

## Quick-Start PlanetBids Registration Instructions

To do business with Castaic Lake Water Agency (Agency), register with PlanetBids. This will also add you to the Agency's Vendor List for goods and services. Registered vendors can:

- Be notified of bid/contract opportunities
- Download bid documents
- Keep track of bidding process
- Receive other Agency communications
- Maintain online profiles 24/7

The instructions below provide a quick-start guide to registration. For more detailed instructions, download the "PlanetBids Online Users Guide" at <https://clwa.org/doing-business>. For additional assistance, click the red "?" (question mark) in the PlanetBids interface as illustrated in the screenshot below, or you may contact PlanetBids support online at <http://home.planetbids.com/tech-support>, or via telephone at (818) 992-1771.



### TO GET STARTED:

- Go to <https://clwa.org/doing-business>
- Click on the "New Vendor Registration" as indicated below



Next, complete the information on each tab, as shown below.

## COMPANY INFO

- Fields marked with a red asterisk are mandatory
- You must keep company and contact information up-to-date at all times.

The screenshot shows the 'Company Info' tab of the 'Vendor Profile New Registration' form. The form is divided into several sections: 'User Authentication' with fields for 'User Name' and 'Password'; 'Company' with fields for 'Business Type', 'Company Name', 'IRS Reporting Name', 'Doing Business As', 'FEI/Tax ID Number', 'DUNS', 'Address', 'City', 'State' (set to California), 'Country' (set to United States), 'Zip', 'Website', and 'Principal Owner/CEO Name' (with sub-fields for Title, Email, Phone, and Fax); 'Main Contact' with fields for Name, Title, Email, Alternate Email, Phone (with ext. field), Toll Free, Mobile, and Fax; and 'Referral' with a dropdown menu for 'How did you hear about registering with Castaic Lake Water Agency?'.

Company Info tab:

- Select a user name and password (username/password must be between 6-10 characters).
- Complete company information.
- Enter contact information (verify email address is entered correctly).
- Also enter an alternate email. Alternate emails are secondary emails that get copied on vendor registration confirmation, user name and password requests, vendor profile edits and new bid alert email messages.

## ADDITIONAL INFORMATION

The screenshot shows the 'Additional Addresses' tab of the 'Vendor Profile New Registration' form. The form is currently empty, showing only the tab header and a few navigation icons.

**Additional Addresses tab:**

If your company has multiple addresses you may enter them here.

## CLASSIFICATIONS/LICENSES

The screenshot shows the 'Classifications/Licenses' tab of the 'Vendor Profile New Registration' form. It contains several sections: 'Classifications' with checkboxes for various business types (e.g., CA Dept. of General Services Small Business (DGS), Disabled Veteran Business Enterprise, Disadvantaged Business Enterprise, Federal SBA Small Disadvantaged Micro Business, Minority-Owned Business Enterprise, NSF Certified Drinking Water Treatment Chemicals, Registered DIR Public Works Contractor, UL Certified Drinking Water Treatment Chemicals, Very Small Business Enterprise, Woman-Owned Business Enterprise) and corresponding reference number and expiration date fields; 'Demographics' with a 'Gender' dropdown; 'Contractor Licenses' with fields for 'Licenses (none)', 'License #', and 'Exp. Date'; and 'Residency and License Information' with fields for 'City of Santa Clara Business License #' and 'Exp. Date'.

**Classification/Licenses tab:**

- Select the classifications that are applicable to the business owner.
- Select all contractor licenses that apply. License number and expiration date are mandatory if a license type is selected.

## OTHER BUSINESS INFO

The screenshot shows the 'Other Business Info' tab of a 'Vendor Profile' registration form. The form includes several input fields and radio button options:

- Payment Terms
- Gross Receipts in Millions
- In Business Since
- Number of Full-Time Employees
- Number of Part-Time Employees
- Has your company ever failed to complete a contract? (YES/NO)
- Has any officer or partner ever worked as an officer or partner for another company which has failed to complete a contract within the last 5 years? (YES/NO)
- Bank References (bank, branch, address)
- Name and address of firm that prepares financial statements and date thereof
- Does your business engage in investment activities in Iran? (PCC 2200-8 Iran Contracting Act) (YES/NO)

### Other Business Info tab

Additional information

## CATEGORY / DESCRIPTION

You can click to view a current list of commodity codes. You can select up to 20 categories. Please be sure to keep selections up-to-date.

The screenshot shows the 'Choose Categories' dialog box. It features a search box at the top with '489 results' and a table of categories. The table has columns for '#', 'Category', and 'Add'. The categories listed include:

#	Category
221310	Water Supply and Irrigation Systems
221330	Steam and Air-Conditioning Supply
236210	Industrial Building Construction
236220	Commercial and Institutional Building Construction
237110	Water and Sewer Line and Related Structures
237990	Other Heavy and Civil Engineering Construction
238110	Poured Concrete Foundation and Structure
238120	Structural Steel and Precast Concrete Contractors
238130	Framing Contractors
238140	Masonry Contractors
238150	Glass and Glazing Contractors
238160	Roofing Contractors
238190	Other Foundation, Structure, and Building Exterior

Buttons for 'Add', 'Remove', 'Cancel', and 'Done' are visible at the bottom of the dialog.

### Category/Description tab:

➤ Categories: Bid alert notifications are sent based on the categories selected.

To select the categories applicable to your business:

- Click **“ADD”** button
- Select categories. You can search for a category in numeric or alphabetical order, sort by clicking on the column header or you can type in a key word or code in the box above to narrow search results.
- Double click on the category you wish to add or click one to select and then click **“ADD”**.
- Click **“DONE”** once you are done selecting categories.

Click on **“Register”** at the bottom of the page when you have completed the registration form.

The screenshot shows the bottom of the registration form. It includes the text 'Castaic Lake Water Agency' and 'PLANETBIDS'. At the bottom right, there are three buttons: 'Report', 'Cancel', and 'Register'. A red arrow points to the 'Register' button.

Next, you should receive an email from PlanetBids as shown on the next page. Be sure to save this important email for future reference. Happy bidding!

## ADDING A VENDOR

*Continued from page 1*

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When a vendor is set up by the Agency, the vendor will receive an email similar to the one shown at right.

This email will be generated if the vendor is set up in the Vendor Management, Contract Management or Insurance Certificate Management modules.

### Sample of Vendor Email

**Received by Vendor from PlanetBids when Vendor is set up by Agency**

From: <[CustomerCare@planetbids.com](mailto:CustomerCare@planetbids.com)>  
Date: Tue, May 24, 2016 at 9:05 AM  
Subject: Vendor Registration  
To: [@gmail.com](mailto:@gmail.com)

*This is an automated email notification. Please do not reply.*

Dear Cell Phones R Us:

**PlanetBids Test Agency** has added your company to their vendor database using PB System™ by PlanetBids.

A temporary unique user name and password has been assigned to your account. You may change your user name or password at any time by logging in and editing your vendor profile at <http://clwa.org/doing-business>

User Name: **pb49472**  
Password: **74439**

Be sure to keep your assigned user name and password in a safe place as you will need it to log in at <http://clwa.org/doing-business> where you can edit your Vendor Profile. You will also need it if you wish to download bid documents and bid electronically from Bid Opportunities.