

	<b>CALIFORNIA RESOURCES CORPORATION (COLLECTIVELY, CRC)</b>	
	<b>User Guide – Respond to Request for Information (RFI)</b>	Version 1.0 December 1, 2014

## OVERVIEW

This User Guide describes how Suppliers participate in Request for Information (RFI) events related to Pre-Qualification, Category Related Qualifications, Sourcing Pre-Screenings or Communications processes.

## HOW TO USE THIS USER GUIDE

**If familiar with the iSupplier Portal Functionalities and the CRC processes, refer to the One-Page Quick Reference (Cheat sheet) on page 2.** Otherwise, review the Process Overview section to better understand the processes. Next, review the Content/Checklist section, as this section lists the required and optional steps for each of the processes. Last, complete the required steps according to the detailed written instructions which follow the numbering sequence shown in the screenshots for how each of the tasks shall be executed.

When completing the steps in the iSupplier Portal, you may refer to the Content/Checklist column to validate that the required steps have been completed. In addition, this User Guide provides high-lighted and / or framed notes, tips and important messages to assist you in some tasks.

## PROCESS OVERVIEW

If CRC invites a Supplier to participate in an RFI event, the Supplier will receive an automatic email notification (Sender: "CRC – Notification") requesting that they access the iSupplier Portal to view, acknowledge and respond to the RFI.

An RFI can contain questionnaires, attachments, policies, forms, etc. and it is used to gather Supplier information related to CRC specific internal processes such as Pre-Qualification, Category Related Qualifications or Sourcing Pre-Screenings.

Processes:

- **Pre-Qualification:** For New Suppliers this request will be for basic business and operational information so CRC can process the New Supplier registration and evaluate whether the Supplier can meet CRC's requirements for their Suppliers. For Suppliers who are already registered in CRC's system ("CRC Registered Suppliers"), CRC might request similar information if it is not already on file as all CRC Suppliers need to be registered and Pre-Qualified to be eligible to participate in any sourcing event.
- **Category-related Qualification:** This request is for information related to specific material/services categories made to CRC Registered and Pre-Qualified Suppliers to assess if the Supplier is technically qualified to participate in sourcing events for that category in a specific CRC asset.
- **Sourcing Pre-screening:** This request is for specific potential bidder information to assess if the Supplier is technically qualified to participate in a specific sourcing event.

**IMPORTANT:** Please note that an invitation to Pre-Qualification, Category Related Qualifications or Sourcing Pre-screening related events does not imply a contract, or intent to purchase goods or services from registered Suppliers by CRC.



## QUICK REFERENCE (CHEAT SHEET)

**1. Receive an Email Notification as an Invitation to Participate in an RFI Event**

- In the email notification, click on the “**Negotiation Details**” hyperlink to be directed to the RFI.

**2. Login to the iSupplier Portal**

**IMPORTANT:** If you had accessed the iSupplier Portal from the hyperlink in an email notification go to step 4. Otherwise, continue with the next step.

- In the “**Main Menu**” panel click on the appropriate responsibility:
  - ▶ New Suppliers must click on the “**Supplier User – Registration**” hyperlink, until the Supplier registration and pre-qualification process has been completed.
  - ▶ Registered Suppliers must click on the “**Supplier User – Transactions**” hyperlink.
- From the “**Home**” page, click on the “**Negotiations**” tab.

**3. Search for the RFI**

- In your “**Company’s Open Invitations**” section, click on the applicable RFI Number under the “**Negotiation Number**” column.
- Alternatively, in the “**Search Open Negotiations**” section search by the RFI number, title, etc.

**4. Review the RFI Before Acknowledging Participation and Responding**

- Review all the sections in the “**Header**” tab.
  - ▶ In the “**Requirements**” section, click on the “**Show All Details**” hyperlink to review each requirement.
- Scroll down to the “**Notes and Attachments**” section, click on every file name hyperlink in the “**Title**” column to download the attached document.
- As needed, select the option “**Printable View**” from the “**Actions**” dropdown menu, and then click on the “**Go**” button to view, save and print the RFI.
- Click on the “**Controls**” tab to review the scheduled start and close dates to respond to the RFI, and the response rules.
- Click on the “**Contract Terms**” tab. Click on the “**Preview Contract Terms**” button to view, save and print the Terms and Conditions.
  - ▶ In the “**Deliverables**” section, access a specific deliverable by clicking on the “**Deliverable Name**” hyperlink.
- As needed, select the option “**Online Discussions**” from the “**Actions**” dropdown menu to request additional information and clarify any issues regarding the RFI. This replaces any email communication.

**5. Acknowledge Participation in the RFI Event.**

- Select the option “**Acknowledge Participation**” from the “**Actions**” dropdown menu, and then click the “**Go**” button.
- Click on the “**Yes**” button to indicate participation in the RFI.
- Click on the “**Apply**” button.

**6. Create Response**

- After reviewing and printing the document, select the option “**Create Response**” from the “**Actions**” dropdown menu, and then click on the “**Go**” button.
- In the “**Requirements**” section, respond to each requirement by entering the appropriate response values.
- As needed, attach any appropriate support documentation to the response in the “**Attachment**” section by clicking on the “**Add Attachment**” button.
- As needed, scroll down to the “**Deliverables**” section and respond to deliverables requesting specific documentation.
  - ▶ Respond to the deliverable by clicking the “**Pencil**” icon in the “**Update**” column.
- Click on the “**Save Draft**” button to save the information you have provided so far.

**7. Validate and Submit the RFI**

- In the “**Response Valid Until**” field, click on the “**Calendar**” icon to select the date indicating how long the response will be valid.
- To review the response before submitting it, click on the “**View RFI**” button.
- To save a draft response, click on the “**Save Draft**” button. See Manage Draft section.
- Click on the “**Continue**” button.
- Click on the “**Validate**” button to verify the quote before submitting it.
- Click on the “**Submit**” button. A confirmation message will be displayed indicating that the RFI has been submitted.

**8. During the Negotiation process, Suppliers can receive email notifications for the following events:**

- Reminders
- Extended close date of the RFI
- Paused of the RFI
- Early Close of the RFI
- Amended RFI
- New Rounds



CONTENT / CHECKLIST

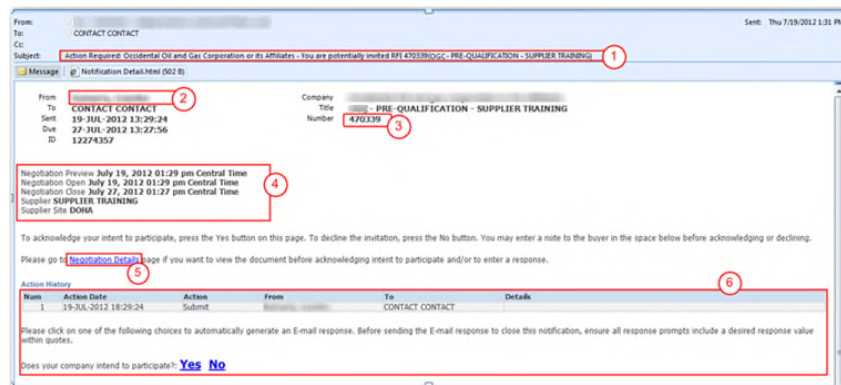
Steps	Page No	Required	Check
1. <a href="#">Receive Email Notification to Participate in a Negotiation</a>	4	Required	<input type="checkbox"/>
2. <a href="#">Access the iSupplier Portal</a>	5	Required	<input type="checkbox"/>
3. <a href="#">Search for the RFI</a>	6	Required	<input type="checkbox"/>
4. <a href="#">Review the RFI</a>	7	Required	<input type="checkbox"/>
4.1. <a href="#">Review the RFI Header Tab</a>	8	Required	<input type="checkbox"/>
4.2. <a href="#">Review the RFI Controls Tab</a>	9	Required	<input type="checkbox"/>
4.3. <a href="#">Review the RFI Contract Terms Tab</a>	10	Required	<input type="checkbox"/>
4.4. <a href="#">Print RFI Details</a>	11	Required	<input type="checkbox"/>
4.5. <a href="#">Download RFI Attachments</a>	11	Required	<input type="checkbox"/>
5. <a href="#">Acknowledge Participation</a>	12	Required	<input type="checkbox"/>
6. <a href="#">Create Response</a>	12	Required	<input type="checkbox"/>
6.1. <a href="#">Complete the RFI Requirements Section</a>	13	Required	<input type="checkbox"/>
6.2. <a href="#">Add Attachments</a>	14	Required	<input type="checkbox"/>
6.3. <a href="#">Submit Deliverables</a>	16	Required	<input type="checkbox"/>
7. <a href="#">Validate and Submit the RFI</a>	18	Required	<input type="checkbox"/>
8. <a href="#">Administrate the RFI and Responses</a>	19	Optional	
8.1. <a href="#">Navigate through the Negotiations Tab</a>	19	Optional	
8.2. <a href="#">Respond by Spreadsheet</a>	21	Optional	
8.3. <a href="#">Receive and Address the RFI Additional Event Notifications</a>	24	Optional	
▶ <a href="#">Extend RFI</a>	24	Optional	
▶ <a href="#">Pause RFI</a>	24	Optional	
▶ <a href="#">Resume RFI</a>	24	Optional	
▶ <a href="#">Early or Scheduled Close RFI</a>	24	Optional	
▶ <a href="#">New RFI Round</a>	24	Optional	
8.3.1. <a href="#">Manage Amended RFI</a>	25	Optional	
8.4. <a href="#">Online Discussions (Inquiries, Clarifications, etc)</a>	27	Optional	
8.4.1. <a href="#">View Sent Online Discussion Attachments</a>	28	Optional	
8.5. <a href="#">Manage Draft Responses</a>	30	Optional	
8.6. <a href="#">Manage Deliverables</a>	31	Optional	
8.7. <a href="#">View Response History</a>	32	Optional	
8.8. <a href="#">Exhibit - Review and Update Products &amp; Services</a>	33	Optional	



INSTRUCTIONS

1. RECEIVE EMAIL NOTIFICATION TO PARTICIPATE IN A NEGOTIATION

When CRC invites a Supplier to participate in an RFI event, an automatic email notification is sent to the specific Supplier contact selected by the CRC Buyer. The notification shows the following information.



- ( 1 ) The email “**Subject**” shows the RFI number, RFI title and required action(s).
- ( 2 ) The “**From**” field shows the CRC person responsible for this event. As needed, contact this person for clarification of any of the RFI information.
- ( 3 ) The “**Number**” field shows CRC’s internal “**RFI Number**”. Save this number to use when performing a search for the document in the iSupplier Portal.
- ( 4 ) The “**Summary**” section shows the following information.

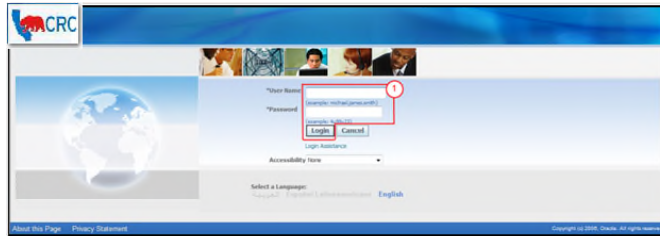
Field	Description
Negotiation Preview	The date the RFI is available to be viewed. No actions are allowed.
Negotiation Open	Scheduled start date to respond to RFI. No responses are allowed before this date and time.
Negotiation Close	Scheduled close date to respond to RFI. No quotes are allowed after this date and time.
Supplier	Supplier’s name.
Supplier Site	CRC Internal identification of a Supplier’s office.

- ( 5 ) Click on the “**Negotiation Details**” hyperlink to access the iSupplier Portal. Within the portal you will be taken automatically to the RFI screen. For further instructions on how to review the RFI, see section [4. - Review the RFI](#).
- ( 6 ) **DO NOT** click on the “**Actions**” button on the notifications (The functionality is disabled). To accept or reject the invitation to participate, access to the RFI within the iSupplier Portal.

**IMPORTANT:** Suppliers who are not registered with CRC (Prospective Supplier) invited to an RFI receive a different notification. They cannot view, acknowledge nor respond to the RFI until they have completed the registration and pre-qualification process and have been granted access to the iSupplier Portal.

## 2. ACCESS THE ISUPPLIER PORTAL

Login to the iSupplier Portal at: [https://supplier.californiareources.com/OA\\_HTML/AppsLogin](https://supplier.californiareources.com/OA_HTML/AppsLogin)

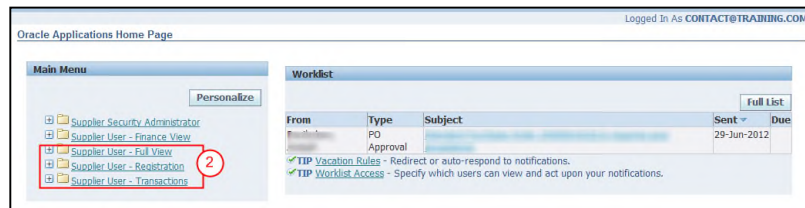


( 1 ) Enter your Username and Password and click on the “**Login**” button.

**Note:** The “**Password**” field is case sensitive. If there is a problem accessing to the iSupplier Portal, click at the “**Login Assistance**” hyperlink. Alternatively, view the [User Guide – Overview Access and Passwords, Navigation, Notification](#)

After logging in to the portal, the “**Oracle Application Home Page**” will be displayed if more than one responsibility is assigned to the user. If the user only has one responsibility the “**Home**” tab screen for that responsibility will automatically be displayed.

**Note:** If you had accessed the portal through the hyperlink in the email notification, you will automatically be taken to the RFI screen.



( 2 ) To access and view the invitation, click on one of the following responsibilities.

Needed Responsibility	Supplier Action
Supplier User – Registration	<ul style="list-style-type: none"> <li>Only applicable for new Suppliers until the Supplier registration and pre-qualification process is completed.</li> <li>View and Respond to an RFI.</li> </ul>
Supplier User – Transactions	<ul style="list-style-type: none"> <li>Only applicable for Registered Suppliers.</li> <li>View and Respond to an RFI.</li> </ul>
Supplier User – Full View	<ul style="list-style-type: none"> <li>Only applicable for Registered Suppliers.</li> <li>Only View RFIs.</li> </ul>

Once in the required responsibility, the “**Home**” tab screen will then be displayed. Click on the “**Negotiations**” tab to see your RFI events.

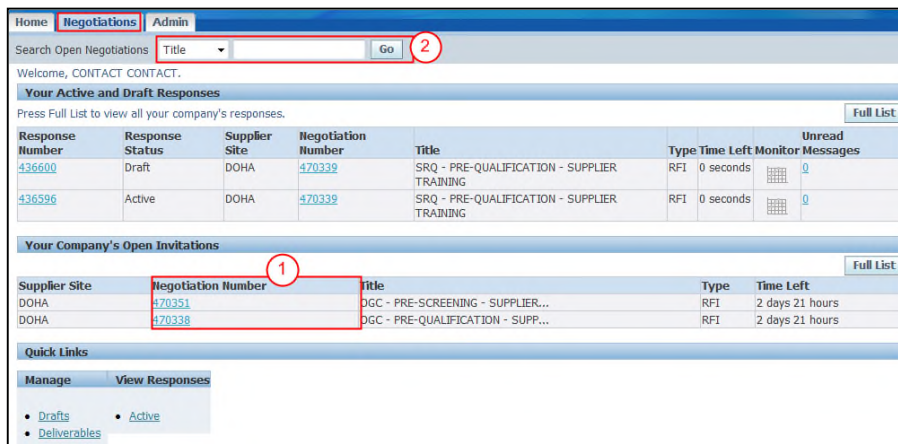
**Note:** If none of these responsibilities have been assigned to you, contact the iSupplier Portal Security Administrator within your company to request them. Go to the [User Guide – Overview – Access and Passwords, Navigation and Notifications](#) to learn how to view the list of your company contacts and iSupplier Users.



### 3. SEARCH FOR THE RFI

The invitations to participate in a negotiation are listed in the “Your Company’s Open Invitation” section under the “Negotiations” tab. This section shows the most recent open invitations.

**IMPORTANT:** Review a specific RFI document before acknowledging your company’s intent to participate in the event.



- (1) In the “Your Company’s Open Invitation” section, click on the “Negotiation Number” hyperlink. The “Document Summary” screen will be shown.

**Note:** View all open invitations by clicking in the “Full List” button.

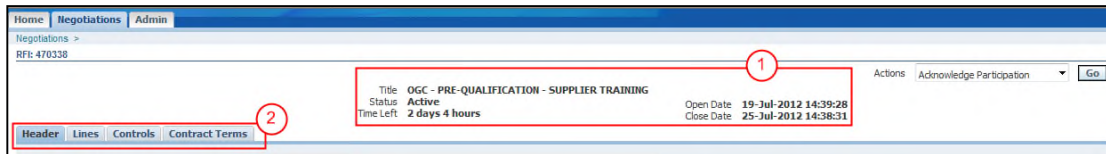
- (2) Optionally, in the “Search Open Negotiations” section search by the RFI number, title, contact, event, line or category. Select the search criteria from the dropdown menu, enter the respective value and click on the “Go” button.

**Note:** For further information about the “Negotiations” tab, see section [8.1. - Navigate through the Negotiations tab](#)

#### 4. REVIEW THE RFI

Review the RFI before acknowledging participation and responding to it. The RFI screen shows the following information.

**Note:** For further instructions on how to view an RFI, see section [3. – Search for the RFI](#).



**IMPORTANT:** Carefully review all RFI sections, tabs and information to clearly understand the document scope and purpose. To print the document, see section [4.4. - Print RFI Details](#). If additional clarification is necessary, use the Online Discussion functionality (See the section [8.4. - Online Discussions](#)).

( 1 ) The “**RFI Main Information**” section shows the following information.

Field	Description
Title	RFI Title
Status	RFI Status <ul style="list-style-type: none"> <li>Active: Event opened to receive Supplier responses.</li> <li>Closed: Event closed to receive Supplier responses.</li> <li>Cancelled: Event cancelled by CRC.</li> <li>Amended: Event amended and closed to receive Supplier responses. A new RFI revision has been published.</li> <li>Round Completed: Event closed to receive Supplier responses. A new RFI round is published.</li> </ul>
Time Left	Remaining time to submit a response to the RFI
Open Date	Scheduled start date to respond to RFI. No responses are allowed before this date and time.
Close Date	Scheduled close date to respond to RFI. No quotes are allowed after this date and time.

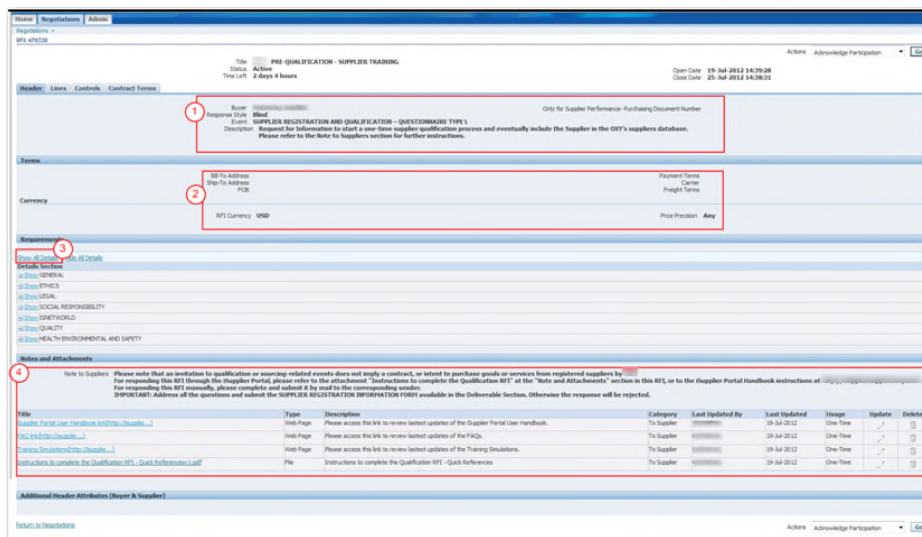
( 2 ) The “**Tabs**” to view the details of the RFI. The tabs show the following information

Tab	Description
Header	Document general information such as Terms, Requirements, Notes and Attachments.
Lines	Only applicable for RFQ and Auctions, shows (product and services) information.
Control	Open/Close date and key response rules.
Contract Terms	Specific terms and conditions applicable to the document.



#### 4.1. REVIEW THE RFI HEADER TAB

The “Header” tab shows the RFI general information, requirements and attachments. Review this information and, as needed, print it. This section shows the following information.



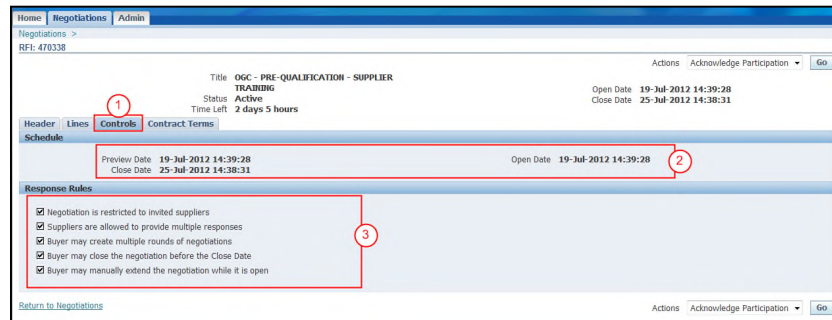
- (1) The “Top” section displays the basic information of the document such as the Buyer name (responsible CRC employee), the event and its description.
- (2) The “Terms” section displays additional information related to shipping, billing, RFI currency, etc.
- (3) In the “Requirement” section, click on the “Show All Details” hyperlink to view the required information. The fields will expand.  
**Note:** As needed, click on the “Show” hyperlink on each field to see detailed information.
- (4) The “Note and Attachments” section shows the “Note to Supplier” field with additional instructions related to the RFI. This section also shows the attached documents related to the RFI.

**IMPORTANT:** Read the “Note to Supplier” field, then open and download the “Attachments”. These attachments are templates that must be completed and submitted with the information required by CRC as attachments. To understand how to download attachments see section [4.5. - Download Attachments](#).



#### 4.2. REVIEW THE RFI CONTROLS TAB

The **“Controls”** tab shows the response rules of the RFI, and important dates to be aware of when creating a response to the RFI.



(5) Click on the **“Controls”** tab to access the information.

(6) The **“Schedule”** section shows the following dates.

Date	Description
Preview Date	Date to access the document content. A response cannot be created before the open date.
Open Date	Scheduled start date to respond to RFI. No responses are allowed before this date and time.
Close Date	Scheduled close date to respond to RFI. No quotes are allowed after this date and time.

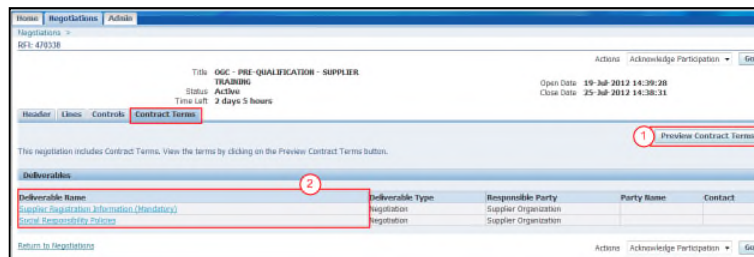
(7) The **“Response Rules”** section shows the following RFI rules assigned by the CRC Buyer.

Rules	Description
Negotiation is restricted to invited Suppliers	Only the Supplier explicitly invited to the RFI can view and participate in the event.
Suppliers are allowed to provide multiple responses	If this rule is checked, Supplier can provide as many responses as needed. Any new response submitted by a User will replace the previous one. If this rule is not checked, Supplier can only respond once. If this is the case, validate the response closely before submitting it. Corrections are not allowed.
Buyer may create multiple rounds of negotiations	As needed, CRC Buyer could request a new RFI round related to the current event.
Buyer may close the negotiation before the Close Date	CRC Buyer can close the event at a date earlier than the original Close Date.
Buyer may manually extend the negotiation while it is open	As needed, CRC Buyer can extend an open event by setting a new date beyond the original close date.

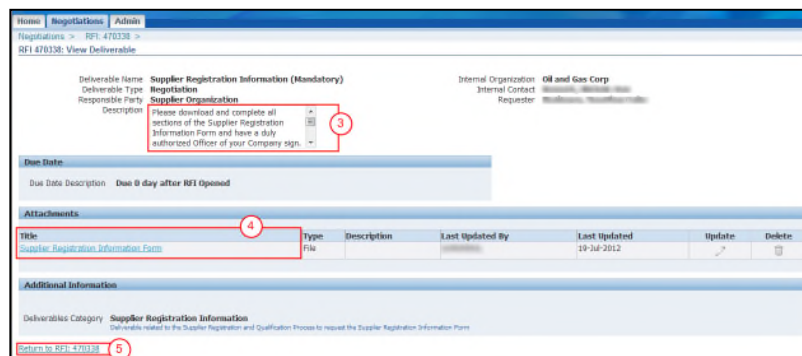


#### 4.3. REVIEW THE RFI CONTRACT TERMS TAB

The “**Contract Terms**” tab shows the negotiation Terms and Conditions as well as any specific documentation requested of the Supplier related to the RFI requested. In this section, Suppliers can open and save these documents to their computer.



- (1) Click on the “**Preview Contract Terms**” button to view, save and print the Terms and Conditions.  
**Note:** A “**Pop-Up**” screen will be displayed. Either click on the “**Open**” button to view the PDF file and print it using the Acrobat Reader or click on the “**Save**” button to save the PDF file in the computer.
- (2) In the “**Deliverables**” section, access a specific deliverable by clicking on the “**Deliverable Name**” hyperlink.

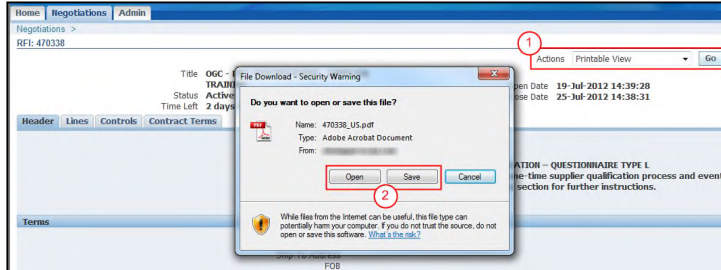


- (3) The “**Description**” field shows instructions and the relevant information about the deliverable. For documentation, this field establishes how and what documentation/information the Supplier must submit.
- (4) View, save or print the existing attachments by clicking on the “**Attachment Name**” hyperlink in the “**Title**” column.
- (5) Return to the previous screen by clicking on the “**Return to RFI: ...**” hyperlink.



#### 4.4. PRINT RFI DETAILS

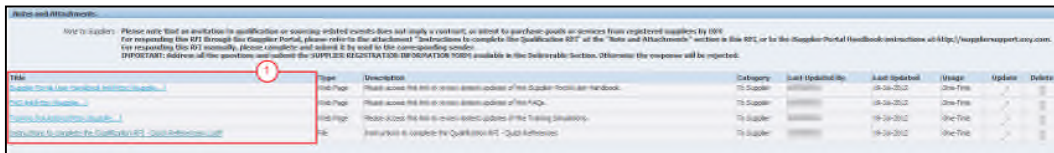
As needed, print the RFI details in a formatted copy to review offline.



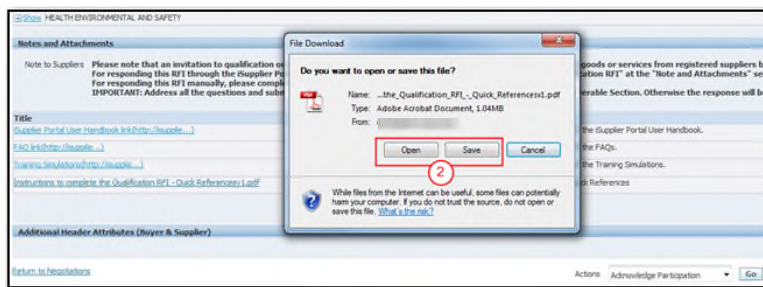
- (1) Select the “Print View” option from the “Actions” dropdown menu, and then click on the “Go” button. A pop-up screen will be displayed.
- (2) Click on the “Open” or “Save” button to view the PDF file and print it using the Acrobat Reader.

#### 4.5. DOWNLOAD RFI ATTACHMENTS

Download the attached documents related to the RFI in the “Notes and Attachments” section on the “Header” tab. These documents can contain instructions and detailed information about the pre-qualification or pre-screening process.



- (1) Click on the file name hyperlink in the “Title” column to download the attached documents related to the RFI.

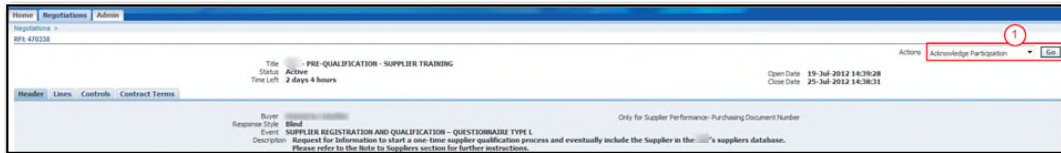


- (2) Click on the “Open” or “Save” button to download and view the attachments.  
**Note:** Repeat these steps to download each of the attachments presented in the RFI.

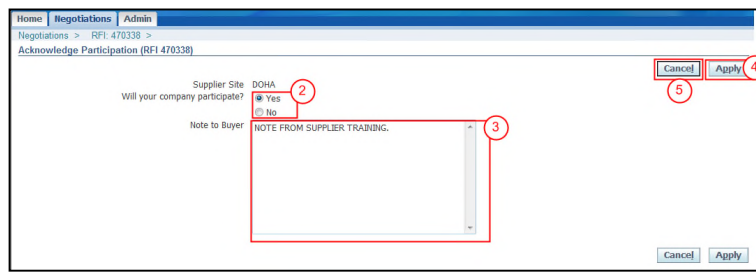
## 5. ACKNOWLEDGE PARTICIPATION

After reviewing the document and clarifying any issues; in the respective RFI screen, acknowledge whether or not your company will be participating in the RFI event.

**Note:** For further instructions on how to search an RFI, see section [3. - Search for the RFI](#).



- (1) Select the option **“Acknowledge Participation”** from the **“Actions”** dropdown menu, and then click on the **“Go”** button. The following screen will appear.

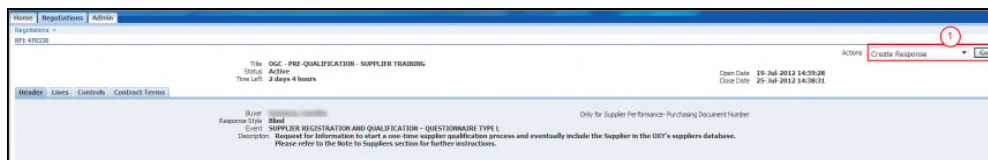


- (2) Next to the **“Will your Company participate?”** question, check the appropriate radio button.
- (3) If necessary, in the **“Note to Buyer”** textbox, type a message to the CRC Buyer responsible for the event.
- (4) Click on the **“Apply”** button.
- (5) Optionally, return to the previous screen by clicking on the **“Cancel”** button.

## 6. CREATE RESPONSE

After acknowledging participation in the RFI event, the next step is to create your response in the respective RFI screen.

**Note:** For further instructions on how to view an RFI, see section [3. - Search for the RFI](#).



- (1) Select the option **“Create Response”** from the **“Actions”** dropdown menu, then click on the **“Go”** button. The **“Create Response”** screen will appear with all the requirements expanded.

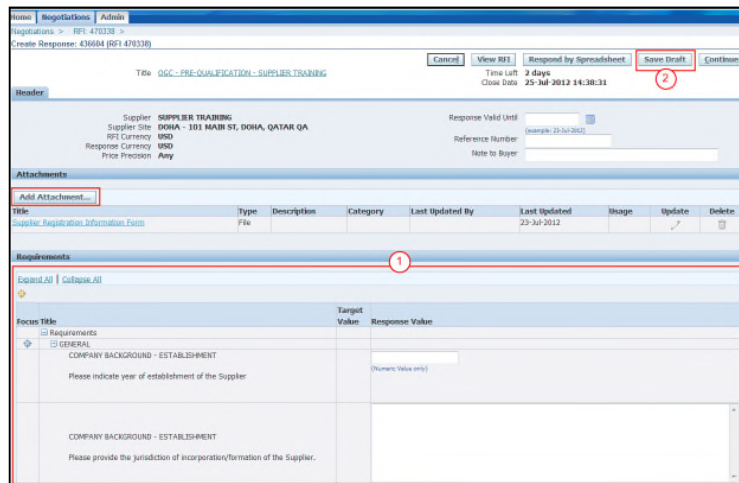
**IMPORTANT:** It is critical to complete and submit all the required data and documents found in the **“Notes and Attachments”** or **“Deliverables”** section. Ensure all the requirements are completed and ready to be uploaded within the response.



### 6.1. COMPLETE THE RFI REQUIREMENTS SECTION

In the “Header” tab respond to each requirement. This section might request for the Supplier to submit additional attachments that must be included in the “Attachments” section.

**Note:** As needed, download the RFI in an Excel spreadsheet to complete the response offline, then upload the completed spreadsheet to the iSupplier Portal. (See section [8.2. – Respond by Spreadsheet](#))



( 1 ) In the “Requirements” section, all of the requirements will expand. Enter the appropriate response values on each required field. The following are potential types of responses being requested.

**Note:** You must complete all of the required fields.

Types of Response field	Description
Dropdown Menu	List of Values - Select the most suitable option
Free text box	Text - Type the answer as detailed as possible
Date	Only dates, click on the “Calendar” icon to enter the date
Number	Only numbers are allowed

**IMPORTANT:** Make sure to scroll down the page and respond all the requirements. When more than 100 requirements are shown within this section, the “Previous” and “Next” hyperlinks will appear, click on these hyperlinks to navigate through the requirements and respond to all of them.

**Note:** As needed, scroll up and attach any appropriate support documentation to a response by clicking on the “Add Attachment” button in the “Attachments” section. For further information about how to add attachment, see section below [6.2. - Add Attachments](#).

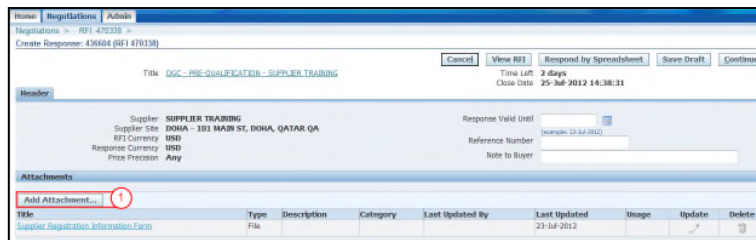
( 2 ) If for any reason it is not possible to complete the response at one time, click on the “Save Draft” button to complete any remaining information later. The information provided will be saved. For instructions on how to access saved responses, see section [8.5. - Manage Draft Responses](#).



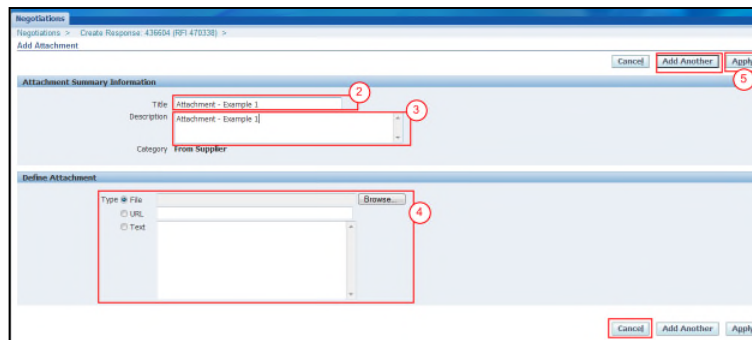
## 6.2. ADD ATTACHMENTS

As needed, use this section to attach any required or support documentation to your response.

**IMPORTANT:** Use this section to attach all CRC required information in the RFI that has been completed (i.e. Excel documentation, Word documentation, etc.) and any support documents required in the Requirements section, and Terms and Conditions section.



- (1) Click on the “Add Attachment..” button in the “Attachments” section on the “Header” tab. The following screen will appear.



- (2) In the “Title” field, enter the file name.
- (3) In the “Description” field, describe/summarize the file content as clearly as possible.
- (4) The “Define Attachment” section shows the following attachment types.

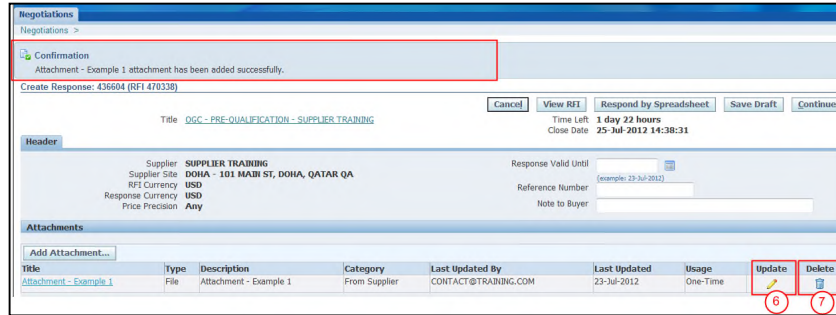
Type	Description
File	Attach a file by selecting the “File” radio button, then click on the “Browse..” button and search for the file in your computer.
URL	Attach a URL by selecting the “URL” radio button, enter (or paste) the applicable URL address (it must not be a Supplier internal webpage. CRC must be able to access it).
Text	Attach text by selecting the “Text” radio button, enter (or paste) the applicable text. This would be used to supply limited information without pictures or tables.

**Note:** As needed, click on “Add Another” button to continue attaching documentation by repeating the steps above. Every time an attachment is added a confirmation message will be displayed.

- (5) Click on the “Apply” button to add the attachments. A confirmation message as shown below is displayed on the “Create Response” screen to indicate that the attachment has been added.



**Note:** If you do not want to submit an attachment and you have not yet clicked on the **“Apply”** button, you can return to the previous screen by clicking on the **“Cancel”** button instead.



- ( 6 ) As needed, update the attachment by clicking on the **“Pencil”** icon on the **“Update”** column.
- ( 7 ) As needed, to delete the attachment, click on the **“Trash”** icon on the **“Delete”** column.

**Note:** Repeat steps 1 through 5 to attach additional files.

### 6.3. SUBMIT DELIVERABLES

In the “**Create Response**” screen, scroll down to the “**Deliverables**” section and respond to the requested documentation.

**IMPORTANT:** The “**Deliverables**” section will only appear if CRC specifically includes it as part of the RFI. Skip the steps below if no deliverables are listed.

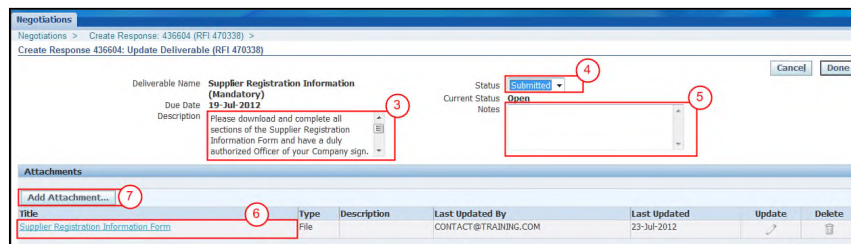


Deliverable Name	Due Date	Status	Alert	Update
Supplier Registration Information (Mandatory)	19-Jul-2012	Open	⚠	✎
Social Responsibility Policies	19-Jul-2012	Open	⚠	✎
Health Environment and Safety Management Certification	19-Jul-2012	Open	⚠	✎
Quality Certifications	19-Jul-2012	Open	⚠	✎

(1) The “**Deliverable Name**” column shows the title of the deliverable.

**IMPORTANT:** This note is only applicable to the Pre-Qualification RFI - the Supplier Registration Information Form must be submitted with the RFI response otherwise your pre-qualification information will not be processed.

(2) Click on the “**Pencil**” icon in the “**Update**” column to submit the deliverable. Then, the “**Update Deliverable**” screen will appear.



(3) The “**Description**” field gives the Supplier the instructions for completing and submitting the requested information.

**IMPORTANT:** Follow the instructions provided in the “**Description**” field. If instructed to submit the documentation/information through the iSupplier Portal continue with the steps described below, otherwise just follow the instructions provided in the “**Description**” field.

(4) In the “**Status**” dropdown menu, change the status from “**Open**” to “**Submitted**” once the requested information has been submitted.

(5) In the “**Notes**” field provide any additional information necessary to make clarifications about the documentation/information provided or actions taken or to be taken.

**Note:** If there is already something written in the “**Notes**” field, it is information/clarification provided to the Supplier, just read it and overwrite it. These changes will show up in the status history.

(6) If files are shown, view, save or print the existing attachments by clicking on the “**Attachment Name**” hyperlink in the “**Title**” column.

(7) Attach the required document files or upload the information/documentation by clicking on the “**Add Attachment**” button in the “**Attachments**” section. Then, the following table will appear.

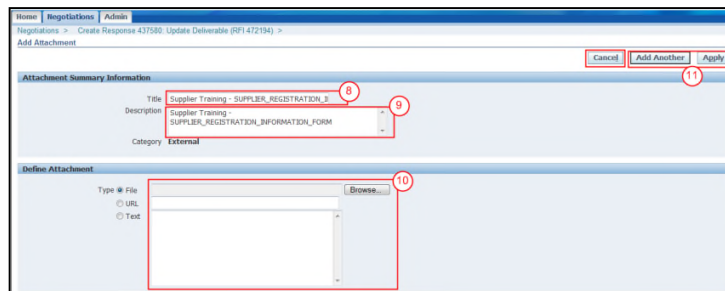




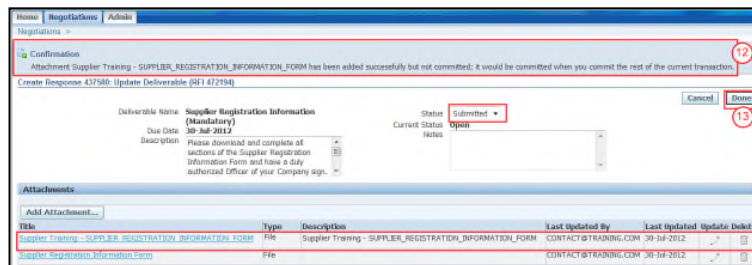
**IMPORTANT:** Suppliers can only add attachments in the Deliverables section. Deletions or updates are not allowed in this section. If any mistakes are made to a file that has been attached, add the corrected file and send the CRC Buyer a request to delete the incorrect file using the “Notes” field in this section.

**OPTIONAL - ATTACH DOCUMENTATION**

**IMPORTANT:** If required to attach documents follow the steps below. Otherwise, skip these steps and go to Step 13.



- ( 8 ) In the “Title” field, enter the file name.
  - ( 9 ) In the “Description” field, describe/summarize the file content as clearly as possible.
  - ( 10 ) The “Define Attachment” section, choose the appropriate type of attachment.
  - ( 11 ) Click on the “Apply” button to return the specific deliverable screen or click on “Add Another” button to continue attaching documentation by repeating the steps above.
- Note:** Optionally, return to the previous screen by clicking on the “Cancel” button.

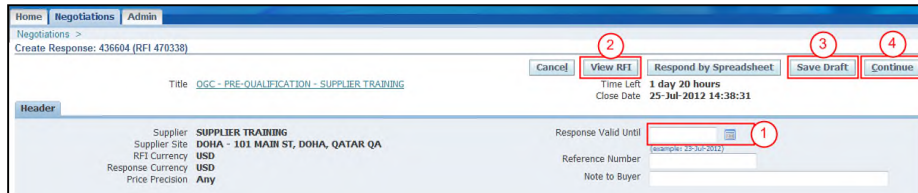


- ( 12 ) After attaching documentation, a confirmation message will be shown.  
**Note:** Verify that the status is “Submitted”, any notes showing are correct and attachments are listed.
- ( 13 ) Click on the “Done” button. The “Document Summary” screen will appear showing the deliverable status updated (It will change to “Submitted”).

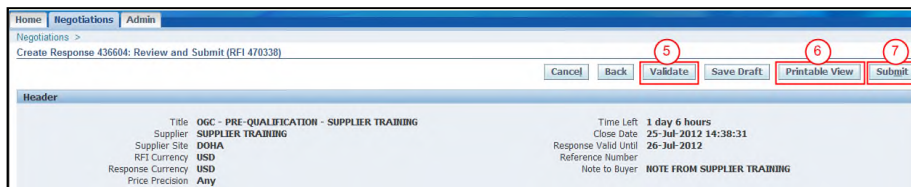
Deliverable Name	Due Date	Status	Alert	Update
Supplier Registration Information (Mandatory)	19-Jul-2012	Submitted		
Social Responsibility Policies	19-Jul-2012	Open		
Health Environment and Safety Management Certification	19-Jul-2012	Open		
Quality Certifications	19-Jul-2012	Open		

## 7. VALIDATE AND SUBMIT THE RFI

After completing all the RFI sections, proceed to submit your response.



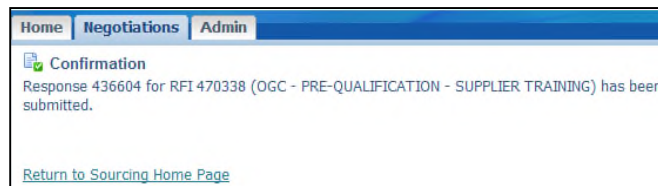
- (1) In the **“Respond Valid Until”** field, click on the **“Calendar”** icon and select a date later than the close date.
- (2) As needed, review the response before submitting it by clicking on the **“View RFI”** button.
- (3) If you are not ready to submit the RFI at this time, you can save it as a draft by clicking on the **“Save Draft”** button and continue to work on it at a later time. For further information, see section [8.5. - Manage Draft Responses](#)
- (4) Click on the **“Continue”** button to proceed with the validation and submission process.



- (5) Click on the **“Validate”** button to verify the response before submitting it.  
**Note:** If all required fields have been populated, a confirmation message will appear with a notification that the response for the RFI has been validated without any errors. If any errors were present, the errors will be shown above the header section. Errors are usually related to missing information in the header and/or requirements section so this should be reviewed to confirm that it is complete.

**IMPORTANT:** Confirmation message only validates that all required fields have been populated. This validation does not mean that the response is approved by CRC.

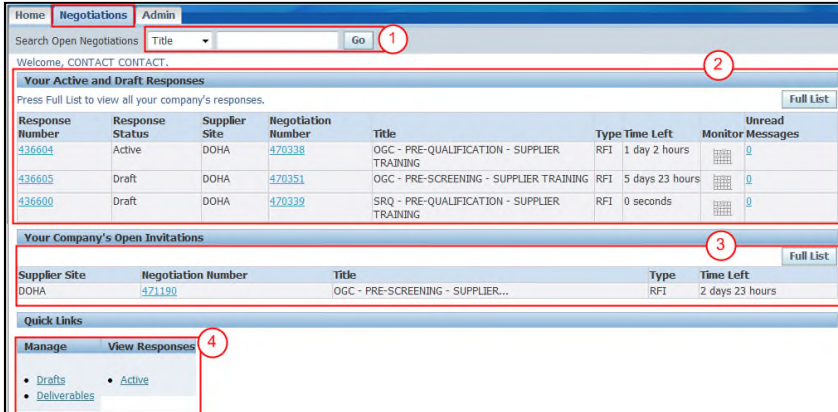
- (6) A copy of the RFI response can be printed by clicking on the **“Printable View”** button.  
**Note:** A **“Pop-Up”** screen will be displayed. Either click on the **“Open”** button to view the PDF file and print it using the Acrobat Reader or click on the **“Save”** button to save the PDF file in the computer.
- (7) Click on the **“Submit”** button. A confirmation message as shown below will appear on the screen to indicate that the RFI has been submitted.



## 8. ADMINISTRATE THE RFI AND RESPONSES

### 8.1. NAVIGATE THROUGH THE NEGOTIATIONS TAB

Click on the **“Negotiations”** tab to view, acknowledge and respond to an invitation. This tab has the following sections.



The screenshot shows the 'Negotiations' tab interface. Callout 1 points to the 'Search Open Negotiations' section with a dropdown menu and a 'Go' button. Callout 2 points to the 'Your Active and Draft Responses' section, which contains a table of responses. Callout 3 points to the 'Your Company's Open Invitations' section, which contains a table of invitations. Callout 4 points to the 'Quick Links' section, which includes 'Manage' and 'View Responses' buttons.

(1) The **“Search Open Negotiations”** section allows the Supplier to search for specific documents.

- Select search criteria using the dropdown menu:

Criteria	Description
Title	RFI Title
Number	RFI number
Contact	CRC’s responsible person
Line	Documents CRC’s material/service item number
Category	Documents that include a particular category
Event	Documents associated with a particular event

- Enter the applicable value (RFI number, etc.)
- Click on the **“Go”** button.

(2) The **“Your Active and Draft Responses”** section shows the events in which the user is currently participating in and has already created a draft response or submitted a response.

**Note:** In order to view all active and draft responses that your company is participating, even the events responded to by other users, click on the **“Full List”** button.

Column	Description
Response Number	Your company’s response number associated with a Negotiation Number (CRC’s document). To view the response, click on the <b>“Response Number”</b> hyperlink. The negotiation summary web page will be shown.
Response Status	RFI response status. <ul style="list-style-type: none"> <li>• Active: Response is successfully submitted by Supplier</li> <li>• Draft: Response is not submitted to CRC, it is under the Supplier review.</li> </ul>
Supplier Site	CRC’s Internal identification of a Supplier’s office.

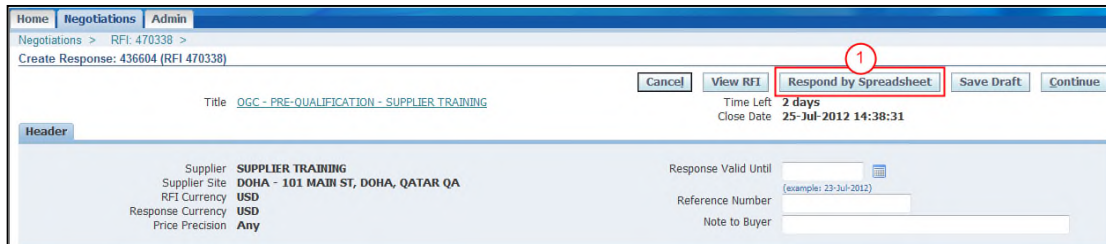
Column	Description
Negotiation Number	RFI number associated with your company’s response number. To view the CRC document, click on the “ <b>Negotiation Number</b> ” hyperlink. The “ <b>Document Summary</b> ” screen will be shown.
Title	RFI Title.
Type	The type of document such as Request for Information (RFI) or Request for Quotation (RFQ)
Time Left	The remaining time available before CRC will be closing the RFI. Supplier can submit a response until CRC RFI is closed.
Unread Messages	The number of unread messages that were sent through the Online Discussion functionality. To view the message, click on the “ <b>Number</b> ” hyperlink. For further information, see section <a href="#">8.4. - Online Discussions (Inquires, clarifications, etc.)</a> .

- ( 3 ) The “**Your Company’s Open Invitations**” section shows the negotiations which your company has been invited to participate in but has not submitted or created a draft response. From this section you can access the negotiations listed to acknowledge participation and create a response.  
**Note:** To make sure that you are seeing all open invitations click on the “**Full List**” button. If there were more open negotiations than what was shown on the initial screen, they will be displayed.
- ( 4 ) The “**Quick Links**” panel provides quick access to drafts, deliverables and active responses.

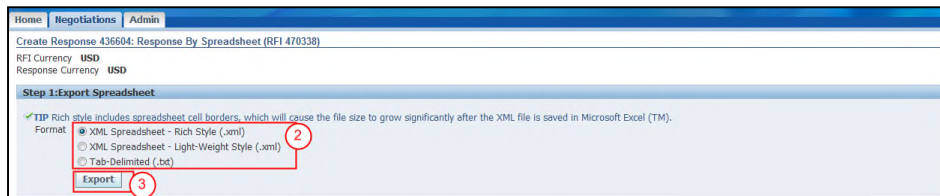


## 8.2. RESPOND BY SPREADSHEET

The functionality “Respond by Spreadsheet” allows the Supplier to download the RFI document as an Excel spreadsheet to complete the response offline and then upload the completed information back to the portal.

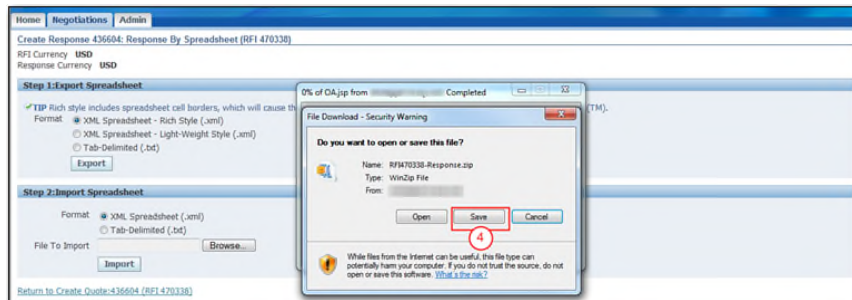


(1) Click on the “Respond by Spreadsheet” button.



(2) In the “Export Spreadsheet” section, select a “Format” radio button (i.e. XML spreadsheet- rich style, XML spreadsheet – light weight style, Tab- delimited).

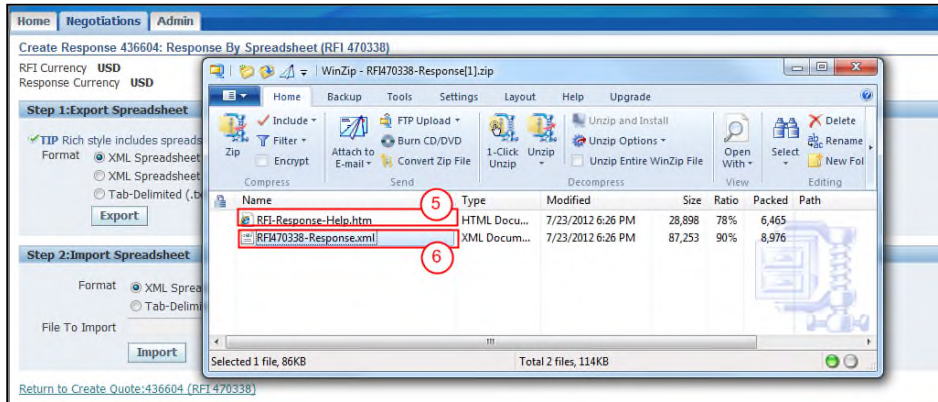
(3) Click on the “Export” button. A pop-up screen will appear.



(4) Click on the “Save” button, and save the file in the preferred location in your computer.

**Note:** The file is saved in your computer as a zip file.

Open the downloaded zip file, this file contain the spreadsheet and the instructions for completing the information.

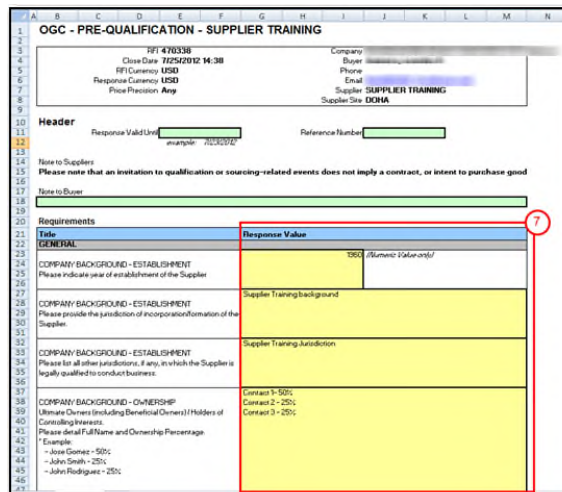


- (5) The “RFI – Response – Help.htm” file describes the information contained in the spreadsheet and provides the instructions for creating and importing responses in RFIs using the spreadsheet.
- (6) The “RFIXXX-Response.xml” file is the Excel spreadsheet. Extract the file to your computer or double click on the “File” icon to open it. Save this file to your computer for future access.

**Note:** This file will contain any response that was previously saved in the “Response” screen. These fields can be updates, as needed.

**Note:** The screenshot above is for illustration purposes only, in this example the spreadsheet is in XML Spreadsheet – Rich Style (.xml) format. However, you can choose a different format when creating the document as seen in Step 2 above.

- Follow the instructions to populate the fields and make sure to respond to all the required fields.

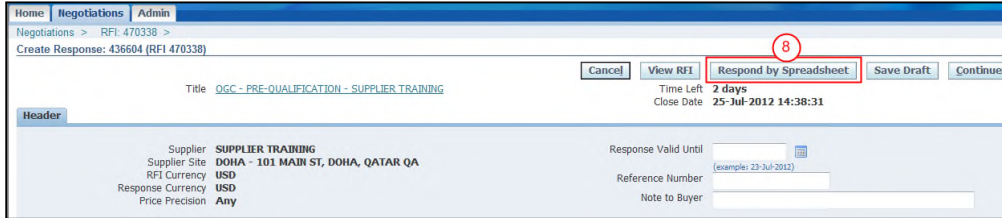


- (7) In the “Response Value” column (column G), enter the appropriate values. **In general, the Excel spreadsheet will not have all the response values required.** Therefore, refer to the RFI for the appropriate response values for each requirement.

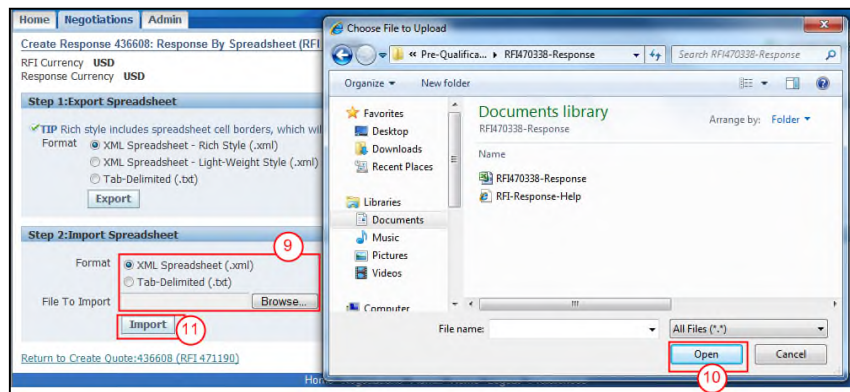
**Note:** Save the file to your desktop.

**IMPORTANT:** Do not modify the rest of the columns.

- After completed the spreadsheet, log in to the portal and open the response associated with the spreadsheet.



(8) Click on the “Respond by Spreadsheet” button.



- (9) In the “Import Spreadsheet” section, select the appropriate “Format” radio button and click on the “Browse” button. A pop-up screen will appear.
- (10) Search for the completed spreadsheet, and then click on the “Open” button.
- (11) Click on the “Import” button to upload the spreadsheet. The “Response” screen will appear with the uploaded responses.

**Note:** If errors are detected during the import process an error message will be displayed and the file will not be uploaded. See screenshot below.

Import Errors				
Worksheet Name	Spreadsheet Row Number	Table	Column Title	Error Value Error
Header	23	Requirements	Response Value	A response value is required for requirement <P>COMPANY BACKGROUND - ESTABLISHMENT</P><P>Please indicate year of establishment of the Supplier</P><P>&nbsp;</P>.
Header	23	Requirements	Response Value	The type of information you entered does not match the type of information requested by the buyer. Please re-enter your information.



8.3. RECEIVE AND ADDRESS THE RFI ADDITIONAL EVENT NOTIFICATIONS

During the negotiation process, Suppliers can receive email notification for the following events.

Event Notification	Description	Supplier Action	Notification Subject
Extend Negotiation	CRC has extended the event's close date.	Verify that response to the Request for Information (RFI) has been submitted.	From: CRC - Notification: Supply Contracts, Auctions@CRC.com To: CONTACT CONTACT Cc: Subject: FYI: Extended: RFI 470351 (OGC - PRE-SCREENING - SUPPLIER TRAINING)
Pause Negotiation	CRC has paused an event.	Optionally, create a draft response but it cannot be submitted.	From: CRC - Notification: Supply Contracts, Auctions@CRC.com To: CONTACT CONTACT Cc: Subject: FYI: Sent: Online Discussion Message for RFI 471190 (OGC - PRE-SCREENING - SUPPLIER TRAINING - LOW RISK)
Early Close	CRC has closed the event to receive responses.	No additional action is required.	From: CRC - Notification: Supply Contracts, Auctions@CRC.com To: CONTACT CONTACT Cc: Subject: FYI: Closed: RFI 470338 (OGC - PRE-QUALIFICATION - SUPPLIER TRAINING)
Amend Negotiation	CRC has amended the RFI document.	View, Re-acknowledge the document and re-submit a response.	From: CRC - Notification: Supply Contracts, Auctions@CRC.com To: CONTACT CONTACT Cc: Subject: FYI: Acknowledgement Required: Amendment 1 to RFI 470351 (OGC - PRE-SCREENING - SUPPLIER TRAINING)
Canceled Negotiation	CRC has cancelled an event.	No additional action is required.	CRC Buyer will notify the Supplier
New Round	CRC has reviewed the Supplier responses to the RFI document and has decided to conduct a new round to get new responses.	Acknowledge the new round and document and submit a new response.	From: CRC - Notification: Supply Contracts, Auctions@CRC.com To: CONTACT10 CONTACT10 Cc: Subject: Action Required: You are invited: Additional round of RFI 470351-2 (OGC - PRE-SCREENING - SUPPLIER TRAINING)

**IMPORTANT:** Even though notifications provide basic deliverable status information, it is necessary to access the specific deliverable within the iSupplier Portal to view and open for additional information.

**IMPORTANT:** For automatic notifications the email sender will be "CRC – Notification" not a specific CRC Buyer. If you do not receive a notification in your mailbox, please check your mailbox spam, trash or delete folders, or see if it might have been filtered by your company spam filtering services. Make sure to set "CRC – Notification" as a valid email sender to avoid any issue for subsequent notifications. Yahoo and Hotmail email account users might NOT receive some notifications correctly. If an email notification contains an error message, contact the CRC Buyer.

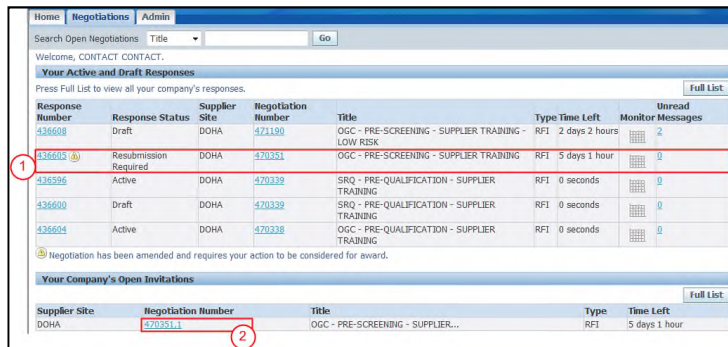
**Note:** For more information about Notifications, view the [User Guide – Overview to Access and Passwords, Navigations and Notifications](#)



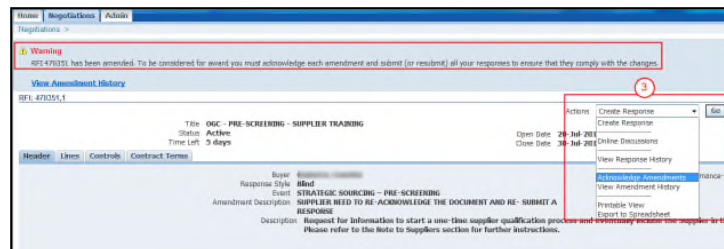


### 8.3.1. MANAGE AMENDED RFI

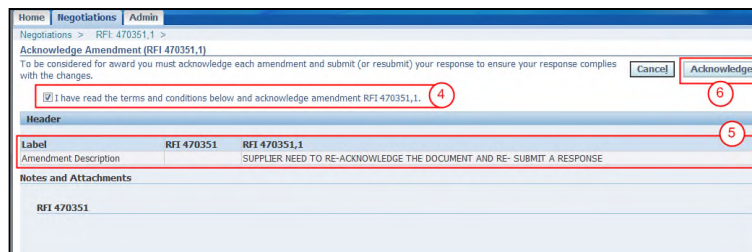
CRC can amend an RFI document and request re-acknowledge and re-submitting a response. The amended RFI will be shown in the **“Your Company’s Open Invitation”** section. Access the portal to review the RFI and perform the required action to be considered for the negotiation.



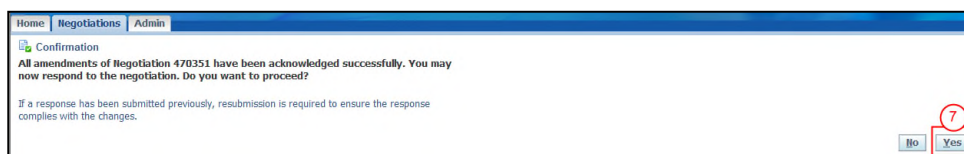
- (1) The **“Your Active and Draft Responses”** section shows the Response Number with a **“Warning”** icon and the response status of *Resubmission Required* for the specific negotiation that has been amended by CRC.  
**Note:** Identify the negotiation number of the document that has been amended.
- (2) The **“Your Company’s Open Invitation”** section shows the document that has been amended. Identify the document’s negotiation number and click on the **“Negotiation Number”** hyperlink to re-acknowledge the amended document. The **“Summary Document”** screen will appear.  
**Note:** For amended RFIs the negotiation number is composed of its legacy negotiation number and the amendment number. i.e.: XXXXXX, 1; XXXXXX,2; etc..



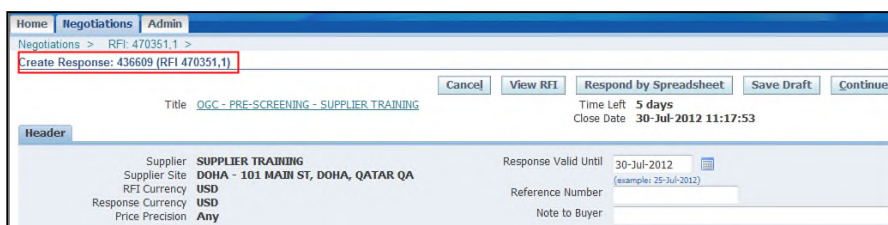
- (3) Select the **“Acknowledge Amendments”** option from the **“Action”** dropdown menu. Then click on the **“Go”** button.



- ( 4 ) Check on the **“I have read the terms and conditions below and acknowledge amendment RFI XXXXXX, X”** checkbox to confirm acknowledgement.
- ( 5 ) Read the description of the amendment to see what action is required with the amendment.
- ( 6 ) Click on the **“Acknowledge”** button. A confirmation message will appear.

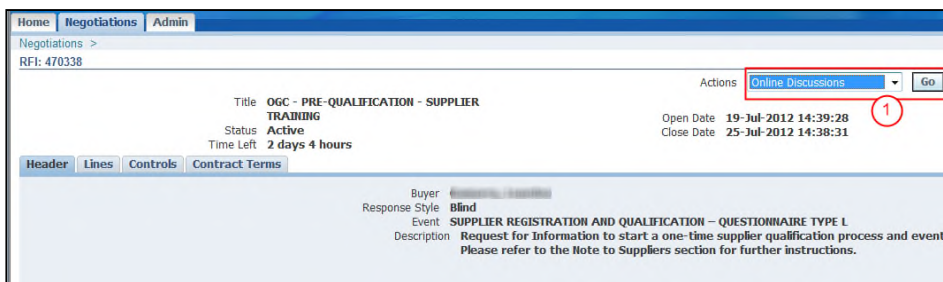


- ( 7 ) Click on the **“Yes”** button to respond the amended negotiation. Then, the **“Response”** screen will appear. To understand how to respond negotiation, see section [6. - Create Response.](#)



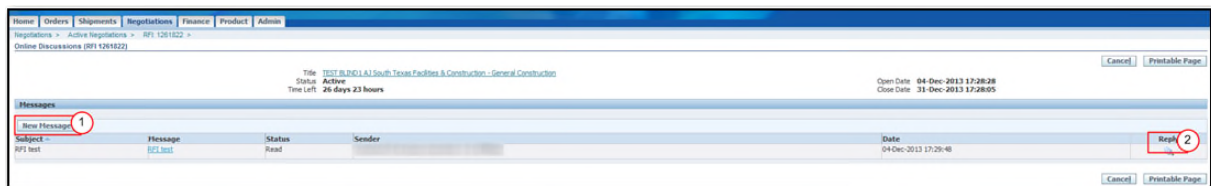
#### 8.4. ONLINE DISCUSSION (INQUIRES, CLARIFICATIONS, ETC)

The Online Discussion functionality should be used to make inquires, clarifications or to provide additional information regarding the RFI document. This functionality replaces any email communication.



(1) Select the option **“Online Discussion”** from the **“Actions”** dropdown menu, and click on the **“Go”** button.

The online discussion screen will be displayed.

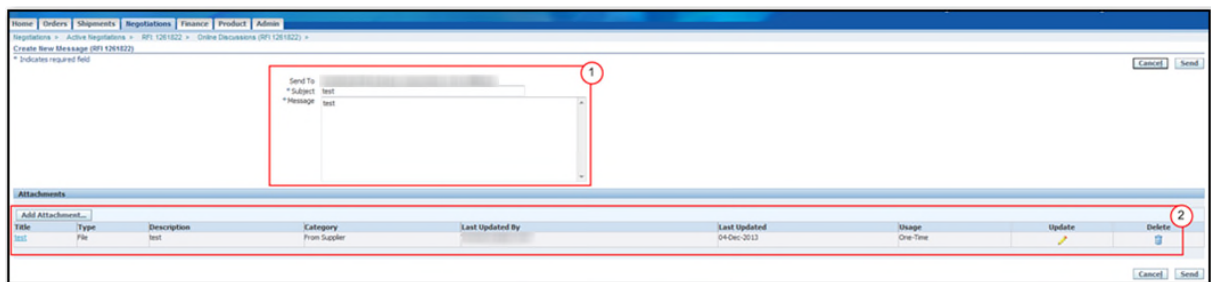


(1) Click on the **“New Message”** button to create a new message.

(2) Click on the **“Reply”** icon to reply to a message.

**Note:** Click on the **“Printable Page”** button to print all messages or click on the **“Cancel”** button to return to the **“Negotiations”** screen.

In the specific online discussion screen, complete the message and as needed, add attachments.



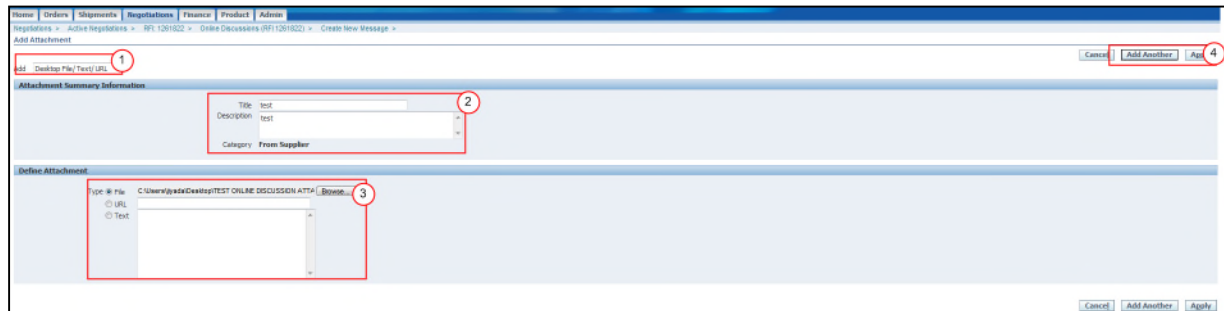
(1) Under the Online Discussion header section, the **“Send To”** field displays California Resources Corporation or its affiliates:

- Enter the subject line in the **“Subject”** field.
- Enter a brief message to send out to the receiver in the **“Message”** field.

**IMPORTANT:** When replying to a message the subject of the subject and message will be pre-populated, you can change them by typing over the pre-populated information.

(2) As needed, under the “Attachments” section, add, remove or update attachments.

- Click on the “Delete” Trash Can icon to remove an attachment
- Click on the “Update” Pencil icon to change the attachment
- Click on the “Add Attachment” button to add a new attachment.



(1) From the “Add” dropdown menu, select the **Desktop File/Text/URL** option.

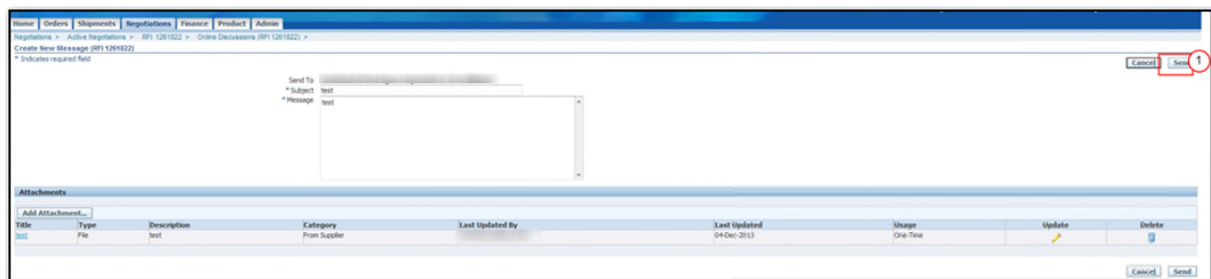
(2) Under the “Attachments Summary Information” section, complete the following:

- In the “Title” field, enter the name of the attachment.
- In the “Description” field, enter the description of the attachment.
- The “Category” field displays **From Supplier**.

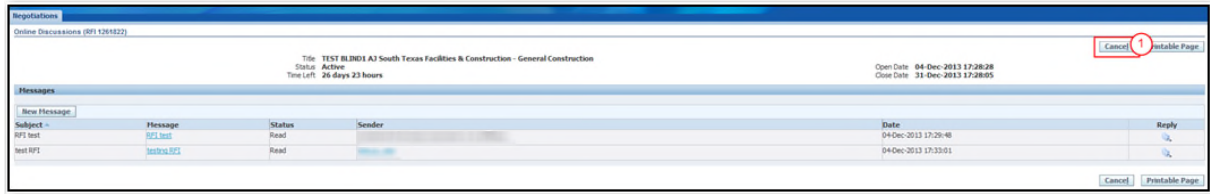
(3) Under the “Define Attachment” section, select the applicable “Type”.

- If “Type” is **File**, click on the “Browse” button to attach the document.
- If “Type” is **URL**, enter the URL in the URL field.
- If “Type” is **Text**, type the message in the text box.

(4) Click on the “Apply” button to return to the message or to add additional attachments, click on the “Add Another” button.



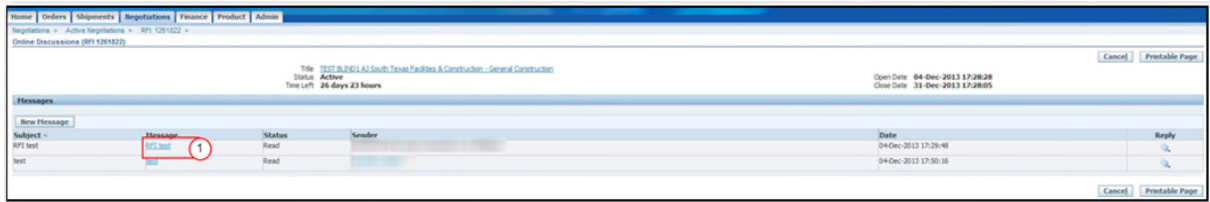
(1) Click on the “Send” button to send the message. System will return to the “Online Discussions” screen, displaying the sent message under the “Messages” section.



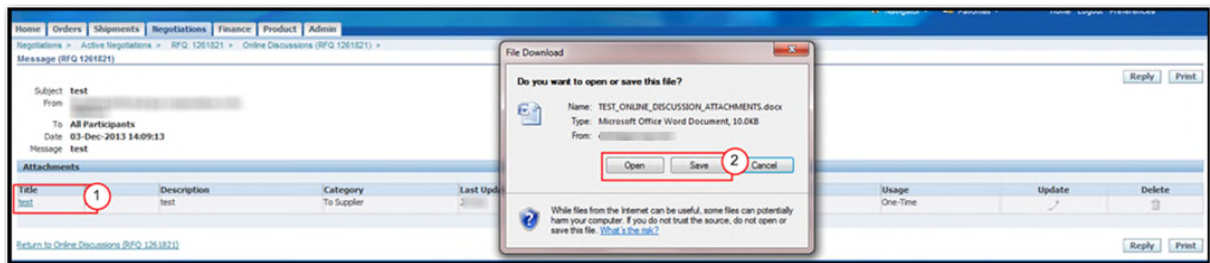
(1) Click on the “Cancel” button to return to the “Negotiations” page.

#### 8.4.1. VIEW SENT ONLINE DISCUSSION ATTACHMENTS

When attachments are included with the online discussion message, the attachments are displayed under the body of the specific online discussion message. Open the online discussion message to access the specific attachments.



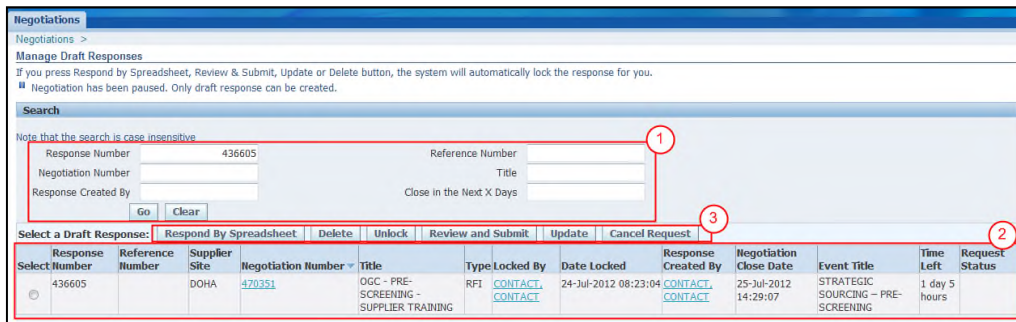
(1) Locate and click on the title of the online discussion message hyperlink to view the message and attachment.



- (1) If attachments have been included in the online discussion it will be displayed under the “Attachments” section as a hyperlink. Click on the title hyperlink.
- (2) The system will display the “File Download” window, click on the “Open” button to view the attachment or click on the “Save” button to save the attachment.

## 8.5. MANAGE DRAFT RESPONSES

If a draft copy of the RFI response was created, you can open the draft and resume completing your response by clicking on the **“Drafts”** hyperlink in the **“Quick Links”** panel at the bottom of the **“Negotiations”** tab, as shown in section [8.1. – Navigate through the Negotiations Tab](#).



- ( 1 ) In the **“Search”** section, populate the search criteria and click on the **“Go”** button. The **“Draft Response”** table will be displayed.
- ( 2 ) In the **“Draft Response”** table select the applicable draft response by checking the radio button next to the Response Number. This table shows the following key columns.

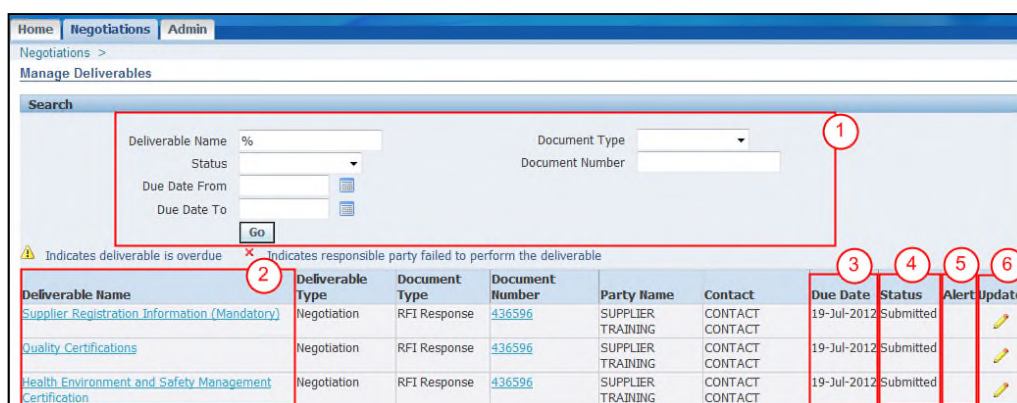
Key Column	Description
Locked by	Name of the user working on the draft response
Locked date	Date when the user created the response
Response Created by	Name of user who created the draft response

- ( 3 ) Select the applicable draft to be managed and click on one of the following action buttons.

Action Button	Functionality
Respond by Spreadsheet	To respond the RFI by importing an excel spreadsheet. For further information see section <a href="#">8.2.- Respond by Spreadsheet</a>
Delete	To delete a draft response
Unlock	To allow another Supplier user to complete and submit the response
Review and submit	To review and submit the draft response
Update	To add additional information to a draft response

## 8.6. MANAGE DELIVERABLES

View and manage deliverables related to RFI documents by clicking on the **“Deliverables”** hyperlink in the **“Quick Links”** section on the **“Negotiations”** tab, as shown in section [8.1. – Navigate through the Negotiations Tab](#).



Deliverable Name	Deliverable Type	Document Type	Document Number	Party Name	Contact	Due Date	Status	Alert	Update
<a href="#">Supplier Registration Information (Mandatory)</a>	Negotiation	RFI Response	436596	SUPPLIER TRAINING	CONTACT CONTACT	19-Jul-2012	Submitted		
<a href="#">Quality Certifications</a>	Negotiation	RFI Response	436596	SUPPLIER TRAINING	CONTACT CONTACT	19-Jul-2012	Submitted		
<a href="#">Health Environment and Safety Management Certification</a>	Negotiation	RFI Response	436596	SUPPLIER TRAINING	CONTACT CONTACT	19-Jul-2012	Submitted		

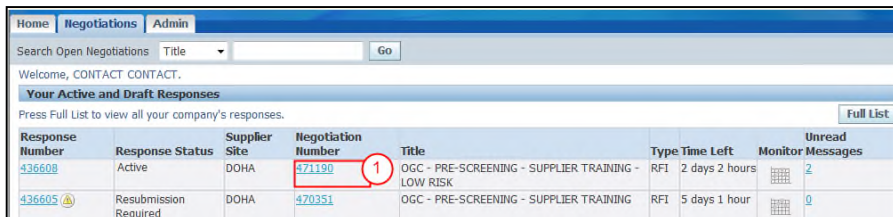
- (1) In the **“Search”** section, populate the applicable criteria (i.e.: Deliverable Name, Status, Due Date From, etc) or leave it blank, and then click on the **“Go”** button. The **“Deliverables”** table will be displayed.
- (2) View the deliverable details by clicking on the appropriate title hyperlink in the **“Deliverable Name”** column.
- (3) The **“Due Date”** column shows the date that the action needs to be completed by.  
**Note: “Prior to” and “Overdue”** automatic notifications are based on this date.
- (4) The **“Status”** column can show the following deliverable statuses.

Status	Description
<b>Open</b>	Deliverable has not been submitted. It is expected that the Responsible Party takes actions before the due date.
<b>Submitted</b>	Deliverable related documentation/information has been submitted/updated by the Responsible Party.
<b>Rejected</b>	Deliverable related documentation/information was reviewed by CRC and it was found to be inaccurate, incomplete or not satisfactory. It is expected that Supplier will re-submit the documentation addressing CRC’s comments and requirements.
<b>Completed</b>	Final Status - Deliverable related documentation/information was reviewed by CRC and it is satisfactory. No additional action is required from the Responsible Party.
<b>Cancelled</b>	Final Status - Deliverable no longer needed. No additional action is required from the Responsible Party.
<b>Failed to Perform</b>	Final Status - Deliverable related documentation/information was reviewed by CRC and it is NOT satisfactory. It is NOT expected that the Responsible Party will take any additional action.

- (5) The **“Alert”** icon is displayed if the deliverable is overdue.
- (6) Click on the **“Pencil”** icon on the **“Update”** column to upload deliverables documentation.

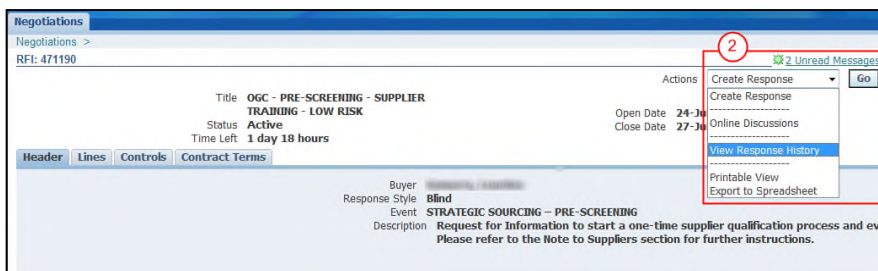
## 8.7. VIEW RESPONSE HISTORY

If multiple responses have been submitted in an RFI, access and view each of them using the “**View Response History**” functionality.



Response Number	Response Status	Supplier Site	Negotiation Number	Title	Type	Time Left	Monitor	Unread Messages
436608	Active	DOHA	471190	OGC - PRE-SCREENING - SUPPLIER TRAINING - LOW RISK	RFI	2 days 2 hours		2
436605	Resubmission Required	DOHA	470351	OGC - PRE-SCREENING - SUPPLIER TRAINING	RFI	5 days 1 hour		0

- (1) Click on the “**Negotiations Number**” hyperlink to access to the Response History.



Negotiations > RFI: 471190

Title: OGC - PRE-SCREENING - SUPPLIER TRAINING - LOW RISK  
Status: Active  
Time Left: 1 day 18 hours

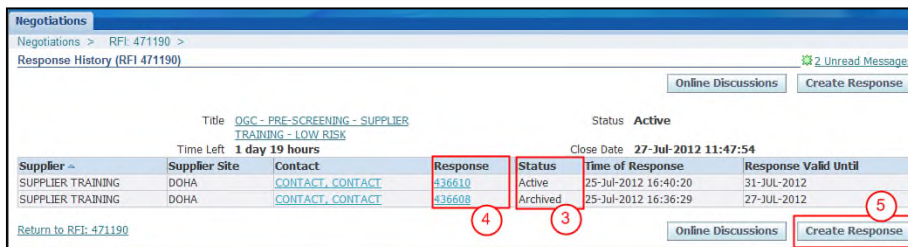
Buyer: [Redacted]  
Response Style: Blind  
Event: STRATEGIC SOURCING - PRE-SCREENING  
Description: Request for Information to start a one-time supplier qualification process and event. Please refer to the Note to Suppliers section for further instructions.

Open Date: 24-Jul  
Close Date: 27-Jul

Actions: Create Response, Create Response, Online Discussions, **View Response History**, Printable View, Export to Spreadsheet

Go

- (2) In the “**Actions**” dropdown menu, select the “**View Response History**” option, and then click on the “**Go**” button. The “**Response History**” screen will appear.



Negotiations > RFI: 471190 > Response History (RFI 471190)

Title: OGC - PRE-SCREENING - SUPPLIER TRAINING - LOW RISK  
Status: Active  
Time Left: 1 day 19 hours  
Close Date: 27-Jul-2012 11:47:54

Supplier	Site	Contact	Response	Status	Time of Response	Response Valid Until
SUPPLIER TRAINING	DOHA	CONTACT, CONTACT	436610	Active	25-Jul-2012 16:40:20	31-JUL-2012
SUPPLIER TRAINING	DOHA	CONTACT, CONTACT	436608	Archived	25-Jul-2012 16:36:29	27-JUL-2012

Return to RFI: 471190

Online Discussions, Create Response

- (3) The “**Status**” column can show the following statuses.

Status	Description
Active	Current response sent to CRC
Archived	Past response sent to CRC. Archived responses are not consider for the negotiation

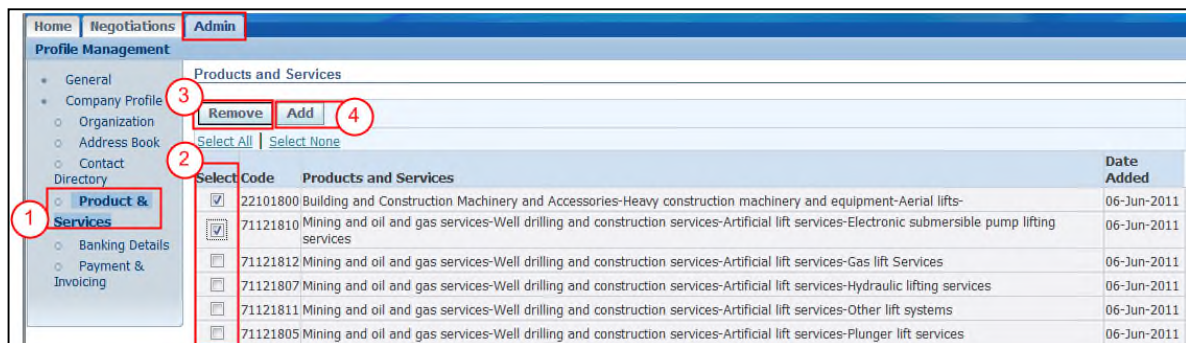
- (4) The “**Response**” column provides access to the response by clicking on the respective “**Response Number**” hyperlink.
- (5) An additional response can be created by clicking on the “**Create Response**” button.



## 8.8. EXHIBIT - REVIEW AND UPDATE PRODUCTS AND SERVICES – PREQUALIFICATION PROCESS

**IMPORTANT:** Only applicable to the Pre-Qualification Process

During the pre-qualification process, it is possible to update the list of products and services offered by your company. You can remove or add product to this list as needed. Access the Products and Services lists by clicking on the **“Admin”** tab.



(1) In the **“Profile Management”** panel, click on the **“Product and Services”** link.

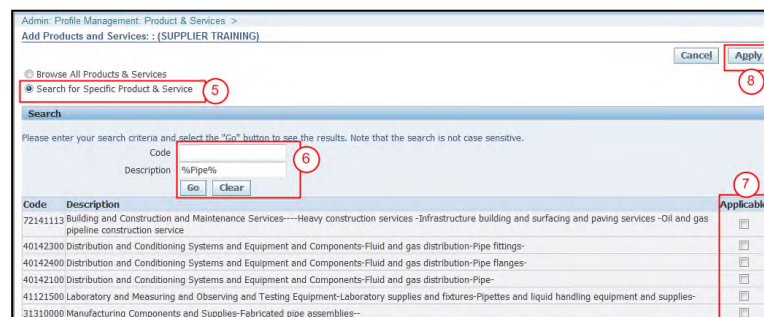
- To Remove Product and Services follow the steps below:

- Select the applicable product and service by clicking on the respective **“Select”** checkbox.
- Click on the **“Remove”** button.

- To Add Product and Services follow the steps below:

- In the **“Product and Services”** screen, click on the **“Add”** button.
  - There two option to search and add Products and Services:

**Option 1:** Search for Specific Code and Product (Recommended)

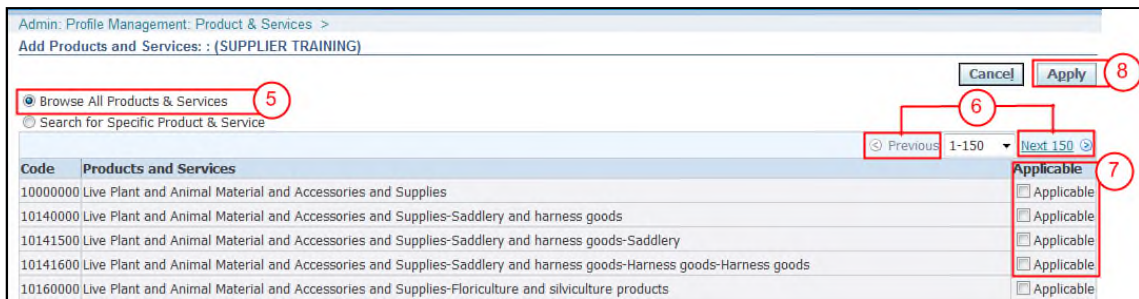


- Click on the **“Search for Specific Product and Service”** radio button to browse for specific Product or Service.



- ( 6 ) In the “**Search**” section populate the applicable criterion (i.e. UNSPSC Code or Description) or leave it blank. Then click on the “**Go**” button. The “**Products and Services**” table will be displayed.  
**Note:** In the “**Description**” field, enter the Product/Service information or keyword (i.e. Tubular, Pipe, etc) with the “%” symbol on either side of the words to broaden the range of results. (i.e. %Tubular%)  
**Note:** Optionally, in the “**Code**” field search by the specific product’s/service’s UNSPSC codes.
- ( 7 ) Select the applicable Products and Services by clicking the respective “**Applicable**” checkbox.  
**Note:** Select as many products and services your company provides.
- ( 8 ) Click on the “**Apply**” button.  
**Note:** Repeat these steps, as needed, to select all applicable categories.

**Option 2:** Browse all Products and Services.



- ( 5 ) Click on the “**Browse All Products & Services**” radio button.
- ( 6 ) Click on the “**Previous**” or “**Next**” hyperlinks to search in the “**Products and Services**” list.
- ( 7 ) Select the applicable Products and Services by clicking the respective “**Applicable**” checkbox.  
**Note:** Select as many products and services your company provides.

**IMPORTANT:** Do not select categories of products or services that your company is not currently providing to other customers. It will delay any CRC internal downstream process and will negatively impact the perceived reliability of the data that your company submitted.

- ( 8 ) Click on the “**Apply**” button.  
**Note:** Repeat these steps, as needed, to select all applicable categories.