Supplier Solicitation User Guide

This guide will cover:

- Solicitation Invite Notification
- Sign In and Access Supplier Portal
- How to Respond to a Solicitation
- How to Respond to an Addendum
- How to Revise and Resubmit a Solicitation Response
- How to View Solicitation Response History
- How to Delete a Solicitation Response
1 Solicitation Invite Notification

- Registration is required to access and respond to King County solicitations. If you have not registered, refer to the Supplier Registration User Guide to get started.

- An Accept Invitation/Decline Invitation email will be sent to the solicitation contact, determined by NAICS code in the solicitation. The email is inviting the supplier to acknowledge participation to the solicitation. Acknowledging participation to solicitations is a best practice. If the supplier declines acknowledgement to the solicitation, the supplier will still be able to submit a response to a solicitation and will receive notifications for the solicitation.

Note: all supplier contacts will receive the solicitation’s notifications. Ensure any supplier contacts who will be receiving the solicitation invites and has the Supplier Bidder role has a user account (Request user account checkbox when editing a supplier contact- not only an Admin Contact). For more information on adding supplier contact roles, view the Supplier Profile Maintenance User Guide.

Note: the supplier will not be able to access all information from the email invitation i.e. attachments; all information can be viewed once accessing the solicitation in the system.

Note: the NAICS Codes on the supplier profile will determine which suppliers are invited to each solicitation. For more information on NAICS codes, view the Identifying NAICS Codes User Guide. For more information on adding or editing NAICS codes on a supplier profile, view the Supplier Profile Maintenance User Guide.

Action Required: You Are Invited to Negotiation KC000169 (Laptops for Fleet Division)

King County Finance and Procurement System <espn-test.ta.sender@workflow.mail.us2.cloud.oracle.com>

Negotiation Invitation
Laptops for Fleet Division
King County
From Heidi Marchell
GSO Solicitation KC000169
Opens 9/10/20 8:39 PM
Closes 9/20/20 8:39 PM
Seeking to purchase laptops for one King County agency.

Accept Invitation  Decline Invitation

Supplier Contact: PPRREGSTRSPSUPLIER CRP2TEST
Acknowledged By: 9/13/20 8:39 PM

You are receiving this notification from company King County because you are identified as a potential supplier for our organization. We are requesting proposals based on the requirements found in the attached file. Within this file you will also find detailed instructions including information such as submission procedures, time frames, and evaluation criteria. Your participation is optional, and your response will be electronically processed through our procurement application.
2 Sign In and Access Supplier Portal

- Go to the **E-Procurement Supplier Portal**. The “Sign In” page will display. Enter your “User ID” and “Password,” then click “Sign In.”

  ![Sign In Page](image)

  **Note:** use supporting web browsers: Mozilla Firefox, Google Chrome, Microsoft Edge, and Apple Safari.

  **Note:** do not use the “Company Single Sign-On” option.

  **Note:** the E-Procurement Supplier Portal is a cloud-based software. Submit responses to solicitations in a timely manner; do not wait until the last minute in case you encounter technical or connection issues. Late responses will not be accepted.
- The home page will display.

- Click the “Supplier Portal” tile.

- In the “Solicitations” section, under “Tasks,” click the “View Active Solicitations” hyperlink or click on the “Requiring Attention” dashboard to access potential solicitations requiring attention.

  Note: use the Search fields if you know have solicitation number.
3 Respond to Solicitations

- The “Active Solicitations” page will display. On the “Invitation Received” drop-down, select the appropriate search parameter (“Yes” or “No”). Fill in the appropriate search parameters, click “Search” when complete.

Note: selecting “Yes” will list all solicitations the supplier is invited to. Selecting “No,” will list active publicly advertised solicitations that your firm has not been invited to.

- Click the desired solicitation number hyperlink.
- The solicitation page will display. Preview the solicitation details by clicking through the links under “Table of Contents” on the left side.

- In the upper right corner, click on “Actions” drop-down, select “View,” then select “View Attachments.”

- Click the “Actions” drop-down and select “Download All.”

Note: downloading all attachments before looking at further information in a solicitation is a best practice.
- A .zip file will download to your computer, save the .zip file and review the solicitation attachments as necessary. In the upper right corner, click “Done” when complete.

- The solicitation page will display, click “Done.”
The “Active Solicitations” page will display, highlight the desired solicitation, click “Acknowledge Participation.”

Note: Acknowledging participation is optional. Suppliers who do not see this option for a solicitation can still create a response for a solicitation.

The “Acknowledge Participation” pop-up will appear. In the “Will Participate” field, select “Yes.” Click “OK.”

Highlight the desired solicitation and click “Create Response.”
• The “Create Response” pop up will appear, click “Create.”

![Create Response Pop-Up]

- Note: only select “Copy from an existing response” if you would like to copy your responses from an existing solicitation. This option is only available after you have submitted a response to a King County solicitation.

• The "Create Response" page will display.

![Create Response Page]

• To send a message to King County on this specific solicitation, click the "Messages" button.
- The "Online Messages" page will display, to create a message, click the plus “+” icon.

- The "Send Message" window will display, fill in the "Subject" and "Message" fields. Optionally, send an attachment in your message by clicking the plus “+” icon. Click “Send” when your message is complete.
- The message sent will appear in "Messages." Highlight the desired message to populate details. To reply to a message, highlight the desired message and click "Reply." Click "Done" when complete.

Note: all messages between the supplier and King County on this solicitation will be in the “Messages” section. All messaging between the supplier and King County will be conducted through this process in the system. No messages should be sent via email.

- The "Create Response" page will display. On the "Overview" page, fill in the appropriate information.
<table>
<thead>
<tr>
<th>Field</th>
<th>Overview Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Date</td>
<td>▪ Date the solicitation will be closed for submitted responses.</td>
</tr>
<tr>
<td>Time Remaining</td>
<td>▪ How much time is remaining before the close date.</td>
</tr>
<tr>
<td>Reference Number</td>
<td>▪ Optional supplier tracking number.</td>
</tr>
<tr>
<td>Response Type</td>
<td>▪ This option may not be available for all suppliers. &lt;br&gt; ▪ Primary: if there is only one response on the solicitation. &lt;br&gt; ▪ Alternate: if there is another response that is not primary on the solicitation (do not use multiple primary responses).</td>
</tr>
</tbody>
</table>

- Click "Next" when the "Overview" page is complete.

The “Requirements” page will display, answer the presented questions. Questions with an asterisk (*) are required.
- Use the arrow to navigate to the next section with additional questions. Alternatively, you can use the “Section” drop-down to navigate directly to specific sections.

Note: sections will vary depending on solicitations. Sections can contain branching questions depending on the answer you choose. Ensure you scroll to the bottom of each section to complete each requirement.

- Attachments may be available in some sections, but all attachments have been downloaded and saved to your computer before “Acknowledging Participation” in the beginning of this training document.
- Sections may require or give you the option to attach additional information. Click the plus “+” icon to attach a document.

Note: sections may provide a form or template to be filled out and re-attached.

- The “Attachments” pop-up will display. Click the plus “+” icon to attach a document. Click “Choose File” to select the document to attach.

- Optionally, fill in the appropriate information for “Title” and “Description” as desired. Click “OK” when complete.
Once you have completed all questions in all sections with the necessary attachments, click "Next."

Note: if all required questions are not completed, you will receive an error message and will not be able to submit your response.
- The “Lines” page will display, enter the “Response Price.”

Note: some solicitations may have no lines or may have multiple lines.

<table>
<thead>
<tr>
<th>Solicitation Type</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architecture &amp; Engineering Solicitations</td>
<td>Pricing lines do not apply.</td>
</tr>
<tr>
<td>Construction Solicitations</td>
<td>Pricing line will <em>typically</em> be for a total bid price.</td>
</tr>
<tr>
<td>Goods &amp; Services Solicitations</td>
<td>Pricing line(s) will <em>typically</em> be solicited by item, group, or by lot.</td>
</tr>
</tbody>
</table>
- The supplier can optionally respond by spreadsheet if there are multiple lines to add. Click the "Respond by Spreadsheet" drop-down and select "Export." A .zip file containing the .csv template will be exported to your computer.

- Open the downloaded export .csv template on your computer. Fill out the form with the appropriate information. Save to your computer.

**Note:** The export .csv file will download. Fields with an asterisk "*" are required. Fields with two asterisks "**" are optional. Save the .csv file without making any edits to the format or content, only complete the columns under "** Response Price."
- Navigate back to the “Create Response” page. Click the “Respond by Spreadsheet” drop-down and select “Import.”

![Image of the Create Response page with imported data]

- The “Import Response” pop-up will appear, click “Choose File” and select your completed .csv template saved to your computer. Click “OK” when complete.

![Image of the Import Response pop-up]

- Verify the “Response Price” lines have been added, click “Next.”

![Image of the Create Response page with response details]

v. 2.1/2021  18
- The “Review Response” page will display, review your response. Click “Save” if your response is not complete and would like to come back and submit at another time.

- Click the “Actions” drop-down, select “Validate” to verify all details have been entered.

  Note: an error message will display if your response is missing required information.

- A confirmation pop-up will appear, click “OK.”
- Click “Submit.”

![Image of a King County document](https://example.com/image)

- A confirmation pop-up with your response number will appear, click “OK.”

  ![Confirmation Pop-Up](https://example.com/image)

  Note: the response will not be submitted until you click the “Submit” button.

- End of process.

### 4 Addendum Notification and Response

- Acknowledgement of addenda for each solicitation is required.

- Once logged into the system, a notification will appear on the bell icon that an “Amendment Requires Your Attention.” Click the bell icon and click the notification link.

  ![Notification](https://example.com/image)

  Note: addendum and amendment are used interchangeably.

  Amendment notifications will also be sent via email.
Under the “Related Links” section, click the “Acknowledge Addenda” hyperlink.

The “Acknowledge Addenda” page will display, check the “Acknowledgement” box stating you have reviewed and acknowledged the amendment for the solicitation.
- Click “Submit.”

- A confirmation pop-up will appear, click “Yes” if you would like to create a new response. Click “No” if you have an existing response created.

- **IMPORTANT**: After reviewing and acknowledging and addenda, consider if you need to adjust an existing response to comply with the addenda. If so, refer to the next section “5 Revise & Resubmit Solicitation Response.”

- End of process.

**5 Revise & Resubmit Solicitation Response**

- Responses to solicitation can be revised and resubmitted any time before the solicitation close date and time.

**Note:** if your response has been submitted, and an addendum is issued, you must log-in and acknowledge the addendum before revising and resubmitting your response. Refer to the previous section “4 Addendum Notification and Response.”
- Once logged into the system, from the homepage, click the “Supplier Portal” tile.

- In the “Solicitations” section, under “Tasks,” click “Manage Responses.”

- The “Manage Responses” page will display, enter the appropriate search parameters, click “Search.”
• Highlight the solicitation you would like to revise your response to and click “Revise.”

Note: response revisions are only an option if there is still “Time Remaining” on the solicitation. The “Response Status” will indicate “Draft” for responses not yet submitted and “Active” for responses that have been submitted.

• The “Create Response” page will display. Click “Next” to navigate to the desired page where revision(s) need to be made.
• Once revision(s) have been made, click “Next” to navigate to the “Review” page. After reviewing, click “Submit” when complete.

Note: in this example, a “Response Price” was revised on the “Lines” page. On the “Changed Lines” tab, notice the documented revision.

• A confirmation pop-up will appear, click “OK.”

• End of process.

6 View Solicitation Response History

• Once logged into the system, from the homepage, click the “Supplier Portal” tile.
- In the “Solicitations” section, under “Tasks,” click “Manage Responses.”

  ![Image](image1.png)

- The “Manage Responses” page will display, enter the appropriate search parameters, click “Search.”

  ![Image](image2.png)
- Click the desired solicitation "Response" hyperlink.

Note: response number hyperlinks will only be enabled for “Active” responses (“Active” responses are responses that have been submitted).

- In the upper right corner, click the "Actions" drop-down and select "View Response History."
On the "Response History" page, all responses from the supplier will be listed. Response(s) with a "Status" of "Archived" are previous submitted response(s) and a response with a "Status" of "Active" is the most recent response submitted. Click "Done" when done reviewing.

Note: King County will only consider "Active" responses.

End of process.

7 Delete Solicitation Response

Once logged into the system, from the homepage, click the “Supplier Portal” tile.
- In the “Solicitations” section, under “Tasks,” click “Manage Responses.”

- The “Manage Responses” page will display, enter the appropriate search parameters, click “Search.”
Highlight the desired solicitation response, click the “Actions” drop-down and select “Delete Draft.”

Note: responses only can be withdrawn before the solicitation close date. If you would like to withdraw after the close date, contact King County via the messaging feature.

Active responses can only be revised and cannot be deleted or withdrawn whether the solicitation be open or closed. If you would like to withdraw an active response, contact King County via the messaging feature.

A warning pop-up will appear, click “Yes.”

A confirmation pop-up will appear, click “OK.”

End of process.