Region 2 Industry Day
Schedule Input Program (SIP) & eTools for MAS Vendors

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Agenda

- eCommerce Systems & Tools
- Customer Pain Points & Vendor Best Practices
- Catalog Submission & Management (SIP / EDI)
- Purchase Orders & Order Status - PO Portal
- Vendor Support Center
eCommerce Systems & Tools

- **GSA Advantage**: Online shopping and ordering
- **eLibrary**: Market research and contract award information
- **eBuy**: Request for Quote (RFQ) / Request for Proposal (RFP) system
- **Schedule Input Program (SIP)**: Desktop application to submit and update electronic catalogs
- **Purchase Order Portal**: Web application to access purchase orders and provide order status
- **EDI / XML**: Electronic interface to submit catalogs and provide order status
Customer Pain Points

1. Poor Catalog Data: Photos, Descriptions, Prices
2. Cancelled Orders & Poor Communication
3. Lack of Order Status or Shipping Information
Vendor Best Practices

Catalog Data
- Keep your catalog items and prices up to date
- Submit accurate manufacturer names and part numbers
- Submit clear product names and descriptions
- Provide Quality Photos: Products with photos are far more likely to be purchased

Communication & Cancelled Orders
- Respond promptly to customer inquiries
- Do not charge a buyer’s credit card until you know you can ship their order
- Obtain credit card authorization before shipping

Order Status
- Provide order status (mandatory)
- Provide tracking information
Schedules Input Program (SIP)

- Desktop Application provided by GSA to assist contact holders with uploading their electronic catalog to GSA Advantage

- Benefits
  - Free for vendors to use
  - Does not require EDI infrastructure

- Getting Started
  - Register your contract with the Vendor Support Center (VSC) at vsc.gsa.gov
  - Review the ‘Vendor Startup Kit’ and ‘Instructions for Vendors Using SIP’ available at vsc.gsa.gov
Catalog Submission & Management

SIP Training & Documentation

• Sign up for SIP Online Training at https://vsc.gsa.gov/training/

SIP Best Practices

• Use SIP templates and import functionality to input more than 50 products
• Submit ‘change’ files for catalog updates instead of re-submitting entire catalog

Keep Catalogs Up To Date

• GSA Advantage catalogs must be updated or validated at least every two years to remain active in the GSA Advantage and GSA eBuy (the bare minimum)
• Please ensure that your products and services are adequately described and remain current.
SIP - Getting Started

• VSC Website
  • Please make sure your company is registered on the VSC.
  • Download SIP from VSC
SIP - Navigation

Start at Contractor

Work Down
SIP - Contractor Information

Click Edit

Click Save

After finishing - Click to close
SIP - Contract Entry

Click Add

After saving - Click to close
SIP - Manual Product Entry

Click Add/Edit

Pricing Info

Click to save
SIP - Exporting to Excel

Click Export

Click to choose XLS or XLSX

Files will export to this location
### SIP - Exporting to Excel

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SIP Data Entry - Exported Files

- Files will end up in your `C:\SIPV8\Export` folder
- Move these files (IPROD, IPRICE, IPHOTO) to the `C:\SIPV8\Import` Folder
SIP Data Entry - Importing

- Click Import to open Import program
- Complete Steps 4-8
SIP - Uploading & COR Approval

- After the data entry in SIP is completed you need to send it to your Contracting Officer.

- Create catalog files, start the upload process. (Only sends updates)

- Resends entire catalog.
It is always good practice to make a backup after making changes in SIP.
Backups will be automatically made during upload.

Go to Tools > Backup
Will be put into the SIPV8/Backup Folder
SIP - Further Topics

• Price Updates (Permanent & Temporary)
• Options & Accessories
• Environmental and Special Features
• Zone Pricing
Purchase Orders & Order Status

Purchase Order (PO) Portal

- Web application to receive orders and provide order status
- Provides daily summary email of all orders placed

Tips
- You can login to PO Portal on after you receive your first order
- Keep your order status POC email up to date within your catalog submission (SIP or EDI)
- Consider a group email for multiple team members managing incoming orders

Coming Soon: Multi Factor Authentication
- Requires password and second factor (typically code sent via email)
- Same credentials as FAS Sales Reporting Portal (SRP)
- Q1 FY2020
PO Portal - Uploading Status from File

Active Purchase Orders

How to Get Orders
- To view/print orders: select the appropriate POs using check boxes then click "Print POs". You may also click on the PO # to view or print.
- To download orders: select the appropriate POs using check boxes then click "Download POs". You will be prompted to select the desired data format.

How to Send Status
- For entire order: enter status info required below then click "Send Status".
- For lines: Click "Lines" if you need to submit status for individual lines.
- Sending Shipped or Cancelled status moves POs to "Completed POs".
- Status Date cannot be more than 14 days prior to today.

PO # (Click to view/print) | PO Date | Retrieved On | PO ID | Order Status | Status Date | Ship Method | Tracking # | Line Detail
--- | --- | --- | --- | --- | --- | --- | --- | ---
47QDCC2OM05A7 | 10-05-2019 | 10-09-2019 | 27053860 | SH | 10-09-2019 | UPS | Lines
PO Portal - Uploading Status from File

Upload Status From a File
Wednesday, October 9, 2019

Instructions: Follow the steps below to upload your order status from a file. Create your status file so that it conforms to the requirements shown in the template provided. You may submit status by order or by line. Your files may be in .xls or .txt format.

Step 1 - Create status file: A template is provided showing required data elements and formats. Click here to view instructions. Click here to view .xls template.
*Click here to export order data for importing

Step 2 - Import status file: Once you have created your status file, select the file below then click Import Status File. Once imported it is ready to be validated.
Select File: Choose File No file chosen

Step 3 - Validate/Upload status file: Once imported, click on the link below to validate and upload the file. If you have errors in your file, you will receive an error report. Important: the entire file must pass validation for any status updates to be accepted (i.e. all or none). Make corrections to your file then repeat steps 2 and 3. Once your file passes validation, status is uploaded to GSA and PO Portal status is updated.

Validate/Upload File
Export Status For POs

Wednesday, October 9, 2019

Step 1 - Export order data for importing: Rather than creating a file from scratch, you may export active orders to a file, add status information, then import back into the system. Make selections below then click Export. Two export files will be created - one for orders and one for lines. Select one of these files to update with status information, then import at Step 2.

Select file format:
- XLS (MS Excel spreadsheet)
- TXT (Fixed Format Text file)

Select orders: (Click here to select individual orders)
- All active orders
- All active orders having Retrieved Date From: ___________ To: ___________ (ex: 07-31-2008)

Export POs

Go to Step 2
Electronic Data Interchange (EDI)

What is EDI?
- Alternative to SIP and PO Portal to upload catalogs and manage purchase orders
- ‘Computer-to-computer’ exchange of business information using a public standard
- Multiple options and standards available as well as third party and Value Added Networks (VANs) who can assist you

How Does it Work?
- Catalog data is submitted to GSA via EDI transaction set
- First checked for syntax and data content, then provided to Contracting Officer for approval
- Approved data is placed online for customer ordering via GSA Advantage.

To get started, contact the EDI help desk at 703-605-9444
Vendor Support Center (VSC)

Use the VSC as a resource for help and guidance.
Information and instructions on SIP and EDI can be found at https://vsc.gsa.gov/faq/startup-kit.cfm
Sign up for SIP training at https://vsc.gsa.gov/training/

VSC help center
Toll Free: 877-495-4849
vendor.support@gsa.gov
PSA: Keep Contact Info Up to Date

Vendor Support Center (VSC) Account
- Default POC for eBuy and SIP
- Can be updated by contacting the VSC help desk or using the Account Maintenance Tool on the VSC website

GSA Advantage
- Check your GSA Advantage Contractor Information page
- Make updates via SIP or EDI

eLibrary
- Check your eLibrary Contractor Information page
- For information on updating your information refer to the eLibrary help guide or select the “(Vendors) How to change your company information” link on the Contractor Information page