MISSISSIPPI MANAGEMENT & REPORTING SYSTEM

Meeting the Management Information Needs for the State of Mississippi

MAGIC Supplier Self-Service Reference Guide

A step-by-step guide for MS Vendors

MAGIC

Mississippi's Accountability System for Government Information and Collaboration

Contents

Supplier Registration

All suppliers must be registered to do business with the State of Mississippi. As a supplier, you may register at any point in time.

To determine whether you are a registered supplier (converted vendor) in MAGIC, go to the MAGIC Vendor Information page and follow the steps below:

- Enter the first five characters of your Vendor Name or your 11 digit SAAS Vendor Number.
- Click Submit.

If you are a converted vendor, you will see your MAGIC Vendor Number, SAAS Vendor Number, Vendor Name, City, State, and Zip displayed. If your vendor information does not exist in MAGIC, you will see "The query you submitted returned no records."

Converted vendors need to submit an email via mash@dfa.ms.gov to request a MAGIC User ID and Password. Enter "Vendor ID Request" as the email Subject, and include the following information in your email:

- MAGIC Vendor Number
- Vendor Name
- Contact Name
- Contact Email Address
- Contact Phone Number

If you are not a registered supplier and you wish to do business with the State of Mississippi, click here to register: State of Mississippi Supplier Registration. If you attempt to complete the registration process and you are already a converted vendor in MAGIC, you will receive a duplicate error message. Please call the MMRS Call Center at 601-359-1343, Option 2 for assistance in locating your vendor information.

If you do not wish to use the State of Mississippi Supplier Self Registration process, you will need to complete the Supplier Registration Form and contact the State of Mississippi agency you desire to do business with to complete the registration process.

The **Supplier Registration** link is also located on the **Mississippi Management & Reporting System** website at http://www.mmrs.state.ms.us/vendors/index.shtml.

Registration Training

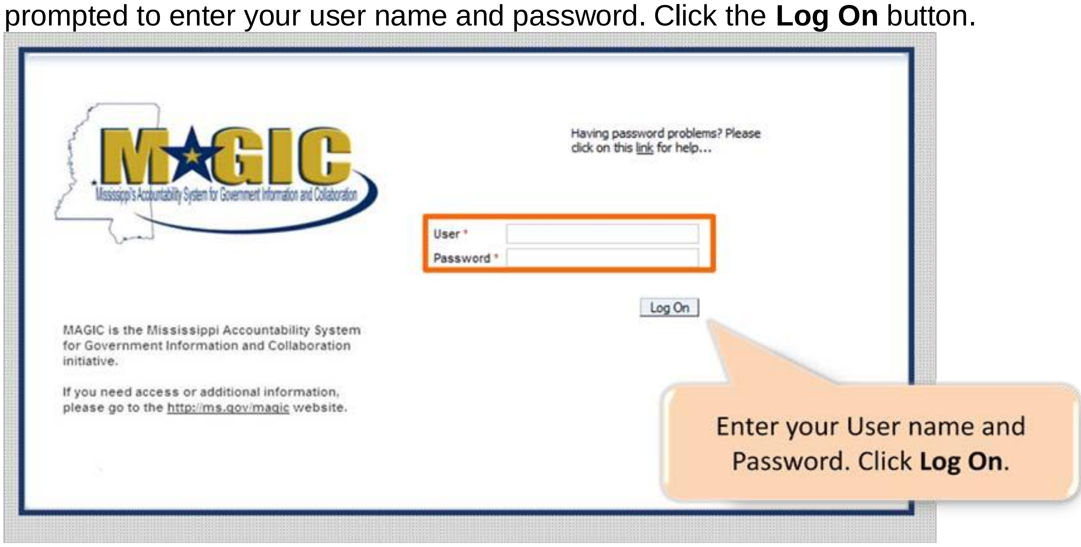
For more information and training on the registration process, there is a short eLearning course which includes audio available online at http://uperform.magic.ms.gov/ucontent/c512c251b3464d7fa7def8e33eb3fd56_en-US/course/html/course.htm.

Benefits of Registration and Using Self-Service

- Registered suppliers are added to the SOMS Supplier List. The SOMS Supplier List is used to notify suppliers of the status on procurement processes, respond to SOMS bid invitations, receive notifications on and review engagement documents issued to your company (such as purchase orders, bid awards, etc.), and upload W-9s, just to name a few.
- It's important to note that the supplier must submit a W-9 after registering before the supplier may be awarded a contract or a purchase order.
- POs and responses to RFx's can be maintained online and you can upload needed documents.
- E-mail notifications are of great benefit to registered suppliers. Based upon the goods and services for which the supplier is registered to provide, and using what is called "Product Categories," an e-mail notification will go out to the supplier for RFx invitations and other bid processes.
- When a new purchase order is issued, or an existing purchase order is changed, an e-mail notification is also sent to the supplier.
- Information provided by the supplier in response to these type of documents may all be maintained online.

MAGIC Supplier Self Service Portal Logon

After you register, you will be sent an e-mail with logon instructions. Go to the MAGIC Portal at http://portal.magic.ms.gov or click the link provided in the SOMS registration e-mail. You will be prompted to enter your user name and password. Click the **Log On** button.



After you log on you are taken to the *Supplier Self-Service* Home Page:

Maintain Company Data

The maintenance of your supplier record is essential. You should maintain company details such as address and contact information to avoid issues in doing business with the State. Good data records will ensure that you receive documents such as purchase orders and that payments are sent to the correct mailing address. Remember that all changes must be reviewed and approved by the State before they take effect.

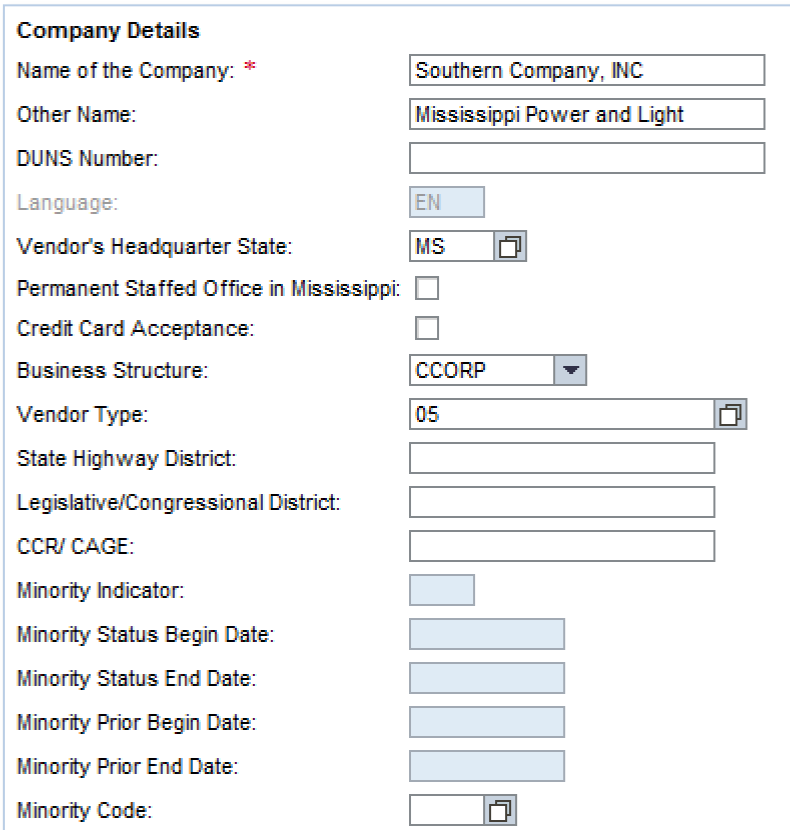
Display Company Data

To change your company data, follow the menu shown on the screen. When you click Company Data you will see your company information, but it cannot be changed until you click the **Process** button.

Your supplier record has multiple sections to help organize specific information about your company. We start with the Company Details section. This area will allow you the benefits of maintaining your company name and address, FEIN and/or D-U-N-S Number, and the vendor type associated with your company.

It's of particular interest to explain that suppliers may have multiple supplier records to support different locations, as an example. For those records, we recommend that you provide a D-U-N-S Number. While this number is not a required field, it does help distinguish each supplier record so that the system will not create duplicate records.

Some fields can be changed and some cannot. The supplier can change the fields with a white back ground, but cannot change the fields that have blue backgrounds:



Company Details

Name of the Company: *	Southern Company, INC
Other Name:	Mississippi Power and Light
DUNS Number:	
Language:	EN
Vendor's Headquarter State:	MS
Permanent Staffed Office in Mississippi:	
Credit Card Acceptance:	
Business Structure:	CCORP
Vendor Type:	05
State Highway District:	
Legislative/Congressional District:	
CCR/ CAGE:	
Minority Indicator:	
Minority Status Begin Date:	
Minority Status End Date:	
Minority Prior Begin Date:	
Minority Prior End Date:	
Minority Code:	

How to Request a Change in Address

The Supplier (Vendor) Alternate Remittance/Ordering Address Maintenance Form is used for requesting a change for alternate ordering and/or remittance addresses. You can access the form at http://www.dfa.ms.gov/media/1691/supplier-vendor-alternate-remittanceordering-address-maintenance-form.pdf.

- Use when you have a main office address *and* alternate addresses for receiving purchase orders and invoices
- This form is specifically for the alternative address(es)
- The form cannot be used for changing the W-9 address
- E-mail the completed forms to OFMMagic@dfa.ms.gov

Below is a sample of the form. This form is only used to create, change or delete alternative order address data. All other changes can be maintained from the Supplier Self-Service Portal.

DEPARTMENT OF FINANCE AND ADMINISTRATION

Supplier (Vendor) Alternate Remittance/Ordering Address Maintenance Form

* Denotes Required Fields

MAGIC Supplier (Vendor) Information			
Main Supplier (Vendor) Name*			
Supplier (Vendor) Number*		DUNS Number	

Add Address Information:	Ordering Address ☐	Remittance Address ☐	Default Address: Yes ☐				
Street/PO Box*							
City*		State*		ZIP Code*		Country*	

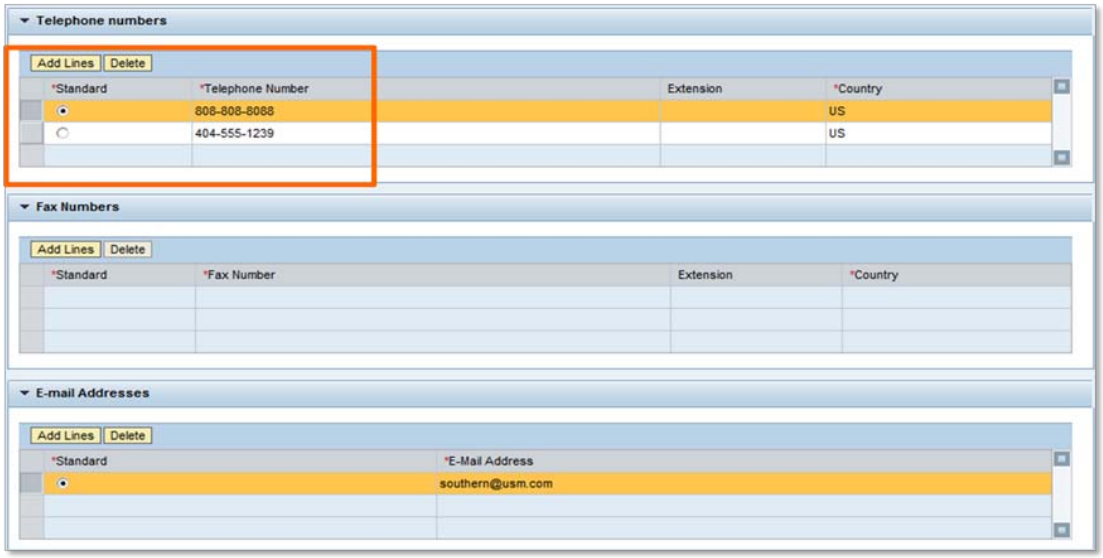
Remove Address Information:	Ordering Address ☐	Remittance Address ☐	Default Address: Yes ☐				
Street/PO Box*							
City*		State*		ZIP Code*		Country*	

Change Address Information:	Ordering Address ☐	Remittance Address ☐	Default Address: Yes ☐				
Change From:							
Street/PO Box*							
City*		State*		ZIP Code*		Country*	
Change To:							
Street/PO Box*							
City*		State*		ZIP Code*		Country*	

Submitter's Contact Information			
Name *		Phone Number*	
Email Address*		Fax Number	

Communication Data

On the **Company Data** screen, scroll down the page to the next section for Company Data on communications. Here, suppliers maintain contact information such as telephone and fax numbers, as well as e-mail addresses. Your phone number and e-mail address are required, but the fax number is optional. To enter additional data, click the Add Lines button and a blank line appears. If you are entering more than one phone number, fax number, or e-mail address, then please select Standard radio button for the main phone number, fax number and e-mail address.

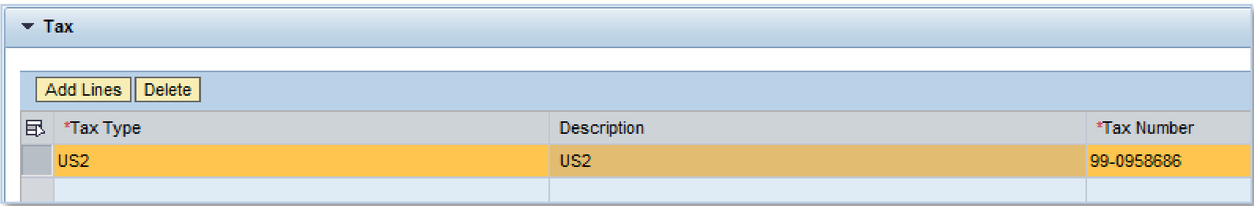


Tax Data

On the Company Data screen is the Tax Data. In this section, enter either the company FEIN Number or Social Security Number (SSN).

- Federal Employee Identification Number (FEIN): use tax type **US2**
- Social Security Number (SSN): use tax type **US1**

The changes will not take effect until the W-9 is submitted and the changes have been approved.



Upload W-9 Form

Suppliers who have completed the registration process and have received a User ID and Password must attach a W-9 to their supplier account in MAGIC. Alternatively, suppliers may submit a valid W-9 to:

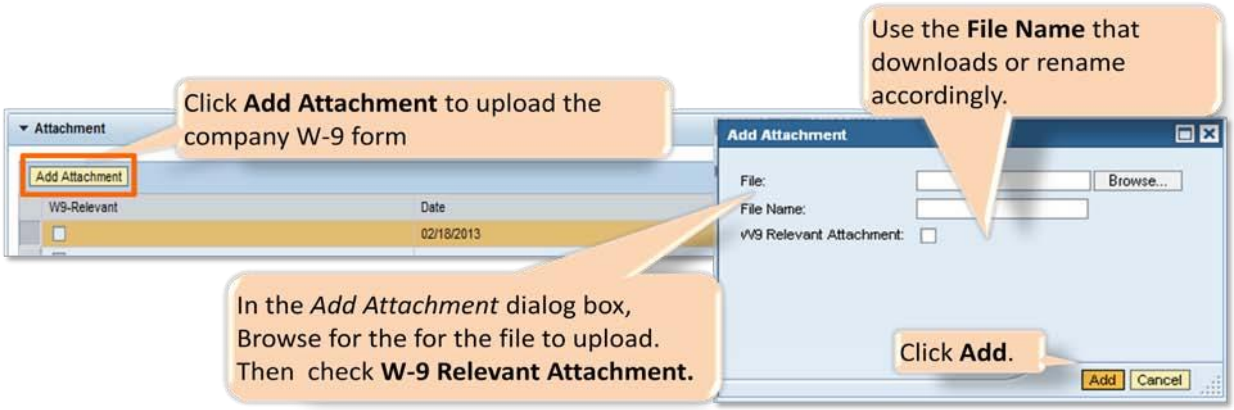
Department of Finance and Administration
P. O. Box 1060
Jackson, MS 39215-1060

OR

Department of Finance and Administration
501 North West Street - Suite 701-B
Jackson, MS 39201

Phone: 601-359-3538, Fax: 601-359-5525, or ofmmagic@dfa.ms.gov

You can attach any document the State may require or that you may deem relevant for doing business with the State. All W-9 forms must be submitted in PDF format using this method. Simply click the **Add Attachment** button, and the *Add Attachment* dialog box displays. Click **Browse** to find your file. Make sure you check **W-9 Relevant Attachment** checkbox, then click **Add**. Your document will then display in the list.



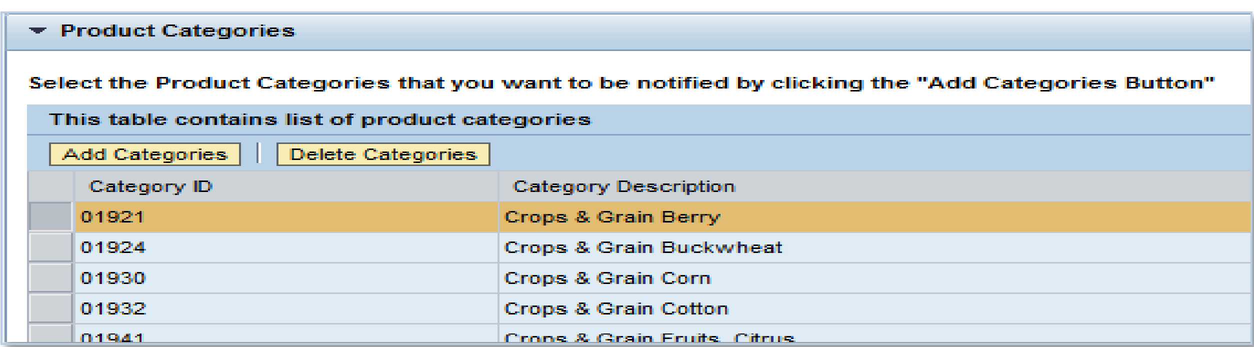
Product Category

Supplier records are identified by product categories that represent the goods and services provided by the supplier.

- Categories support the bidding process and drive placement on the Supplier List
- Bid Invitations are sent to suppliers according to the Categories selected

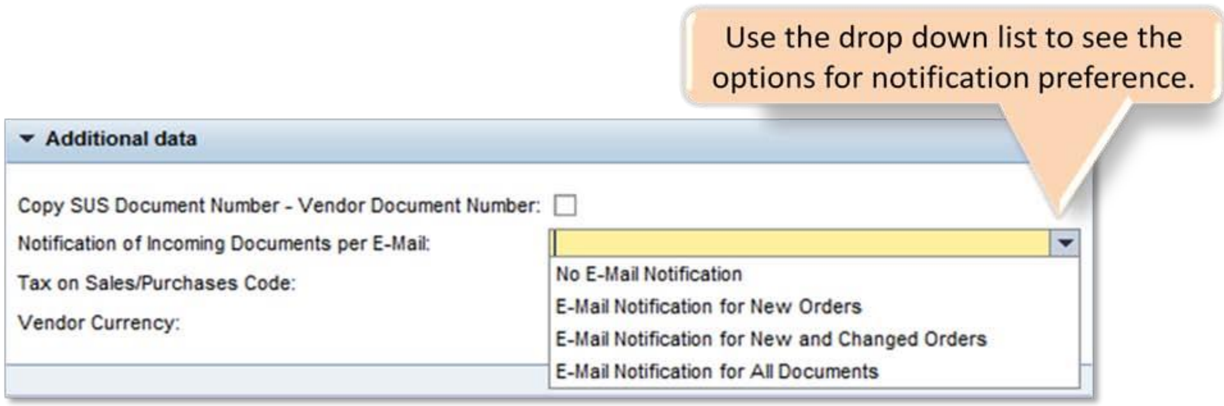
These product categories may be revised at any time. You have the option to add new categories or to remove existing ones.

Click **Add Categories** button to add new categories to the list. To remove product categories, select the categories that you want to delete and click **Delete Categories** button.



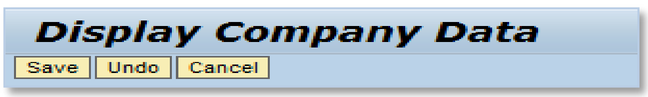
Additional Data

The **Additional data** section is complete at the supplier's discretion. It is important to note that you can select the type of notifications you will receive from the State. Just click the drop down arrow in the **Notification of Incoming Documents per E-Mail** field and highlight your selected preference.



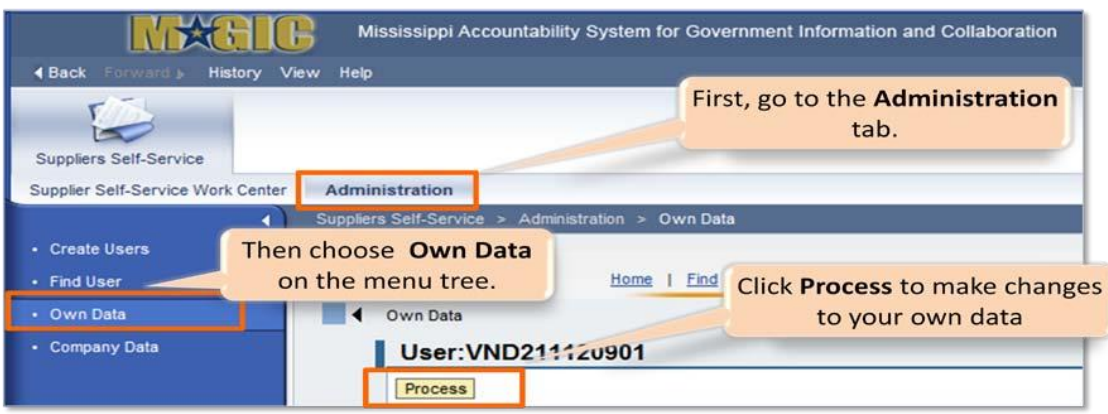
Complete Company Data Maintenance

You will find the Save button at the top of the screen just under the **Display Company Data** screen name. It is very important that you click the **Save** button before you exit the page. If you do not do this, all of your changes will be lost and are not submitted to the State for review.

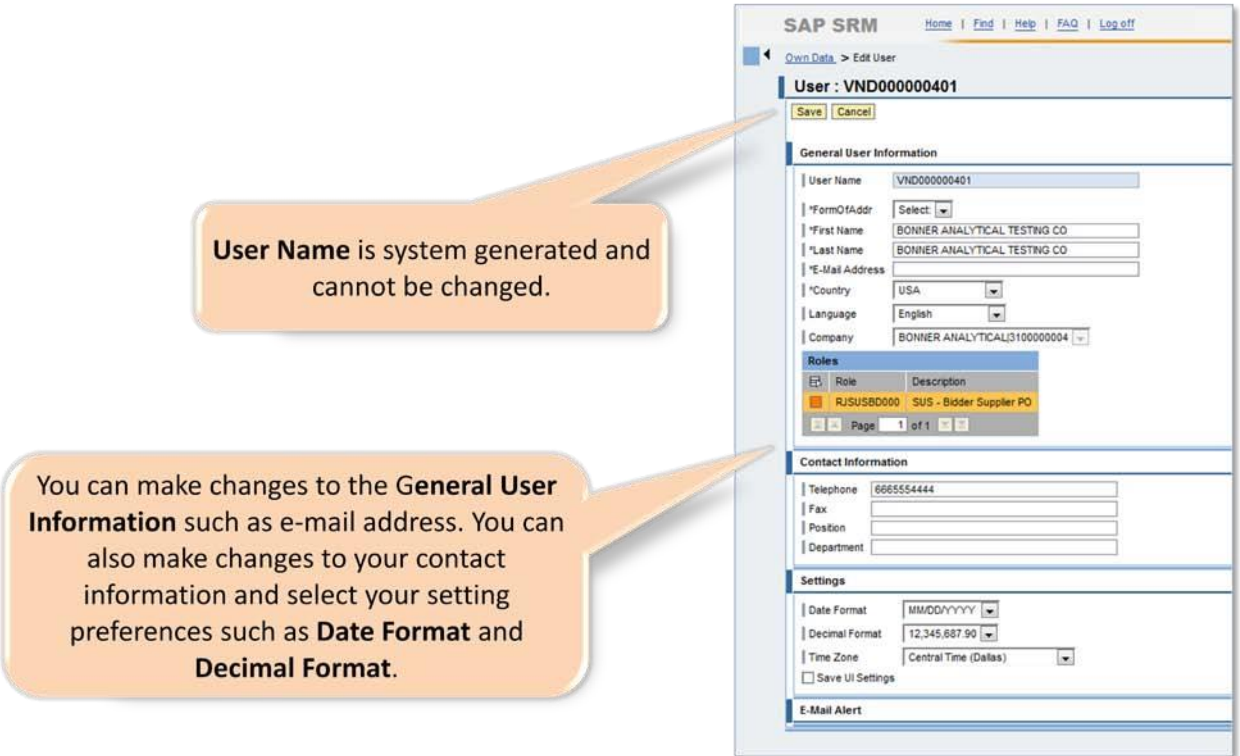


Maintain Own Data

For every supplier record, contacts are created to represent the company. Each contact may update his or her personal information in the **Own Data** section.



The information displayed is based on the logon information you entered. So, you will only see the information specific to you. On this screen you can change any of the information in the white fields. User Name is generated by MAGIC and cannot be changed.



Find User

Before you create a new user, it is helpful to do a search to see if the user already exists in MAGIC. This will help to prevent duplicate user records.

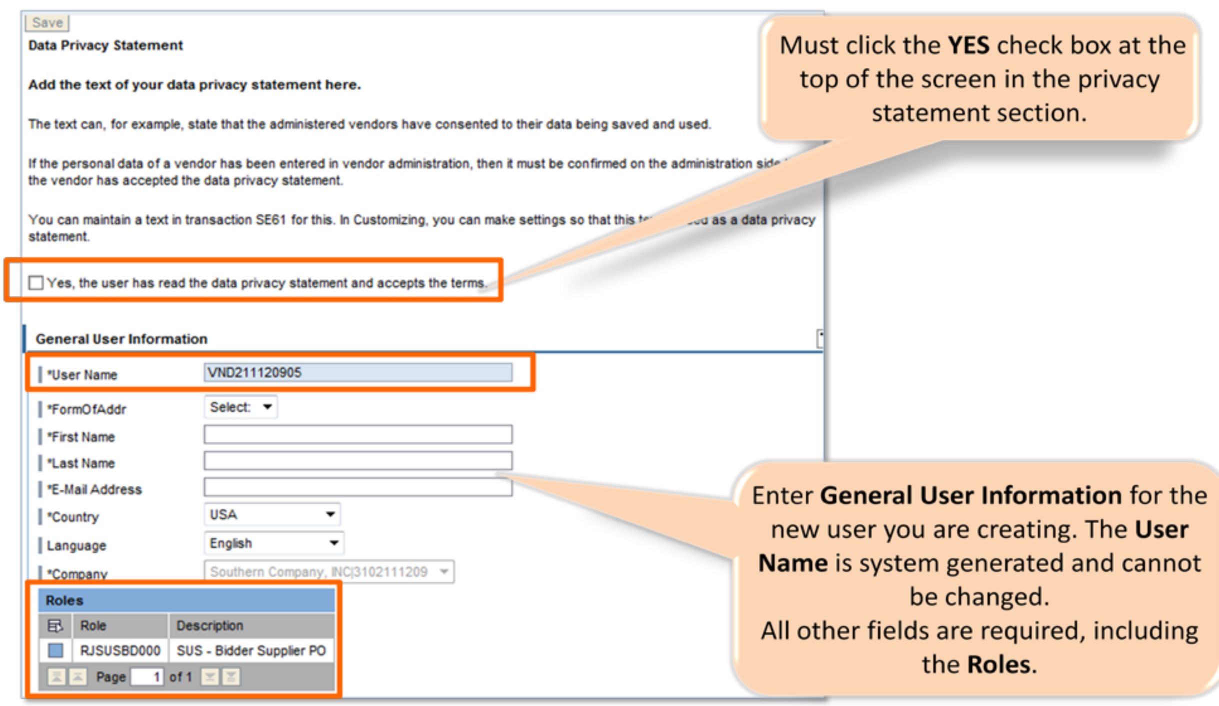
Create Additional Users

A supplier may need to have additional users authorized in MAGIC. You have the option to add users as needed. These users have access to the following:

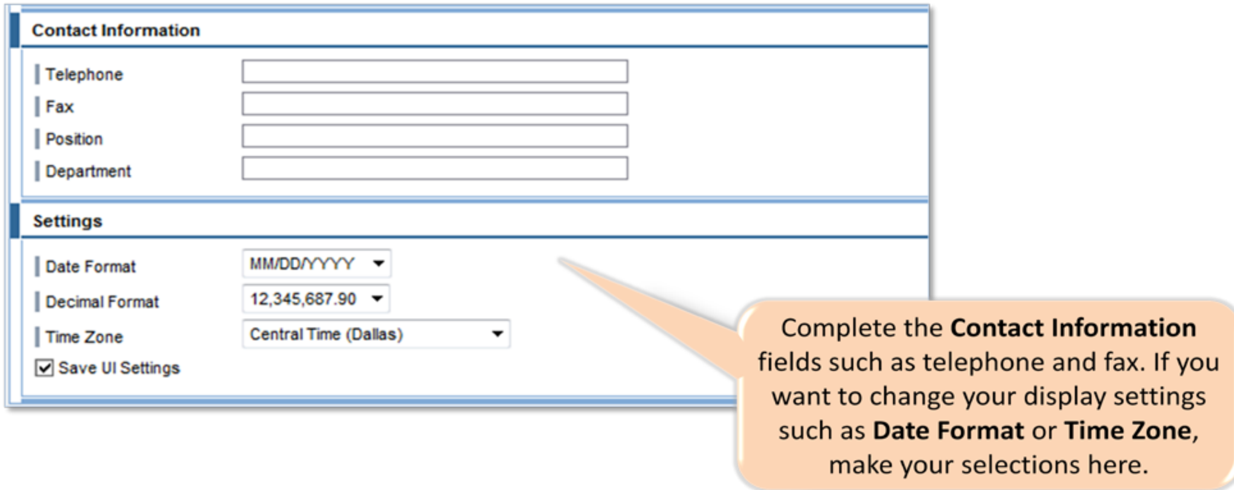
- View RFx and Purchase Orders
- Create RFx Responses
- Maintain their Own Data

Only the Administrator can maintain company data or create new users. This can only be performed with an Administrator User ID, which ends with '01'.

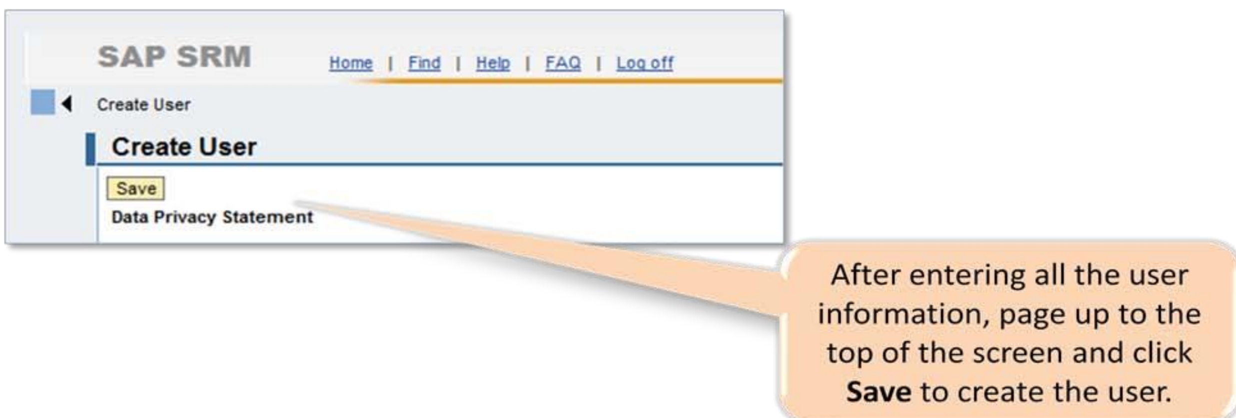
If there is a change in the Administrator, you must update the contact information for the Admin User ID.



The contact information should be specific to the new user. The **Settings** section is used to select the format of items such as the date and time zone.



Navigate to top of screen to find the **Save** button. After clicking save, the user will receive two e-mails with User ID and password.



RFx

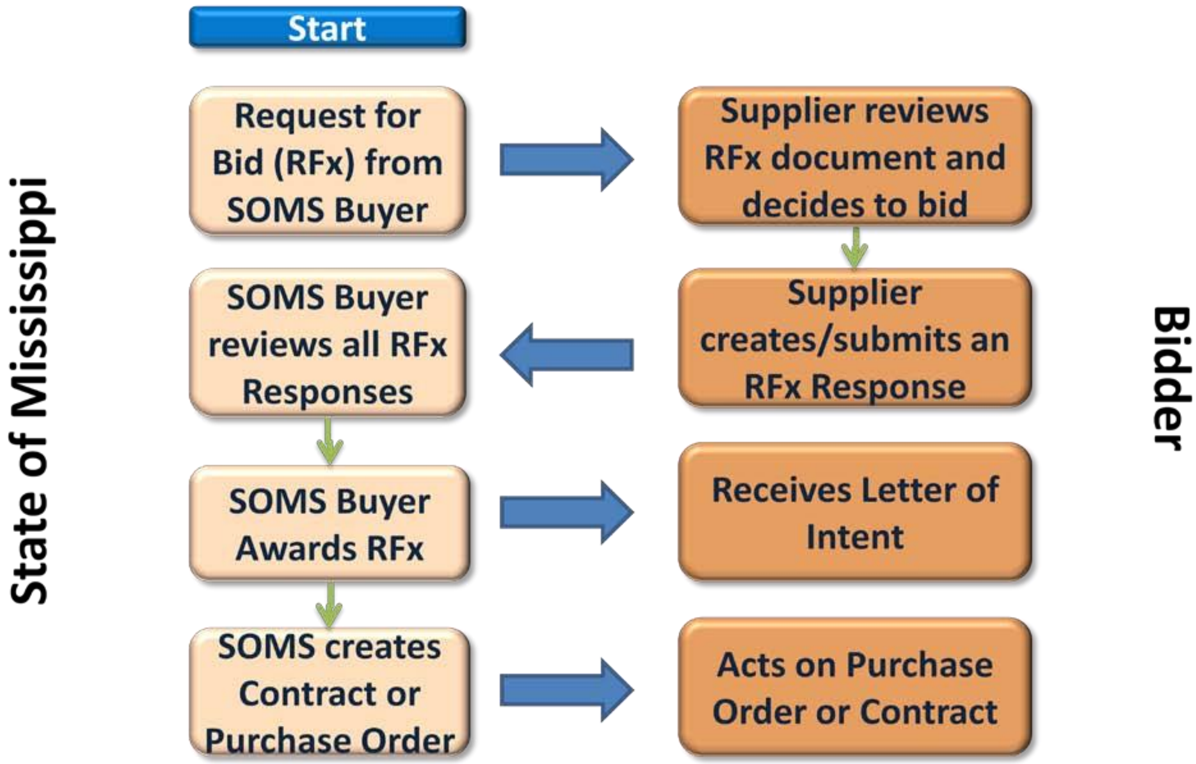
The term **RFx** refers to various types of documents used to request responses from suppliers (RFPR, IFBD, RFQR, RFIN, etc.)

RFx Response is a response by the supplier to request for goods and services from the State of Mississippi when using an RFx document.

RFx Process

- The process with the Buyer creating an RFx and making it available to the supplier. The supplier reviews the RFx and decides whether or not to participate.
- The supplier creates a response and submits to the State of MS (SOMS) before the deadline. Please note, there may be additional communication between the buyer and supplier until both parties come to an agreement.
- Once an agreement is made, a letter of RFx award is sent to the awarded supplier.

- The SOMS buyer may then create a Purchase Order and/or Contract for which the supplier fulfills as specified.



RFx Notification

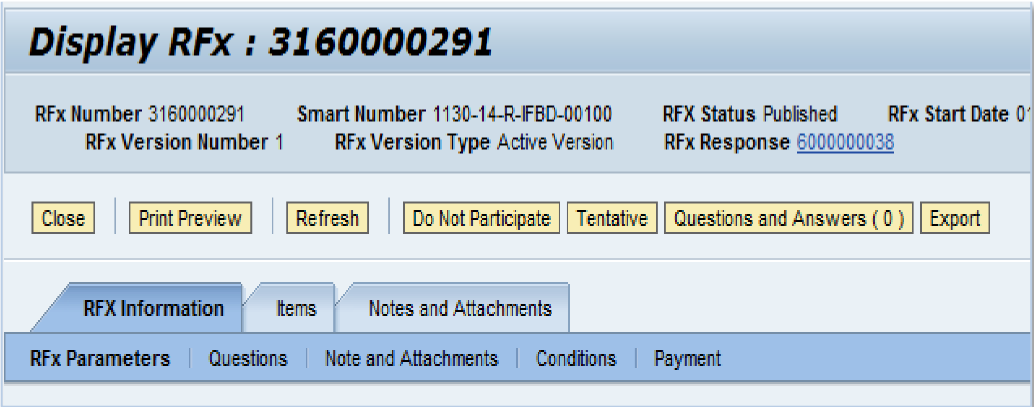
The notification for an RFx invitation is provided to suppliers by one or more of the following methods:

- E-mail sent to the Supplier Contact Person
- Newspaper
- Mississippi Public Bid Board Website
- Supplier Self-Service Portal for registered suppliers

RFx Document Information

When you display the RFx, you will find all of the information needed to submit your response, including the submission date, buyer contact information, item details, and any questions or attachments.

- **RFx Information** (i.e. submission date, opening date, buyer contact information)
- **Item** details (i.e. item description, quantity requested, delivery dates, ship to address)
- **Notes and Attachments** (i.e. material or service specs, terms and conditions)



RFx Response

Suppliers are able to respond to an RFx invitation using the Supplier Self-Service or by submitting a paper response. If allowed, the suppliers may edit their response at any time until the bidder submission deadline.

With the RFx Response feature, suppliers are able to:

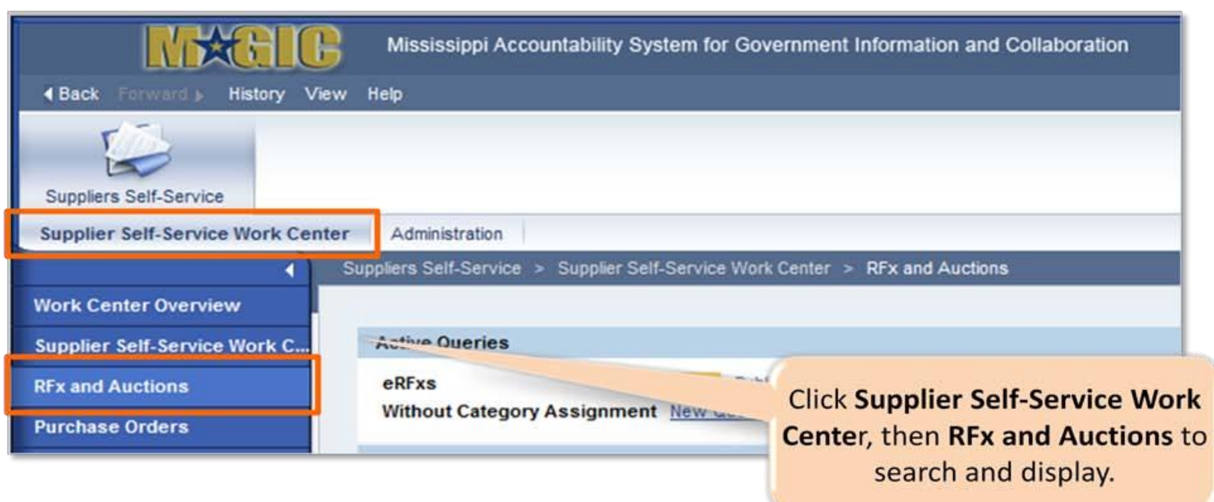
- Respond to an RFx electronically through Supplier Self-Service or submit a paper response
- Update the RFx Response electronically at any time (as allowed), up to the bidder submission deadline date/time

NOTE: Submit RFx responses prior to the bidder submission deadline date/time

Search and Display an RFx

MAGIC provides search functionality to enable looking up RFx information.

Click **Supplier Self-Service Work Center**, then click **RFx and Auctions** to search for and display an RFx document.

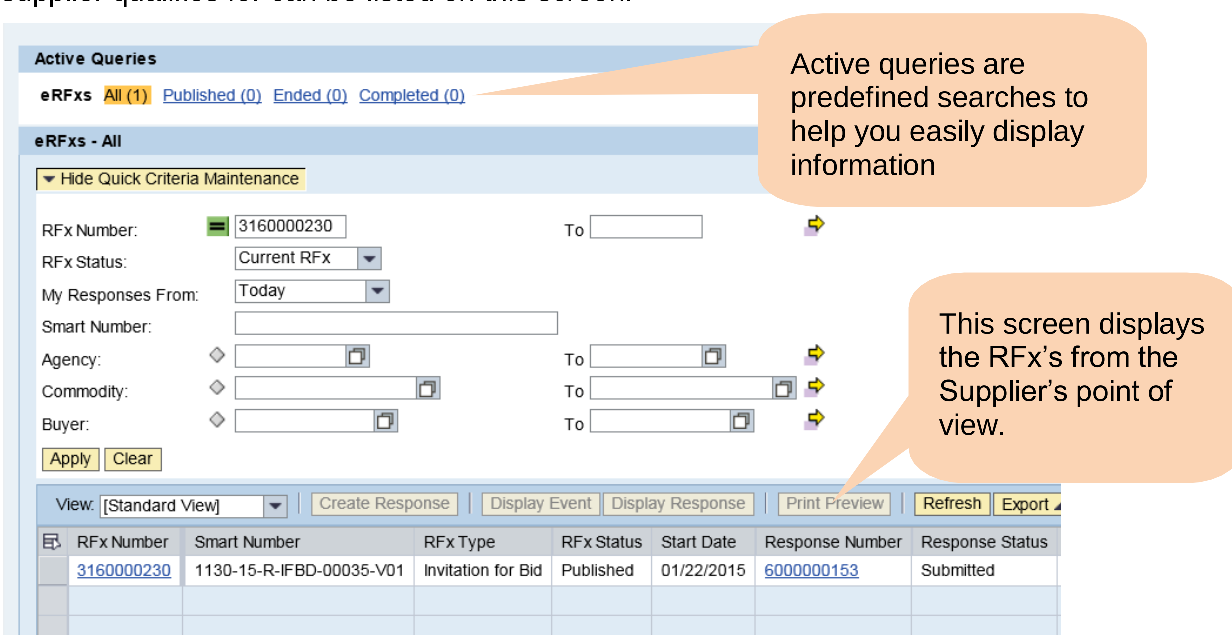


Suppliers may search online for the RFx using many different types of information. For example, you can enter the **RFx Number**. You can search for the responses you submitted during a specified period. It is also possible to view RFx's by the commodity or the buyer submitting the RFx. There are many options available to aid in your search:

- RFx Number
- RFx Status
- My Response From
- Smart Number
- Agency
- Commodity
- Buyer

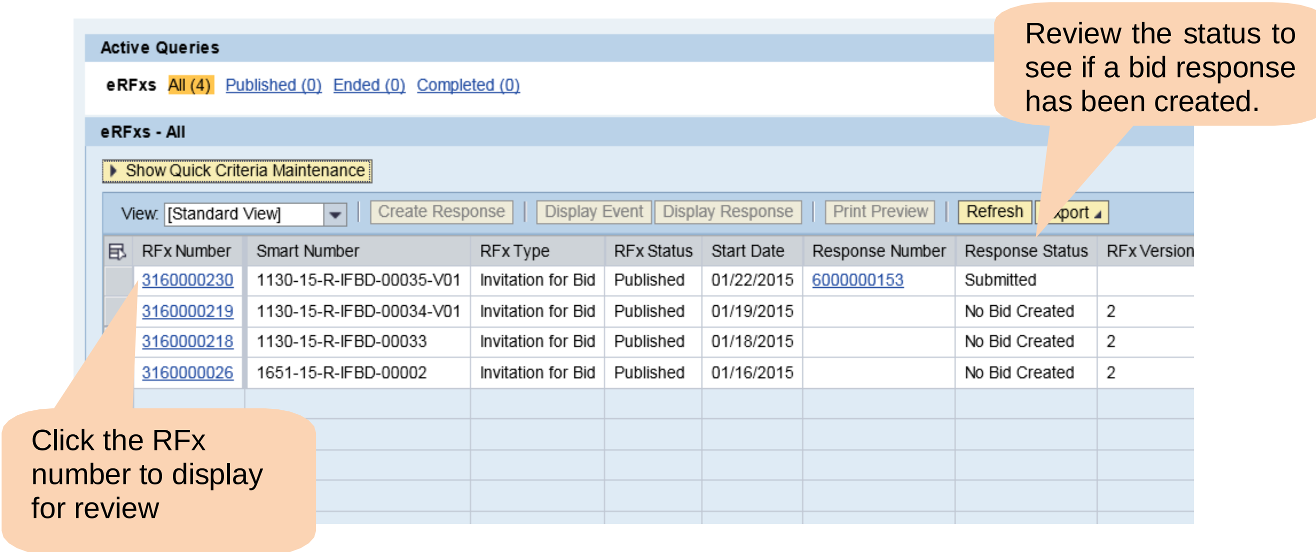
RFx List

Search queries provide a list of results from which to choose. If you select an **Active Query**, you will only see those items matching the pre-defined criteria identified in the query. After you have selected a query or identified your search criteria, you will see the results of the search at the bottom of the screen. This screen displays the RFx from a supplier's view. All RFx's the supplier qualifies for can be listed on this screen.

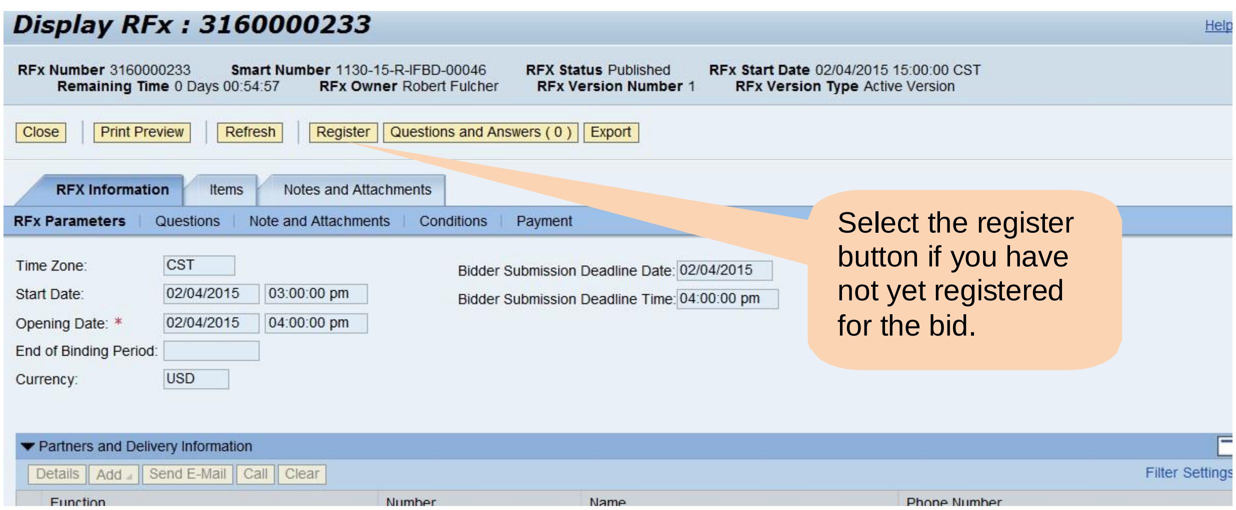


Respond to an RFx

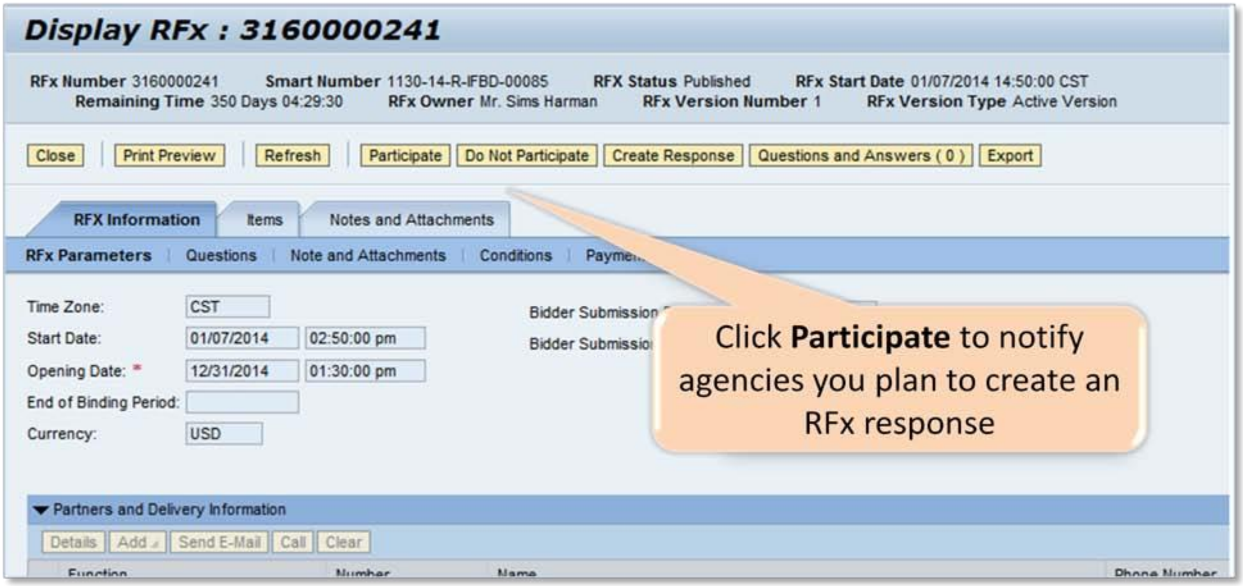
When you receive an RFx notification you may respond via the RFx document found on the RFx list. Click the **RFx Number** to view the RFx document and start the process to create a response.



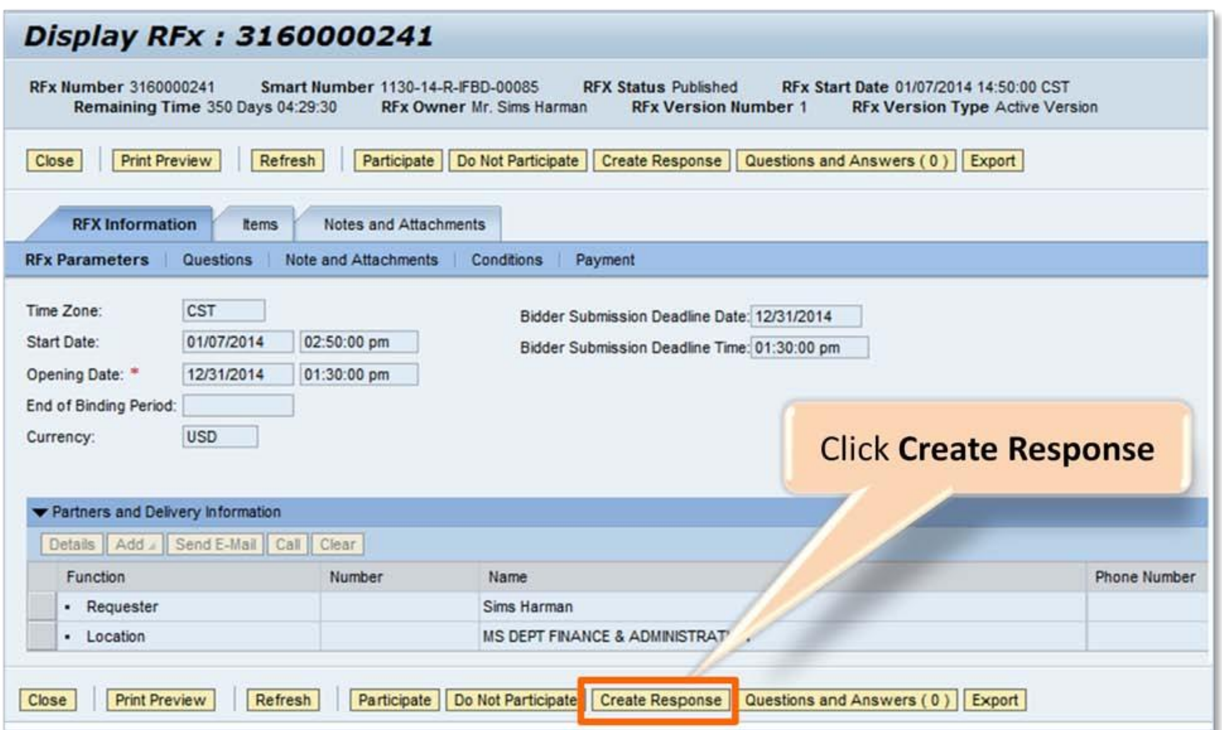
If you have not registered for the bid, you will need to select the **Register** button after clicking on the RFx number from the search as pictured above. This button appears prior to the **Participate** button if you have not registered already.



After you have reviewed the RFx, you may notify the agency of your plan to participate or not. This is an optional step. Other suppliers will not see if you have chosen to participate.



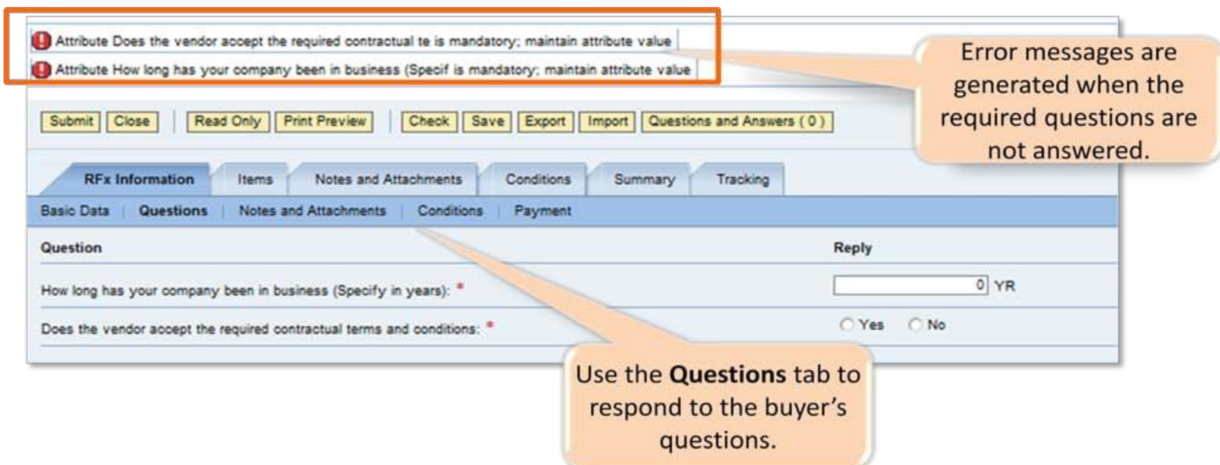
Once you have signified your plan to participate and now you can create the response. Review the Request for bid (RFx). Click **Create Response** to create an RFx Response. Click the **Notes and Attachments** tab to view any notes or attachments.



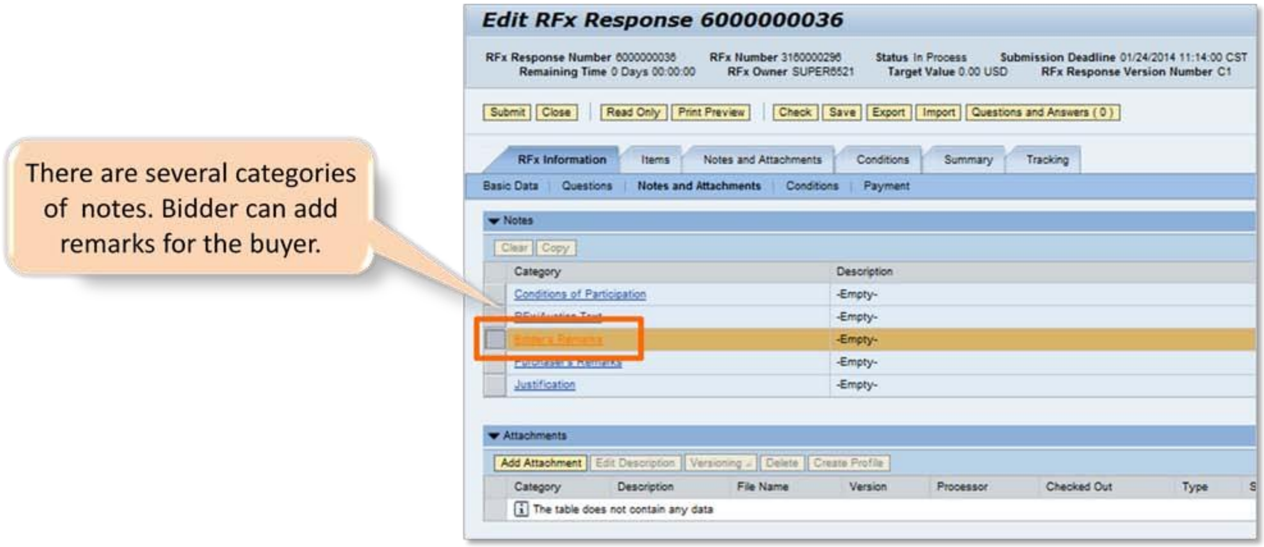
There are several buttons on the RFx response screen. Each may be used as you create the response.

- **Submit** – sends the response to the State
- **Close** – closes the screen without saving the information
- **Read Only** – changes the screen to display
- **Print Preview** – displays the RFx as it will print
- **Check** – reviews the response for errors
- **Save** – saves the RFx but it is not submitted. You can access the RFx at a later time for completion.
- **Export** – export the RFx to an Excel spreadsheet (it will not format well)
- **Import** – not used
- **Questions and Answers** – allows you to ask the buyer questions

If there are questions from the SOMS Buyer, you can display and reply to them under the **Questions** tab.

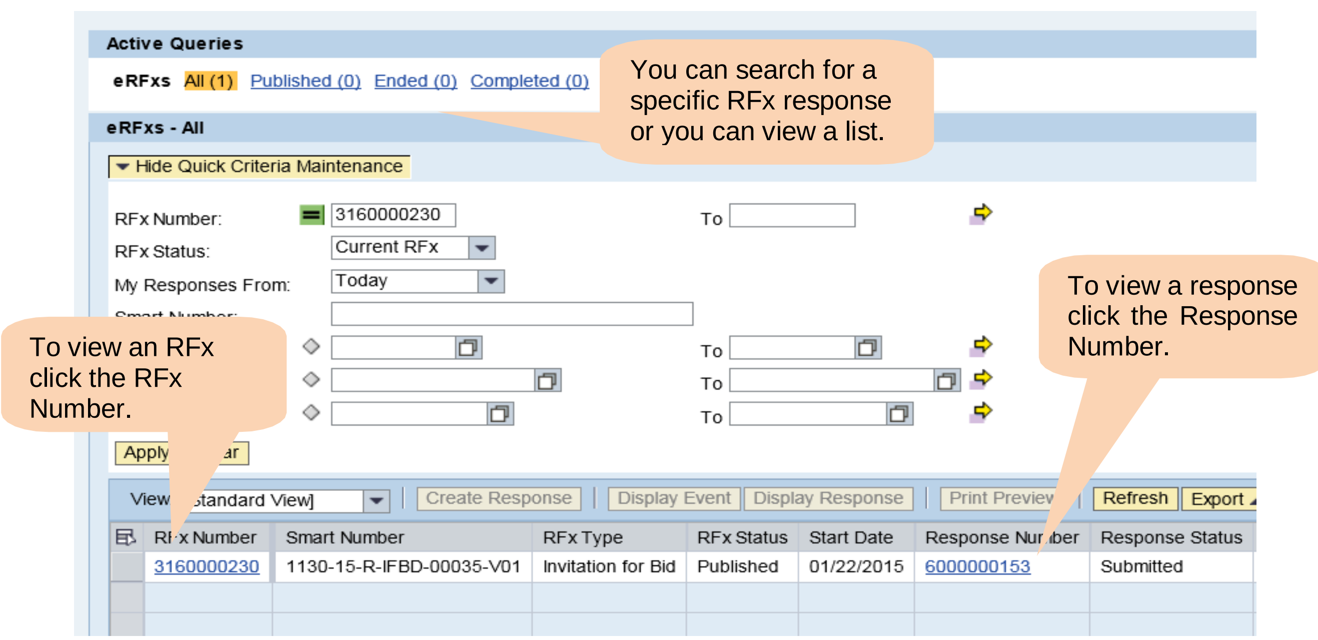


You can add remarks to clarify aspects of your RFx response. In addition, you can attach any supporting documents.



View RFx Response

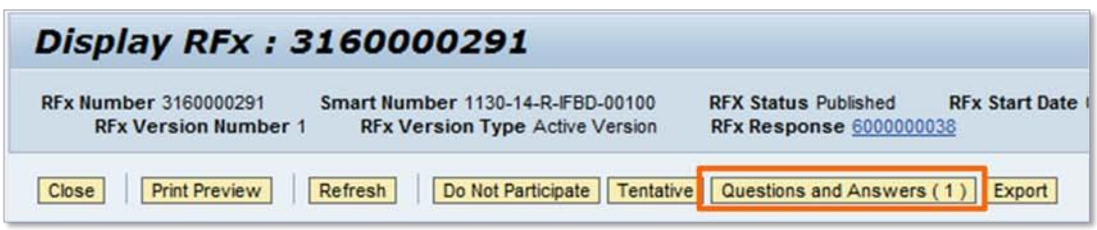
You can enter search criteria to view a specific RFx response that you have created. You may also select an **Active Query** to view a list of documents that pertain to your supplier record. Click the blue link to view either the RFx event or the response.



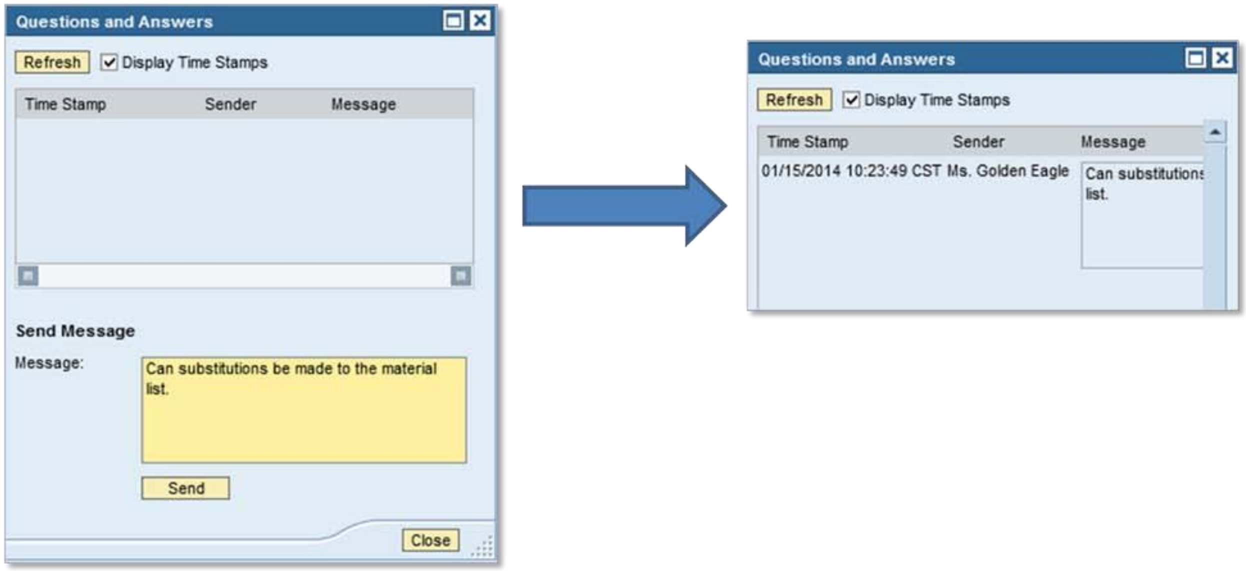
The RFx Response screen has several tabs to organize the information. You can click on different tabs to view **Questions** and their responses, **Notes and Attachments**, **Conditions**, **Items**, **Summary** and **Tracking.**

Ask the Buyer a Question

Questions and Answers can be accessed from the RFx or the RFx Response. Click the Questions and Answers button to ask a question and see the buyer's response to questions asked. Whether you access questions and answers from the RFx itself or from the RFx Response, all questions and answers will be displayed.



Enter the question in the Message text box. Click the Send button and the time stamp will be updated. You will see a time stamp appear in the upper portion of the screen. Should there be more than one question, you will see a list of time stamps along with the message.

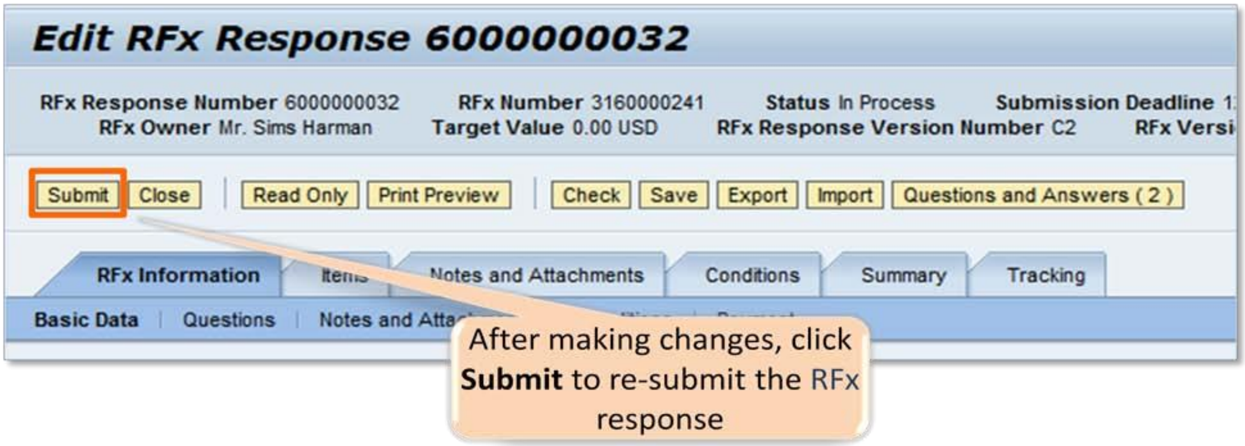


Change an RFx Response

There are several concepts to remember when making changes to an RFx Response. One very important element is that not all RFx notifications allow changes to the initial response. Should an RFx allow for changes, you can edit items such as the price or delivery time, or add new attachments. Each time you submit a changed response a version is created. Each version can be accessed as needed.

Click the **Edit** button to make changes to the RFx Response. Changes can be made to price, delivery time, and new attachments can be added.

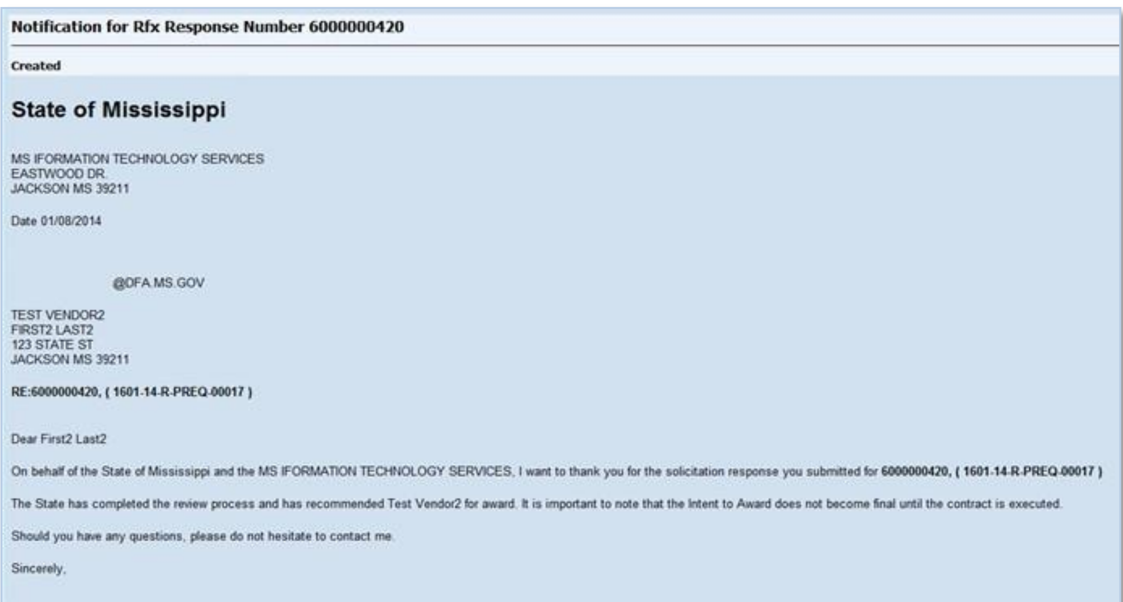
After the changes have been made and reviewed, click the **Submit** button to transmit the changes to SOMS. If you are not ready to submit the changes, you can click the **Save** button.



Sample of RFx Award Letter

Should you be selected to provide the product or service you will receive an award letter. An Award letter includes the bid response number you submitted. The Supplier Self-Service Portal can be used to view the contract and PO when they are executed. Both POs and contracts will be sent to you (the supplier) when completed as well.

- Letter of intent will be e-mailed to company
- Letter of intent is not final until a contract is executed



Notification for Rfx Response Number 6000000420

Created

State of Mississippi

MS IFORMATION TECHNOLOGY SERVICES
EASTWOOD DR.
JACKSON MS 39211

Date 01/08/2014

@DFA.MS.GOV

TEST VENDOR2
FIRST2 LAST2
123 STATE ST
JACKSON MS 39211

RE:6000000420, (1601-14-R-PREQ-00017)

Dear First2 Last2

On behalf of the State of Mississippi and the MS IFORMATION TECHNOLOGY SERVICES, I want to thank you for the solicitation response you submitted for **6000000420, (1601-14-R-PREQ-00017)**

The State has completed the review process and has recommended Test Vendor2 for award. It is important to note that the Intent to Award does not become final until the contract is executed.

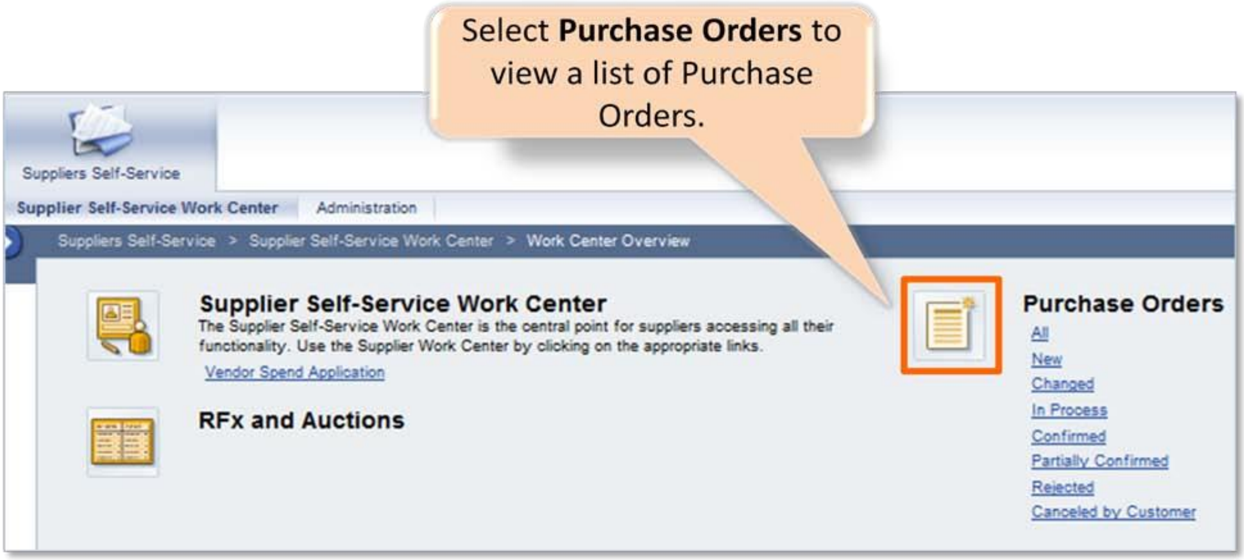
Should you have any questions, please do not hesitate to contact me.

Sincerely,

Purchase Orders

View Purchase Orders

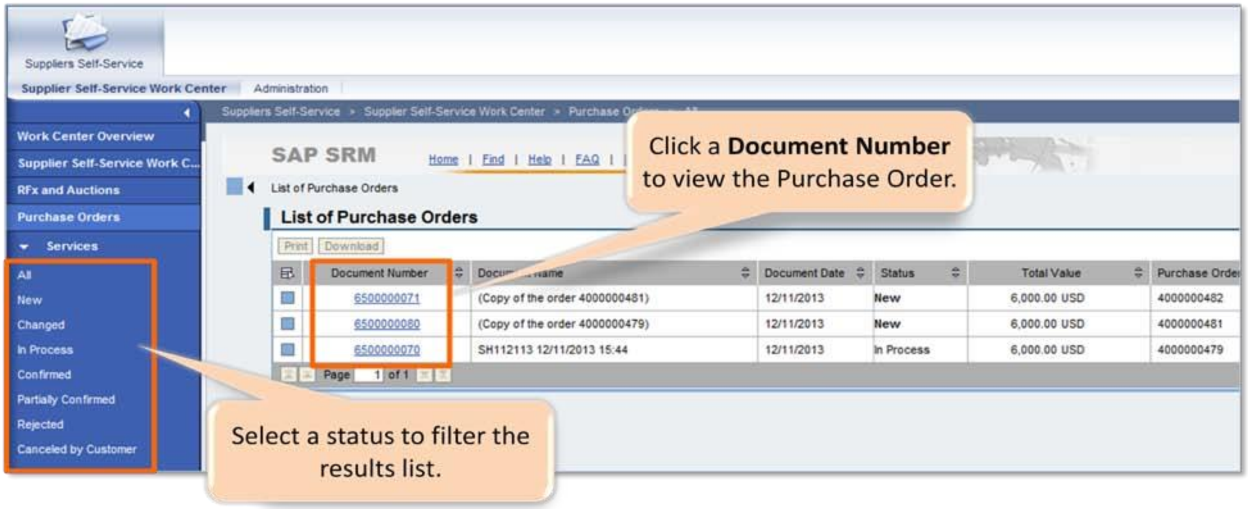
The **Purchase Order** icon on the Supplier Self-Service Work Center screen will take to you the *Purchase Orders: The "All" option to the right side of the page will provide* a list of purchase orders (POs).



All purchase orders for a supplier display as a default. Filter the list by selecting a status. By selecting a status from the list you can narrow the results for the supplier in the list display. The statuses that are relevant include New, Changed, and In Process. The other statuses will not apply.

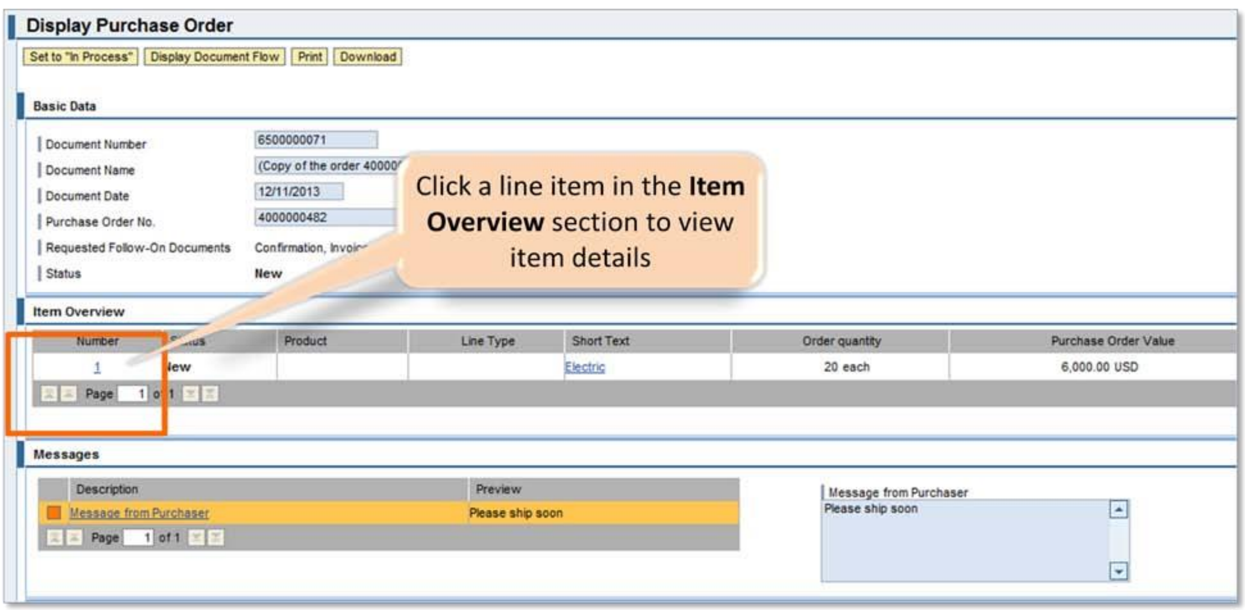
- **New** - A new purchase order is available in the Portal.
- **Changed** - A Portal purchase order was changed by an SOMS Buyer.
- **In Process** - You are working on a Portal purchase order, or you have saved one but have not sent it yet.

You can also click a **Document Number** to view a purchase order document.

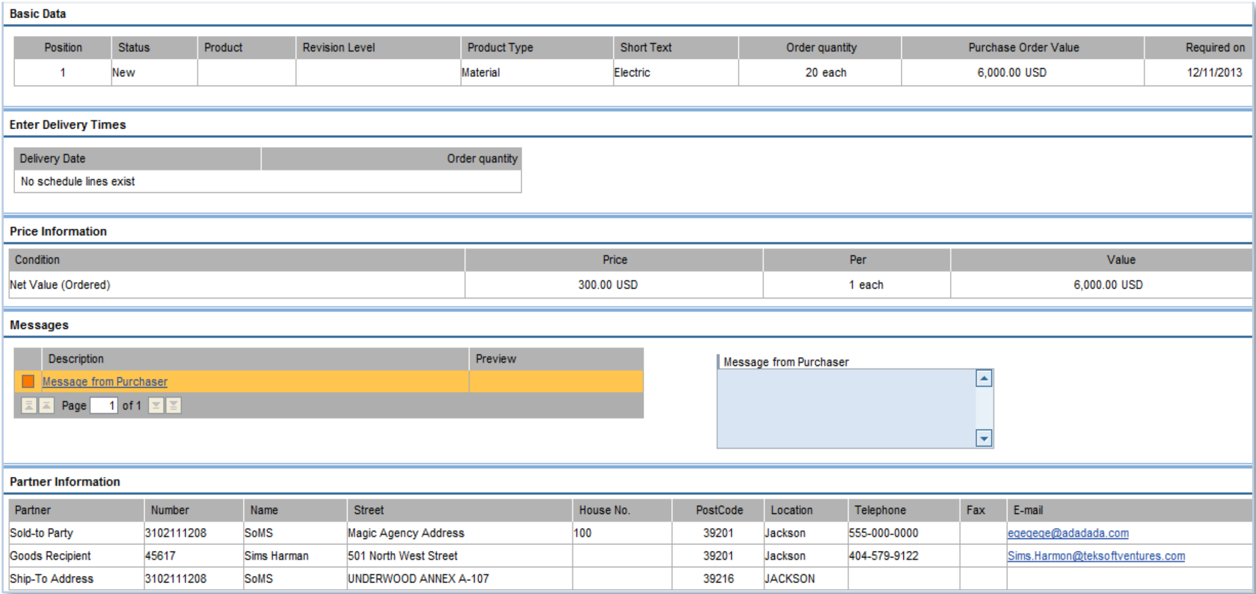


The purchase order contains multiple sections with details such as **Delivery Times**, **Price Information Messages** and **Partner Information**. You will need to scroll down the page to view all of the information provided.

To view details of a specific line item, click the number link beside that item.



You can also view line item details such as Delivery Times, Price Information Messages and Partner Information. All information on this screen applies only to the line item selected.



Basic Data

Position	Status	Product	Revision Level	Product Type	Short Text	Order quantity	Purchase Order Value	Required on
1	New			Material	Electric	20 each	6,000.00 USD	12/11/2013

Enter Delivery Times

Delivery Date	Order quantity
No schedule lines exist	

Price Information

Condition	Price	Per	Value
Net Value (Ordered)	300.00 USD	1 each	6,000.00 USD

Messages

Description	Preview
Message from Purchaser	

Page 1 of 1

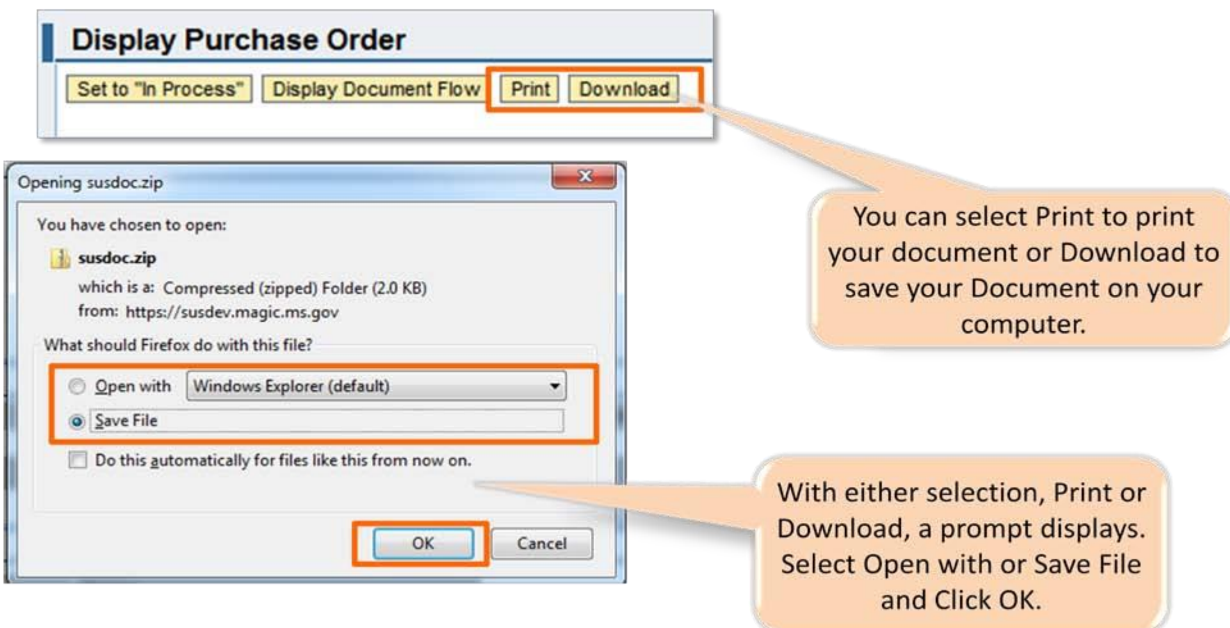
Message from Purchaser

Partner Information

Partner	Number	Name	Street	House No.	PostCode	Location	Telephone	Fax	E-mail
Sold-to Party	3102111208	SoMS	Magic Agency Address	100	39201	Jackson	555-000-0000		egegege@adadada.com
Goods Recipient	45617	Sims Harman	501 North West Street		39201	Jackson	404-579-9122		Sims.Harmon@teksoftventures.com
Ship-To Address	3102111208	SoMS	UNDERWOOD ANNEX A-107		39216	JACKSON			

Print or Download a Purchase Order

You can select Print to print your document or Download to save your Document on your computer. With either selection a prompt displays. Select **Open with** or **Save** file. Click **OK**.



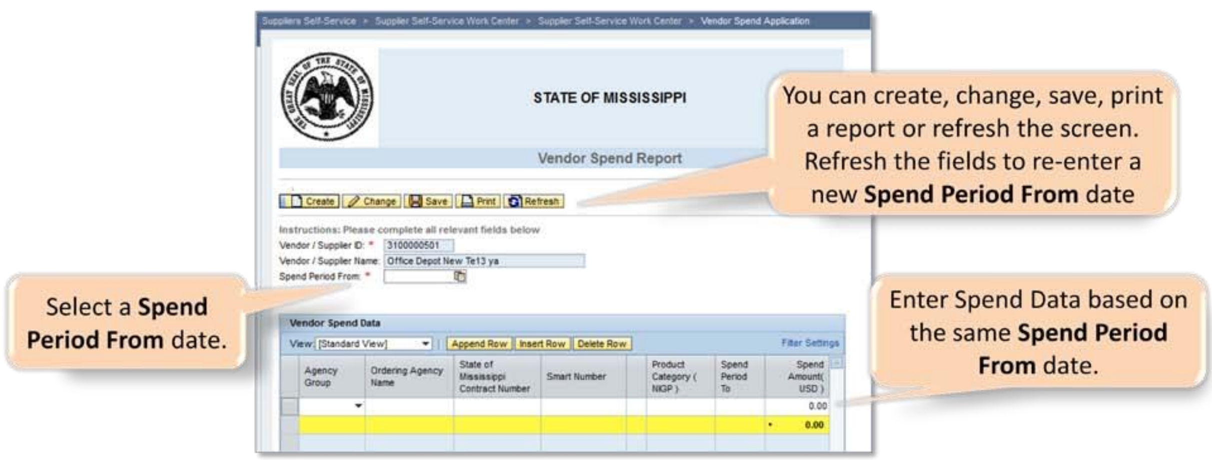
Vendor Spend Application

Used for contract purposes, the **Vendor Spend Application** provides a report of a supplier's spend period and amount based on the ordering agency name and SOMS contract number. The spend calculations only apply for agencies or governing authorities outside of MAGIC (for example, universities, cities, counties, etc.)

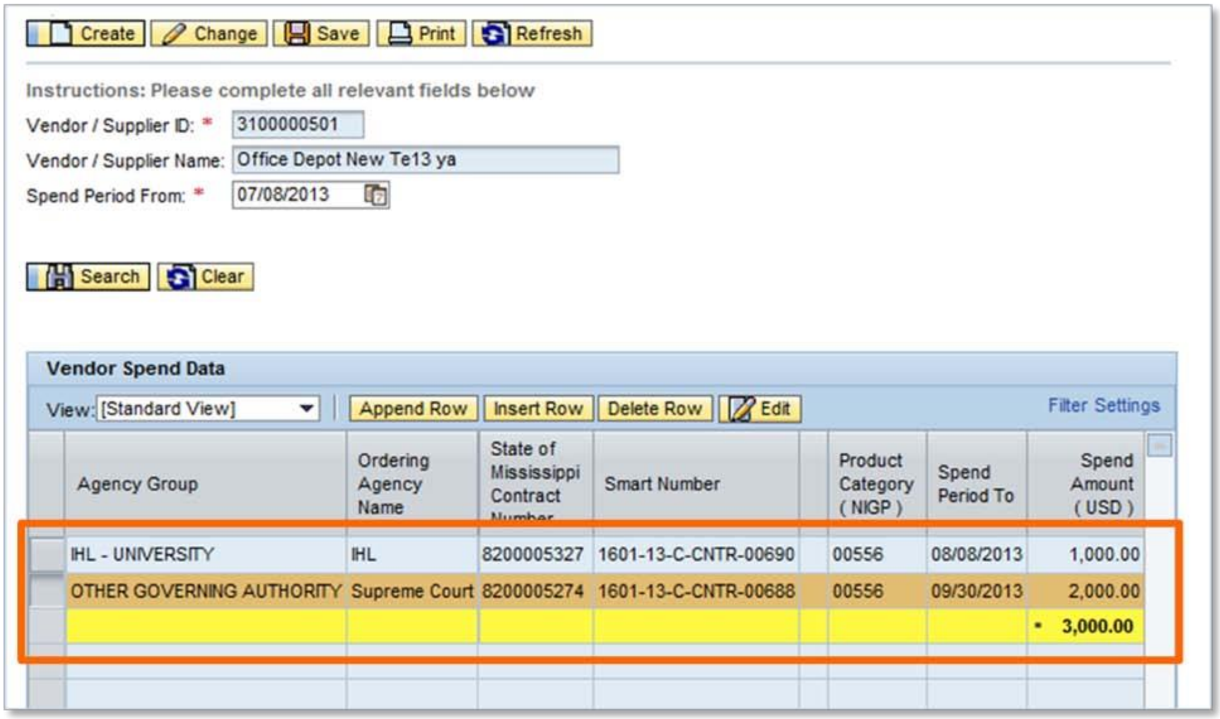
There are two ways to access the **Vendor Spend Application**: On the *Supplier Self-Service Work Center Overview* screen or from the **Supplier Self-Service Work Center** menu.

Complete the fields to select the Spend Period From date, the Agency Group, Ordering Agency Name, Contract Number, Product Category, and Spend Amount. When you enter the **Contract Number**, the Smart Number displays in the **Smart Number** field. The Smart Number does not have to be entered.

The Smart Number is a unique identifier assigned by MAGIC to identify the Agency code, Fiscal Year, RFx (RFx type)/Contract type and sequential number; for example, 1234-13-R-IFBD-12345 (where “R” refers to RFx and “C” if it’s a Contract).



This is how the document will look with the fields populated**:**



Create | Change | Save | Print | Refresh

Instructions: Please complete all relevant fields below

Vendor / Supplier ID: * 3100000501

Vendor / Supplier Name: Office Depot New Te13 ya

Spend Period From: * 07/08/2013

Search | Clear

Vendor Spend Data

View: [Standard View] | Append Row | Insert Row | Delete Row | Edit | Filter Settings

Agency Group	Ordering Agency Name	State of Mississippi Contract Number	Smart Number	Product Category (NIGP)	Spend Period To	Spend Amount (USD)
IHL - UNIVERSITY	IHL	8200005327	1601-13-C-CNTR-00690	00556	08/08/2013	1,000.00
OTHER GOVERNING AUTHORITY	Supreme Court	8200005274	1601-13-C-CNTR-00688	00556	09/30/2013	2,000.00
						• 3,000.00

Glossary

A **D-U-N-S Number** is a unique 9-digit identifier required for all businesses registering with the U.S. Federal government for contracts or grants.

An **FEIN**, Federal Employer Identification Number, is used by businesses to classify and identify them as a taxpayer. An FEIN is unique to a business just like a person's (SSN) Social Security number. This number is also known as a Federal Tax Identification Number (Tax ID).

MAGIC, Mississippi's Accountability System for Government Information and Collaboration, is Mississippi State Government's Enterprise Resource Planning (ERP) solution. Powered by SAP Public Sector® software, MAGIC replaces the State's legacy administrative systems with a fully-integrated information system.

The term **RFx** refers to various types of documents used to request responses from suppliers (RFP, ITB, RFQ, RFI, etc.)

A **Product Category** represents the goods and services that your company provides to the State of Mississippi.

RFx Response is a response by the supplier to a request for goods and services from the State of Mississippi when using an RFx document.

Supplier refers to a vendor of goods or services.

A **Supplier Administrator** is the supplier's contact person who is responsible for the supplier account.