

Steps to Use the Product Category Search when creating an RFX



The purpose of this Job Aid is to outline the steps to use the Product Category search field when searching for vendors (bidders) when creating an RFX. You will be able to do this once you are ready to add Bidders (underneath the Bidder's Tab) to your RFX.

When Searching for Bidders, it is important to use the Product Category. Only the bidders included on the RFX will receive an email notification from MAGIC of the bid opportunity.

During the MAGIC vendor registration process, vendors select Product Category codes associated with the products or services they offer and are automatically added to the Supplier List for those code(s). The Supplier List functionality in MAGIC allows you to search and add bidders to an RFX using the Product Category field. Using this functionality should maximize the number of vendors who receive an automatic email notification of the bid opportunity.

INSTRUCTIONS:

To properly notify potential vendors of RFX opportunities using Supplier List, follow the steps below:

- 1.) Search for appropriate bidders to add to the RFX by clicking on Bidders tab



- 2.) Next click on **Search for Bidders** and then select "From Internal Directory" which appears in the dropdown.

- 3.) Ensure the search view is by "Bidders from Suppliers Lists".

- 4.) Enter the Product Category (same Product Category from the items tab) and click the **Search** button.

The screenshot shows the 'Search for Bidders' window. At the top, there are tabs for 'RFx Information', 'Bidders', and 'Items'. The 'Bidders' tab is active. Below the tabs, there is a 'Search for Bidders' dropdown menu. Below that, there is a 'View By' dropdown menu set to 'Bidders from Supplier Lists'. Below the 'View By' dropdown, there is a 'Search by Supplier List' section with several search filters: 'Number', 'Description', 'Product ID', 'Product Category', 'Purchasing Organization', 'Supplier', and 'Created By'. The 'Product Category' field is highlighted with a red box. Below the search filters, there is a 'Maximum Number of Hits' field set to 500 and a 'Search' button. Below the search filters, there is a table of bidders with columns: Number, Description, Product Category, Purchasing Organization, Product ID, Supplier Number, and Created By. The table contains several rows of bidder information. At the bottom of the table, there is an 'Add Selected Bidders' button and a 'Cancel' button. The 'Add Selected Bidders' button is highlighted with a red box.

Steps to Use the Product Category Search when creating an RFx



- 5.) Once the search results have been returned, highlight selections. If multiple selections are needed, use the shift key and select additional lines.
- 6.) Then click **Add Selected Bidders** to add your selection(s). This will ensure that all the vendors who have registered for particular product categories will be informed of a bid opportunity via email (if an email address is maintained).

Note: If an expected vendor is not on the list the vendor has not updated their registration or they did not include that Product Category code when registering.

We encourage using this feature of MAGIC to notify all vendors who possibly qualify for the RFx that is being created and published to the Web site.