



# **Procurement (PRO) Contract Management System (CMS) User Guide – Vendor Portal**

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## **1. Introduction**

Salesforce is a cloud-based integrated platform. TxDOT uses the system as a Contract Management System (CMS) to streamline contracting processes to increase productivity and interaction between PRO Division, PRO Customers, and PRO Vendors.

## **2. General Information**

- 2.1. Screenshots in the PRO CMS User Guide are for illustration purposes only. Actual project titles, documents, and personnel names will vary.
- 2.2. The intent of this manual is to be interactive. If a step in this manual does not apply, skip forward to the next applicable step.
- 2.3. To edit applicable details of each project or contract record, click on the pencil  icon: or *Edit* button at the top of any page.

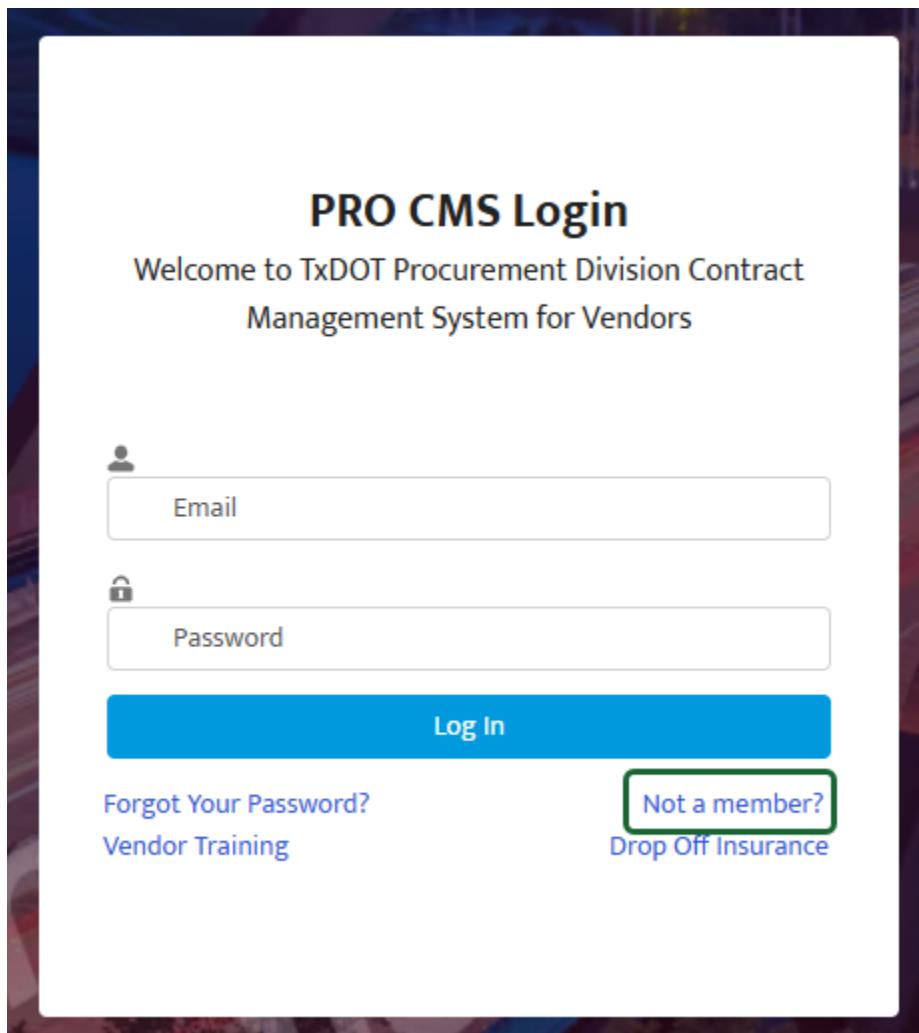
## **3. Vendor Portal**

- 3.1. The Vendor Portal is a place to manage contracts with the Procurement Division. Vendors can upload files, upload bond and insurance information, and track the status of documents.
- 3.2. Benefits of the portal include the following:
  - 3.2.1. Operates in one system to reduce time and inefficiencies.
  - 3.2.2. Manages communication across internal TxDOT PRO teams and external Vendors/Suppliers
  - 3.2.3. Provides organization
  - 3.2.4. Drives accuracy and transparency
  - 3.2.5. Removes certain manual processes

## 4. Accessing PRO CMS

- 4.1. Navigate to [Salesforce](https://txdot.my.site.com/PROVendors) (txdot.my.site.com/PROVendors)
- 4.2. When accessing for the first time, click Not a member? blue link.

Figure 1 – PRO CMS Login Screen

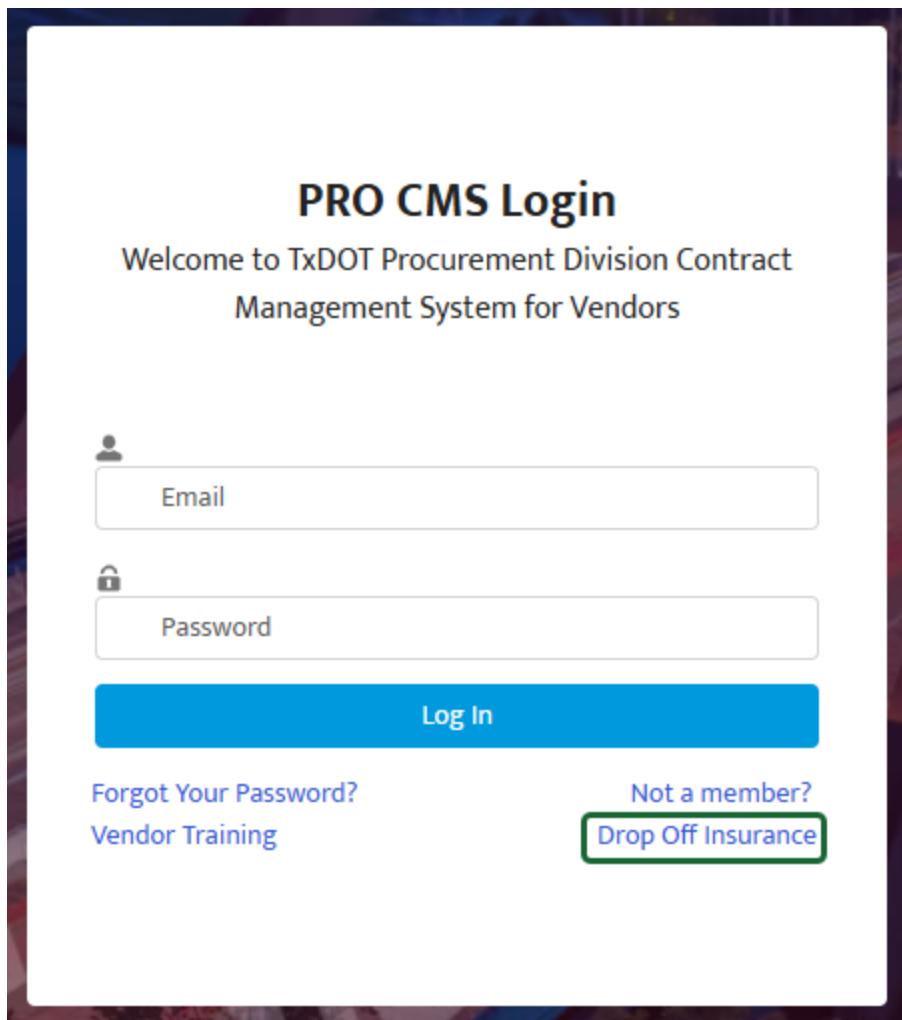


- 4.3. Enter the requested information into the form. Click Sign Up.
- 4.4. If the Federal Employer Identification Number (EIN) is unknown, leave this field blank during the sign-up process.
- 4.5. Access to certain features and functionalities within CMS will not be available until the user enters the Federal EIN.

## 5. Drop Off Insurance

- 5.1. To drop off insurance on behalf of a vendor, access the CMS Application. On the PRO CMS Login page, click *Drop Off Insurance*.

Figure 2 – Drop Off Insurance Blue Link

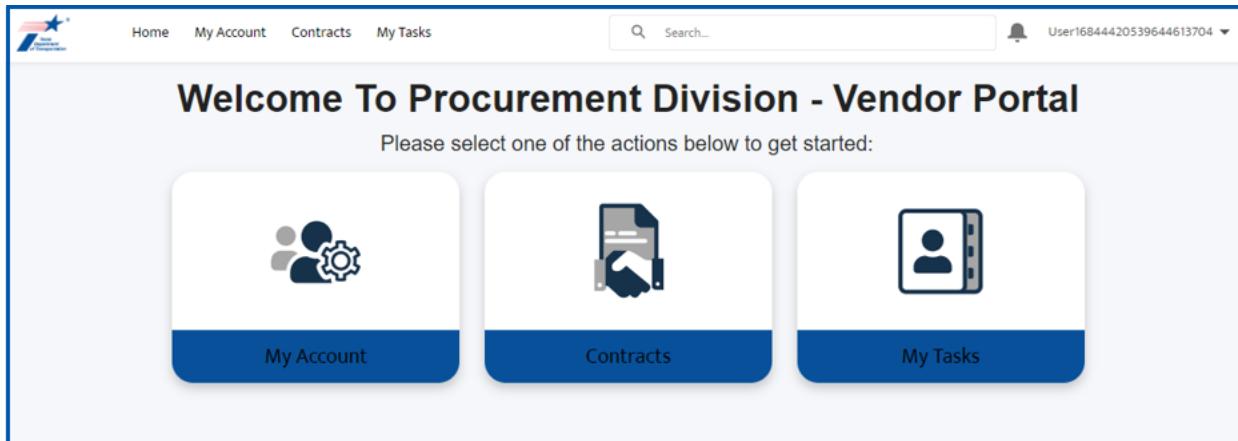


- 5.2. Search for the vendor covered under the insurance or select *PRO Insurance Drop Box*.
- 5.3. Click *Upload Files* or drag and drop files to upload.

## 6. Homepage Overview

### 6.1. Viewing the homepage

Figure 3 – Vendor Portal Home Page



### 6.2. The homepage features the following icons:

#### 6.2.1. My Account

#### 6.2.2. Contracts

#### 6.2.3. My Tasks

### 6.3. Using navigational tabs

#### 6.3.1. Navigational tabs on the top of the page match the icons on the home screen.

### 6.4. Access profile settings by clicking the Username at the top right of the page.

### 6.5. Select the My Profile option.

### 6.6. Select the Profile tab.

### 6.7. The Profile tab displays the following information:

#### 6.7.1. Name

#### 6.7.2. Manager

- 6.7.3. Title
- 6.7.4. Email
- 6.7.5. Mobile
- 6.7.6. Address
- 6.7.7. About Me

6.8. The Settings & Preferences tab gives vendors access to:

- 6.8.1. Account username and email.
- 6.8.2. Location settings
- 6.8.3. Email notifications

6.9. Use the checkboxes to configure your email notification preferences.

6.10. Click Save.

## **6.11. My Account Tab**

- 6.11.1. Click My Account
- 6.11.2. The Details tab displays information about the vendor's account, including:
  - 6.11.2.1. General account information
  - 6.11.2.2. Billing address
  - 6.11.2.3. System information
- 6.11.3. The Related tab displays information related to the vendor's account, including:
  - 6.11.3.1. Contacts
  - 6.11.3.2. Contracts
  - 6.11.3.3. Location Codes

6.11.3.4. Insurance – upload insurance documents by clicking New button. Fill in applicable fields. Click Save.

6.11.3.5. Files

## **6.12. Contracts Tab**

6.12.1. To access a list of contracts, click the Contracts tab on the top of the page.

6.12.2. Page Symbols:

6.12.2.1. List View Controls

6.12.2.2. Display Table

6.12.2.3. Refresh Page

6.12.2.4. Edit List

6.12.2.5. Charts

6.12.2.6. Filter

6.12.3. Click on blue link to access Contract details.

6.12.4. The Related tab gives Suppliers access to:

6.12.4.1. Points of contact.

6.12.4.2. Bonds – Fill in new bond information and click Save.

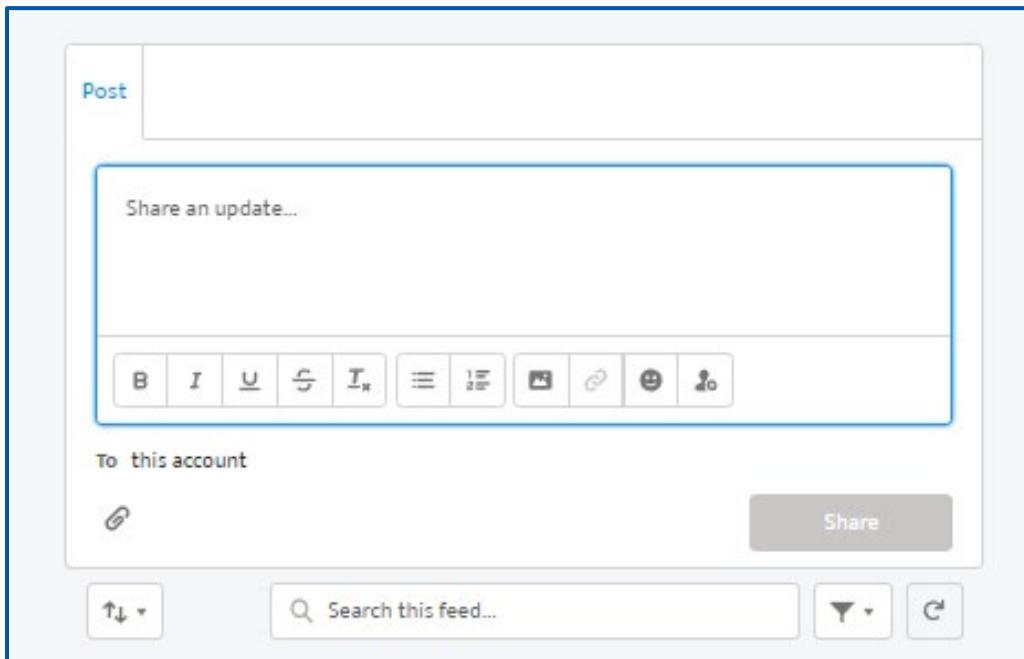
6.12.4.3. Insurance

6.12.4.4. Files

## 7. Chatter

7.1. Chatter is a communication tool where you can communicate with the Procurement Division about your account, contracts, or questions you may have in the contracting process.

Figure 4 - Chatter Message



7.2. Features include:

- 7.2.1. Creating Posts
- 7.2.2. Leaving comments
- 7.2.3. Liking comments
- 7.2.4. Using the "@" character to mention other users
- 7.3. Each document record in CMS includes a *Chatter* section.
- 7.4. When sending a *Chatter* message, CMS generates a notification email to the recipient, as well as a *Bell* notification, displayed in the user's *Widget* area.

## 8. Tasks

8.1. When an action needs to be taken in the contracting process, tasks are assigned to a user. A task may be assigned to a vendor to act on a part of the process.

Figure 5 – Task Details

The screenshot shows a 'Task' page with the following details:

- Contract #:** 601000000000000000000000000000004343: Monthly Progress Assessment Report and Form
- Name:** Related To 601000000000000000000000000000004343
- Details:** Task Information
- Subject:** Contract #601000000000000000000000000000004343: Monthly Progress Assessment Report and Form 2579 Required
- Assigned To:** PRO External Portal User
- Due Date:** 6/30/2023
- Comments:** A monthly HUB Subcontracting Progress Assessment Report and Form 2579 - HSP Compliance is required for Contract #60100000000000000000000000000000323. Please mark this task as complete once you have submitted both the Progress Assessment Report and Form 2579 to the contract manager.
- Additional Information:**
- Priority:** Normal
- Status:** Open

8.2. Features include:

- 8.2.1. A record of tasks assigned throughout the contracting process.
- 8.2.2. Visibility into task statuses
- 8.2.3. Ability to share updates or leave comments on a task.
- 8.2.4. Receiving email notifications upon task assignment (if subscribed)