Supplier Bid Response Quick Tutorial

Welcome to Electronic Bidding!

This Quick Tutorial provides instruction on navigation of this organizations Ion Wave Technologies (IWT) software system, locating bid requests, and creating and submitting a bid response.

Log in to the system. Once you have logged in, the system will open to the 'Available Bids'. (*See Figure 1.*)

Figure 1

The available bids are displayed in to two different areas: "My Invitations" (bid events which are based on the commodity affiliated with your business) and "Other Bid Opportunities". Click the **bid number** to view the bid opportunity.

NOTE: Multiple pages of bid opportunities may exist. Click to the next page (located on the bottom of the screen) to access additional pages. (*See Figure 1.*)

After selecting the desired bid, an *Intent to Bid* window may pop-up requesting a response of your intention to participate in the bid event. (*See Figure 2*).
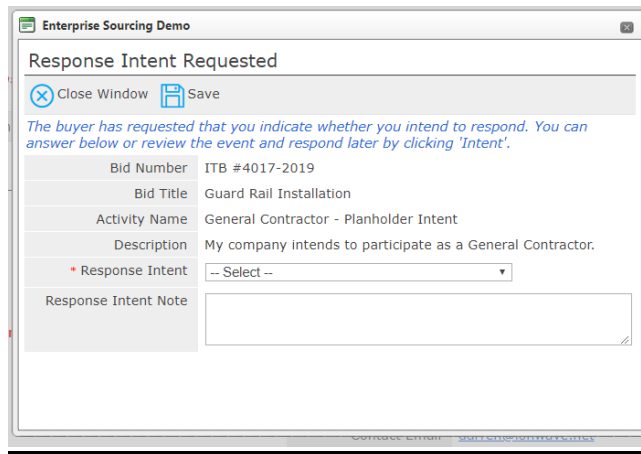
Figure 2

If you choose not to respond via the pop-up window, a reminder will appear at the top of the bid opportunity screen. You can register your intent by selecting the 'Intent' function in the top toolbar. (*See Figure 3).*

Figure 3

Once the desired bid opportunity has been selected, a series of tabs may be present. If one of the tabs listed below does not appear on your bid, then it is not applicable to the solicitation. *(See Figure 4).*

Figure 4

TAB OVERVIEW:

Event Details Tab – Information specific to the bid opportunity will be displayed on this tab, including: bid notes, contact, ship to, and bill to information.

Messages Tab – Messages sent by the buyer, specific to the bid request, will be displayed here.
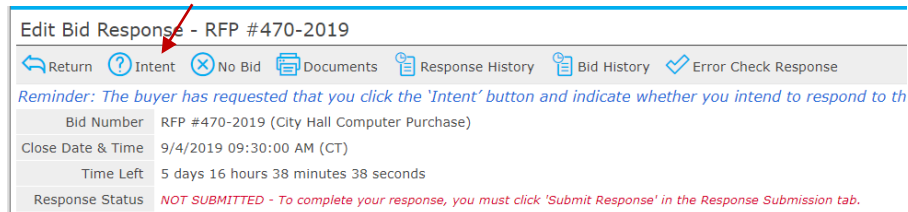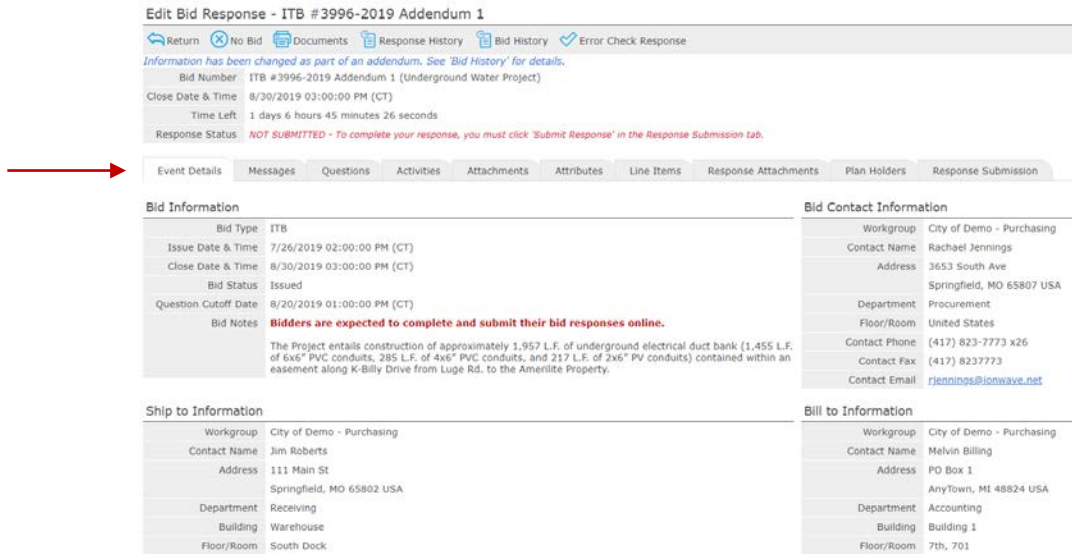
Questions Tab – If this tab is displayed, you will be able to submit bid specific questions (until the Cutoff Date and Time provided) by clicking 'Ask Question.' Questions and answers provided will be reviewed at the Buyers discretion. *(See Figure 3).*

Activities Tab – Any events, specific to this bid opportunity, will be displayed here for you to review and respond (as applicable). Activity types may include:

- Participation Activity: activity requiring your participation
- Non-Participation Activity: activities provided for informational purposes

Attachments Tab - The buyer may include a number of attachments to the bid opportunity for a number of reasons which include, but are not limited to, the following: Informational purposes and/or to provide the supplier with a form to complete and submit as a response attachment. Do access the documents:

- Click the 'Download' function located to the left of the document. (*See Figure 5).*
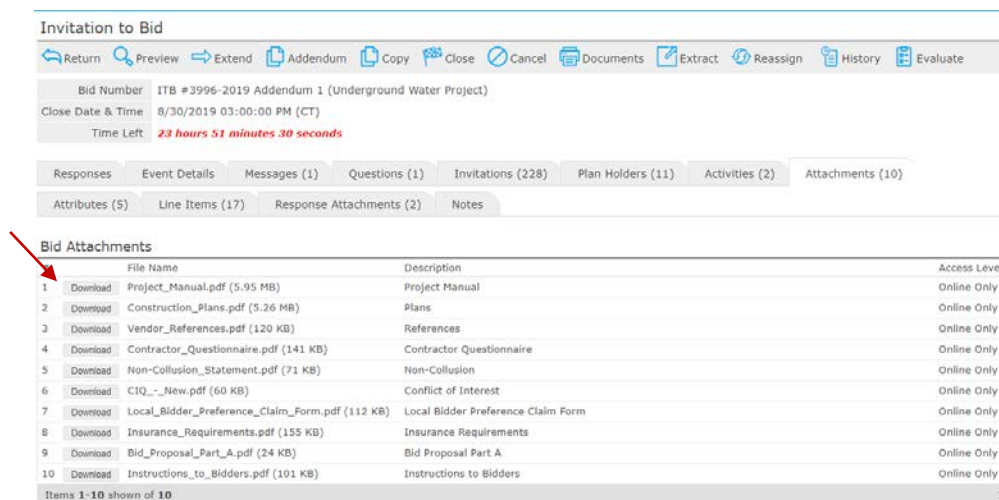- Open and Save the file to your desktop or another drive.

Figure 5

Attributes Tab – The attributes tab contains a series of questions and/or notes from the buyer to suppliers responding to the bid opportunity. While not all of the questions are required to be completed, there may be others which are required to be completed. Here are a few additional notes covering the attributes:

- Read and/or answer all attributes.
- Required attributes have a red asterisk (*) to the right of the required field.
- A required attribute must be answered in order to submit the response.
- Click 'Save' (to save your responses)
- Click 'Error Check' (to determine if you have missed any required responses) *(See Figure 6).*

Figure 6

Line Items Tab - Enter your response in the price or percentage field provided. Click on the save button to retain your entries. Once the information has been saved, an extended price will be calculated. *(See Figure 7).*

Figure 7

There may be some additional responses required on the Line Items Tab. These may include the following:

- Item Attributes – Additional questions related to the bid line item may be included. Answer the questions, complete specification requests, and review additional terms and notes specific to the line item. (NOTE: Line attributes may not be present on the bid request). *(See Figure 8).*

Figure 8

- Item Attachments – The buyer may include some additional documentation related to the bid line. Click 'Download' to access the file(s) pertaining to this line item. (NOTE: Item level attachments may not be present).
- Required fields have a red asterisk (*) to the right of the response field.
- A required field must be answered in order to submit the response.

- Click 'Save' (to save your responses).
- Click 'Error Check' (to determine if you have missed any required price fields). *(See Figure 7 above).*
- A line item may include one or more of the following options *(See Figure 9)*:

Figure 9

Add Alternates option– Where allowed, you can bid an alternate.
- Click 'Add Alternate' and enter the fields requested. *(See Figure 10).*

Figure 10

- If an alternate is added in error, click 'Delete Alt' on the right of the screen.

No Bid – Unless specified by the buyer, you do not have to use the 'No Bid' function at the line level. If using the 'No Bid' function, do the following:
- Click 'No Bid' (if you prefer to 'no bid' a line). (NOTE: a pop-up window will appear asking you to confirm you wish to 'no bid' the line item. Select "ok" to 'no bid' the line. *(See Figure 11).*
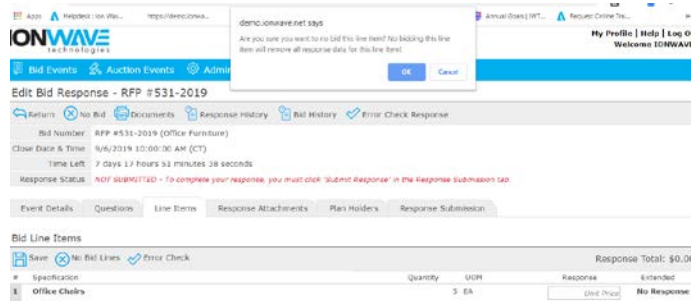

Figure 11

- To remove the 'no bid', click "Clear No Bid". *(See Figure 12).*

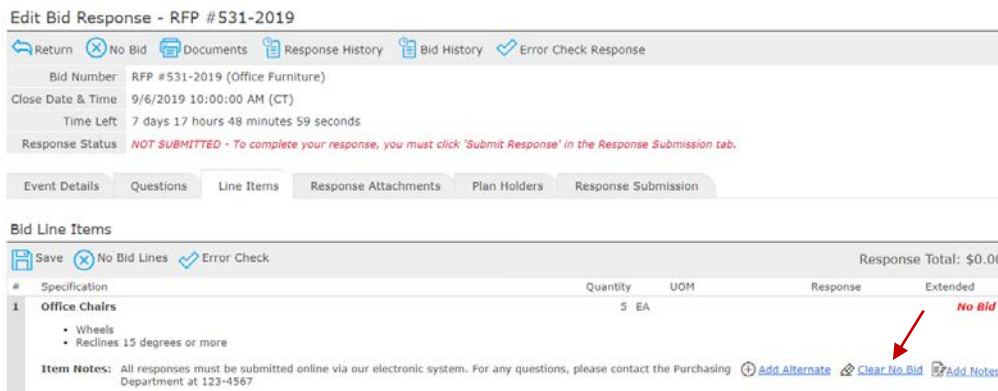*Figure 12*

Add Notes – Where allowed, click 'Add Notes' to enter comments for buyer review.

Please Note: A response of zero ($0.00) entered in the price field is defined by the buyer using one of the parameters below:

- Zero is a valid response – An extended price of $0.00 is displayed and stored, upon save.
- Zero is considered a 'No Bid' – No Bid is displayed upon save.
- Zero is not a valid response – A response of '0' (zero) is cleared and 'No Response' is displayed, upon save.

Response Attachments Tab – The buyer may request a bidding supplier to provide documents for the buyer's review. A red asterisk (*) located to the left of the requested file name indicates that it is required. *(See Figure 13).*
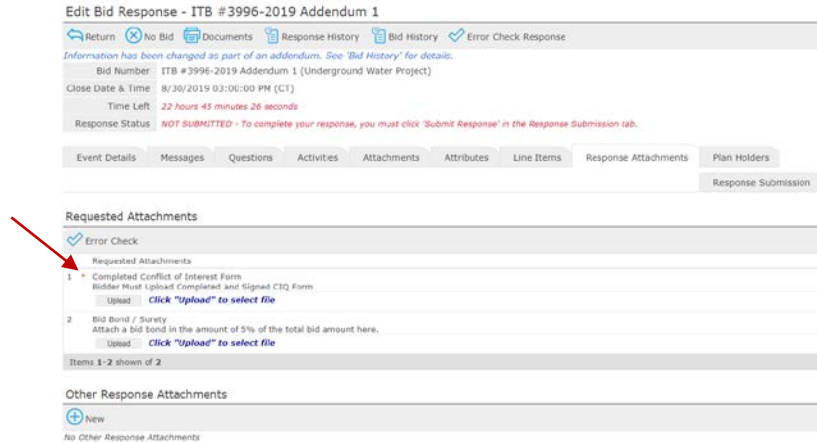

Figure 13

- To attach a file, click "Upload".
- Click "Select File" in the pop-up window.
- Highlight the file to be attached and click 'Open'.
- The file will upload, then click 'Save'.

Other Response Attachments – Suppliers may be provided the opportunity to include additional documents for buyer review. Availability of this feature is at the buyer's discretion. *(See bottom of Figure 13).* To attach an additional document,

- Click "New"
- Click "Select File" in the pop-up window
- Highlight the file to be attached and click 'Open'
- A description of the file is required. Enter a description of the attached file in the space provided and click 'Save'.

If you wish to *view* the attached document, click the **Download Button** (located at the left of the file name).
To delete an attached file, select the **Delete Button** (located to the right of the file name) – Click to remove the attachment. *(See Figure 14).*
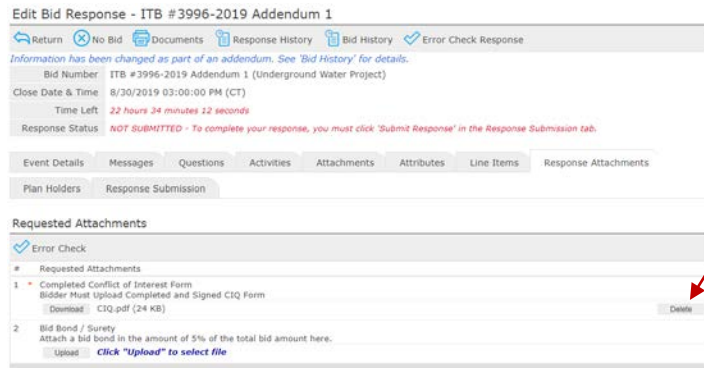
Figure 14

Please Note: If you have attached a file that requires additional editing, you must delete the attached file and attach a corrected file.

The maximum file size is 100 megabytes per file.

Plan Holders Tab – The plan holders tab contains information on suppliers who may be participating in the bid opportunity. The buyer configures the list to populate with all invited suppliers or based on supplier actions on the bid.

Response Submission – The final process in submitting a bid is located in the Response Submission tab. After completing your bid response, you must submit successfully before the close date & time of the bid event. There are several features located on the Response Submission tab:

- Supplier Note to Buyer – Allows suppliers to enter an optional note to the buyer. This field may not be available on all bids.
- Digital Signature - Enter Your Full Name & Your Email Address. Both of these fields are required to be completed.
- Click "Error Check" to determine if you have missed any required fields. *(See Figure 15).*
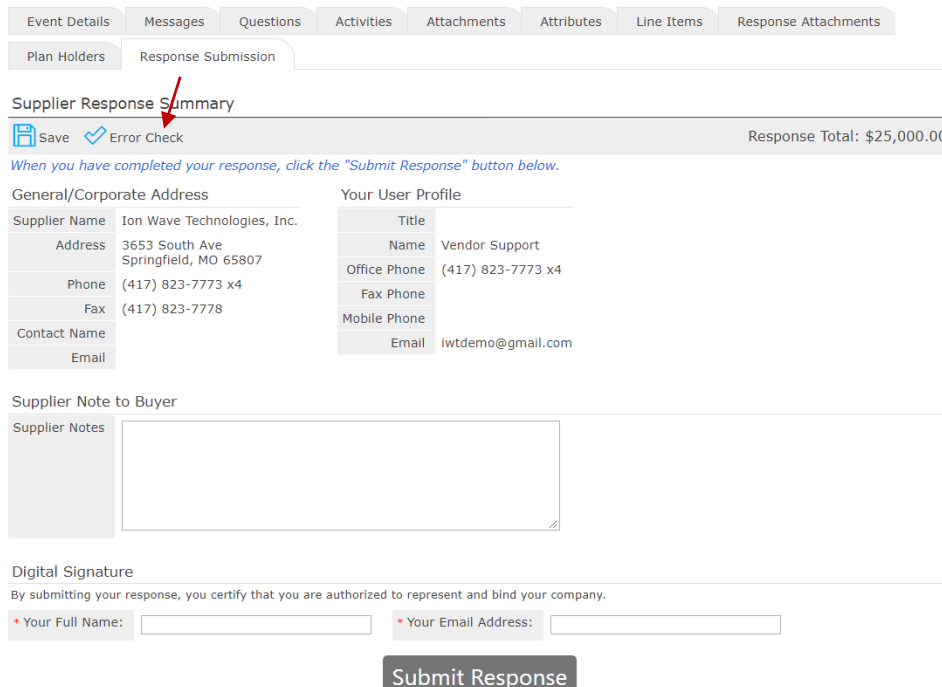

Figure 15

- Click 'Submit Response'

- A successfully submitted response will display 'Response Submitted' followed by the date and time stamp in the Response Status field. *(See Figure 16).*
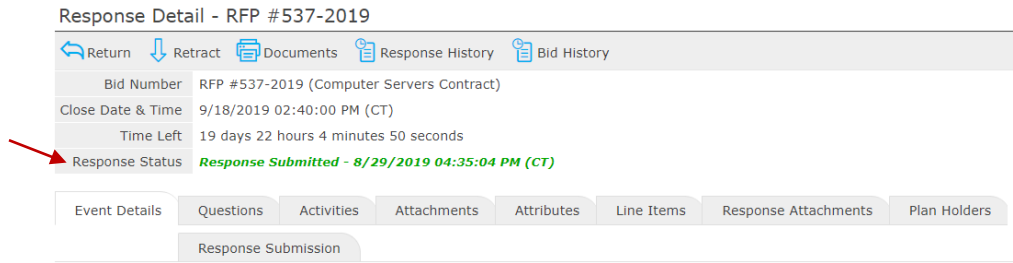

Figure 16

Submission Errors – When an error(s) occurs, the system will display the location of error(s). In the example below, the errors occur in the Attributes tab, Response Attachments tab, and Response Submission tab. *(See Figure 17).*
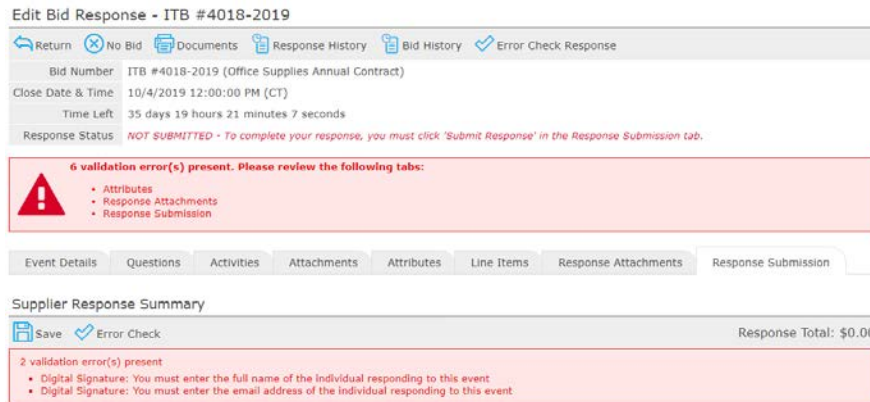

Figure 17

- To resolve errors, you must access the tab where errors occur and complete.
- Once the errors are corrected, proceed to the Response Submission Tab to submit the response.

System Notification – An email notification will be sent to confirm response failure or response submission.

Response Retraction – This function is available at the buyer's discretion and can be used to retract a submitted response for additional editing. *(See Figure 18).*
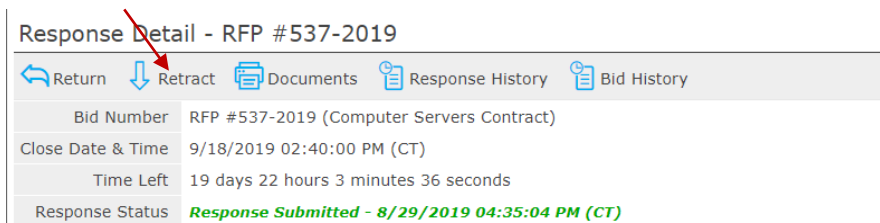

Figure 18

- From the top toolbar, select the 'Retract' function.
- Navigate to the desired tabs for editing.
- Select the Response Submission tab to 'Submit' the revised response.

Important Note: A retracted bid response is no longer considered "submitted." The user <u>MUST</u> resubmit a retracted bid response to considered.