

# FI\$Cal for Bidders and Suppliers

Wave 2 End-User Training



California's Online Marketplace



## Course Introduction

Topic 1: Understanding the Vendor Management File

Topic 2: Introduction to Cal eProcure

Topic 3: Bidder Registration Process

Course Summary

The purpose of the FI\$Cal for Bidders and Suppliers course is to explain the functionality related to Bidders and Suppliers in FI\$Cal.

After completing this course, you will be able to:

- Explain the Vendor Management File
- Understand that Cal eProcure replaces BidSync
- Describe the Bidder Registration processes in Cal eProcure

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Term	Definition
<b>Cal eProcure</b>	The State's new online supplier portal providing access to State procurement and contracting resources. This portal replaces BidSync.
<b>Bidder</b>	An entity that has registered in Cal eProcure to receive notifications and submit bids online, maintain their information, and apply for certifications
<b>Supplier</b>	An entity that is actively doing business with the State or otherwise receiving payments from the State. In Cal eProcure, Supplier is an alternate term for "Vendor."
<b>eSupplier</b>	An entity that has both registered in Cal eProcure and is actively doing business with the State. Once a Bidder is awarded a contract or purchase order, they are then categorized as an eSupplier in FI\$Cal.

- FI\$Cal departments will utilize one master list of all Supplier information, called the Vendor Management File (VMF)
- For a Supplier to have a record in the VMF, a Supplier must have submitted a STD 204 to FI\$Cal and have been awarded a contract or purchase order from a department that is transacting in FI\$Cal
- For a Bidder to have a record in the VMF, the Bidder must have completed the online Bidder Registration process
- The Tax Identification Number (TIN) and FI\$Cal Vendor/Supplier ID are the unique identifiers for each Supplier in the VMF
- Any SB/DVBE certification information will be associated with each unique Supplier record
- The FI\$Cal Service Center (FSC) is the point of contact for all issues relating to the VMF

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# What is Cal eProcure?

Cal eProcure is California's source of public procurement information

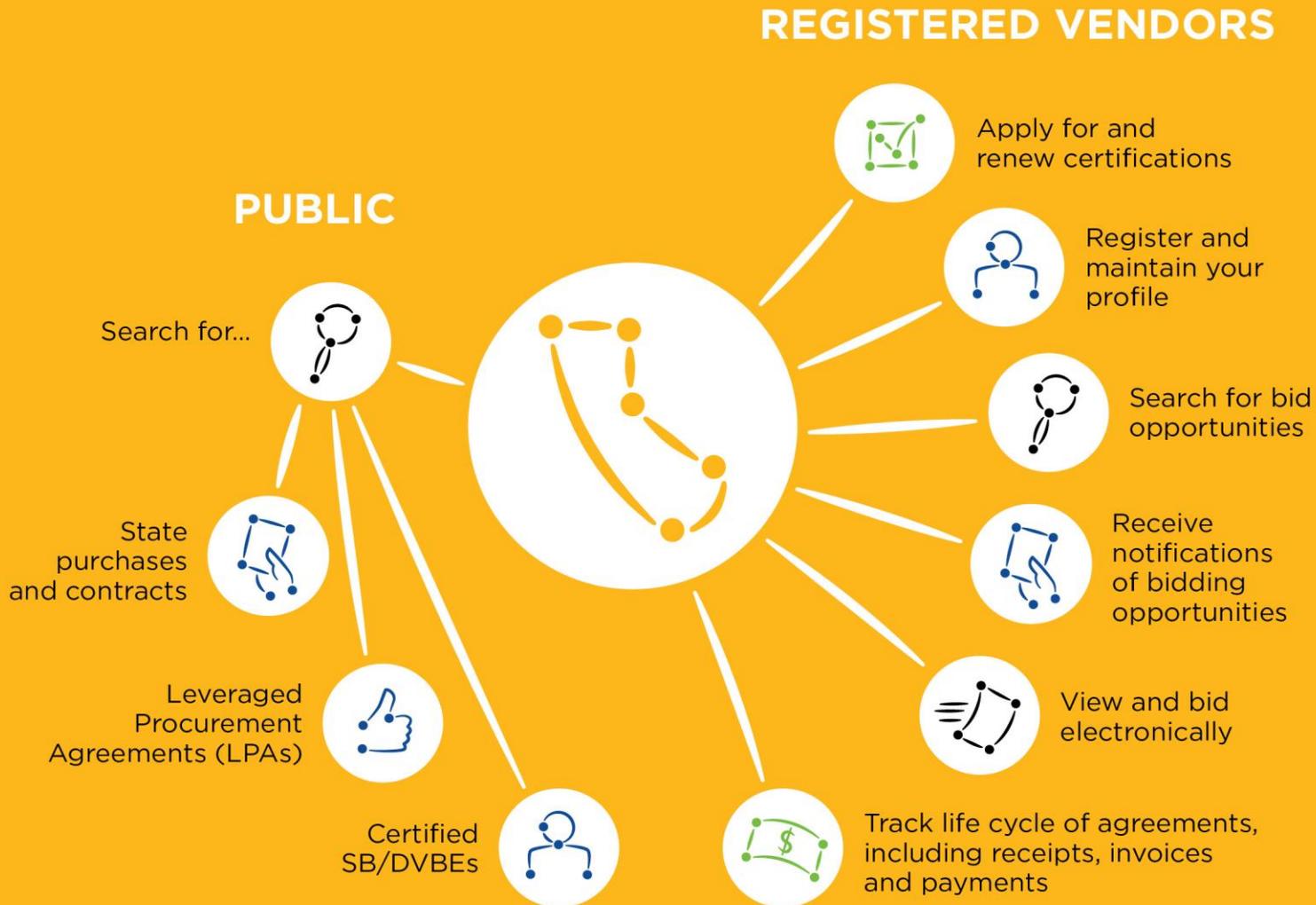
Cal eProcure replaces BidSync as California's Online Marketplace

Bidders use Cal eProcure to apply for Small Business / Disabled Veteran Business Enterprise certifications

Cal eProcure provides access to the California State Contracts Register (CSCR)

Bidders access Cal eProcure in order to contract with the State

# What Can I Do in Cal eProcure?



## What is Not Changing Due to Cal eProcure?

- State procurement policies, statutes, and regulations still apply
- Bidders must still submit all State required documentation with their bid responses
- The bidding requirements for doing business with the State remains the same
- The State will continue to accept paper bids from Bidders and Suppliers
- Suppliers are not required to register as Bidders and submit electronic bid responses
- The Department of General Services and the Department of Technology continue to serve as control agencies for procurement for the State of California

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- Bidder registration is completed by the individual/business using the Cal eProcure website
- This process requires information such as company addresses and contact information, as well as a valid Tax Identification Number (TIN)
- During Bidder registration, Cal eProcure will validate your TIN against all existing Supplier records. If a Supplier record already exists for your TIN, you will be given instructions to complete the eSupplier registration process.
- Bidder Registration can be completed solely by the business and does not require any input or assistance from a State department
- Additional training material exists to support the Bidder Registration process

1. Registering in Cal eProcure allows Bidders/eSuppliers to:
  - a) Apply for and/or renew SB/DVBE certifications
  - b) Provide specific criteria that will generate notifications about State solicitation events
  - c) Accept invitations to bid on solicitation events
  - d) Submit electronic bid responses
  - e) Maintain profile information
2. The following benefits are only available to eSuppliers:
  - a) Ability to view their purchase documents issued by the State
  - b) Track the life cycles of agreements such as receipts, invoices and payments

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After completing this topic, you are now able to:

- Understand that Cal eProcure is replacing BidSync
- Understand that the State will use the VMF as a master record of all supplier information
- Recognize the key activities taking place within Cal eProcure
- Describe the process and benefits of registering as a Bidder or eSupplier