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CITY OF PHILADELPHIA

Seller Administrator User Guide
Maintaining PHLContracts Vendor Information

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Maintaining PHLContracts Vendor Information

For additional information on Seller Administrator functions, please refer to the Seller Administrator's Guide available by clicking the Help icon (question mark) located in the upper right portion of the main user menu.

Working with the PHLContracts Procurement System

Overview of the PHLContracts Vendor Portal

The City of Philadelphia Procurement System (PHLContracts) is powered by Periscope Holdings Inc.'s BuySpeed software, an Internet-enabled application that provides decentralized purchasing functionality specifically designed for government agencies.

The PHLContracts Vendor Portal allows sellers (vendors) of goods and services to:

- Register with the City of Philadelphia by completing an online application and [Consent and Authorization Agreement](#)
- Maintain their organization information
- Maintain information on commodities and services they offer
- Maintain information on certifications and categories
- View bid opportunities indexed by commodity and service then respond electronically online
- View active contracts and search contracts and bids
- View purchase orders (contracts) sent to them
- Receive procurement news and information directly from the City

Vendor Roles and Activities

Registered vendor users are assigned one of two roles in the PHLContracts system:

Seller Administrator	Organizational maintenance focus
Seller	Purchasing information focus

Important concepts related to vendors and vendor users:

- Our goal is for vendors to use the PHLContracts system to initially register and to maintain their organizational information *
- Vendors must complete their registration and maintain 'Active' status to be eligible to submit responses to City bids

Maintaining PHLContracts Vendor Information

- Seller Administrators can perform all the Seller role functions
- Registered vendor organizations may have multiple Seller Administrators and multiple Sellers
- The individual who initially registers their organization in PHLContracts will by default be assigned the Seller Administrator role
- Each vendor organization must maintain at least one individual assigned the Seller Administrator role

* As part of the initial roll out of the PHLContracts system, vendors with active and recent purchase orders will be automatically registered in the system. Please refer to additional user guides related to 'Migrated Vendors' for specific information on what these vendors need to do to complete required organization information, including submitting the Consent and Authorization Agreement.

Responsibilities of the Seller Administrator Role

Seller Administrators should be prepared to perform the following tasks:

- Maintain vendor organization information including:
 - Company general profile
 - Ensure the organization's Consent and Authorization Agreement ("Agreement") is completed and uploaded to the organization's profile. The Agreement can be found at <http://www.phila.gov/procurement>.
 - Address information
 - Commodity and service information
 - Certification and category information
- Manage access to the PHLContracts system for company representatives, including Sellers and other Seller Administrators
- Review Vendor News and Vendor Alerts issued by the City of Philadelphia through the PHLContracts system

Seller Administrators should refer to the Seller Administration User Guide available by clicking the Help icon (question mark) located in the upper right portion of the main user menu. Additional questions may be directed to the City of Philadelphia Procurement Customer Service Representatives at (215) 686-4755 / (215) 686-4720 or by email at PHLContracts@phila.gov.

Maintaining PHLContracts Vendor Information

Responsibilities of the Seller Role

Sellers should be prepared to perform the following tasks:

- Regularly access the PHLContracts system to review available bids
- Respond with quotes and other requested information required by City buyers to conduct procurements and purchases

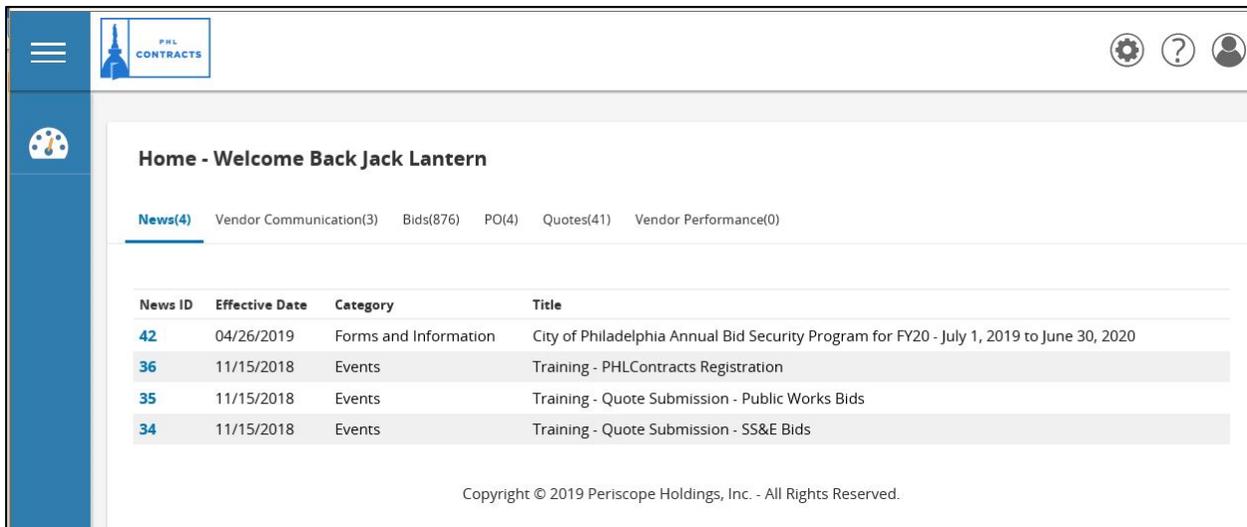
Sellers should refer to the Seller User Guide available by clicking the Help icon (question mark) located in the upper right portion of the main user menu. Additional questions may be directed to Procurement Customer Service at (215) 686-4755 / (215) 686-4720 or by email at PHLContracts@phila.gov.

Maintaining Company Information

Maintaining General Company Information

For this example, we use a hypothetical vendor, ABC Supply whose Seller Administrator is Jack Lantern.

When Jack logs into PHLContracts, by default he will be in the Seller role as shown below.



To switch to the Seller Administrator role, he simply needs to click on the user  icon on the top right of the screen, then click on the down triangle ▼ and select Seller Administrator.

Maintaining PHLContracts Vendor Information

Below is the Maintenance Home page displayed when Jack switches to the Seller Administrator role. The **Maintain Organization Information** option contains several sub-options for specific types of vendor information.

Maintenance Home Page for: ABC Supply

General Alerts

Maintain Organization Information



This section is used for maintaining organization information.

Maintain Users on this Account



This section is used to maintain users for the organization.

Add Users on this Account



This section is used to add users to the organization.

Add Associated Organization



This section is used for adding an organization with the same Tax ID.

When Jack selects the **Maintain Organization Information** option, the Maintain Organization Information page is displayed.

Maintain Organization Information for: ABC Supply

Maintain General Organization Information



This section is used for maintaining general organization information.

Maintain Addresses



This section is used to maintain addresses.

Maintain Commodity Codes & Services



This section is used to maintain commodity codes and services.

Maintain Regions



This section is used to maintain regions.

Maintain Terms and Categories



This section is used to maintain terms and categories.

Maintain Quote Attachment Repository



This section is used to maintain files in the quote attachment repository.

Credit Memo List



This section is used to view credit memos.

The sub-options Jack is most likely to use are:

- Maintain General Organization Information
- Maintain Addresses
- Maintain Commodity Codes & Services
- Maintain Terms & Categories

Maintaining PHLContracts Vendor Information

When Jack selects the **Maintain General Organization Information** option, the existing general information for ABC Supply is displayed and Jack can update a limited set of fields, including business description, incorporation information, and general email address. The remainder of the general information cannot be updated by the Seller Administrator, specifically: vendor number, company name, vendor legal name, Tax ID. If this information needs to be revised, Jack should contact a City Procurement Customer Service Representative at (215) 686-4755 / (215) 686-4720 or email PHLContracts@phila.gov.

Maintain General Organization Information

Vendor ID: **V00002001**

Company Name*: ABC Supply Vendor Legal Name*: ABC Supply

DBA for Vendor:

Tax ID #*: Country Code for Tax ID*: US - United States of America

Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)?

EIN SSN

Incorporation Details: State: Year of Incorporation: 0

Business Description: n/a

Preferred Delivery Method: Email

Vendor Email: ABCSupply99@att.net

Vendor Fax:

Emergency Supplier:

Yes No

Emergency Phone*: Ext.:

Emergency Contact Name*:

Emergency Email*:

Emergency Info Comment:

Maintaining PHLContracts Vendor Information

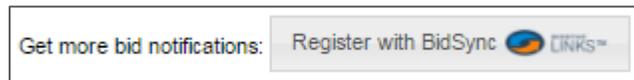
Creating a BidSync Account

BidSync is an integrated seller network that is linked to the PHLContracts system. The network allows sellers to be notified of bidding opportunities with other public sector organizations: a network comprised of over 900,000 seller organizations. Opting into the BidSync network is NOT REQUIRED of PHLContracts vendors; however, the network may provide benefits to vendors.

First, even with a non-paid subscription to BidSync, vendors will receive periodic notifications of bidding opportunities with other public sector organizations. Further, a number of large national vendors use the BidSync network to search for subcontractors and partners. For PHLContracts vendors who possess special certifications (e.g., MBE, WBE, MWBE, DSWBE, SBE), becoming part of the BidSync network may provide additional opportunities to work with prime vendors across the network.

When a PHLContracts vendor registers with BidSync, they are likely to be contacted in the future by BidSync to expand their account to a paid service (with a greater number of identified opportunities). This service is not related in any way to their relationship with the City of Philadelphia.

If a PHLContracts vendor would like to opt into the BidSync network, they may simply click on the icon shown below.



The vendor can either register from scratch or link their existing PHLContracts vendor account to BidSync. Simply follow the instructions that follow through the links to register, provide information on certifications, select types of opportunities your company is interested in being notified about, etc.

A screenshot of a web browser window titled "Register With BidSync". The window has a gray title bar with the BidSync logo and "LINKS™" on the left and a close button on the right. The main content area has a white background. At the top center, it says "Register With BidSync" in bold. Below that is the BidSync logo, which is a blue and orange circular icon followed by the text "BIDSYNC". Underneath the logo, there are two columns of text. The left column is titled "Add BidSync Account" and contains an orange button with the text "Register with BidSync". Below the button is a checkbox with the text "I Agree to the BidSync Terms & Conditions". The right column is titled "Already have a BidSync Account?" and contains the text "Link my account to BidSync." followed by a "Username" field with the text "ghiggins", a "Password" field with a masked password "*****", a "Forgot Password" link, and an orange button with the text "Link Account".

Maintaining PHLContracts Vendor Information

Maintaining Emergency Vendor Information

Vendors who anticipate providing product and services on an emergency basis should complete the Emergency Supplier fields:

- Emergency Supplier check button (Yes or No – default)
- Emergency Phone Number*
- Emergency Contact Name*
- Emergency Email*
- Emergency Info Comment

Note: Fields which are required if 'Emergency Supplier' is checked (Yes) are identified with an asterisk

Emergency Supplier information may be added/revised at any time by the Seller Administrator.

Maintain General Organization Information

Vendor ID: **V00002001**
Company Name*: ABC Supply Vendor Legal Name*: ABC Supply
DBA for Vendor:
Tax ID #*: Country Code for Tax ID*: US - United States of America

Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)?
 EIN SSN

Incorporation Details: State: Year of Incorporation: 0
Business Description: n/a
Preferred Delivery Method: Email
Vendor Email: ABCSupply99@att.net
Vendor Fax:

Emergency Supplier:
 Yes No

Emergency Phone*: Ext.:
Emergency Contact Name*:
Emergency Email*:
Emergency Info Comment:

Maintaining PHLContracts Vendor Information

Adding & Maintaining Attachments to Vendor Profile

Jack can add forms and attachments to ABC Supply's company profile. Use of forms is explained in another User Guide. Examples of attachments include scanned copies of signed documents, certificates, and licenses. The process of uploading attachments is intuitive. All common file types may be uploaded as attachments.

When attachments are added to your vendor profile, you may choose to make certain files confidential. When you make an attachment confidential, it may only be viewed and used by City personnel.

Based on the nature of business that a vendor does with the City, certain attachments are required to be added to a vendor's profile. However, all vendors using PHLContracts.phila.gov, must complete and submit the [Consent and Authorization Agreement](#).

When finished, Jack clicks on the **Save & Exit** button to return to the previous option menu.

Adding & Maintaining Company Addresses

PHLContracts allows vendors to add and maintain three types of addresses:

1. General/Corporate Mailing Address (only one may be specified)
2. Remit Addresses (for payments to the vendor from the City)
3. Sales Addresses (for shipment of documents to vendors during the bidding process, etc.)

Maintaining PHLContracts Vendor Information

To add or modify an existing address, follow the steps below. From the main maintenance page, click on **Maintain Addresses**.

Maintain Organization Information for: ABC Supply

Maintain General Organization Information
This section is used for maintaining general organization information.

Maintain Addresses
This section is used to maintain addresses.

Maintain Commodity Codes & Services
This section is used to maintain commodity codes and services.

Maintain Regions
This section is used to maintain regions.

Maintain Terms and Categories
This section is used to maintain terms and categories.

Maintain Quote Attachment Repository
This section is used to maintain files in the quote attachment repository.

Credit Memo List
This section is used to view credit memos.

When you select the **Maintain Addresses** menu option, a list of your company's current addresses will be displayed (both active and inactive addresses are shown).

Maintain Addresses for: ABC Supply

Name ↕	Address Type	Address Information	Status	Default for Type
General	General/Corporate Mailing Address	Jack Lantern 101 Oak Street Oakton, VA 22804 US Email: ABCSUPPLY@ATT.NET Phone: (703)555-5555	Active	Yes
ABC Supply Business Office	Remit Address	B. Long Fellows 88 Gentle Street Denton, VA 22142 US Email: blongfellow@att.net Phone: (703)555-5555	Active	Yes

You can select one of the existing addresses to review, revise, or inactivate by clicking on the Address Name, or select the **Add Another Address** button to create a new address.

Vendors may have multiple Remit and Sales Addresses. If a vendor has more than one active address for any type, one of those addresses should be selected as 'Default'.

Maintaining PHLContracts Vendor Information

Below is an example of the page provided for entering a new address. You would select the Address Type (Sales or Remit) and enter the required information for this address. Note that the current default address for the Remit Address type is listed. You can choose to retain this as the default address for this type or set the new address as the default type.

Address Book - ABC Supply

Enter a New Address

Address Type: Remit Address ▾

Name this Address*:

Contact Name*:

Address Line 1*:

Address Line 2:

Address Line 3:

Address Line 4:

Country*: US - United States of America ▾

City*: State/Province*:

ZIP*: County:

Phone*: Ext:

Toll Free: Mobile:

Fax: Email*:

Id: 0 Alternate Id:

Status: Active ▾ Web Address:

Default address for this address type
Current Default Address:
B. Long Fellows
88 Gentle Street
Denton, VA 22142
US
Email: blongfellow@att.net
Phone: (703)555-5555

(Begin with http:// or https://)

The list of ABC Supply's addresses now reflects a new sales address. We did not have to designate this sales address as the primary remit address because it is the only sales address specified for ABC Supply.

Click the **Add Another Address** button to add another address, or click **Exit** if you have completed all address changes

Maintaining PHLContracts Vendor Information

Maintaining Categories & Certification Information

Vendor Category and Certification information is important to the City and to Vendors because it specifies characteristics about the vendor which are used to determine eligibility for certain types of procurements or purchases. As you will see in the table below, updates to most of the vendor categories are restricted to City of Philadelphia Vendor Administrators (Procurement Department personnel). However, vendors are encouraged to input information on certain categories and their related certifications.

The following table presents the vendor categories currently in use:

Vendor Category	Response Required	Certification-Enabled	Restrict to Vendor Admin
Consent and Authorization Agreement Confirmation	Yes	No	No
Consent and Authorization Agreement Received	No	No	Yes
Minority, Woman, or Disabled Vendor - Self-reported	No	No	No
Small Business Entity (SBE)	No	No	No
Commercial Activity License (CAL)	No	Yes	Yes
W9 on File	No	No	Yes
Annual Bid Security Fee (SS&E)	No	No	Yes
Minority Business Enterprise (MBE)	No	No	Yes
Women Business Enterprise (WBE)	No	No	Yes
Minority/Women Business Enterprise (MWBE)	No	No	Yes
Disabled Business Enterprise (DSBE)	No	No	Yes
Disadvantaged Business Enterprise (DBE)	No	No	Yes
Local Business Entity (LBE)	No	No	Yes
Slavery Affidavit (SA)	No	No	Yes
Contractor's License (CL)	No	Yes	Yes
Demolition License (DL)	No	Yes	Yes
Demo Annual Processing Fee (DAP)	No	No	Yes
OSHA 30 (O30)	No	Yes	Yes
Audited Financial Statements (AFS)	No	No	Yes

Response Required: Some response must be entered to complete this page of the registration.

For example, the “Consent and Authorization Agreement Confirmation” category is a required field. Upon selecting “Yes” the Seller Administrator agrees to upload the completed Agreement form to the organization’s profile. The Agreement can also be submitted as an attachment to the first quote submitted by a vendor in PHLContracts.

Maintaining PHLContracts Vendor Information

Failure to complete, sign, and submit the Consent and Authorization Agreement (“Agreement”) will result in any quote submitted by a vendor being deemed non-responsive. The Agreement can be found at www.phila.gov/procurement.

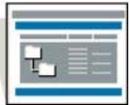
Certification Enabled: Vendor must provide documentation of eligibility for this category designation by a recognized authority.

Restricted to Vendor Administrator: Only the Vendor Administrator can enter the selection (upon receipt of certification documentation or document).

PHLContracts allows vendors the ability to update the values of certain vendor categories and to add supporting certification information to the vendor category.

To view and update vendor categories and certification, click on the **Maintain Terms and Categories** menu option.

Maintain Organization Information for: ABC Supply

<p>Maintain General Organization Information</p>  <p>This section is used for maintaining general organization information.</p>	<p>Maintain Addresses</p>  <p>This section is used to maintain addresses.</p>	<p>Maintain Commodity Codes & Services</p>  <p>This section is used to maintain commodity codes and services.</p>	
<p>Maintain Regions</p>  <p>This section is used to maintain regions.</p>	<p>Maintain Terms and Categories</p>  <p>This section is used to maintain terms and categories.</p>	<p>Maintain Quote Attachment Repository</p>  <p>This section is used to maintain files in the quote attachment repository.</p>	<p>Credit Memo List</p>  <p>This section is used to view credit memos.</p>

When you enter the page, review all the values on your company’s profile. If you need to modify a value (e.g. Yes), you can simply click the check box. If you determine that a value on your profile is incorrect and you cannot edit it, contact Procurement Customer Service at (215) 686-4755 / (215) 686-4720 or PHLContracts@phila.gov for assistance.

Maintaining PHLContracts Vendor Information

For certain vendor categories (e.g., Small Business Entity), the Seller Administrator should add related certification information (e.g., a license or certification from an authorized organization). If a category is shown with an **Add Certification** option, click the link and enter the appropriate information on the certification (e.g. licensing information).

Category: Small Business Entity (SBE)

Description: Certified Small Business Vendor

Please select at most one category value

Select

Yes [Add Certification](#)

Notes:

A typical certification will look like this when the link is clicked.

Add Vendor Certification - ABC Supply

Vendor ID	V00002001
Category	14
Category Type	Yes
Certification Source	U.S. Small Business Administration ▼
Certification ID *	<input type="text"/>
Effective Date (MM/DD/YYYY) *	<input type="text"/> 
Expiration Date (MM/DD/YYYY)	<input type="text"/> 
Certification Status	Active ▼
Certification Description	<input type="text"/>

Based on the entity that issued the Certification, use the scroll down menu to select the appropriate source (e.g., U.S. Small Business Administration). Then input the ID of the Certification. In most cases, this will be a license number, certification, or authorization tracking number issued by the certifying agency.

Maintaining PHLContracts Vendor Information

Finally input the beginning (effective) and end (expiration) date of the certification. If the certification does not have an end date, input 1/1/2025.

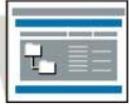
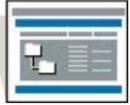
Once you have completed inputting information on the certification, click **Save & Exit**. Now this certification information will be reflected under the related category.

You may also want to provide documentation that substantiates the certification information on your company profile. To add a copy of a license, certification from an authorized organization (e.g., U.S. Small Business Administration), or other supporting documentation, navigate to the **Maintain General Organization Information** page and upload the Attachments there.

Maintaining PHLContracts Vendor Information

Maintaining Commodity & Service Codes

Maintain Organization Information for: ABC Supply

<p>Maintain General Organization Information</p>  <p>This section is used for maintaining general organization information.</p>	<p>Maintain Addresses</p>  <p>This section is used to maintain addresses.</p>	<p>Maintain Commodity Codes & Services</p>  <p>This section is used to maintain commodity codes and services.</p>	
<p>Maintain Regions</p>  <p>This section is used to maintain regions.</p>	<p>Maintain Terms and Categories</p>  <p>This section is used to maintain terms and categories.</p>	<p>Maintain Quote Attachment Repository</p>  <p>This section is used to maintain files in the quote attachment repository.</p>	<p>Credit Memo List</p>  <p>This section is used to view credit memos.</p>

Select the **Maintain Commodity Codes & Services** menu option to receive a list of your organization's current Commodity Code selections. Another option is to display inactive Commodity Codes).

Commodity Code Maintenance Home Page for: ABC Supply

Maintain Commodity Codes
This section is used to add or remove commodity codes.

Display Inactive Commodity Code
This section is used to display inactive commodity codes.

Exit

Maintaining PHLContracts Vendor Information

The current list of ABC Supply's selected Commodity Codes is displayed as follows.

Commodity Code and Service Codes			
Current Codes - ABC Supply			
Deactivate	Code	Description	Date Added
<input type="checkbox"/>	031-06	Air Conditioning and Heating: Central Units, and Parts and Accessories Not Individually Itemized	09/26/2016
<input type="checkbox"/>	031-07	Air Circulation Equipment (Not Otherwise Classified)	09/26/2016
<input type="checkbox"/>	031-08	Air Curtains	09/26/2016
<input type="checkbox"/>	031-09	Air Flow Meters	09/26/2016

Jack can deactivate codes from this list by checking the **Deactivate** box preceding the line and clicking the **Deactivate Selected Items** button.

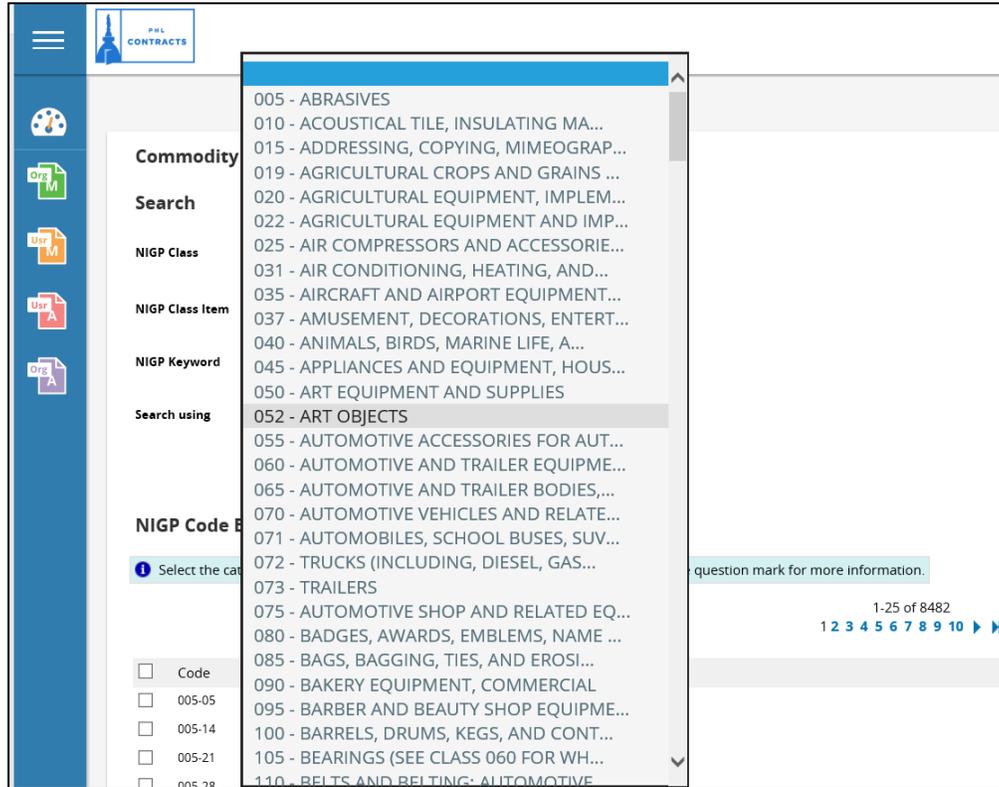
Jack can add additional codes by clicking the **Add Additional Codes** button.

The process for adding additional codes is the same as explained for initial registration. There are three techniques for selecting and adding codes:

Maintaining PHLContracts Vendor Information

1. Select Individual NIGP Class and Item Combinations

The first method is to select individual NIGP Classes and Class Items using the Class and Item drop down lists. Select Class Code 052 'Art Objects' from the NIGP Class drop down list.



Maintaining PHLContracts Vendor Information

Then, select the NIGP Class Item 76 'Recycled Art Objects' from that drop-down list because ABC Supply supplies recycled arts to institutions and governments.

The screenshot shows a web form titled "Commodity Code and Service Codes - ABC Supply". It has several input fields: "Search", "NIGP Class", "NIGP Class Item", "NIGP Keyword", "Search using", and "NIGP Code B". The "NIGP Class Item" dropdown menu is open, displaying a list of categories. The category "76 - Recycled Art Objects" is highlighted. To the left of the dropdown, there are checkboxes for selecting codes: "Code", "052-02", "052-08", "052-12", "052-14", and "052-24".

Field	Value
Search	
NIGP Class	
NIGP Class Item	02 - Antiques 08 - Ceramic and Glass Objects (Sha... 12 - Collectibles, Museum Pieces, e... 14 - Cut-Outs, Life Size/Oversized,... 16 - Drawings (Originals) (Charcoal... 24 - Engravings, Etchings, Linocuts... 32 - Fabric Designs (Silk Screen, e... 40 - Masks 48 - Mixed Media 50 - Murals, Canvas 51 - Murals, Clay 52 - Murals, Glass 53 - Murals, Photographic: Kiln Fir... 54 - Murals: Stone, Tile 55 - Murals, Wall 56 - Paintings (Originals) (Oil, Ac... 64 - Photographs 72 - Posters and Prints (Not Origin... 76 - Recycled Art Objects 80 - Sculptures: Marble, Metal, Pla... 88 - Wood Carvings and Woodcuts
NIGP Keyword	
Search using	
NIGP Code B	
<input type="checkbox"/> Code	
<input type="checkbox"/> 052-02	
<input type="checkbox"/> 052-08	
<input type="checkbox"/> 052-12	
<input type="checkbox"/> 052-14	
<input type="checkbox"/> 052-24	

Save this specific product/service to ABC Supply's profile by checking the box preceding it and pressing the **Save and Add More** button. Repeat this process, selecting individual codes or selecting multiple codes at a time.

Maintaining PHLContracts Vendor Information

Commodity Code and Service Codes - ABC Supply

Search

NIGP Class: 052 - ART OBJECTS

NIGP Class Item: 76 - Recycled Art Objects

NIGP Keyword:

Search using: ALL of the criteria

Search

NIGP Code Browse Show Categories

i Select the category that best describes the product and service you offer. Click on the question mark for more information.

<input type="checkbox"/>	Code	Description
<input checked="" type="checkbox"/>	052-76	Recycled Art Objects

Save Save and Add More

Maintaining PHLContracts Vendor Information

2. Select from a NIGP Class List

In the second method, you select the NIGP Class 052 – Art Objects, which returns a list of all NIGP Class Items within that class. You can select multiple items or all items within that class list by checking the boxes.

These selections must be saved before you go on to identify more codes (**Save and Add More**).

Commodity Code and Service Codes - ABC Supply

Search

NIGP Class 052 - ART OBJECTS ▾

NIGP Class Item ▾

NIGP Keyword

Search using ALL of the criteria ▾

NIGP Code Browse

i Select the category that best describes the product and service you offer. Click on the question mark for more information.

<input type="checkbox"/>	Code	Description
<input checked="" type="checkbox"/>	052-02	Antiques
<input checked="" type="checkbox"/>	052-08	Ceramic and Glass Objects (Shadow Boxes, Stained Glass, etc.)
<input checked="" type="checkbox"/>	052-12	Collectibles, Museum Pieces, etc. (Not Otherwise Classified)
<input checked="" type="checkbox"/>	052-14	Cut-Outs, Life Size/Oversized, of Animals and Symbols
<input checked="" type="checkbox"/>	052-24	Engravings, Etchings, Linocuts, Lithographs, Scrolls, Serigraphs, and Similar Reproductions
<input type="checkbox"/>	052-32	Fabric Designs (Silk Screen, etc.)
<input type="checkbox"/>	052-40	Masks

Maintaining PHLContracts Vendor Information

3. Use NIGP Keyword Search

The third method available to identify NIGP codes is to search by NIGP Keyword. Enter 'Recycled Art' in the NIGP Keyword field then click the **Search** button.

Commodity Code and Service Codes - ABC Supply

Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

NIGP Code Browse

i Select the category that best describes the product and service you offer. Click on the question mark for more information.

<input type="checkbox"/>	Code	Description
<input type="checkbox"/>	050-69	Recycled Art Equipment and Supplies

A list of NIGP Commodity codes (5-digit code and description) containing that phrase is displayed. Check the box preceding them, then click either the **Save & Add More** or the **Save & Edit** button.

When he is finished updating ABC Supply's Commodity Code selections, Jack clicks on the **Save & Exit** button to return to the previous option menu.

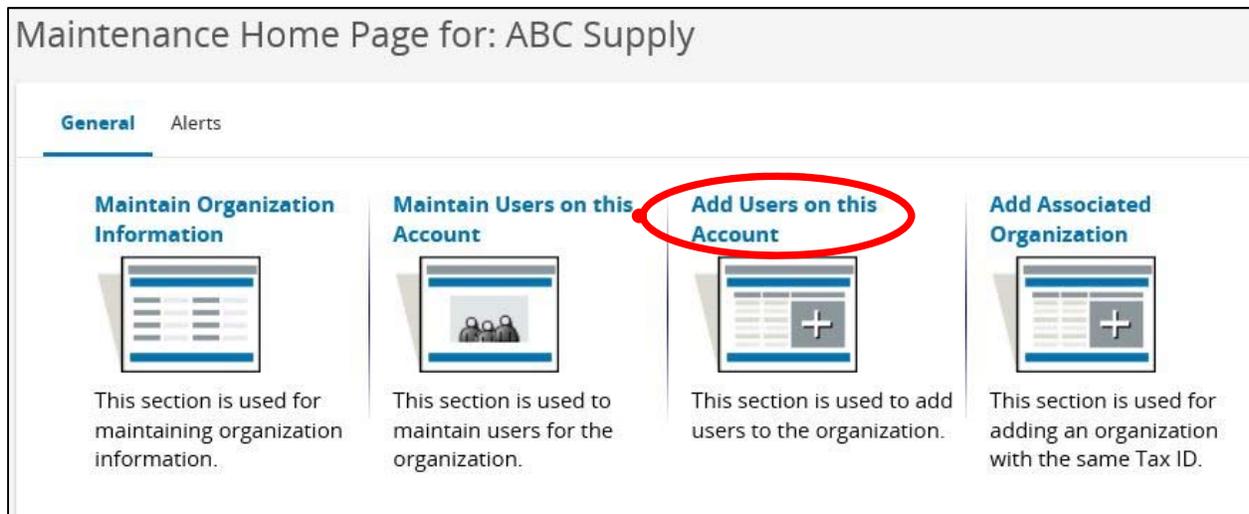
Adding System Users

Seller Administrators have the ability in PHLContracts to add new users to their company's account. Typically, Seller Administrators add Sales representatives to their company account so that they can view Bids, respond to Bids, and view and receive contracts and Purchase Orders. Please note: Only provide access to users who are authorized to submit quotes on your company's behalf.

Seller Administrators should follow these steps to add new system users:

Step 1. Select Add Users on This Account

From this menu, select the **Add Users on this Account** menu option.



Step 2. Enter and Save User Information

A page containing general information fields for a new user is displayed. The required fields are:

- First Name*
- Last Name*
- Job Title*
- Phone Number*
- Email Address*
- Login ID*
- Password* / Confirm Password* (**this is the temporary password**)
- Login Question* (select from dropdown list)
- Login Answer*
- Role(s)* (in this example the new users is being assigned the Seller role)

Maintaining PHLContracts Vendor Information

Note: Fields highlighted with an asterisk are required

Login IDs must be from 6 to 100 characters long and are not case sensitive.

New Vendor User for ABC Supply

Salutation	Mr. ▾		
First Name*	Donald	Last Name*	Leeds
Job Title*	Sales Manager	Department:	Sales
Phone*	703 555 5555 -	Email*	dleeds@att.net
Login ID*	DLEEDS	Status*	Active ▾
New Password*	Confirm Password*
Login Question*	What is your favorite food? ▾	Login Answer*	Pizza

Roles

<input checked="" type="checkbox"/> Seller	<input type="checkbox"/> Can Create Blanket Change Orders
<input type="checkbox"/> Seller Administrator	<input type="checkbox"/> Can Upload Contract

Save & Exit Reset Cancel & Exit

The temporary password **buysp55d!** should be entered in both the Password and Confirm Password fields.

Once you have entered and reviewed the user information, click the **Save & Exit** button to complete the transaction.

Step 3. Advise New User of their Login Information

Donald Leeds should be notified and given the temporary password to use to log in. He will be prompted to select a new password upon log in.

Passwords must conform to the following format and are case sensitive:

- Must be between 6 and 15 characters
- Must include both alpha and numeric characters
- Must include at least one special character (e.g., #, @, %, \$, !)

Maintaining PHLContracts Vendor Information

Additional requirements for passwords:

- Passwords must be changed every 180 days
- A password cannot be reused until 5 other passwords have been used
- After 4 unsuccessful attempts to login, the account will be locked

Resetting User Passwords

Seller Administrators should follow these steps to reset one of their organization's users' password.

Step 1. Select Maintain Users on This Account

From this menu, select the **Maintain Users on this Account** menu option.

Maintenance Home Page for: ABC Supply

General Alerts

Maintain Organization Information
This section is used for maintaining organization information.

Maintain Users on this Account
This section is used to maintain users for the organization.

Add Users on this Account
This section is used to add users to the organization.

Add Associated Organization
This section is used for adding an organization with the same Tax ID.

Maintaining PHLContracts Vendor Information

Step 2. Select the User Record Maintain

A page listing ABC Supply's users is displayed from which Jack would select Angula Malone (the person who needs their password reset).

User Maintenance for: ABC Supply

Search Using: ALL of the criteria

Search Fields:

First Name <input type="text"/>	Last Name <input type="text"/>
Login ID <input type="text"/>	Status <input type="button" value="v"/>
User Role <input type="text" value="Seller"/> <input type="text" value="Seller"/>	

Browse by: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)
[0](#) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#)

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[1](#) [2](#)

Login ID	First Name	Last Name	Status	Role(s)	Organization
A.CAMPFIELD_VENDOR	Aycha	Campfield	Active	Seller Seller Administrator	
ANGULA.TEST	Angula	Malone	Active	Seller Seller Administrator	

Maintaining PHLContracts Vendor Information

Step 3. Edit the User's Record

The User Maintenance page for the selected user is displayed. Any of the user information can be changed, but in this example, we wish to reset the password.

A temporary password is entered in the New Password and Confirm Password fields. (buysp55d!) Users will be prompted to select a new password the next time they log on.

User Maintenance: Angula Malone - ABC Supply

Salutation	<input type="text"/>		
First Name*	<input type="text" value="Angula"/>	Last Name*	<input type="text" value="Malone"/>
Job Title*	<input type="text" value="Sales Managaer"/>	Department:	<input type="text" value="Sales"/>
Phone*	<input type="text" value="703"/> <input type="text" value="555"/> <input type="text" value="5555"/> - <input type="text"/>	Email*	<input type="text" value="amalone@att.net"/> <input type="button" value="x"/>
Login ID	<input type="text" value="ANGULA.TEST"/>	Status*	<input type="text" value="Active"/> <input type="button" value="v"/>
New Password*	<input type="password" value="....."/>	Confirm Password*	<input type="password" value="....."/>
Login Question*	<input type="text" value="What is your favorite food?"/> <input type="button" value="v"/>	Login Answer*	<input type="text" value="Pizza"/>

Roles

<input checked="" type="checkbox"/> Seller	<input type="checkbox"/> Can Create Blanket Change Orders
<input type="checkbox"/> Seller Administrator	<input type="checkbox"/> Can Upload Contract

The user information fields which can be updated using the User Maintenance page are:

- First Name*
- Last Name*
- Job Title*
- Phone Number*
- Email Address*
- Password * / Confirm Password* (**this is the temporary password**)
- Login Question* (select from dropdown list)
- Login Answer*
- Role(s)*

Maintaining PHLContracts Vendor Information

Note 1: Fields highlighted with an asterisk are required

Note 2: The LOGIN ID of the user may not be edited once the user account is established.

Once you have entered and reviewed the user information, click the **Save & Exit** button to complete the transaction. You will return to the User Listing.

Step 4. Advise User of their Login Information

The user should be notified and given the temporary password to use to log in. The user will be prompted to select a new password upon log in.

Passwords must conform to the following format and are case sensitive:

- Must be between 6 and 15 characters
- Must include both alpha and numeric characters
- Must include at least one special character (e.g., #, @, %, \$, !)

Additional requirements for passwords:

- Passwords must be changed every 180 days
- A password cannot be reused until 5 other passwords have been used
- After 4 unsuccessful attempts to login, the account will be locked

Set-Up Associated Organizations

For vendors who have associated organizations, such as Doing Business As (DBA) or multiple locations sharing the same central ownership (legal entity), PHLContracts provides an option on the Seller Administrator Home page which allows them to request the DBA vendor to register and be associated with the “parent” vendor profile. Associated businesses can participate in procurement transactions independently but share common Tax ID and remit addresses. **DBA vendors are required to submit their own Consent and Authorization Agreement.**

Maintenance Home Page for: ABC Supply

General Alerts

<p>Maintain Organization Information</p>  <p>This section is used for maintaining organization information.</p>	<p>Maintain Users on this Account</p>  <p>This section is used to maintain users for the organization.</p>	<p>Add Users on this Account</p>  <p>This section is used to add users to the organization.</p>	<p>Add Associated Organization</p>  <p>This section is used for adding an organization with the same Tax ID.</p>
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Maintaining PHLContracts Vendor Information

When the Seller Administrator clicks on the **Add Associated Organization** option, an email screen appears. The Seller Administrator enters the email address for the DBA vendor and a message in the Text field onscreen.

Send Mail

i Use the email form below to request that the associated organizations register in BSO. The link provided below must be used in order to register with the same tax ID.

To*:

CC:

Send confirmation email to jlantern@att.net

From:

Subject*:

Text:

The **To:** email address will receive an email which looks like the following:

From: PHLContractsSystem@phila.gov

Date: Fri, Jul 12, 2019 at 12:20 PM

Subject: ABC Supply requests you register with PHLContracts.

Please register a second branch of your organization. Use the link below to register with the City of Philadelphia, Procurement Department's eProcurement system using the same tax ID as ABC Supply.

http://phlcontractsphila.gov/bso/external/vendor/regCompanyInfo.sdo?reg_code=UJ9Hk7NusfOq0PfoxFA-KH0XKOhNxqIPt1yBVMaaEmi9wwty5qWa93RpPGufGTtZGmlsOzSbH2iwPAEBDfU&mode=init_new_vendor

Use this link to log on to PHLContracts Online: <http://phlcontracts.phila.gov>.

Maintaining PHLContracts Vendor Information

When the second business organization follows the web link provided, they will complete the registration process and be automatically linked to the 'inviting' organization. The Tax ID of the associated organization should not be edited by the user.

Maintain General Organization Information

Vendor ID:	V00005385	
Alternate ID:		
Company Name*:	ABC Supply - South Florida	Vendor Legal Name*:
	ABC Supply	
DBA for Vendor:	V00002001	
Status:	Active	Status Change Reason:
Tax ID #*:	Country Code for Tax ID*:
	Show <input type="checkbox"/>	US - United States of America
Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)?		
<input type="radio"/> EIN <input checked="" type="radio"/> SSN		
Incorporation Details:	State:	Year of Incorporation: 0
Business Description:	Plumbing and Electrical Supplies	
Preferred Delivery Method:	Email	

The page above shows the General Organization Information City of Philadelphia staff see for the DBA vendor. The information now includes the **DBA of Vendor** field, linking this vendor record to the main vendor record.

Maintaining PHLContracts Vendor Information

If City procurement staff use the Search option of the Vendor Lookup page and enter the Tax ID#, both businesses will appear in the list returned.

Maintain Vendors

Search using: ALL of the criteria Status: Any

Search Fields:

Vendor Name	Vendor Legal Name
Vendor Tax ID	Vendor ID
Alternate Id	Class Code
Class Item Code	NIGP Keyword
Integration ID	

Reference Vendor Pay-Only Vendor

Browse By: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Find It Clear

Results

Vendor ID	Name	Tax Id	Alternate Id	Reference Vendor	Status
V00002001	ABC Supply	*****3050	32023723	No	Active
V00005385	ABC Supply - South Florida	*****3050		No	Active

A 'Best Practice' to follow when establishing Associated Businesses is to use the EXACT same business name and append that name with a qualifier, such as shown in the example above. Good qualifiers include:

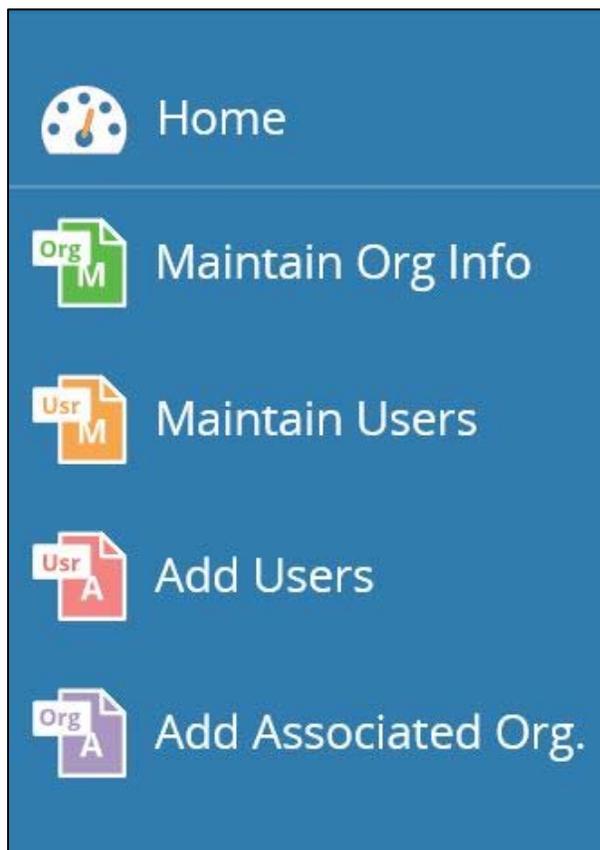
- City name example: NAPA Auto Parts – Flint Ridge Store
- Region example: NAPA Auto Parts – East Store
- Branch number example: NAPA Auto Parts – Store 112

Appendix A – PHLContracts Navigation Overview

Navigation Bars and Header Icons

The left navigation bar and header icons allow you to move within the application and give you access to open and closed bids, purchase orders, contracts, quotes and account maintenance. As you travel through the application, you will always see this navigation and header icons at the left and top of each page.

Left Side Navigation (Shown as Expanded and Unexpanded)



Maintaining PHLContracts Vendor Information

Header Icons

Icon	Description
	Advanced Search and Reports
	About BuySpeed, User Manual, Customer Service, NIGP Code Browse
	My Account – View and edit your account information, select your User Role, and Logout

NIGP Code Browse

The NIGP Code Browse link found in the Help icon  dropdown allows you to search commodity codes by Class and Class Item codes set up and maintained in your PHLContracts database.

My Account

The My Account link found in the in the User icon  dropdown allows you to keep your individual user profile current. Modifying your personal login information does not change your company's general information with the agency. To maintain the overall organization information with an agency, you must have the role of Seller Administrator and must use the Maintain Users functions.

Use the **Edit** button to update your personal information. You can change your title, contact information, as well as your login password and login security question and answer. You may also select the default tab that you wish to begin on once you log in and view your home page. You must enter your password for the changes to become effective.

NOTE: This is where you can change your PHLContracts password.

Red and Yellow Error Messages

PHLContracts has developed a series of messages that will display when data inside your document is not correct including when criteria are not met or when required fields are not properly filled out. Messages in yellow are warnings that do not require any intervention. The document can continue the message is strictly for your information. Pop-up messages will also appear when required fields were left blank or invalid data was entered.

Appendix B – Frequently Asked Questions

The follow are some typical questions often asked by vendors.

Can a user change his/her password?

Yes. Any currently logged in user can change his/her password by clicking on the **My**

Account link found in the User icon  dropdown. Click on the **Edit** Button next to the **My Information** heading. The user can edit general profile information as well as select a new password. Note: The current password must be entered at the bottom of the page.

Can a vendor change his/her login ID? / How can a vendor change his/her Login ID?

A vendor (Seller Administrator) can select the login ID for new user account when they originally create it. The login ID cannot be changed after that point. If you are unhappy with your login, the Seller Administrator can create a new Seller or Seller Administrator account and you can start using it (previous login ID can be inactivated).

Can a vendor have more than one Seller Administrator?

Yes. As many as they want but they must always have one active Seller Administrator.

What if I forget my login ID or Password?

If you are a Seller, contact your organization's Seller Administrator. They can advise what your login ID is and can assign you a temporary password so you can login and assign a new password.

If you are a Seller Administrator (or are a Seller and cannot contact your Seller Administrator) you can contact the City Procurement Customer Service Representative and upon confirmation of your identity, can have a temporary password assigned so you can log in.

What are NIGP Commodity Codes and why is the City using them?

The NIGP Commodity/Services Code is an acronym for the National Institute of Governmental Purchasings' Commodity/Services Code. The **NIGP Code** is a coding taxonomy used primarily to classify products and services procured by state and local governments in North America.

There are two parts to the 'why' question. First, why employ a taxonomy at all? The City's objective is to improve the matching of possible suppliers to product and service requirements. Allowing vendors to specify the products and services they provide via 'codes' allows the City buyers to identify possible suppliers of specific requirements more efficiently. The City is using NIGP because it is a leading taxonomy in use by governments. Vendors serving other state and municipal agencies may already somewhat familiar with NIGP.

Maintaining PHLContracts Vendor Information

What if a vendor registers but doesn't select a Commodity Code?

A vendor's registration is not complete until they have specified at least one select commodity code. Vendors are encouraged to specify several commodity codes to increase their chances of matching items included on a bid.

Why does the system tell me my Login ID or Password is incorrect?

If you use the 'Remember Login / Password' option of your operating system, you may find that it fills in information on the PHLContracts Login Page which does not match your PHLContracts account. You may need to clear out the prefilled information and enter your login ID and password.

Is there a downloadable 'App' available so I can access the system through my smartphone?

No. You do not need to use a downloadable App to access the City procurement system from your tablet or Smartphone. Any device which can access the internet from one of the supported web browsers (MS Internet Explorer, MS Edge, Google Chrome, FireFox, or Apple Safari) can access the system. Key vendor actions such as checking for bids, responding to bids, and viewing message, work well on smaller devices. Other functions requiring file attachments and spreads may require traditional devices.

Will vendors be able to search through all available bids, even if they are not registered? Or have registered but do not match the Commodity Codes of that bid?

Yes. You do not need to be a registered vendor to use the Open Bids Search facility provided on the PHLContracts login page. The URL for this is <https://phlcontracts.phila.gov/bsa/login.sdo>

You must be a registered vendor to be able to respond to open bids.

I completed all the information on the Vendor Information tabs and pressed the Save and Continue Registration buttons along the way, then closed my browser window. None of the information was retained. Why?

It appears that you did not press the Complete Registration button at the bottom of the Summary tab before you closed your browser session. No information is saved in PHLContracts until the Complete Registration button is pressed. The (new) vendor registration sequence is designed to step the vendor through all the tabs, concluding at the Summary tab. The Complete Registration button becomes available only if all required information has been entered. This prevents incomplete vendor records being created.

Maintaining PHLContracts Vendor Information

How will my employees who are Sellers know that the Consent and Authorization to Bid Agreement has been completed and submitted?

It is the responsibility of each registered entity to ensure the Consent and Authorization Agreement (“Agreement”) is uploaded to each of its PHLContracts organizational profile. No quote will be considered for evaluation if the responding organization’s Agreement is not completed and uploaded to its profile before any bid closing.

Must the Consent and Authorization to Bid Agreement (“Agreement”) be submitted with my Quote too?

*The Agreement must be completed uploaded to your organization’s PHLContracts profile before your first quote is submitted. If it is not completed and uploaded to your organization’s profile before your first quote is submitted, the Agreement **must** be completed and uploaded as an attachment to your first quote. After that initial upload of the Agreement, your organization will no longer need to submit the Agreement unless directed otherwise by the City.*

If I submit the Agreement with my first quote, how will it be uploaded to my organization’s profile?

Your organization’s Seller Administrator should—as soon as possible—also attach a scan of the fully executed Agreement, including any attachments, to the vendor’s profile in PHLContracts. If you have questions/concerns, please contact Procurement Customer Service at (215) 686-4755 / (215) 686-4720 or by email at PHLContracts@phila.gov.