



WILMORITE

### CONTRACT MANAGEMENT SYSTEM (Operations)

Via the WilShare Home Page, Corporate Applications, OPS-CMS Dashboard you may access Account Description cost code(s) and view Vendors, RFP status, contracts, insurance, etc.

#### **Initiating RFP Creation Requests:**

***NOTE:** If you already have a vendor proposal in hand, you must still create a Request mentioning this in the Scope of Work box. Then, upload the proposal in the Browse box, AND enter the vendor number for the vendor in the Vendor 1 box.*

1. Go to the OPS-CMS Dashboard
2. Under **Reports**, click **Vendors**.
3. Find the Vendor and write down their **Vendor Number**.
  - If you do not see the Vendor listed, they must be onboarded.
  - Send an email to [Opscontracts@wilmorite.com](mailto:Opscontracts@wilmorite.com) and type **NEW VENDOR** in the subject line. Within the email, provide the following:
    - Vendor Name
    - First and last name of the vendor contact
    - Email address of the vendor contact
  - Continue to check the **Vendors** report until you see the vendor listed with their accompanying vendor number.
4. Under **Submit Forms**, click **RFP Creation Request**.
5. Complete and submit the creation request form, entering:
  - Property name
  - Exact wording under **Scope of Work** that should appear in the final contract, *including if Preferred Services or Preventive Maintenance or both*.
  - Enter applicable Account Description Cost Code(s)
  - Site plans or any other information you want the vendor to know when preparing their proposal.
  - Commencement and Expiration dates which will appear on the contract.
  - Vendor number(s). You may add up to three vendors you want to receive an RFP.

Via Smartsheet, the Operator (D. Rath) will receive all RFP Creation Requests and send formal RFPs to vendors. If you need to convey any special instructions for the Operator only, please note those in a separate paragraph within the Scope of Work box.