click on the Security tab, then click on Trusted sites. With Trusted sites highlighted, click on the Sites button.
Enter [https://procurement.bistatedev.org](https://procurement.bistatedev.org).

Click on the “Add” button. Verify that correct e-mail address is entered then click close.
HTTP 1.1/Keep Alive

Users should have the HTTP 1.1/Keep Alive option enabled. To set this option, perform the following:

On your tool bar go to the Tools menu item and select Internet Options.
Click on the Advanced tab, then scroll through the list of options until the HTTP 1.1 settings section is reached. Verify that there is a check mark in the box (☑) next to Use HTTP 1.1, Use HTTP 1.1 through proxy connections settings, and Use HTTP2. If not, click on the box next to the setting, and then click on the Apply button.
To ensure that the most current data is being viewed, you should configure the browser to check for newer versions of stored pages every time the webpage is visited. On your tool bar go to the Tools menu item and select Internet Options.
On the General tab, click on the Settings button in the Browsing history section.
Select the Every time I visit the webpage radio button, and then click on the OK button.
Optional Browser Settings

Pop-up Windows: When using Internet Explorer 7 or higher, Web based list of values can lose focus. To regain focus within the pop-up window, the user may have to press “Ctrl & Tab”. To control how the popup windows are handled, perform the following:

On your tool bar go to the Tools menu item and select Internet Options.
On the General tab, click on the Tabs button.
Select the Always Open Pop-Ups in a New Tab radio button, and then click on the OK button.
FREQUENTLY ASKED QUESTIONS

Why am I unable to log in?

- You must be a registered user. Go to Section Two to review how to become a registered user.

- Passwords are case sensitive (user names are not). Additionally, if you try unsuccessfully to log in for 3 times you are locked out and must request a new temporary password.

- Your user name is always your e-mail address. Make sure when you attempt to log in that you have correctly entered your user name and if you are requesting a password reset your user name must be correct. If you have multiple e-mail addresses, check a past notification from BSD Workflow to see what e-mail address was used when you registered.

When I log in I sometimes can’t find the solicitation referenced in the e-mail; it’s not listed in my Open Notifications.

- You will receive e-mail notifications for either of two reasons. (1) The Buyer specifically invited you, or (2) At least one item on the solicitation has a NAICS category which you are registered for.

- If you are invited it is stated so in the subject line of the e-mail and the e-mail will ask you to respond as to whether or not you are going to participate in the solicitation. This solicitation will appear in your Open Notifications.

- If the e-mail was sent because of its category the subject says “FYI” instead of “Invited”. You are not asked to respond about participating and it will not be in your Open Notifications. You can access it, however, by the link in the e-mail or by searching for it. See Section Three for how to use the search function.

- If you are receiving FYI notifications for items you do not sell, we suggest you modify your Products and Services. See Section Eight for how to do this.
**Menu items don't appear on my screen as they do in the manual? There's a lot of "undefined".**

- Our bidding system is not compatible with Internet Explorer 10 (unless you use the Compatibility Mode). Any version of Internet Explorer 9 and lower and Mozilla Firefox are compatible. See Page 115 to see how to determine what version of Internet Explorer you are using and how to turn on the Compatibility Mode if you are using IE 10.

**I entered a price in a line I didn’t want to quote. I took the price out but I still get an error message when I want to move to another screen.**

- If you inadvertently entered a price on a line you don’t want to quote and but used your backspace or space key to delete the price, you will get an error message. You must delete the price using your delete key and you must also delete the Quote Quantity and the Promise Date (using your delete key). (These fields populate when you enter anything into the price field.)

**Why does the screen sometimes not display when I use the back browser button?**

- In some screens you may use the back browser button but in others it does not work. A better way to move backwards is to use the links at the top of the window to “back up”. Anything underlined is a link.

**What can I do if I’m not receiving the e-mail notifications sent to me by BSD?**

- Everyone’s e-mail system is different. Many times it’s the spam filter preventing e-mail notifications from being delivered. If you’ve tried the steps in Section 12 but are still having problems we recommend that you check with your IT department.
If I’m not in the office how co-workers can receive my notifications and create quotes on my behalf?

- We are limited when we invite a supplier to participate in a quote to invite only one person from a supplier. You can, however, have as many users as you require at your company. It would be prudent to have at least two people in your organization registered as users. You can request that an invitation be sent by e-mailing a request to procurement@bistatedev.org. Please give the e-mail address of the person to be invited as well as the name of your company.

- That person will have access to view any open solicitation. If you notify our buyers of your absence they can invite that person instead of you during your absence.

- If you put an extended absence greeting on your e-mail with substitute contact information, we receive that and notify the applicable buyer. They can notify your substitute of the pending solicitation and if they have access they can create a quote.
QUICK GUIDE TO CREATING A QUOTE

1. If you have a notification e-mail you can access the solicitation by clicking on the link in the e-mail. If not, log in to https://procurement.metrostlouis.org/OA_HTML/AppsLocalLogin.jsp. From the Navigator page select BSD Solicitations and then Solicitations Home Page. Use the Search Open Negotiations (by “Number”) to locate the solicitation.

2. Click on the number of the solicitation you wish to quote.

3. Go to the Actions box in the upper right corner of the window and using the pull down box select “Create Quote”.

4. Accept the Terms and Conditions.

5. Enter a quote price in each line you are quoting; enter nothing in lines you are not quoting.

6. The Quote Quantity will default from the Target Quantity but is changeable to a lower number.

7. The Promise Date defaults from the Requested Date but should be changed if applicable.

8. You may add notes and/or attachments at the line or header level.

9. When done, click on the Continue button at the bottom right side of the window.

10. Click on the Submit button to finish your quote. You will receive a confirmation page with a unique quote number.