OregonBuys Supplier Bid Solicitation Response

OregonBuys allows Suppliers to view Bid Solicitations and submit electronic responses called Quotes. These actions are accomplished in the Seller role. As such, a user should navigate to the Seller role to complete the activities outlined in this guide.

Below details two ways to access Bid Solicitations. Option 1 shows you how to locate Bid Solicitations using the Bids tab, where you'll find additional open bid opportunities. Option 2 shows a direct way of locating a specific Bid Solicitation via the Advanced Search.

To locate the Bid Solicitation using either option, navigate to the "Create the Quote" section, which walks you through the electronic Quote submission process.

Locate the Bid Solicitation (Option #1):

1. Log into **https://oregonbuys.gov/bso/**

   ✓ Make sure you are logged in as the Seller
   (Select Seller role from top right icon)

2. Click Bids Tab

Zoom in to enlarge the screenshot if greater detail is needed.

3. Under the section Open Bids locate the Bid Solicitation number

   ✓ The Bid Solicitation number is provided in the email sent by OregonBuys

4. Click Create Quote

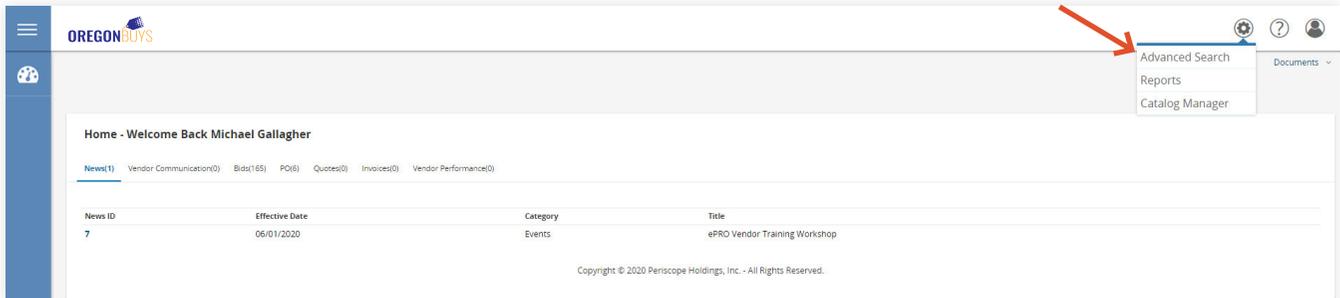*Zoom in to enlarge the screenshot if greater detail is needed.*

5. Click Yes (or No) on the Acknowledge Receipt and View Solicitation screen

   ✓ Clicking Yes opts you into being notified when an amendment occurs against the document

   ✓ If an amendment occurs, the user who acknowledges receipt of the Bid Solicitation is emailed that a change occurred and needs to log into the system and locate the Bid Solicitation to view the change

   ✓ You're directed to the General Tab of the Quote

Locate the Bid Solicitation (Option #2):

1. Log into **https://oregonbuys.gov/bso/**

    > Make sure you are logged in as the Seller Administrator
    > (Select Seller Administrator role from top right icon)

2. Click the Settings icon

3. Click Advanced Search

Zoom in to enlarge the screenshot if greater detail is needed.

4. Click Bids in the Document Type field

5. Enter the Bid Solicitation number in the Bid # field

    ✓ The Bid Solicitation number is provided in the email sent by OregonBuys

6. Click Find it

7. Click the Bid Solicitation number

8. Click Yes on the Acknowledge Receipt and View Solicitation screen

    ✓ Clicking Yes opts you into being notified when an amendment occurs against the document

    ✓ You're directed to the Bid Solicitation screen

9. Click Create Quote

    ✓ You're directed to the General Tab of the Quote

    - If you clicked "No" on acknowledge receipt you will be asked again to respond yes or no before proceeding
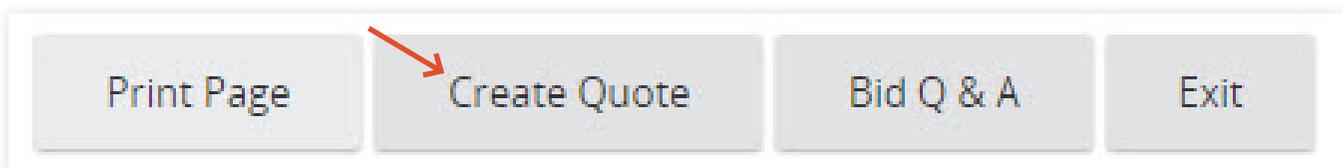
Create the Quote:

1. General tab

    ✓ Captures header level data

    - Description field (required): Description of Sellers response

    - Delivery Days (optional): Days to deliver items or services

    - Discount Percent (optional): Discount percent for all Items

    - Is "No Bid" (optional): Checkmark to formally respond to bid without actually bidding on items. This selection acknowledges you do not want to participate and will not be eligible for award on any items on the bid. If you elect to do this, skip straight to the summary tab after saving this screen.

    - Shipping Terms (optional): Configurable dropdown to allow Sellers to identify their preferred Shipping Terms

    - Freight Terms (optional): Configurable dropdown to allow Sellers to identify their preferred Freight Terms

    - Ship Via Terms (optional): Configurable dropdown to allow Sellers to identify their preferred Ship Via Terms

    - Payment Terms (optional): Configurable dropdown to allow Sellers to identify their preferred Payment Terms

    - Promised Date (optional): Date to deliver Items to Organization

    - Info Contact (optional): Contact information for questions regarding Quote

    ✓
    - Comments (optional): Field to enter in notes to Organization

    Click Save & Continue

    - The Quote will be saved in the system as In-progress

    - The Quote is assigned its own unique document id number

    ✓
    - A red validation error message appears stating the Terms & Conditions needs to be acknowledged. Updating this will be covered below on the Terms 7 Conditions Tab. Until the Vendor takes action on this tab, a red validation error will appear at the top of the Quote.

Zoom in to enlarge the screenshot if greater detail is needed.

2. Items tab

✓ Captures the Supplier's response (e.g., pricing) for each Item on the Bid Solicitation

• Enter the price for each Item being bid against in the Unit Cost field

• Sellers can export all the Items by clicking the Export button located at the bottom of the screen, enter their Price for each Item under the Unit Cost column and removing "Y" under the No Bid column, save the CSV File to their computer, then upload it by clicking the Upload button, and selecting the file from their computer

Item Number	Print Sequence	Quote item	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	No Bid	No Charge	See Quote Attachments	Alternate Description
1	1	1.0		Laptops	4.0	EA	999.99	0.0		0.0				
2	2	2.0		Computer Monitors	4.0	EA	0.0	0.0		0.0	Y			

• Items not being bided against, leave the Unit Cost as $0

✓ Click Save & Continue

✓ Click Notes subtab

Zoom in to enlarge the screenshot if greater detail is needed.

3. Note subtab

✓ Allows the Seller to capture internal notes regarding individual Items that may be reviewed by the Seller (or other Sellers in the Supplier's organization) at a later date.

✓ Organization users cannot see the Seller's notes.

• Click item number

Zoom in to enlarge the screenshot if greater detail is needed.

- Enter information in the text box
- Click Save & Exit

✓ The Seller may also capture notes applicable to all Items (i.e., the Quote in general) on the Notes tab

✓ Click Questions tab

4. Questions tab

✓ Allows the Seller to answer questions asked by the Organization as part of the Bid Solicitation

✓ If a question is required, the Seller will see a red validation error at the top of their Quote until the question is answered

✓ Provide an answer to the Question

✓ Click Save & Continue

✓ Click Subcontractors tab

5. Subcontractors tab

✓ Allows the Seller to select subcontractor(s) associated with their Quote and enter planned participation information (if requested on the Bid Solicitation). A subcontractor must be registered as a Supplier in the system for the prime Vendor to add the subcontractor to the Quote

✓ Click Lookup & Add Vendors

- Enter the Company's name in the Vendor Name field
- Click Find it
- Select the Supplier
- Click Save & Exit

✓ Select Vendor Category Participation Type

✓ Enter the Estimated Dollars - The dollar amount to be paid to the subcontractor by the vendor

✓ Click Save & Continue

✓ Click Notes tab

6. Notes tab

✓ Allows the Seller to capture internal notes applicable to all Items listed on the Bid Solicitation. Organization users cannot see the Seller's notes. The Supplier may also capture notes regarding each Item on the Items Tab/Notes subtab mentioned above.

✓ Enter note information in the comment box

✓ Click Save & Continue

✓ Click Terms & Conditions tab

7. Terms & Conditions tab

✓ Allows the Seller to respond to the terms and conditions associated with the Bid Solicitation. The Terms & Conditions and all other Bid Attachments are shown on the tab (and in the Bid Attachments).

• Any attachment shown on the tab may be downloaded by the Seller.

• The Seller has the option to accept or to not accept the Terms & Conditions of the Bid. Until the Vendor takes action on this tab, a red validation error will appear at the top of the Quote.

✓ Click Yes

✓ Click Save & Continue

✓ Click Attachments tab

Quote 00000536 - IT Hardware and Computer Supplies

General   Items   Questions   Subcontractors   Notes   **Terms & Conditions**   Attachments   Summary   **Back to Bid**

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name		Description	File Size
📥 RFP - IT Hardware.docx	(view details)		11,884 bytes

Do you accept the terms & conditions of the bid?

◉ Yes   ○ Yes with exceptions   ○ No

If you do not fully accept the terms & conditions, please note the exceptions below:

[   ]

[Save & Continue]

8. Attachments tab
   - ✓ Allows the Seller to capture any supporting documentation related to their Quote that may be helpful to the evaluators.
     - • Examples include: proposal documents, product specifications, warranty documents and completed/signed forms required by the Bid Solicitation.
   - ✓ Click Add File
     - • Click Choose File (Google Chrome) or Click Browse (Internet Explorer, Mozilla Firefox)

Add File

ℹ **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

ℹ Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name*: [   ]
Description: [   ]
File*: [Choose File] No file chosen
Location: 00016915
Confidential: ☐

[Save & Exit] [Save & Continue] [Reset] [Cancel & Exit]

- • Select the file
- • Click Open
- • Complete the fields – The Seller may update the Name for the attachment and enter a description that displays to the Organization user
- • Click Save & Exit – Repeat previous steps to add additional attachments

Add File

ℹ **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

ℹ Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name*:   IT Hardware and Computer Supplies RFP Response.docx

Description:

File*:   [Choose File] IT Hardware...sponse.docx

Location: 00016915

Confidential: ☐

[Save & Exit] [Save & Continue] [Reset] [Cancel & Exit]

✓ Additional features:

- Confidential – Allows the Seller to make their attachment confidential from the public. Documents containing sensitive information, such as tax information, would be deemed confidential.
  - ◦ Click Confidential associated with the document
  - ◦ Click Save & Continue
- Delete – Allows the Seller to delete an attachment
  - ◦ Click Delete associated with the document
  - ◦ Click Save & Continue

✓ Click Summary tab

Quote 00000536 - IT Hardware and Computer Supplies

General   Items   Questions   Subcontractors   Notes   Terms & Conditions   **Attachments(1)**   Summary   **Back to Bid**

ℹ Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

Name	Description	Confidential	Order	Attached By	Attached Date	Delete
IT Hardware and Computer Supplies RFP Response.docx (view details)		☐	0	Michael Gallagher	02/08/2021	☐

Forms

ℹ Click **Add Form** to add form attachments.

No Form Attachments

[Save & Continue] [Add File] [Add Form]

9. Summary tab
   ✓ Allows the Seller to review all the information entered on the previous tabs for review prior to submitting the Quote.
   ✓ Once the Quote is submitted, the Seller cannot edit the document; however, the Seller may withdraw the Quote (for editing and resubmission) at any time before the Bid Opening Date and Time.
   ✓ Click Submit Quote
      - Click Ok in the popup window confirming you want to submit your Quote

[Print] [Submit Quote] [Cancel Quote]

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- The screen refreshes, leaving you on the Summary Tab.
- The status changes to Submitted – The Quote is officially submitted ending the process

Quote 00000536 - IT Hardware and Computer Supplies

General   Items   Questions   Subcontractors   Notes   Terms & Conditions   Attachments(1)   **Summary**   **Back to Bid**

Header Information

Quote #:	00000536	Bid #:		Status:	Submitted
Organization:	Purchasing Agency				
Description:	RFP - IT Hardware	Delivery Days:	0	Discount Percent:	0.0
Bid Flag:		Alternate Bid:	No	Shipping Terms:	
Freight Terms:					
Ship Via Terms:		Payment Term:			
Promised Date		Info Contact:		Quote Total	$3,999.96
Comment:					
Date Last Updated:	02/08/2021 01:58:20 PM	User Last Updated:	Michael Gallagher		

Zoom in to enlarge the screenshot if greater detail is needed.

Locate a Previously Submitted Quote:

1. Click Quotes tab
2. Click Submitted tab
   - ✓ A list of all submitted Quotes displays in association with the Bid Solicitation they were submitted against
3. Click Quote number
   - ✓ You're directed to the General tab
   - ✓ You can review an information on any of the tabs

Zoom in to enlarge the screenshot if greater detail is needed.

Withdraw and Resubmit a Previously Submitted Quote:

1. Click Summary tab

Zoom in to enlarge the screenshot if greater detail is needed.

2. Click Withdraw
   - ✓ The Withdraw button is located at the bottom of the Summary tab
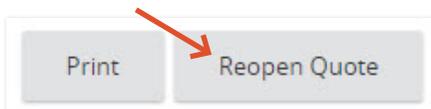

3. Click Ok
   - ✓ A popup window displays asking "Are you sure you want to withdraw this quote?"
   - ✓ Your screen refreshes, leaving you on the Summary tab
   - ✓ The status of your Quote changes to Withdrawn

   Zoom in to enlarge the screenshot if greater detail is needed.

4. Click Reopen Quote
   - ✓ The Withdraw button is located at the bottom of the Summary tab

   - ✓ Your screen refreshes, leaving you on the Summary tab
   - ✓ The status of your Quote changes to In progress

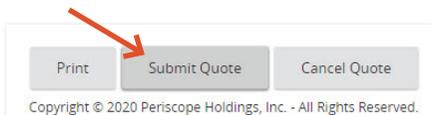   *Zoom in to enlarge the screenshot if greater detail is needed.*

5. Click the appropriate tab(s)
   - ✓ Go to any of the tabs that a modification or addition needs to be made
   - ✓ Once all the modifications are made to your Quote, go to the Summary tab to resubmit your Quote

6. Click Summary tab

7. Click Submit Quote
   - ✓ Click Ok in the popup window confirming you want to submit your Quote

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   - ✓ The screen refreshes, leaving you on the Summary Tab.
   - ✓ The status changes to Submitted – The Quote is officially submitted ending the process