Vendor Reference Guide

Using the BuyBoard V.5 – July 2015

BuyBoard Overview

The BuyBoard is an online purchasing cooperative that gives its customers (members) access to thousands of items that have gone through a competitive procurement process. Members include school districts, cities, counties, universities, other governmental agencies, and non-profit organizations.

Vendors that are awarded a BuyBoard contract are approved to sell their products to BuyBoard members.

Who are BuyBoard Members

Members participating under The Local Government Purchasing Cooperative are Texas school districts, cities, counties, universities, and other local governmental agencies inside the state of Texas.

Members participating under Texas Association of School Boards are non-profit organizations inside and outside the state of Texas.

Members participating under National Purchasing Cooperative are local governmental agencies which reside outside the state of Texas.

Understanding Why Members Use the BuyBoard

Members use the BuyBoard for a variety of reasons:
1. To abide by competitive procurement laws – customers purchase from approved BuyBoard vendors, knowing those vendors have already gone through the competitive procurement process.
2. To eliminate bidding – using the BuyBoard lets customers eliminate the time and cost associated with placing bids.
3. To save time – customers can purchase a vast array of products all in one location.
4. To save money – BuyBoard vendors offer savings to customers who purchase products through the BuyBoard, coupled with internal administrative savings, the BuyBoard is a very cost effective procurement vehicle.

Understanding How Members Use the BuyBoard

Members browse the BuyBoard to locate products and to obtain price information. Members use that information to compare prices and to verify that they are getting the best deal through the BuyBoard.

Members use the BuyBoard's RFQ feature to request quotes from vendors and to obtain additional price discounts off items.

Members take advantage of the other features of the BuyBoard to keep track of purchases made through the BuyBoard for bid compliance, audit and pricing.

Logging in to the BuyBoard

1. Launch Internet Explorer.
2. Enter the BuyBoard URL http://www.buyboard.com, then press **Enter.**
3. Click **BuyBoard Login** in the upper right corner.
4. At the BuyBoard Login page, enter your **User ID** and **Password**, and then click **Login**.

Note: Logins are case-sensitive. Check to see if your caps lock key is on if you can't login.
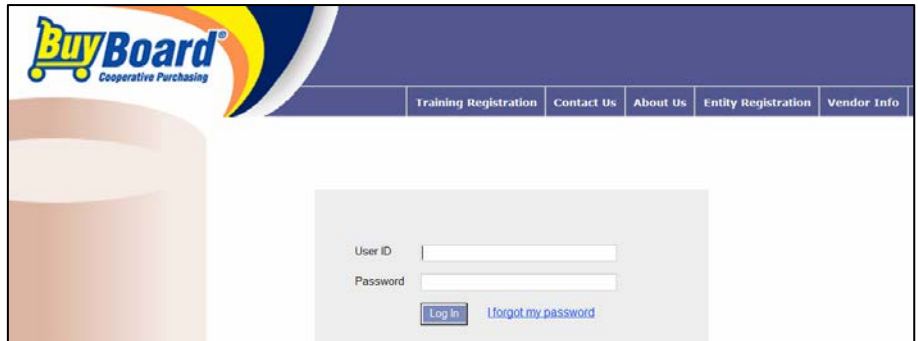
If you don't remember your User ID, call the BuyBoard at 800-695-2919 or send an email to info@buyboard.com. The login can only be provided to the vendor contact on file. The *I forgot my password utility* only works for members. The first screen that opens upon log-in is the BuyBoard News page that provides vendors relevant information regarding the BuyBoard.

To Browse the BuyBoard

As a vendor you can only view your information on the BuyBoard. You will not see other vendors' information or pricing. Your information is presented exactly as a BuyBoard member sees it. This includes your contact information, catalog pricing, discount pricing, price sheets, etc. Keep this in mind as your look at your information. Please send an e-mail to info@buyboard.com to have any changes made.

There are three options available to search the BuyBoard:

1. **Search Term**- enter a search term and select from the options listed

   - All – returns all descriptions and pricing sheets containing the search term.
   - Vendor Discounts Only –displays the percentage discount offered by your company off your published catalog or list price.
   - Catalog Pricing Only –displays your catalog and unit pricing that has been uploaded to the BuyBoard.

   Note: The Search feature will return any portion of the term found in the following:
   - Vendor Name
   - Short Item Description
   - Full Description
   - Part number
   - Brand
   - Pricing Sheet (These are PDF documents provided by your company that contain catalog or price pages)

2. **Search by Vendor**- Use this search to find your items on the BuyBoard. Your company name will appear in the Vendor: field. Click the blue **Search** button to see your items and any uploaded pricing.

3. **Browse Contracts** – displays the list of commodities and contracts you are awarded under. The members will see the entire list of commodities with the associated contracts.

Browse Contracts

General Construction/Road and Bridge Equipment & Supplies

Construction, Road, Bridge & Other Equipment 424-13

Public Works Supplies & Equipment

Refuse Bodies, Trailers & Other Bodies (Bodies 400) 425-13

Refuse Bodies, Trailers & Other Bodies (Trailers 2%) 425-13

Using the Search Results Page

The Search Results page is displayed when you select any one of the three searches or browse options. The page will display the item(s) associated with the specific search term, vendor or vendor discounts to a maximum of 1,000 entries.

Search Results

Show [25 ▼] results   Narrow Results: [   ]

Vendor	Description	Pricing Sheet	Price	
VendorQRG	5% Discount off Widget Price list	Pricing Sheet	$0.00	Show Details

Showing 1 to 1 of 1 entries

[First] [Previous] [1] [Next] [Last]

Vendor- indicates the vendor name associated with the item description. Click the vendor's name to view the Vendor's Contract Information page. Various contract documents are available as indicated at the bottom of the page.
Description- displays a short description of the item or vendor's percentage discount structure
Pricing Sheet- If displayed will open a PDF document that provides the vendor's price/option sheet(s). If indicated as N/A than no pricing sheet is available.
Price- the item's BuyBoard price (discount applied). If price is $0.00 then click the pricing sheet to view prices (if available)
- To refine your search, type in additional search terms or keywords in the **Narrow Results** box. This is a cumulative search feature that will continue to refine the search based on terms or keywords.
- To display more entries on the page select the amount desired, maximum is 100 per page.
- To re-sort the way items are displayed click the column heading
- To display item details, click **Show Details**. Click **Hide Details** to collapse.
- To scroll through the results pages click at the bottom of the page.

Additional Refinements to the Search Results
Vendors – to view or select a specific vendor that resulted from the search. Click a vendor name to select.
Price Range- allows for a price range to refine the search. Enter the range of prices and click **Go**. Click **Clear Price Filter** to reset.
Category- displays the categories of products that are the result of the search. To select a category, click the name.
Contract – displays the contracts that are the result of the search. To select a contract, click the name.
Note: All search refinements only apply to the total number of entries returned in the initial search. The maximum number of results is 1,000 entries.

RFQ TAB (Request for Quotes)

The Request for Quotation (RFQ) feature of the BuyBoard lets member's request additional discounted pricing (based on volume purchases) or obtains a written quote from vendors.

- Pricing sent through the RFQ feature is completely confidential, and vendors will have no knowledge of other vendors' price quotes.
- No bid tabulation is provided except for the receipt of a purchase order from the member.

Responding to Requests for Quotation (RFQ)
1. Click the RFQ tab then **Respond to RFQ**.
2. From the RFQ List, click **View** next to the RFQ you wish to open to review the items.

Vendor RFQ List

	Status	Title	Contact Entity	Vendor	Due Date
View	Awaiting Response	Thing-a-ma-jigs	TASB Administration	Heil of Texas (Texan Waste Equipment Inc.)	8/31/2015 5:00 PM
View	Responded	Widgets	TASB Administration	Heil of Texas (Texan Waste Equipment Inc.)	8/31/2015 5:00 PM

3. From the RFQ Summary page, click **Respond to RFQ** to initiate your response.
   - Or -
   Choose **No Response** to acknowledge the RFQ, but to not send a quote. No further action is necessary in this case.

RFQ Summary

RFQ List | Print | Respond to RFQ | No Response | View Attachment

Note: If View Attachment is visible, this means the member has attached a file that may include specifications or other details regarding the RFQ. Review and print the attachment before clicking Respond to RFQ.

4. From the RFQ Vendor Contact Information page complete all the required fields indicated by an asterisk (*). Information that is pre-populated can be change by highlighting and deleting. Click Save when complete.

RFQ Vendor Contact Information

Contact Name:*   John Doe

Vendor Contact Phone:*   800-695-2919

Vendor Contact Email:*   natalie.england@tasb.org

Vendor Quote#:*   1234

Prices Honored Through:*   9/30/2015

Vendor Notes:

Save | View RFQ Summary | View Items

5. Click **View Items** at the bottom of the RFQ Vendor Contact Information screen to display the Respond to RFQ Items page.

6. Click **Respond** next to the item(s) you wish to provide pricing for. You can respond to one or all in the list of requested items.

7. Each field with an asterisk (*) is a required field and must be completed.

- **Unit Cost** – enter the cost in the following format: 100 or 100.00. Do not use a dollar sign ($) or comma (,) in your price.
- **Vendor Part Number** – if pre-populated, this was entered by the member requesting the quote. If the part number is not correct for the unit price quoted you can change it by deleting and entering the correct part number.
- **Quantity** –the pre-populated quantity is the amount requested by the member and should only be changed based on a different pack/weight count being quoted.
- **Unit of Measure** – select from the drop-down list.
- **Pack Weight/Count** – enter the packing or packaging for the item. Example 100/box or 12/case.
- **Manufacturer** – if pre-populated this is the manufacturer being requested. If you are quoting a different manufacturer just delete and enter the manufacturer being quoted.
- **Manufacturer Model #** - if pre-populated this is the model # requested. If your quote is based on a different model number just delete and enter the correct model #.
- **Item Description** – requested item description as entered by the member. To change, just delete and enter new description or add additional text to existing description.
- **Deviation** – any change or variations to the item not addressed in the above fields.

8. Click **Save Item** to save the information and return to the items list. Click **Respond** next to the other item(s) you wish to provide pricing.
- Click **Edit** to make any changes to individual entries you have made

- Click **Delete** to remove all entries you have made and start over.

9. Once complete, click **View Response** to review all your responses.

RFQ Vendor Response

| RFQ List | Print | View RFQ Summary | Submit RFQ | Edit Contact | Edit Items | View Attachment |

Vendor Contact Information

Vendor Contact: John Doe

Vendor Phone: 800-695-2919

Vendor Email: natalie.england@tasb.org

Quote Number: 1234

RFQ Expiration: 9/30/2015

Submitted On:

Vendor Notes:

Item Information - Item deviations are displayed in italics.

Item #	Description	Price	Qty	
[1]	Widgets, medium size	$0.56	2	Show Details

10. From the RFQ Vendor Response page, you have the following options:
    - **RFQ List** – to view a list of current RFQ's
    - **Print** – to print of copy of the RFQ
    - **View RFQ Summary** – displays member contact and item information
    - **Submit RFQ** – sends your RFQ response to the member
    - **Edit Contact** – to change contact information, quote number, or date that prices are good through.
    - **Edit Items –** to change any information regarding item prices, part number, manufacturer, etc.
    - **View Attachment –** If an attachment was included, the View Attachment button will be visible. If no attachment was included, the button will not be visible.

If you have submitted the RFQ, but before the due date, you can still modify your response as many times as you would like. At the point the due date and time have been reached you can no longer make any changes to your response.

To Modify and Update an RFQ - Prior to the Due Date
1. Click **Respond to RFQ** and click **View** next to the RFQ to update.
2. Click **Update RFQ**.
3. From the RFQ Vendor Contact Information make any necessary changes and click **Save**
4. Click **View Items** to make item or pricing changes.
5. Click **Edit** to make changes to any individual item entries you made. Or **Delete** to remove all your entries and start over.
6. Click **View Response** to review all your responses.
7. Click **Submit RFQ** to send your response to the member.

RFQ Status Report
This creates a report based on the criteria you have selected. The system will default 14 days back.

1. To change the Start Due Date and End Due Date, place your curser in the field and select from the calendar.
2. The Group default is All, to change select from the drop-list.
3. The Current Status default is All RFQ's, to change select from the drop-down list.
4. Click **View Report**

- To change your selection criteria, click **Change Criteria**
- To print the report, click **Print**
- To view the RFQ details, click the title of the RFQ.
- To view your response per item, click **Show Details**

REPORTS TAB
The following reports are available to view or print based on your vendor profile and role.

PO Status Report –Available to all vendors and allows you to view/print a report of purchase orders processed.

1. Start and End Date – the default is set for September 1, 2006. You can change this by selecting the start/end date from the calendar that appears when you place your cursor in the field.
2. Group – select the group from the drop down list or default to all.
3. Status – select the status from the drop down list
   - **All Purchase Orders** – returns all processed PO's
   - **Accepted** – the PO has been successfully transmitted to you as the vendor.
   - **Cancelled** – the PO has been cancelled based on direction from you as the vendor or the member agency.
   - **Duplicate PO** – two PO's were processed in error and one has been marked as a duplicate.
   - **PO Disapproved** – the PO was rejected.
   - **Record Release** – the PO was entered into the BuyBoard for record purposes only and not transmitted to you as the vendor.
   - **Released** – the PO has been submitted to you as the vendor, but has not been acknowledged.
4. Click **View Report**. This will display only the first 1,000 purchase orders.

- To search your results, you can use the **Narrow Results** field to search by date, status, PO number, Entity, or PO total. This is a cumulative search feature that will continue to refine the search based on terms or keywords. To search by PO Total be sure and use the $ sign.
- To resort the Status Date, Status, PO Number, Entity, Or PO Total click the up/down arrow.
- To display more entries on the page select the amount desired, maximum is 100 per page
- Click the PO number to view the PO header, vendor and status information.
- To page thru the results click at the bottom of the page.
- To view the PO, click **View PO**. This will display the PO in a PDF format.

View Summary- provides a summary report by status and PO Total based on the criteria selected.

Purchase Order Status

Change Criteria   Print

Purchase Orders for 12/20/2011 to 1/3/2012

Status	PO Total
Released	$100.00
PO Totals	**$100.00**

Export- provides an excel spreadsheet export based on the criteria selected.

Vendor Ledger Report- Available to vendors based on user profile. The Vendor Ledger provides information of all orders and payments submitted to the BuyBoard. Through this report, a vendor has the option of creating three types of reports, depending on their needs.

1. Click on Vendor Ledger

Vendor Ledger

Start Date:	9/1/2006
End Date:	1/5/2012
Invoice Type:	ALL
Vendor:	VendorQRG
Payment Status:	All Purchase Orders

View Report   Export

2. Start and End Date – the default is set for 14 days prior. You can change this by selecting the start/end date from the calendar that appears when you place your cursor in the field.
3. Specify Invoice Type or leave as ALL

Invoice Type:	ALL
	ALL
Vendor:	The Local Government Purchasing Cooperative
	Texas Association of School Boards
Payment Status:	National Purchasing Cooperative

4. Choose Payment Status:

- **All Purchase Orders** – a report of all orders and payments submitted to the BuyBoard during the specified period.
- **Open Purchase Orders Only** – A report of all unpaid orders submitted to the BuyBoard during the specified period.
- **Paid Purchase Orders Only** – A report of all paid orders submitted to the BuyBoard during the specified period.

5. Click View Report or Export to export to an excel spreadsheet.
     Note: Type Definition:
       SO = Purchase order
       RC = Payment

Vendor Invoice Report –provides access to invoice(s) for any month from November, 2006 to current processed month.

1. Click Vendor Invoice

2. Select from the drop-down the option of monthly invoices.

3. Select the desired invoice and click **View Report**. Click **Open** on the pop-up screen. Your selected report will be viewable and printable in PDF format.

Vendor Statement Report - provides access their Statement of Outstanding Balances for any month from November, 2006 to current processed month.

1. Click **Vendor Statement**
2. If the statement field is pre-populated that indicates that specific monthly statement is the only one with any outstanding balance. If not, select from the drop-down the option of statements.
3. Click **View Report**. Click **Open** on the pop-up screen. Your selected report will be viewable and printable in PDF format.

HELP TAB – Help screens and text.

Additional Resources – The Additional Resources page gives you access to the BuyBoard logos in various sizes and file types. Please refer to the guidelines for use of the BuyBoard logo before placing it on any material.