# MERX Supplier Guide

**June 2013**

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# Welcome to MERX

MERX is a service designed to facilitate the buying and selling of goods and services between the public and private sectors.

MERX is an opportunity and award notice management system that:

- Allows you to search and view opportunity notices and award notices
- Gives you free online preview and electronic orders of associated components (bid documents/attachments)
- Allows you to create an opportunity matching profile
- Allows you to instantly update your organization and contact profile information
- Gives you unlimited Toll Free Customer Service
- Gives you the ability to order bid sets by one of the following delivery methods: Courier, Mail, Email, Download, Fax or Pickup

Review the next section to learn how to use this guide and to familiarize yourself with MERX.

# About this Reference Guide

This reference guide introduces you to MERX services and shows you how to complete frequently performed Supplier functions. The guide is divided into 4 sections:

| | |
|---|---|
| **Section 1: Getting Started** | All you need to know about system requirements, and accessing MERX via the Internet. |
| **Section 2: Working with MERX** | Gets you logged in, shows you how to navigate through MERX and helps you perform the most common supplier related tasks. This section also identifies other functions that are not covered in this guide but are available on MERX. |
| **Section 3: Reference Information** | Find out about additional sources of information, where to find answers to frequently asked questions (FAQs) and how to contact MERX. |
| **Appendix A: Field Definitions for Opportunities** | Look up information on field definitions. |
| **Appendix B: Search Operators** | Look up information on search operators. |

**!** INDICATES IMPORTANT AND CAUTIONARY MESSAGES

**TIPS** INDICATES USEFUL ADVICE

# Section 1 – Getting Started

Ensure that you are able to connect to the MERX site, through the Internet and you have an Internet browser installed.

## System Requirements

We make every effort to ensure that MERX will run on all new browsers. If you are experiencing difficulties using MERX with your new internet browser please let us know at merx@merx.com.

We recommend that you update your browser to the latest version supported by your operating system so that you can take advantage of new browser features. The following versions are the minimum that MERX will currently support.

- Internet Explorer 7.0 or greater
- Google Chrome
- Firefox

## Cookies

In order for MERX to run smoothly your Internet browser must accept 'Cookies'. Cookies are small packets of information that store and track your work preferences, patterns and Internet addresses (also referred to as URLs). The browser uses this information to speed up your Internet access. Without cookies MERX will be very slow and may encounter system errors. Cookies do not record or transmit your email address or any other personal information to MERX. When you exit your browser, the cookies created by MERX are removed from your hard drive.

# Section 2 – Working with MERX

Learn how to perform common activities with MERX by following the quick and simple, step-by-step instructions provided in this section. You can review instructions for the following:

- Logging on to MERX
- Creating an opportunity matching profile
- Viewing an opportunity or award notice
- Viewing (online only) electronic documents
- Searching/How to search for an opportunity notice
- Ordering Associated Components (documents/attachments)
- Modifying your organization and contact profile information

## Logging on to MERX

To log-on to MERX, you must first access the Language Choice page and select French or English. If English is selected, the English MERX home page will be launched. The English home page allows you to access other Information pages.

1. Double click on the Web Browser icon located on your workstation desktop.

   a) If you have the MERX address as your home page setting the MERX home page will automatically be displayed.

   b) If the MERX address is not set to be your home page, then enter the MERX site addresswww.merx.com in the Address or Location field at the top of your browser and press Enter. The MERX Language Choice page will be displayed.

2. Click on the Language of choice; either English or French.

3. Click on the **LOGIN** button (upper right hand corner of the screen) to open the MERX login page.

4. Enter your User ID and Password and click on the **Login** button.

   User IDs and Passwords are case sensitive. Make sure you type your User ID and Password using the appropriate case.

   The first time you login, you will be prompted to change your password. You can change the password at any time by using the Change Password function located under the Manage My Account/View Own Profile page.

   *Note:* *If you have forgotten your password, click the "Forgot your password?" link and follow the screen prompts to request your password from MERX.*

You have now successfully logged in. Review the next section to learn how to use some of the most common MERX functions.

**!** KEEP YOUR USER ID AND PASSWORD IN A SAFE PLACE TO ENSURE SECURITY!

**TIP** BOOKMARK THE MERX WEB SITE PAGE FOR QUICK AND EASY ACCESS!

## The Opportunities Page

The Opportunities page gives you access to all of the supplier features and functions of MERX.

The Opportunities page is divided into two sections:

- Supplier menu links
- Opportunities

## Links to MERX Functions

Links to MERX functions (pages) are displayed on the left-hand side of the page. A link is an electronic path that quickly takes you to a particular page/function within MERX. Links are identified by underlined or [bracketed] text. Click on the function with which you wish to work. If a menu item is grey, it means that the page is currently displayed or the MERX page is not available for selection.

| | |
|---|---|
| Opportunities: | This option allows you to access the Opportunities page, from which you will be able to find and display opportunity notices. |
| Category View: | This option allows you to view and search opportunites using the category matrix. |
| Opportunity Matching Profile: | Under this sub-header you will be able to Create, Manage, and Run your Opportunity Matching profile(s). |
| My Account Activity: | This option allows you to access your Opportunity Ordered List, your Order Tracking Report and View Statements.<br><br>The Opportunity Ordered List is a list of the opportunity notices you have ordered. Here you can check to see if you have selected the option to receive amendments or notifications. You can sort the list by Confirmation Number, Purchase Order Number (if one was used), or by Date Ordered. If you have clicked on a confirmation number you will be taken to a screen from where you can download PDF files of all opportunity documents you have ordered (if PDF is available).<br><br>The Order Tracking Report will permit you to search for a specific MERX Reference Number or Solicitation number and access all your order details for that opportunity.<br><br>You can also view your MERX statements for the last 12 months. |
| Manage My Account: | This option allows the Supplier Coordinator to access profile maintenance functions such as updating the organization’s information or updating/adding new supplier contacts. If your role is a Supplier, you will |

| | |
|---|---|
| | access the View Own Contact Information page. |
| Information: | Under this sub-header you will be able to access MERX Announcements, Government Announcements, Government Publications, Business Resources, Events, and our Frequently Asked Questions pages. |

## Viewing a Notice

You can view an opportunity notice at anytime to determine if you would like to pursue the opportunity and order associated components (documents/attachments).

To view detailed information about an opportunity notice, follow these steps:

1. From the Opportunities page, fill out your search criterias in the Search bar and click the Search icon.

2. Locate an opportunity notice that is of interest to you.

3. Click the title of the opportunity notice. The Opportunity Abstract page will be displayed.

4. a) If you would like to order associated components (documents/attachments), click on the **Order Associated Documents** link to open the Order Basket page.

   b) To view a list of suppliers who have ordered associated components (documents/attachments), click on the **Document Request List** link (available at the discretion of the buying organization).

   c) To return to Opportunities, click on the **back button**.

## The Categories List (on the Canadian Public Tenders service only)

The Supplier Category View page displays a list of categories that are divided into 4 commodity groups (Goods, Services, Construction and Other). To the right of each category is a summary number of all open opportunity notices that match that category. The summary number is a hyperlink. When clicked, the Opportunities page will be launched and all matching Canadian opportunity notices for that category will be displayed. If there are new opportunities published on MERX today, a second hyperlinked summary number will be displayed. Clicking this hyperlink will launch the Opportunities page and display the new Canadian opportunity notices (published today).

## Setting up an Opportunity Matching Profile

Opportunity matching is a feature that allows you to define and save the criteria for the type of opportunity notices you wish to find. You can have the matching opportunity notices automatically sent to you at no charge by email in html or plain text format, or fax. You can also run your opportunity matching profile online.

Opportunity matching does not limit the notices you can view. You can always perform a search for any type of notice. As a Value Added Service, you can create up to 9 Opportunity Matching profiles in order to separate the different services your organization might offer.

A tutorial link is available on the MERX web site designed to help you get your profile set up and achieving great results.

## How to create your Opportunity Matching Criteria:

1. From the Opportunities page, under the Opportunity Matching sub-header, click the **Create My Profile** link. The New Matching Profile page will be launched.

2. Enter the search criteria items you wish to use to find opportunity notices. You must complete at least one of the search fields detailed below.

| **Field** | **Description** |
|---|---|
| Profile Name | Enter a descriptive name for your profile. |
| Delivery Method | When opportunities are found, by which delivery method would you prefer to receive them? Select one of the four delivery methods you would like to use. |
| Online Only | You can access your results online at any time by clicking on the Run My Profile link located under the sub-header Opportunity Matching. All matching opportunity notices will be displayed in published date sequence with today's new opportunities appearing first. |
| Fax | On a daily basis, the abstracts for any newly published opportunities that match your profile will be faxed to you. To modify your delivery fax number, update your own profile using the Manage My Account link on the Opportunities page. Note that there is no additional charge for delivery as this is included in your core subscription price. |
| HTML Email | On a daily basis, the abstracts for any newly published opportunities that match your profile will be emailed to you in HTML format. This means it will include hyperlinks to the MERX website. To modify your delivery email address, update your own profile using the Manage My Account link located on the Opportunities page. Note that there is no additional charge for delivery as this is included in your basic subscription price. |
| Plain Text Email | On a daily basis, the abstracts for any newly published opportunities that match your profile will be emailed to you in plain text format. This means it will not include hyperlinks to the MERX website. To modify your delivery email address, update your own profile using the Manage My Account link located on the Opportunities page. Note that there is no additional charge for delivery as this is included |

| | |
|---|---|
| | in your basic subscription price. |
| Delivery Language | Please select the language in which you wish to receive your Opportunity Matching results (Mandatory) |
| Keywords | Enter a keyword or phrase that represents the goods or services you provide. Click *Searching for Character Strings* for more information about entering search character strings. |
| Categories | Select the categories for the opportunities you wish to view by clicking on the drop down arrow. Click in the checkbox to the left of each category you wish to select and click on Submit at the bottom of the page. |
| GSIN Group | Select the GSIN Group(s) for the opportunities you wish to view by clicking on the drop down arrow. Click in the checkbox to the left of each GSIN Group you wish to select and click on Submit at the bottom of the page. |

3. You can refine your Search Results by using the following fields:

| | |
|---|---|
| Must Have | Enter any keyword(s) that MUST appear in the opportunity. If you enter a list of items separated by commas, an opportunity will be selected if any keywords in your list exist in the notice abstract. Note that all the special character search operators outlined above can be used here. |
| Must NOT Have | Enter any keyword(s) that MUST NOT appear in the opportunity. If you enter a list of items separated by commas, an opportunity will be excluded if any keywords in your list exist in the notice abstract. Note that all the special character search operators outlined above can be used here. |
| Include ACAN | Select "No" from the drop down list to exclude ACANs (Advance Contract Award Notices). ACANs are typically opportunities that are awarded to a sole source supplier.<br>The initial default is to include ACANs. |

4. a) If you wish to test the Opportunity Matching Profile, click the **Test** button to view the matching opportunity notices that will be listed at the bottom of the page.

   b) Click on the **Save** button to save your profile.

   c) If you want to abort the changes, click the **Cancel** button.

   Regardless of your selected delivery method, you can always access your results online at any time by clicking the **Run My Profile** link under the sub-header Opportunity Matching available from the Opportunities page.

## How to Run an Opportunity Matching Profile

Use the Opportunity Matching search function to find opportunity notices that match your preset Opportunity Matching profile.
To run your Opportunity Matching profile, go to the Opportunities page, under the Opportunity Matching sub-header, click on the Run My Profiles link. Select the profile you wish to Search if more than one Opportunity Matching profile has been created. Your search results page will be displayed.

## Removing your Opportunity Matching Profile

If you want to remove your opportunity matching profile, go to the Opportunities page, under the Opportunity matching sub-header, click on the **Manage My Profiles** link. On the Manage My Profiles page, insert a checkmark in the checkbox and then click the **Delete** button to remove your opportunity matching profile completely.

## Searching for Opportunity Notices

To search for opportunity notices, you can either run your Opportunity Matching profile or you can do a simple or advanced search for opportunity notices.

A simple search allows you to enter any keyword or string of characters to perform a broad search. The advanced search is a quick way of retrieving one or more particular opportunity notices that match one or more specified conditions.

## How to Perform a Simple Search

Use the simple search function to find opportunity notices based on keywords. You can search for Canadian or International opportunity notices.

1. Go to the Opportunities page.

2. Enter a keyword(s) (e.g. construction, computer systems). Refer to Appendix B of this guide for detailed information on using special search characters.

3. Select if you wish to view All opportunities or only those posted Since Last Login.

4. Click on the **Search** icon to the right of the field box to initiate the search and display the results.

You can also find a specific notice by entering its Solicitation Number, Reference Number into the search box and then clicking the **Search** icon to the right of the field box. For example, if you want to find a notice and you know its Solicitation or Reference Number, enter the Number in the search box, and then click the Search icon to the right of the field box.

## How to Perform an Advanced search

Use the advanced search function to refine your search to find specific types of Canadian or International opportunity notices that match the goods or services you provide.

1. Go to the Opportunities page.

2. Click the **Advanced Search** link.

3. Enter or select the information you wish to use for your search criteria. If you require a detailed explanation about the fields, terms or functionality of the Advanced search page, click the **Help** button located at the top right corner of the page.

4. At the bottom of the page, select the maximum number of results you want returned per screen from the Maximum number of results drop down box.

5. Click on the **Search** button to initiate the search and display the results.

**TIP** FOR A LIST OF "SEARCH OPERATORS" THAT WILL AID IN DEFINING YOUR SEARCH, SEE APPENDIX B.

## How to View Documents

The view feature will allow Registered Suppliers to preview (online only) supporting solicitation documents associated with a given opportunity in a “preview” window. This will help Registered Suppliers decide whether to place an order with MERX for those particular documents. Saving or printing the previewed documents will be prevented until such time as an order is placed.

Access to the view feature will be included on the opportunity notice by way of a “**preview associated components**” link. The “preview” links will only appear if one or more of the electronic supporting solicitation documents are available electronically. If there are no documents associated to a notice, no links will appear.

Follow these steps to view detailed information about an opportunity:

1. From the Opportunities page, click on the title of the opportunity notice you wish to view. The Opportunity Abstract page will be displayed.

2. a) If there are documents associated to the notice, you may preview certain electronic documents. Simply click on the **Preview Associated Components** link and then on the **Preview** link(s) associated to the documents you wish to view. Note: Saving or printing the previewed documents will be prevented until such time as an order is placed.

   b) If you would like to order documents, click on the **Order Associated Components** link to open the Order Basket page.

   c) To view a list of suppliers who have ordered components or items (documents/attachments), click on the **Document Request List** link.

   d) To return to the Opportunities page, click on the **Opportunities** link.

## Ordering Associated Components

If associated components are available for an opportunity, an order link will be available beside the opportunity notice. In most cases, you must order all associated components and you should authorize MERX to automatically send you amendment notifications. You may also choose to subscribe to a MERX Value Added Service that will ensure that all amendments are automatically delivered to you.

You can determine if additional information is available by looking at the Associated Components field on the Opportunity Abstract page. If the field displays “Yes”, then there are associated components to be ordered.

MERX provides you with the ability to order any of the associated components online.

*Note:* *If you are a new subscriber or you are placing a one time order (Non Subscriber order), all ordered components must be purchased using a credit card.*

## How to Order Components

Follow these steps to order associated components.

1. From the Opportunities page, click on the **Order** link located to the right of the opportunity notice for which you wish to order associated components. The Order Basket page will be displayed.

2. Enter the quantity for each component item you wish to purchase. By default, the quantity is set to one (1). Select the delivery method you wish to use from the drop down list.

3. If you are a subscriber to the Automatic Transmission of Amendments, a Value Added Service, you will be able to select “Receive Amendments” from a dropdown list authorizing MERX to automatically send you amendments should additional components be issued. (You will be charged a fee for each subsequent component that is sent to you.) As a Core Service subscriber you will have the option to select “Receive Notifications” (without additional charge) by email, fax or mail for each opportunity you order.

4. An opportunity order can be removed from the Order Basket. To delete an order, click the check box (in the Delete column) to the left of the opportunity being ordered. Click the **Recalculate** button to refresh the Order Basket page.

   If you require detailed help information, click the **Help** button located at the top right corner of the page.

5. If you have selected a delivery method other than the default or have entered a different quantity, click the **Recalculate** button to refresh the totals on the order form.

Note: *If you wish to view details about the component you are ordering (for example the number of pages in a document) you can click the component hyperlink under the Items column.*

6. If you want to add more opportunities to your Order Basket, click on the **Add more items** button to launch the Opportunities page. When you order another opportunity, the Order Basket page will be launched and you will see that a new item has been added to the Order Basket.

7. Review the details on the Order Summary page. Verify your contact profile delivery information. If you need to modify your contact information, click the **Change Profile** button. Update your contact information (mailing address, fax and e-mail address) as required and click the **Submit** button. Once the changes have been made, click on the Opportunities link in order to access your order basket located at the top of the page. To continue the order currently in progress, click on the Continue button and the Order Summary page will once again be displayed. To complete your order, click on the **Process Order** button. If you wish to modify your order, click the **Change Order** button.

8. The Order Confirmation page will be displayed. Print this page so that you have a copy for your records. To print the page, click on the **Print** button in your browser's toolbar or select the File menu and then select the Print command.

   If there are any documents to be downloaded, a download button will be displayed to the right of the document item. There is no additional charge for downloadable documents. Note that for document delivery methods other than download, your credit card must first be processed before the order is completed. Credit Card processing can take up to two minutes. To view your order status, you can go to the Opportunity Ordered List where you will also be able to access the downloadable documents. To access the Opportunity Ordered List, return to the Opportunities page and click the Account Activity link.

   Note: *Downloadable files may be in PDF format. PDF files on MERX are best viewed using Adobe Acrobat Reader version 6.0 or higher.*

   *You may be required to install Adobe Acrobat Reader. You can get Acrobat Reader free from the Adobe web site (www.adobe.com/prodindex/acrobat/readstep.html) or by clicking the **Acrobat Reader** button on the Order Confirmation Screen.*

9. Click on the **Done** button to return to the Supplier Menu page.

## How do I view my MERX Statements?

Supplier Coordinators can view their organization's MERX Statements online at anytime. Your last 12 MERX Statements are displayed.

Should your MERX account have a balance of zero ($0) at the end of the month, statements will not be mailed to you. If you wish to receive a printed statement in the mail, send an email request to merx@merx.com. Be sure to include your MERX User ID, Organization Name and telephone number in the email message.

To view your MERX Statements, follow these steps:

1. Go to the Opportunities page.

2. Click the **My Account Activity** link.

3. Under the Online Statements title, click the **View** link. The Statements List page will be displayed.

4 Click the statement number link you wish to view. A new browser window displaying the selected statement will be launched.

5. Use the browser's tools to print or save the statement file. To print, click the **Print** button on your browser's tool bar. When finished, close the browser window that contains your MERX Statement.

## Changing Your Password

As a new user, you are automatically prompted to change your password when you first login. Passwords must have a minimum of 6 characters.

*Note:* *A MERX Password security feature limits the number of failed login attempts. After 10 consecutive failed attempts your account will be locked out. You will have to contact the MERX Call Centre to unlock your account.*

To change your password at any time, follow these steps:

1. From the Opportunities page, click on the **Manage My Account** link.
   If you are a Supplier Coordinator the View Organization page will be displayed. If this is the case, click the **View Own Profile** link.

2. Click the **Change Password** link. The Change Password page will be displayed.

3. Enter your old password in the Old Password field.

4. Enter your new password in the New Password field.

5. Confirm your new password by re-entering it in the Confirm New Password field.

6. Click on the **Submit** button to change your password and return to the View Own Contact Information page.

## Modify Your Organization's Profile and Contact Information

Supplier Organization information can only be updated by the Supplier Coordinator or the Call Centre. The Organization's profile and the primary contact information are accessed through the Manage My Account function.

It is critical that this information be kept current as MERX uses your organization and contact information to reach you regarding your business and opportunities.

*Note:* *A Supplier Coordinator is a registered MERX user who acts as a manager for registered supplier contacts within the Supplier's organization.*

## How to Modify Your Organization's Profile

Only a Supplier Coordinator may update the organization's information.

*Note:* *If you are not a Supplier Coordinator, and you click the Manage My Account link, you will open the View Own Contact Information page.*

1. From the Opportunities page, click on the **Manage My Account** link to open the View Organization Information page.

2. Click the **Update** button located at the bottom of the page.

3. Update the organization's information as required.

4. a) Click on the **Submit** button at the bottom of the page to save your changes and open the View Organization Information page.

   b) If you wish to abandon the changes you have entered click the **Cancel** button.

   c) Click on the **Opportunities** link to return to the Opportunities page.

## How to Modify your Contact Information

A Supplier's role can be a Supplier or a Supplier Coordinator. Depending on your role, the steps to update your Contact Information will be different.

As a Supplier, you may modify your personal contact information by following these steps:

1. From the Opportunities page, click on the **Manage My Account** link to open the View Own Contact Information page.

2. Click the **Update** button located at the bottom of the page. Update your contact information as required.

3. Click on the **Submit** button to save your changes. You will be returned to the View Own Contact Information page.

4. Click on the **Opportunities** link to return to Opportunities page.

As a Supplier Coordinator, you may modify your personal contact information by following these steps:

1. From the Opportunities page, click on the **Manage My Account** link to open the View Organization page.

2. Click on the **View Own Profile** link to open the View Own Contact Information page.

3. Click the **Update** button located at the bottom of the page. Update your contact information as required.

4. Click on the **Submit** button to save your changes. You will be returned to the View Own Contact Information page.

5. Click on **Opportunities** link to return to the Opportunities page.

You have now updated your contact information.

## How do I cancel my User ID? (Supplier Coordinator, Supplier)

Depending on whether you are a Supplier Coordinator or a Supplier, the steps to cancelling your user ID will be different. If your assigned role is **Supplier Coordinator**, follow the steps for "Cancelling my ID (if you are a Supplier Coordinator)". If your assigned role is **Supplier**, follow the steps for "Cancelling my ID (if you are a Supplier)"

*Note:* *If you do not know what your assigned role is, you can find out by following the first two steps of "Cancelling my ID (if you are a Supplier Coordinator)".*

*If your assigned role is Supplier, you will go directly to the View Own Contact Information page and you will see "Supplier" displayed in the Role field. Proceed with step 3 of Cancelling my ID (if you are a Supplier).*

As a Supplier Coordinator, you may cancel your Id by following these steps:

1. Go to the Opportunities page.

2. Click on the **Manage My Account** link located on the left side of the page. The View Organization page will be displayed. If you have a parent organization, the page header will display View Sub Organization.

3. Click the **View Own Profile** link located on the left side of the page. The View Own Contact Information page will be displayed.

4 Click the **Cancel Contact** link, located on the left side of the page. The Online Cancellation wizard will be launched.

5. The MERX Online Cancellation wizard will prompt you with a number of questions. Respond to the questions as required. If you wish to abort the cancellation, click the **No** button.

   If you have ordered any opportunities that are still open for which amendment or update documents may be issued, you have the choice to continue to receive them. If you choose to continue to receive amendments or update documents, you must provide a valid credit card.

6. A confirmation page will be displayed confirming your cancellation. At this point you are logged off of MERX. Clicking the **OK** button will launch the MERX Home page.

As a Supplier, you may cancel your Id by following these steps:

1. Go to the Opportunities page.

2. Click on the **Manage My Account** link located on the left side of the page. The View Own Contact Information page will be displayed.

3 Click the **Cancel Contact** link, located on the left side of the page. The Online Cancellation wizard will be launched.

4. The MERX Online Cancellation wizard will now prompt you with a number of questions. Respond to the questions as required. If you wish to abort the cancellation, click the **No** button.

   If you have ordered any opportunities that are still open for which amendment or update documents may be issued, you have the choice to continue to receive them. Your organization will be charged for all amendments.

5. A confirmation page will be displayed confirming your cancellation. At this point you are logged off of MERX. Clicking the **OK** button will launch the MERX Home page.

## How do I cancel a Contact? (Supplier Coordinator)

Only a Supplier Coordinator can cancel a contact within their organization. Only one contact can be cancelled at a time.

1. Go to the Opportunities page.

2. Click on the **Manage My Account** link located on the left side of the page. The View

Organization page will be displayed. If you have a parent organization, the page header will display View Sub Organization.

3. Click the **Organization Contact List** link located on the left side of the page. The Organization Contact List page will be displayed.

4. Click the Contact Name whose subscription you wish to cancel. The View Contact Information page will be displayed.

5 Click the **Cancel Contact** link, located on the left side of the page. The Online Cancellation wizard will be launched.

6. The MERX Online Cancellation wizard will prompt you with a number of questions. Respond to the questions as required. If you wish to abort the cancellation, click the **No** button.

   If the contact has ordered any opportunities that are still open for which amendment or update documents may be issued, you have the choice to continue to receive them. Your organization will be charged for all amendments issued.

7. A confirmation page will be displayed confirming the cancellation. Click the **OK** button to finish. The View Contact Information page will be launched. The contact's status will be changed to Cancelled.

*Note: If you are unable to access MERX and would like to cancel your subscription, you can fax a written request to MERX at 1-888-235-5800. Ensure that your full name, organization name, User ID, Phone and Fax numbers are included in your cancellation request. A MERX customer service representative will fax you a Subscription Cancellation form. Please complete the form and return it by fax. Upon receipt of the completed Subscription Cancellation form, your subscription will be cancelled within 4 hours.*

## Additional MERX Functions

Other MERX functions are available that have not been discussed in this guide. These functions include:

- Viewing a list of suppliers who have ordered documents (Document Request List on the Opportunities page)
- Viewing a list of document orders that you have placed (Opportunity Order List under Account Activities on the Opportunities page)
- Viewing order details for a specific opportunity (Order Tracking Report)
- Viewing a list of suppliers who have been awarded contracts (Award Notice under Search on the Opportunities page)
- Viewing closed opportunities (Former Opportunities under the Search on the Opportunities page)

# Section 3 – Reference Information

In addition to this Supplier Guide, there are other sources of information available to you:

## Tutorials

MERX's online tutorials help provide detailed information on many areas of MERX while you are using it. To access the tuturials page, click on the tutorials  button.

## Online Frequently Asked Questions (FAQs)

MERX's online FAQs provide answers to frequently asked questions. To access FAQs, go the Opportunities page, and click the **Information** link on the left side of the page. Once the Information page has been launched, click the **FAQs** link located on the left side of the page.

## Call Centre

You can talk to an expert about any MERX related topic during regular business hours or send a fax or email 24 hours a day 7 days a week.

| | | **Hours:** |
|---|---|---|
| **Phone:** | 1-800-964-MERX (6379) | 7:00 a.m. to 8:00 p.m. Eastern Time Monday to Friday (excluding Public Holidays) |
| **Fax:** | 1-888-235-5800 | 24 hours a day<br>7 days a week |
| **Email:** | merx@merx.com | 24 hours a day<br>7 days a week |

## Distribution Unit

The MERX Distribution Unit (MDU) is responsible for the receipt, reproduction, and distribution of components (documents/attachments).

| | | **Hours:** |
|---|---|---|
| **Address:** | 1165 Kenaston Street<br>Ottawa, ON  K1B 3N9 | 8:00 A.M. to 5:00 P.M. Eastern Time Monday to Friday (excluding Public Holidays)<br>*For pickup* |

# Appendix A – Field Definitions for Opportunities

The following field definitions will assist you in finding opportunity or award notices that might be of interest. There are different types of notices: Opportunity Notices, Advanced Contract Awards, and Contract Awards etc.

## Notice Definitions

**Solicitation Number**
An internal procurement code that the Buyer assigns to an opportunity. It can be all numbers, all letters, or a combination of both. The code cannot exceed 20 characters and may include slashes (/) and dashes (-).

**Reference Number**
A unique number code generated and assigned by MERX to an opportunity or award notice. The purpose of this code is to avoid confusion when the same solicitation number is used more than once by two different buyers.

**Tender Type**

| Tender Type | Description |
|---|---|
| Notice of Proposed Procurement (NPP) | A general opportunity that is available to the Supplier base, for which a contract will be awarded. It normally includes an associated document for distribution. |
| Advanced Contract Award Notice (ACAN) | A notice of intent to negotiate with only one firm. Suppliers cannot bid on these opportunities; however they may indicate their interest directly to the Contracting Authority on or before the closing date. |
| Letter of Interest (LOI) or Request for Information (RFI) | An opportunity that is not open for bidding. The Buyer is solely interested in receiving feedback from the Supplier base regarding a subject and, based upon the feedback, may re-issue the opportunity as an opened tender at a later date. A LOI or RFI may include an associated document. |
| Price and Availability (P&A) | This refers to goods only. The Buyer is requesting feedback from the Supplier base; an associated document may be included. |

**Contract Award Notice (CAN)**
Information on who has been awarded the contract.

**Published date**
The date on which the opportunity or award notice's became "Active". Once the status has changed to "Active", the opportunity then becomes available for Suppliers to view.

**Region of Opportunity**

The region or location where suppliers should be based or located in order to qualify as a supplier for the opportunity.

**Region of Delivery**
Indicates the region where the goods and/or services are to be delivered.

**Agreement Type**
This field indicates the agreement under which the opportunity falls. (e.g. NAFTA, World Trade Organization, Aboriginal Programs, etc).

**Solicitation Method**
The solicitation method selected by the Buyer. This field describes opportunity restrictions (if any) and is used in conjunction with the agreement type. For example, Open Bidding - the opportunity is open for any interested bidder.

**Closing Date**
The date that all bid submissions must be received. The opportunity notice remains on MERX until the next business day. The opportunity notice is then moved to the historical database (Former Opportunities).

**Closing Time and Zone**
Indicate the exact time and time zone at which the bid submissions must be received.

**Language**
Indicates the available language of the notice. The language selected does not refer to the language of components (documents/attachments).

**Associated Components**
Associated components are documents or attachments that are provided with a notice to provide supporting information. Components can be electronic documents, paper documents, plans (blueprints), or physical (videotapes, CDs, product samples, etc.).

**Estimated Value**
Indicates the approximate value of the opportunity when awarded.

**Category**
A Category is a type of classification for various types of Goods and Services. This field is used by a Buyer to select one category that bests represent the goods or services being solicited. The Supplier selects one or more categories to search for opportunity and award notices.

**Title**
This field contains the title of the opportunity or award notice.

**GSIN (Goods and Services Identification Number)**
A GSIN code is used to identify a group or subgroup of goods or services. This coding system allows for more accurate search results when searching for opportunities. At least one, and up to ten, GSIN codes may be selected for each opportunity or award notice.

# Appendix B – Search Operators

The following search operators are useful tools to find one or more specific opportunities:

| | |
|---|---|
| AND | Use this to search for opportunities containing both the words it separates. e.g. network AND server - will find opportunities containing both words. |
| OR | Use this to search for opportunities containing one or both of the words it separates. e.g. network OR Server - will find opportunities containing either word. |
| NOT | Use this to search for opportunities containing the word preceding it, but not the word following it. e.g. network NOT server - will find opportunities containing network but not server. |
| NEAR/n | Use this to search for opportunities in which one query word occurs within a specific range of another query word. e.g. network NEAR/3 server - will find opportunities in which the word network occurs within three words of the word server, in either direction. |
| ADJ | Use this to search for opportunities in which one query word occurs immediately after another query word. e.g. network ADJ server - will find opportunities in which the word network is immediately followed by the word server. |
| W/n | Use this to search for opportunities containing word pairs in which the second part of the pair occurs within a specified number of words after the first. e.g. network W/3 server - will find opportunities in which the word server occurs within three words after the word network. |
| ? | Use this to match a single character. e.g. wo?d - will find opportunities containing wood as well as word. |
| * | Use this to match a string. e.g. Micro* - will find opportunities such as microscope, microcomputer, etc |