

## 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.

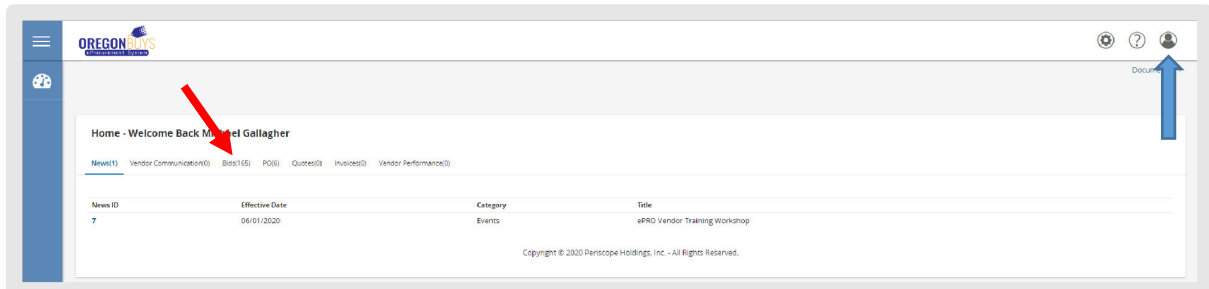
To locate the Bid Solicitation using either option, navigate to the "Create the Quote" section, which walks you through the electronic Quote submission process.

### Locate the Bid Solicitation (Option #1)

1. Log into <https://oregonbuys.gov/bsa>

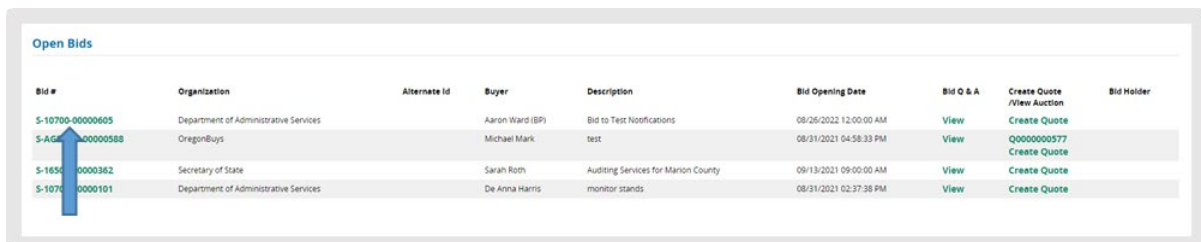
- ✓ Make sure you are logged in as the Seller  
(Select Seller role from top right icon, located at the blue arrow)

2. Click on the Bid Tab.



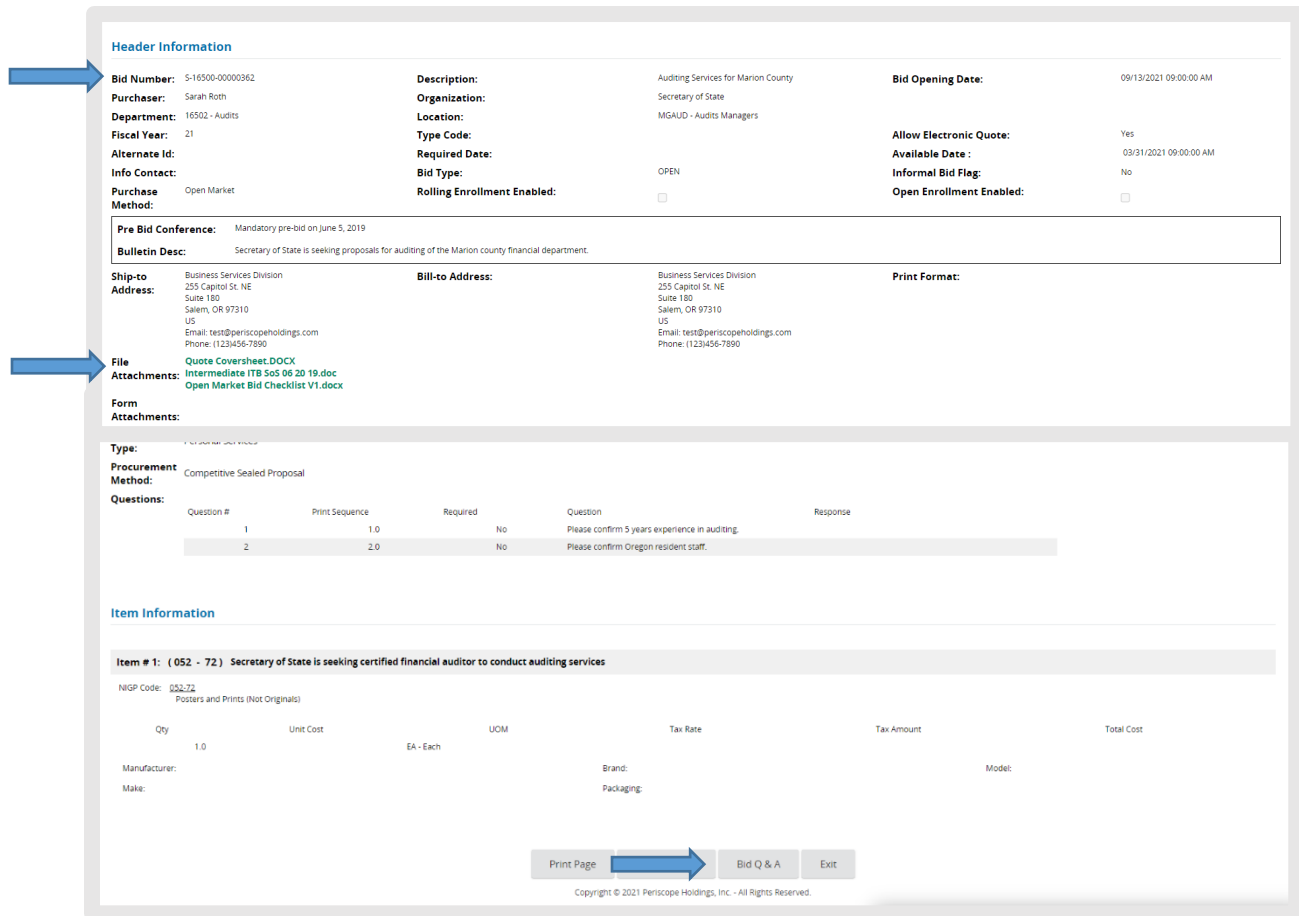
- Under the Open Bids section, locate the Bid Solicitation number or the Solicitation that you would like to Bid on. The Bid Solicitation number is provided in the email sent by OregonBuys.

3. To review the solicitation, click on the solicitation number on the left hand side.



Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
S-10700-00000605	Department of Administrative Services		Aaron Ward (BP)	Bid to Test Notifications	08/26/2022 12:00:00 AM	View	Create Quote	
S-10700-00000588	OregonBuys		Michael Mark	test	08/31/2021 04:58:33 PM	View	Q000000577 Create Quote	
S-16500-0000362	Secretary of State		Sarah Roth	Auditing Services for Marion County	09/13/2021 09:00:00 AM	View	Create Quote	
S-10700-0000101	Department of Administrative Services		De Anna Harris	monitor stands	08/31/2021 02:37:38 PM	View	Create Quote	

4. You will be able to review a high level of what the solicitation is about and download the documents for this solicitation. You will want to download all documents and read all documents. These documents will explain what you will need to be able to bid on the solicitation.



**Header Information**

**Bid Number:** S-16500-0000362      **Description:** Auditing Services for Marion County      **Bid Opening Date:** 09/13/2021 09:00:00 AM  
**Purchaser:** Sarah Roth      **Organization:** Secretary of State  
**Department:** 16502 - Audits      **Location:** MGAUD - Audits Managers  
**Fiscal Year:** 21      **Type Code:**      **Allow Electronic Quote:** Yes  
**Alternate Id:**      **Required Date:**      **Available Date :** 03/31/2021 09:00:00 AM  
**Info Contact:**      **Bid Type:** OPEN      **Informal Bid Flag:** No  
**Purchase Method:** Open Market      **Rolling Enrollment Enabled:**       **Open Enrollment Enabled:**

**Pre Bid Conference:** Mandatory pre-bid on June 5, 2019  
**Bulletin Desc:** Secretary of State is seeking proposals for auditing of the Marion county financial department.

**Ship-to Address:** Business Services Division  
255 Capitol St. NE  
Suite 180  
Salem, OR 97310  
US  
Email: test@periscopesholdings.com  
Phone: (123)456-7890

**Bill-to Address:** Business Services Division  
255 Capitol St. NE  
Suite 180  
Salem, OR 97310  
US  
Email: test@periscopesholdings.com  
Phone: (123)456-7890

**Print Format:**

**File Attachments:** Quote Coversheet.DOCX  
Intermediate ITB S05 06 20 19.doc  
Open Market Bid Checklist V1.docx

**Form Attachments:**

**Type:** Competitive Sealed Proposal

**Procurement Method:** Competitive Sealed Proposal

Question #	Print Sequence	Required	Question	Response
1	1.0	No	Please confirm 5 years experience in auditing.	
2	2.0	No	Please confirm Oregon resident staff.	

**Item Information**

**Item # 1: ( 052 - 72 ) Secretary of State is seeking certified financial auditor to conduct auditing services**

NIGP Code: 052.72  
Posters and Prints (Not Originals)

Qty	Unit Cost	EA - Each	UOM	Tax Rate	Tax Amount	Total Cost
1.0						

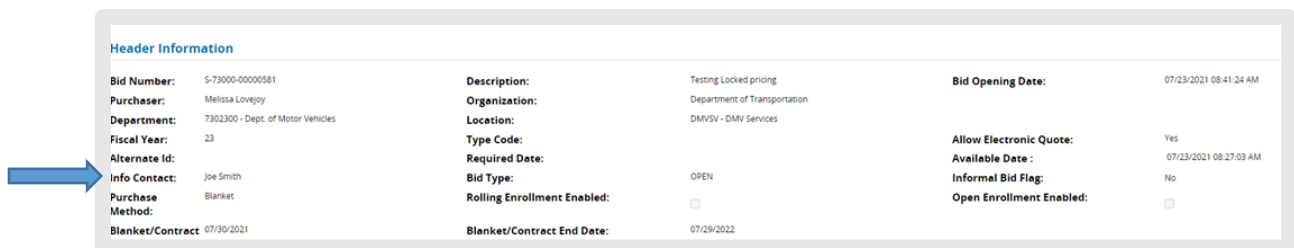
Manufacturer:      Brand:      Model:  
Make:      Packaging:

Print Page      Bid Q & A      Exit

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5. If you want to submit a Question and the solicitation allows you to submit through the OregonBuys system you will click on the Bid Q&A button at the bottom of the screen. (Some solicitations will allow you to ask questions in the OregonBuys system and view all answered questions that were submitted by either your company or others. If the solicitation does not allow vendors to ask questions through the system, you will submit your question to the single point of contact.)

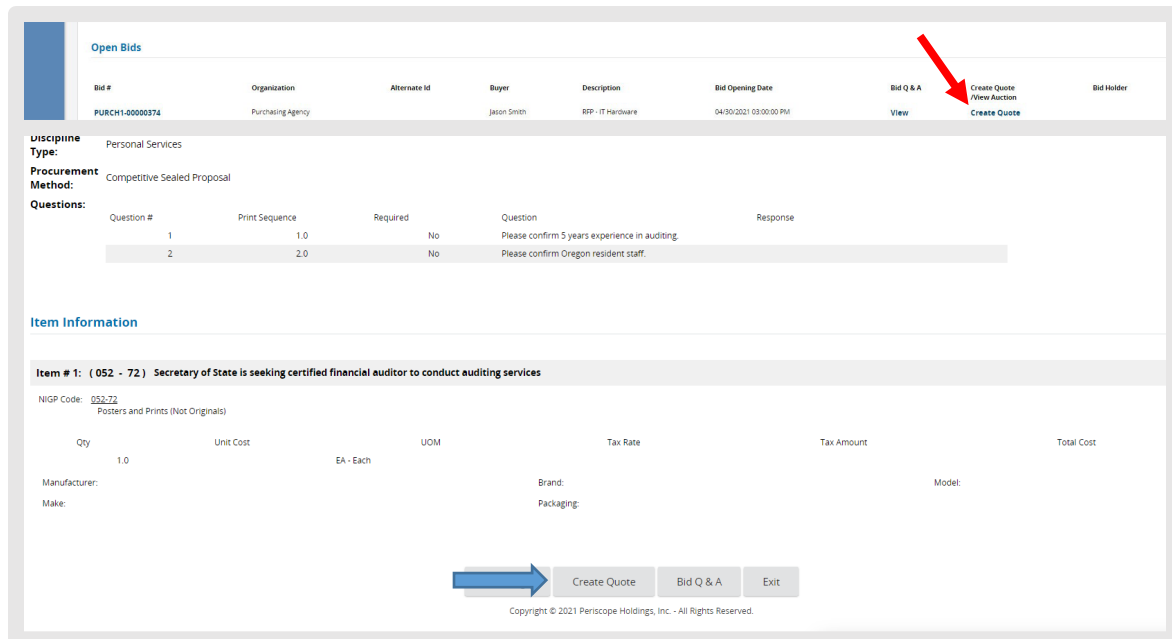
6. The single point of contact will be located in the Header Information section under the info contact. This will have the single point of contact name, phone number, and email.



**Header Information**

**Bid Number:** S-73000-0000581      **Description:** Testing Locked pricing      **Bid Opening Date:** 07/23/2021 08:41:24 AM  
**Purchaser:** Melissa Lovejoy      **Organization:** Department of Transportation  
**Department:** 7302300 - Dept. of Motor Vehicles      **Location:** DMVSV - DMV Services  
**Fiscal Year:** 23      **Type Code:**      **Allow Electronic Quote:** Yes  
**Alternate Id:**      **Required Date:**      **Available Date :** 07/23/2021 08:27:03 AM  
**Info Contact:** Joe Smith      **Bid Type:** OPEN      **Informal Bid Flag:** No  
**Purchase Method:** Blanket      **Rolling Enrollment Enabled:**       **Open Enrollment Enabled:**   
**Blanket/Contract:** 07/30/2021      **Blanket/Contract End Date:** 07/29/2022

7. Once you are ready to submit your Quote (Proposal to an RFP or a Bid to an ITB/RFB). Click Create Quote (there are two ways to Create a Quote, one is from the Bid Tab under Open Bids. The other way is when you have clicked on the solicitation/bid number on the left side of the screen. At the bottom of that screen you will find the button Create Quote.)

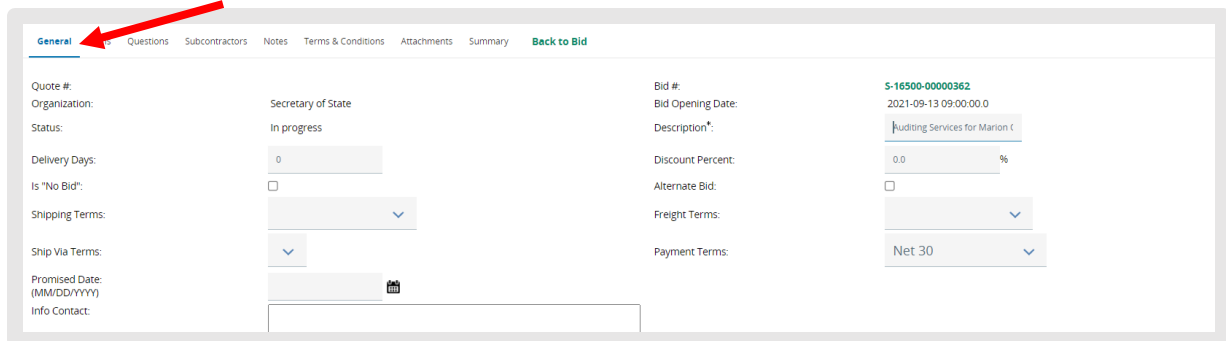


8. Click Yes (or No) on the Acknowledge Receipt and View Solicitation screen.

- Clicking Yes opts you into being notified when an Addendum/Amendment occurs against the document (in the OregonBuys system Amendments in the Bid solicitation could also mean Addendum to the solicitation document. It could also mean that there were some data entry updates. You will find out what those changes are when you have clicked on the bid number to review under the Header Information section, the line will be titled Amendment.)
- 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.

## Create the Quote

### 1. Select General Tab



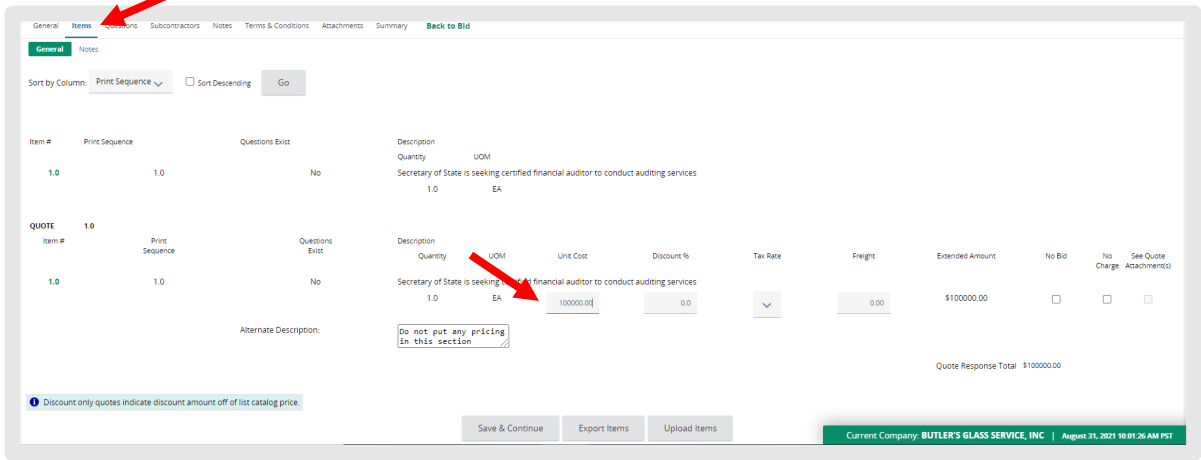
#### ✓ Captures header level data

- Description field (required): Description of Sellers response (Defaults to what the description is on the bid).
- 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: Contact information for questions regarding Quote. Enter the name of the person, their email and phone number.
- Comments (optional): Field to enter in notes to Organization.
- Resident Bidder (required): must select yes or no.(Resident Bidder means are you a resident bidder of Oregon.

#### ✓ Click Save & Continue.

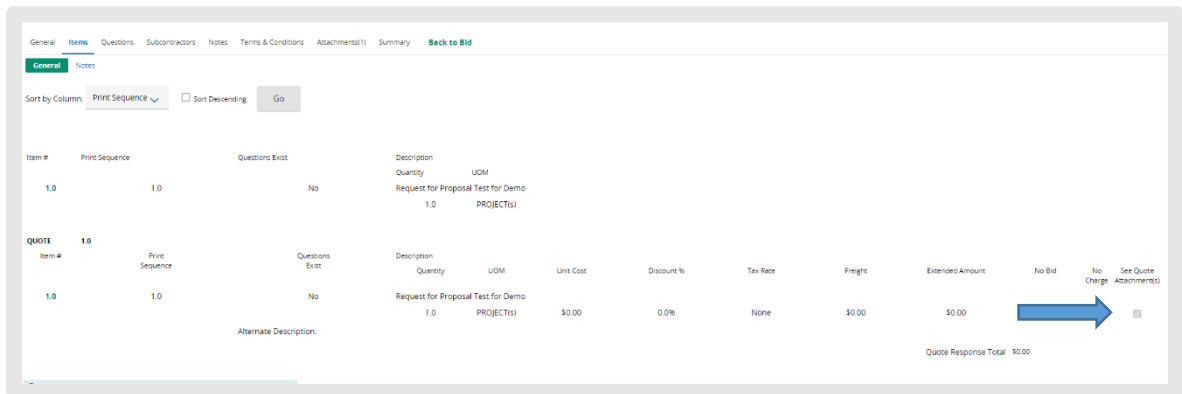
- The Quote will be saved in the system as In-progress.
- The Quote is assigned its own unique document ID number.
- A red validation error message appears stating the Terms & Conditions needs to be acknowledged. Updating this will be covered below on the Terms & Conditions Tab. Until the Vendor takes action on this tab, a red validation error will appear at the top of the Quote.

## 2. Items Tab



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

- Enter the price for each Item being bid against in the Unit Cost field. Only if required. If the pricing is disabled and cannot be entered you must attach the required documents that are stated in the solicitation for the pricing (if required).
- If pricing is not required the Quote box will have a check mark.



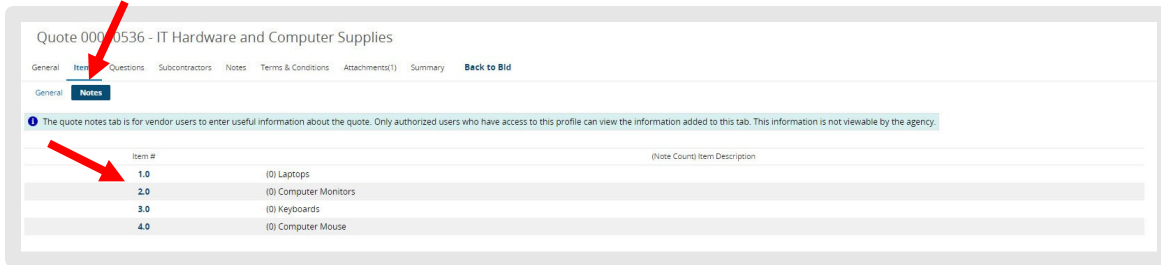
- Sellers can also export all the Items by clicking the Export button located at the bottom of the screen, enter their Price for each Item under the Unit Cost column and removing "Y" under the No Bid column, save the CSV File to their computer, then upload it by clicking the Upload button, and selecting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

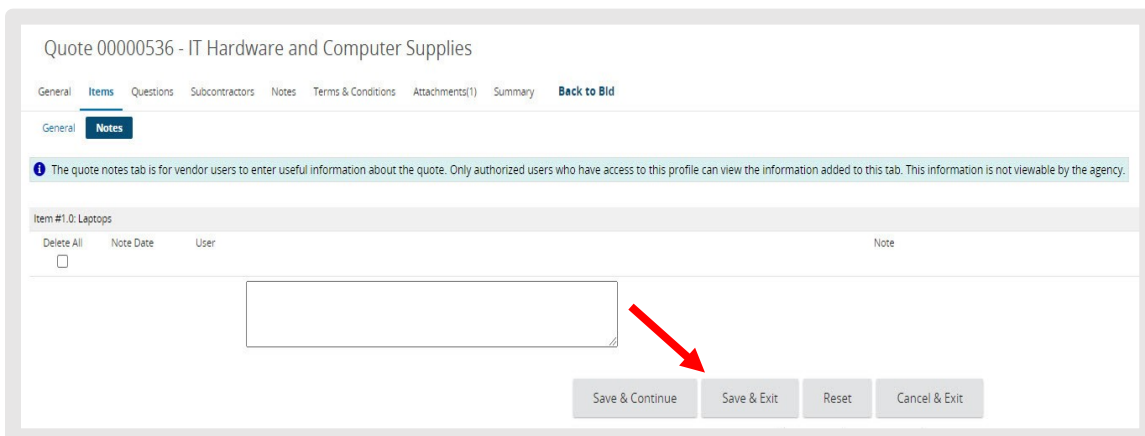
### 3. Click Notes Sub-Tab



✓ 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.

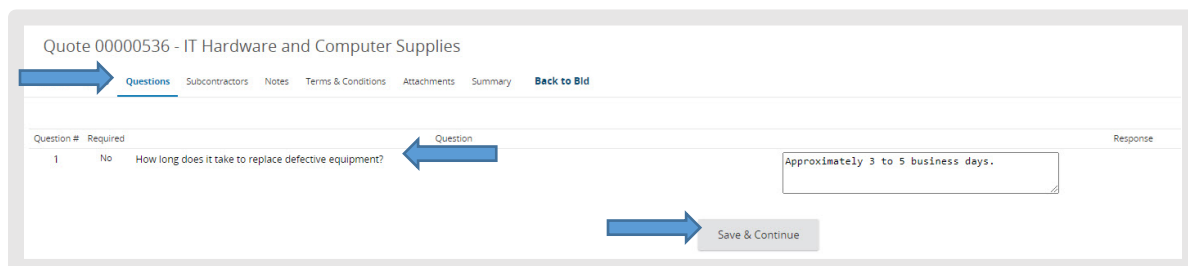
✓ Organization users cannot see the seller's notes.

- Click item number
- Enter information in the text box.
- Click Save and Exit.



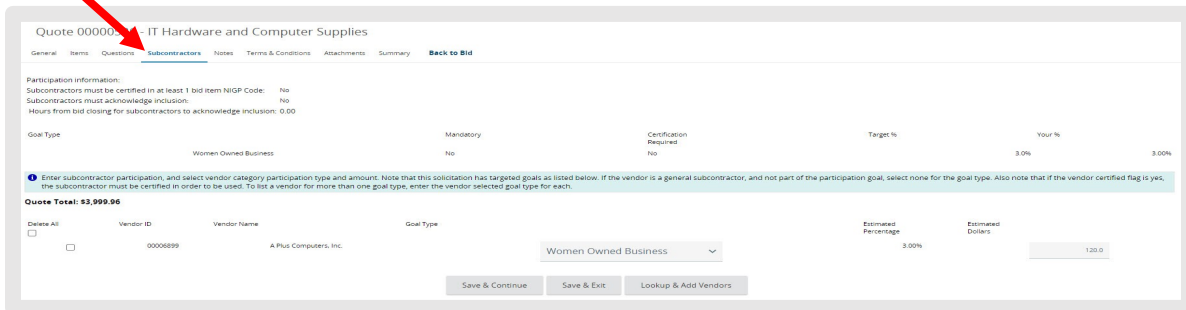
✓ The Seller may also capture notes applicable to all items (i.e. the Quote, in general) on Notes tab.

### 4. Click Questions tab.

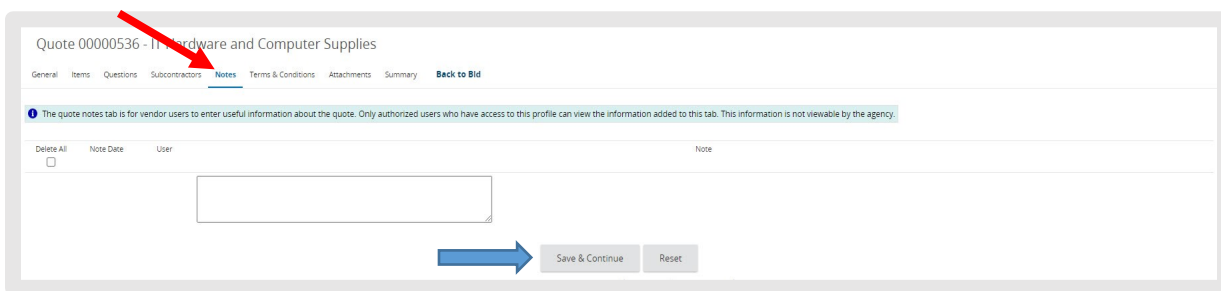


- Allows the Seller to answer questions asked by the Organization as part of the Bid Solicitation.
- If a question is required, the Seller will see a red validation error at the top of their Quote until the question is answered.
- Provide an answer to the Question.
- Click Save & Continue

## 5. Subcontractor Tab - Skip this tab for Phase 1 ODOT will not be using this tab for its vendors.



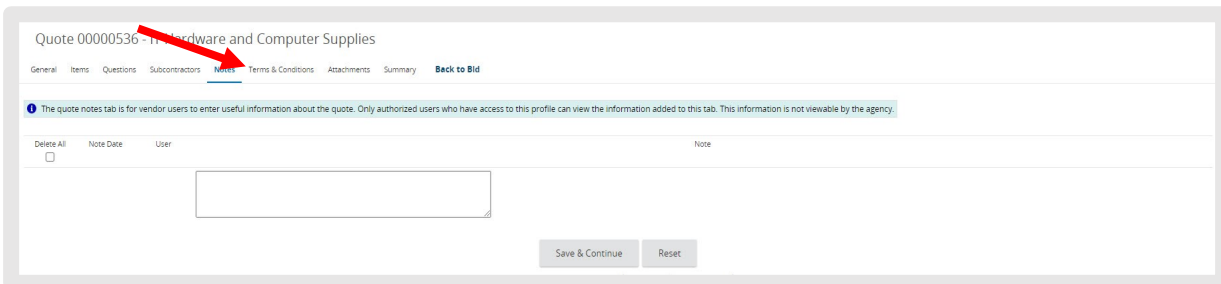
## 6. Click Notes tab



✓ 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 sub-tab mentioned above.

- Enter note information in the comment box.
- Click Save & Continue.

## 7. Click 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).

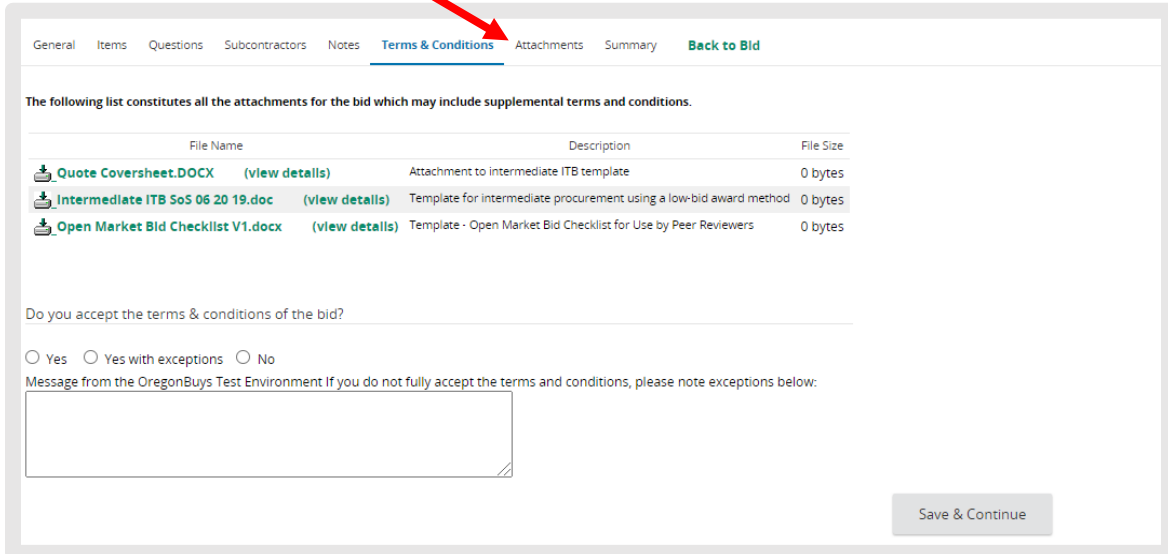
- Any attachment shown on the tab may be downloaded by the Seller.
- The Seller has the option to accept or to not accept the Terms & Conditions of the Bid. Until the Vendor takes action on this tab, a red validation error will appear at the top of the Quote.

- Make sure that you read the solicitation document to determine if the Organization will allow you to mark the yes with exceptions. If you mark this and the solicitation does not allow the exceptions you are wanting your bid could be considered to not move forward.




✓ Click Yes.

✓ Click Save & Continue.

8. Click Attachments tab



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

File Name	Description	File Size
 Quote Coversheet.DOCX <a href="#">(view details)</a>	Attachment to intermediate ITB template	0 bytes
 Intermediate ITB SoS 06 20 19.doc <a href="#">(view details)</a>	Template for intermediate procurement using a low-bid award method	0 bytes
 Open Market Bid Checklist V1.docx <a href="#">(view details)</a>	Template - Open Market Bid Checklist for Use by Peer Reviewers	0 bytes

Do you accept the terms & conditions of the bid?

Yes  Yes with exceptions  No

Message from the OregonBuys Test Environment If you do not fully accept the terms and conditions, please note exceptions below:

[Save & Continue](#)

✓ Allows the Seller to capture any supporting documentation related to their Quote that may be helpful to the evaluators. Make sure you are attaching all required documents that are listed in the solicitation.

- 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).
- 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, you can only enter one document at time.



**Add File**

**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.

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\*:  IT Hardware...sponse.docx

Location: 00016915

Confidential:

✓ Additional Features

• Confidential – this is highly recommended for all of the vendors documents. Allows the Seller to make their attachments confidential from the public. Documents containing sensitive information, such as tax information, would be deemed confidential. All documents that are NOT marked confidential will be viewable to the public. These will be show publicly after the Bid has been awarded.

◦ 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.

## Required Documents

If there are required documents, you will need to upload them by clicking on upload next to the name of the required document, which is located at the bottom of the page on the attachment tab. When there are required documents the system will not allow you to submit your Quote (Bid or Proposal) until you have uploaded all required documents.

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

Message from the OregonBuys Test Environment Marking an item "Confidential" will ensure the document will not be displayed publicly within the OregonBuys system. Message Code: CANOT

**Files**

Click **Add File** to add file attachments.

No File Attachments

**Forms**

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

No Form Attachments

**Required Attachments**

(These are attachments requested by the Agency, and a Quote response must include them to be submitted)

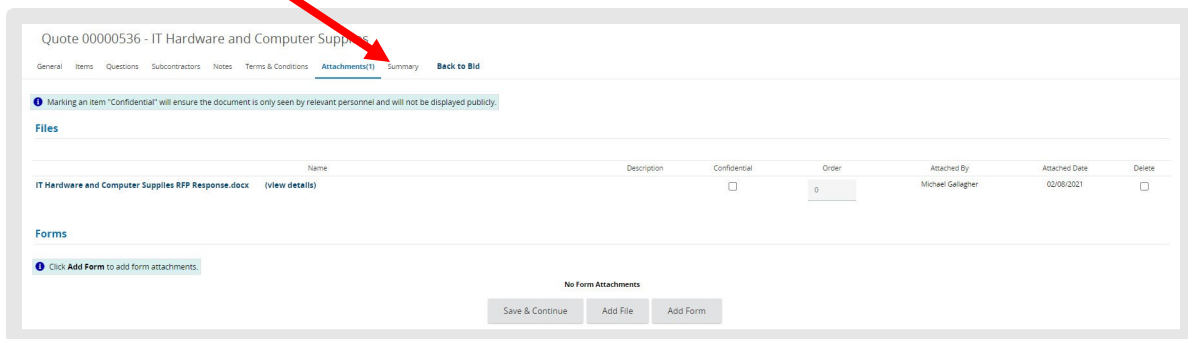
Name	Description	Attached By
Proposal Cover Sheet	Must submit your proposal cover sheet	<input type="button" value="Upload"/>
Bid Bonds	Must submit your Bid Bonds	<input type="button" value="Upload"/>

✓ Click on choose file located your computer

- Confidential – this is highly recommended for all of the vendors documents. Allows the Seller to make their attachments confidential from the public. Documents containing sensitive information, such as tax information, would be deemed confidential. All documents that are NOT marked confidential will be viewable to the public. These will be show publicly after the Bid has been awarded.

✓ Click on Save & Exit

9. Click Summary tab

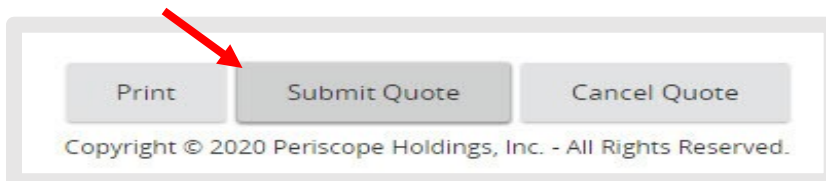


✓ Allows the Seller to review all the information entered on the previous tabs for review prior to submitting the Quote.

✓ 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.

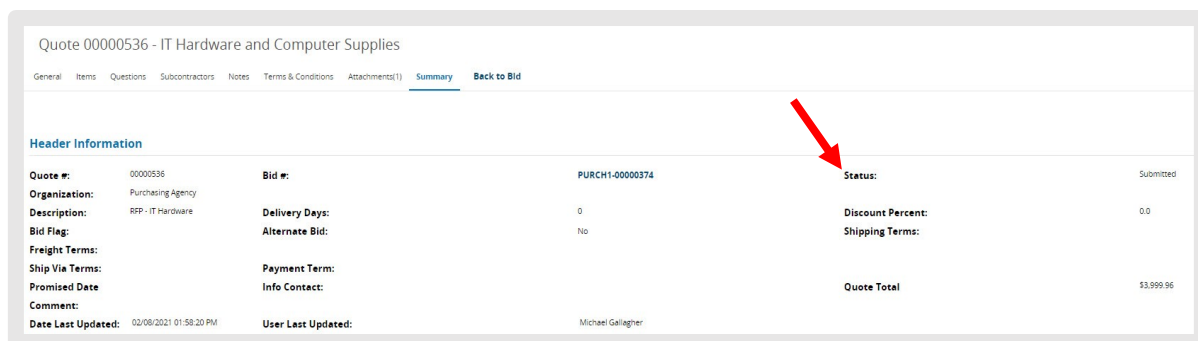
✓ Click Submit Quote.

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



• The screen refreshes, leaving you on the Summary Tab.

• The status changes to Submitted – The Quote is officially submitted ending the process.



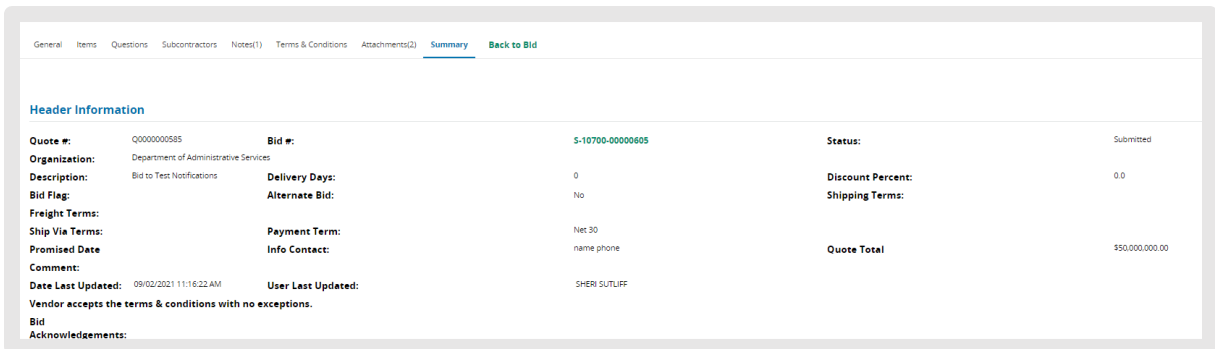
## Locate a Previously Submitted Quote

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. OregonBuys: Powered by Periscope
3. Click Quote number.
  - ✓ You're directed to the General tab.
  - ✓ You can review any information on any of the tabs.



## Withdraw and Resubmit a Previously Submitted Quote:

1. Click Summary tab.

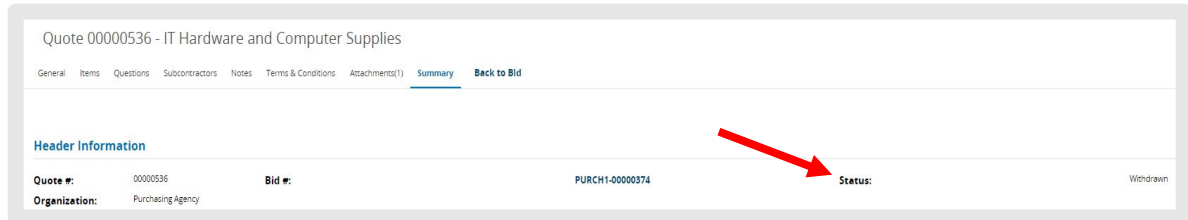


2. Click Withdraw Quote button located at the bottom of the summary page.

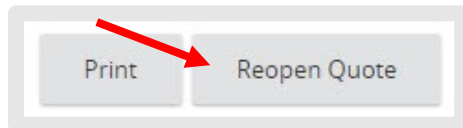


3. Click Ok.

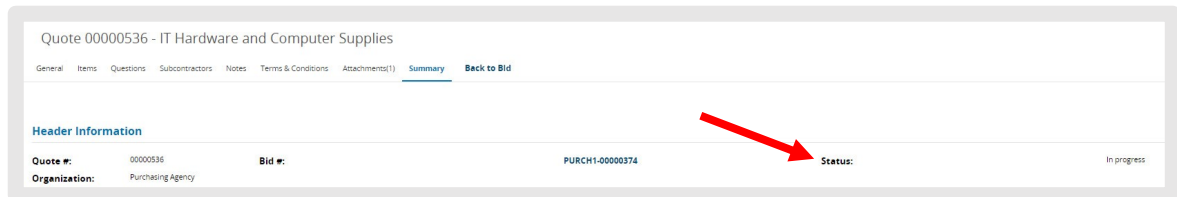
- ✓ A popup window displays asking “Are you sure you want to withdraw this quote?”
- ✓ Your screen refreshes, leaving you on the Summary tab.
- ✓ The status of your Quote changes to Withdrawn.



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.



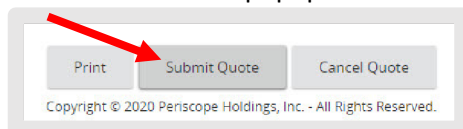
5. Click the appropriate tab(s).

- ✓ Go to any of the tabs that a modification or addition needs to be made.
- ✓ Once modifications are made to your Quote, go to the Summary tab to resubmit your Quote.

6. Click Summary tab

7. Click Submit Quote

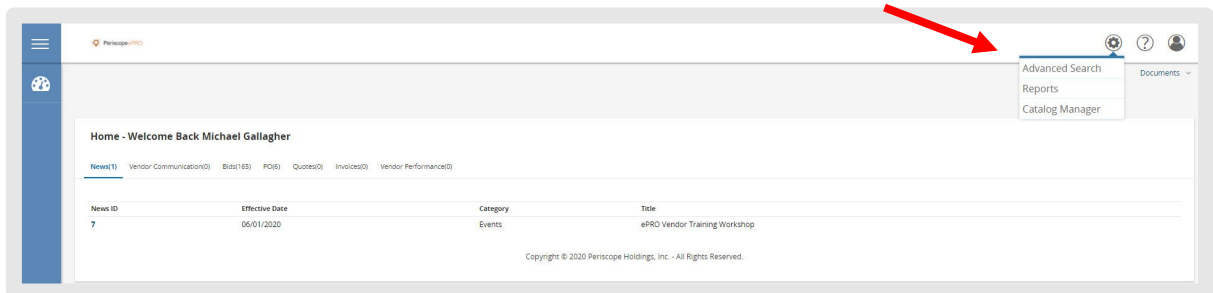
- ✓ Click Ok in the popup window confirming you want to submit your Quote.



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

## Locate the Bid Solicitation (Option #2):

1. Log into <https://oregonbuys.gov/bsa>
  - 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.



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.