

eBid eXchange

Quickstart Guide for Vendors



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USING THIS QUICKSTART GUIDE

This Quick Start Guide is intended as a summary reference for eBid eXchange Users. More details can be found in the online help available by clicking on the Help link in the upper right of the website.

Please pay particular attention to the comments enclosed in text boxes which are intended to highlight important business rules in eBid eXchange.

1.0 OVERVIEW

Following is an overview of the features of this eBid eXchange website.

Home Page - On the Home Page, you will see text information about using the site posted by the site owner. Optionally, you may also see links to relevant websites and documents. These documents are for general information and are typically not for a specific Solicitation.

Registration - Access to many features may require that you submit information about your company online. See the Vendor Registration section of this Help document for more information.

Logging In - You will create an online Account to which you will have sole access that will require that you login to access many areas of the website. After you have registered, each time you come to the website you should begin your session by logging in with your email and password. The Login button is in the upper right. Use the same button to Logout when your online session is complete.

Time Zone - The time that you logged into the website will be displayed in the upper right. Note that this is the time zone for the website owner. Please be aware that time zone may be different for each solicitation. You will need to convert your local time to that of the website to ensure that your information is submitted on time.

Solicitations - Solicitations are requests for quote, requests for information, requests for proposals, and invitations for bid issued by the site owner. Click on the Solicitations tab to access these opportunities. You will be required to Login to view and respond to many Solicitations.

Bids/Awards - At the discretion of the site owner, information about the bids received and award of vendor contracts may be posted under the Bids/Awards tab. This tab will not be visible if this feature has not been enabled.

Getting Help - Use this Help document to get more information about the specific features you are using. If you are still having trouble using the site, use the Contact Us link at the top of the page to request assistance.

Browser Settings - This site uses Javascript and pop-ups. Your browser must have Javascript enabled and you must disable your pop-up blocker while you are using this website.

2.0 LOGIN/PASSWORD

The Login button is in the upper right. Use the same button to Logout when your online session is complete.

You will be automatically logged out if you do not perform any actions within a period of 60 minutes. Simply login again to use the website.

If you have forgotten your password, enter your email address into the Forgot Password section and click the Reset Password button. You will receive an email message with a hyperlink that you must click to reset your password.

When you receive the Forgot Password email message, click on the Click to Set New Password link in the message, enter and confirm your new password on the form provided, and click the Change Password button.

If you have forgotten the email address you used to register, you must contact a System Administrator with your company who set up your initial registration so they can change your email address and reset your password. If you are the sole Contact with your company, contact the website owner for assistance.

What if I don't receive my initial account activation email?

All email messages that are generated from the system come from the eBid Systems mail server (mail.ebidsystems.com) with the sending address DoNotReply@ebidsystems. These messages are generated within a few seconds to a few minutes, so if you haven't received the message within an hour from your initial registration completion, there may be a problem in receiving mail from our server.

Occasionally, your email software may quarantine or reject the system messages as suspected spam. Depending on how you receive email, spam filters may be activated:

- On your desktop computer (i.e. Microsoft Outlook junk mail filters).
- On your company network email system (i.e. Microsoft Exchange server).
- On your Internet Service Provider's mail server.

To troubleshoot an instance where you have not received your account activation message, try the following:

Step 1 - Check to see if the message from DoNotReply@ebidsystems is in your junk mail folder. If so, add ebidsystems.com to your Safe Senders list in your email software, click on the activation link in the email message to complete your registration.

Step 2 - If the account activation message from DoNotReply@ebidsystems is not in your junk mail folder, add ebidsystems.com to your Safe Senders list in your email software.

Step 3 - Go to the ebidexchange.com website where you registered, click on the Login button in the upper right and enter your email address in the Forgot Password form. If you entered the email address correctly matching the address that you used at the time of first registration, the system will send another account activation message to your email address.

Step 4 - If you have not received an account activation message within a few minutes after following Steps 1, 2 and 3, you will need to contact your company network administrator and/or Internet Service Provider and have them add the ebidsystems.com mail server domain (I.P. Address 72.3.134.114) to your safe sender list. Once this has been done, go back to Step 3 to have the system resend your account activation email.

If the above steps do not work, we recommend that you set up a free email account with Microsoft (Hotmail.com) or Yahoo (Yahoomail.com). Our system has been tested with both of these email systems and our messages are not blocked by their spam filters.

I tried to re-register but the system says my email address is in use?

The system prevents duplicate email addresses from being associated with more than one account or contact. You must first ensure that you are able to receive email from ebidsystems.com using the above procedures. If necessary, you can ask the website owner to delete your existing account so that you can restart the registration process.

3.0 VENDOR REGISTRATION

To register as a new Vendor, click on the Registration tab, enter a Company name and email address, and click the Next button.

If there are no matching Company records in the vendor database, you will be sent an email message. Open the message and click on the specified link, enter and retype your personal password, click the Change Password button, and follow the instructions for completing your Company registration.

As the first person to create an account for your Company, you will have Company Administrator permission status. Only Company Administrators can edit Company information, Categories, Service Areas, and Documents. Only Company Administrators can add or edit additional Company Contacts.

If there are similar Company records in the vendor database, you will be presented with a list of companies that potentially match the company name you entered. If you are associated with one of the listed companies, click on the Company name link, and contact the Company Administrative Contact listed and have them add you as a company contact.

If you are not associated with one of the listed companies:

- Click on the Continue New Company Registration button to add a new Company and follow the instructions for No matching Companies above, or
- Click on the Enter Another Company Name button to return to Register as a New Vendor described above with a different company name.

3.1 Company

Fill out all required fields and hit Insert to save your entries, or Cancel to clear the form. After you have completed all steps of your registration, you will see a View Company Summary link at the top of the Company page that will provide a printable summary of your complete Company profile. To edit your Company profile, login and click on the Registration tab.

If you were the first person to create an account for your Company, you will have the Company Administrator Permission Role. Only Company Administrators can edit Company information. Only Company Administrators can add Company Contacts, who can view, but not edit Company information.

Account Approval

If the Account Approval function has been enabled, you will see an Account Approval section and status near the top of the Company page. Your Account will be initially given Pending status until the site owner has reviewed and approved your request to be a vendor in their system.

You will receive an email message when your Account has been Approved which will be reflected in the Account Approval Status on the Company page.

If you receive an email message indicating that your request for an Account has been denied, your Account will be Inactivated and you will no longer be able to log in.

If the Approval feature has been enabled and you make changes to your profile, your approval status will automatically be set to Pending and must be re-approved by the site owner. Until your account is approved, you will be unable to respond to Solicitations.

3.2 Contacts

By default the first time you view the Vendor > Company screen, the Address Type will be set to Use Company Information, assuming that you share the same address as the Company. Selecting Enter Personal Information will allow you to enter personal address, phone, and fax information that is different than the Company information. Fill out the required fields and click the Update button to save your entries. If you have Company Administrator privileges you can add additional Company Contacts.

Company Administrator - If you were the first person to create an account for your Company, you will have the Company Administrator Permission Role. Only Company Administrators can edit Company information. Only Company Administrators can add Company Contacts, who can view, but not edit Company information. Company Administrators can also grant Company Administrator Permission Role to other Contacts.

Company Contacts - Any other Contacts that attempt to register under the same Company name will be shown a list of Company Administrators and directed to contact a Company Administrator to be added as an additional Company Contact. Company Contacts can view the online Company profile, edit their Contact information, and transact website business on behalf of the Company (optionally including download documents, ask questions, declare Intent to Bid, and submit Bids).

Opting Out of Bid Notifications - If you no longer wish to receive email or fax announcements from the system click on the View link for the Contact, click on the Edit button for the Contact, and check the box "I wish to opt out of Bid Notifications". You will still be able to log in but will no longer receive system messages.

Changing Passwords (Company Administrator only) - If a Contact has forgotten their password or you want to change the existing password for a Contact, click the Reset Password button at the bottom of the page. This will send an email message to the Contact, requiring them to change their password.

3.3 Categories

Categories are used to define the products and services that your company provides. These Categories are used in matching bid opportunities with vendors that provide relevant products and services.

If the Categories feature is enabled, a Categories link will appear under the Registration tab. Only Company Administrators can edit Company Categories.

You must have the Permission Role of Company Administrator to add or delete Categories. Make sure to Save your selections after checking the relevant Categories.

3.4 Service Areas

Service Areas are used to define the geographic areas in which your company provides its products and services. These Service Areas are used in matching bid opportunities with vendors that provide relevant products and services in those areas. Service Areas are presented in an expandable tree view of geographic subdivisions.

If the Service Areas feature is enabled, a Service Areas link will appear under the Registration tab. Only Company Administrators can edit Company Service Areas.

Checking the parent Service Area will automatically include all child Service Areas.

3.5 Documents

If the Documents feature is enabled, a Documents link will appear under the Registration tab. You must have the Permission Role of Company Administrator to add or delete Documents.

On the Documents page, you will be presented with fields for one or more optional or required documents to be submitted as part of the registration process. To upload a document, click on Browse button, navigate to the folder that contains your document, highlight the document and click the Open button on the dialog box, and click the Save button to upload your documents.

If successful, the page will refresh and you will see an Account information updated message at the top of the screen. Your document filenames will appear as hyperlinks on the page, along with the date uploaded and the name of the user who uploaded the documents.

You can upload a new document that will overwrite the existing document file previously uploaded (you cannot delete a document). Follow the procedure for entering a new document.

3.6 Approval

If the Account Approval function has been enabled, you will see an Account Approval section and status near the top of the Company page. Your Account will be initially given Pending status until the site owner has reviewed and approved your request to be an Active vendor in their system.

You will receive an email message when your Account has been Approved which will be reflected in the Account Approval Status on the Company page. If you receive an email message indicating that your request for an Account has been denied, your Account will be Inactivated and you will no longer be able to log in.

4.0 SOLICITATIONS

4.1 Solicitation List

Solicitations are Invitations to Bid, Requests for Information, Requests for Quote, or Requests for Proposal that are posted by the website owner. You can sort the listing by clicking on a column heading. If you are viewing the list prior to logging in, you will see a list of Public solicitations. After logging in, this list will also display Private Solicitations to which you have been specifically invited.

Solicitations shown may have the following Status:

- Open – Bids are being received up to the listed Closing Date/Time.

- Closed – The Date/Time for receiving Bids has passed.
- Pending Award – Bids have been received and are being evaluated.
- Awarded – One or more Vendors have been selected to receive a contract.
- Cancelled – The bidding process for this Solicitation was stopped.

4.2 Solicitation Description and Events

The Description page contains general information about the bid opportunity, and may also contain information on one or more scheduled Events.

An optional Event Registration feature may be enabled for a Solicitation. If you have not previously Registered for this Event, the Registration Status field will display Currently Not Registered | Register.

You must login first to Register. After you login, the word Register will become a hyperlink that you can click to Register your intent to attend the meeting. When you Register, your Company will appear on a list of prospective Event attendees.

After you click the Register link, the message in the Registration Status field will change to Registered | Unregister. If your plans change and you will be unable to attend the meeting, after you login, click the Unregister link to remove your name from the list of prospective attendees.

The online Event registration function is only available through the date and time displayed in the Registration Cutoff Date field.

4.3 Documents

If you are not logged in or if your account has not been approved, you can view the document filenames on this page, if present. However, download buttons and document hyperlinks are disabled.

Project Role

If the Project Role feature has been enabled by the site owner and you have not already made a selection for this Solicitation, a yellow message box will appear at the top of the page asking you to declare your intended role on the project, such as Prime Contractor, Subcontractor, Supplier, or Other. Make a choice from the flipdown box. You must contact the Solicitation Contact if you need to change your Project Role for this Solicitation.

Viewing Documents

Documents are presented in a hierarchical, expandable “treeview” of document folders and hyperlinks. You can expand or collapse the folders by clicking on the + or – symbol adjacent to a document folder.

Clicking on the document filename hyperlink will open the document using the viewing application that is associated with this document type on your computer, such as Adobe Acrobat.

Clicking on a file with the .TIF and .DWF extension will prompt you to download the free Brava Viewers that are available for each drawing type. This is a free viewer that is especially useful for viewing and doing takeoffs from drawings. After you download and install the Brava Viewer, each time you click on document link with these extensions, it will automatically be displayed in a new Brava Viewer window.

If you are logged in and you have not viewed a file, the word NEW in red font will appear to the left of the filename.

Downloading Documents

Downloading documents to your computer and viewing them locally is the most efficient way to work with documents provided online.

To download all listed documents:

- Click the Download All as Zip File button.
- A File Download dialog box will open.
- Click Save and a Save As dialog box will open.
- Navigate to the folder where you wish to save the documents.
- Optionally change the default filename and hit Save.
- A Download complete dialog box will open.
- Click Open to view the documents or Close if you wish to work with the documents later.
- The documents are now stored on your local computer.

To download selected documents:

- Check the box next to the document you wish to download
- Click the Download Selected as Zip File button
- A File Download dialog box will open.
- Click Save and a Save As dialog box will open.
- Navigate to the folder where you wish to save the documents.
- Optionally change the default filename and hit Save.
- A Download complete dialog box will open.
- Click Open to view the documents or Close if you wish to work with the documents later.
- The documents are now stored on your local computer.

Ordering Documents

If the Document Ordering feature has been enabled, you will see Order Instructions and buttons for ordering document prints on the Documents page. Either click the Order Complete Set Prints button, or to Order Selected Prints, first check the individual prints you wish to Order, and then follow the on-screen instructions to place your order.

You will receive an email message confirming the placement of your document order. If you selected a reprographics company, they will contact you regarding payment. Once the reprographics company has received payment and processed your document order, you will receive a message when your documents have shipped or are available for pickup.

4.4 Bidders (Planholders) List

If public posting of the bidders list has been enabled by the site owner (Bidders link is present on the Solicitations tab), your company name and contact information will be automatically added to the Bidders List (also called Plan Holders List) when you download a document or order documents.

The Bidders list displays the Company address and specific points of contact for Companies that are on the Bidders List.

4.5 Bidder Questions and Responses

The Questions feature allows vendors to ask questions about a Solicitation and view Answers posted by the site owner. If the Questions feature has been enabled, you will see a Questions link on the Solicitations tab.

If you are not logged in or if your account has not been approved, you can view the Questions and Answers on this page, if present. However, you will not be able to submit new Questions.

To ask a question about the solicitation, click the Ask Question button, enter your Question in the text box provided, and click Save.

Note that Questions must be submitted before a cutoff date is displayed adjacent to the Ask Question button.

Questions are presented in a tabular format showing the Question asked, a posted Answer (if available), and the Posted Date of the Answer. When an Answer to your Question has been posted, you may also receive an email message with the Question and Answer. At the discretion of the site owner, you may also view online Answers to Questions posted by other Vendors and receive this information by email.

4.6 Intent to Bid

The Intent feature (short for Intent to Bid) allows Vendors to submit a Will Bid or No Bid response as an early indication of their intent to submit a bid or proposal in response to a Solicitation.

If you are not logged in or if your account has not been approved, the Edit button allowing you to submit an Intent to Bid will be disabled.

To submit an Intent to Bid response, click the Edit button, select either the Will Bid or No Bid response, enter any comments in the text box provided, and click Save.

If you have been invited to bid on specific categories of work, you can submit a separate Intent to Bid response for each category of work.

4.7 Online Bidding

Only users with online access to your company information can add, edit, or withdraw an electronic bid for your company. Bid information you submit is transmitted by secure connection. If designated as a Sealed Bid, the receiving organization will not be able to see submitted information until the Bids Due Date/Time has passed.

The time that you logged into the website will be displayed in the upper right. Note that this is the time zone for the website owner. Please be aware that time zone may be different for each Solicitation. You will need to convert your local time to that of the website to ensure that your information is submitted on time.

The Bid feature allows Vendors to submit an online Bid. Bids may consist of a combination of Lump Sum Price, Bid Document, Comments, Answers to Bid Questions, and Unit Prices for

multiple line items. If the Bid feature has been enabled, you will see a Bid link on the Solicitations tab after you have selected a specific Solicitation.

If you are not logged in, your account has not been approved, or the Solicitation has Closed or been Cancelled, the Enter Bid button allowing you to submit a Bid will be disabled.

Entering a Bid

Click the Enter Bid link to enter your bid information. Depending on the information required in response to the Solicitation, you will be required to provide one or more types of information described below.

Lump Sum Bid - Enter a single price into the field provided.

Bid Questions - You may be asked to answer specific Bid Questions posed by the buying organization. Enter an answer to each specific question in the field provided.

Line Item Bids - You may be required to enter prices for several specific items. If requested you will be presented with an online Bid Form. In this form you will have a field for entering your unit price for that item and any comments you wish to provide regarding your bid. Your comments could include information on alternate item specifications, availability, shipping, or other information you want the buyer to consider.

Note: You will never be asked to submit both a Lump Sum and Unit Prices. When you enter your Unit Prices, the system will automatically extend the prices and total your Bid. Also, you must enter a Price for all items in the Bid Form. Enter zero to No Bid an Item.

Bid Documents

With any Bid, you will have the opportunity to attach a single Bid document to your Bid that contains additional optional or required information regarding your Bid. After you upload a document, your document filename will appear as a hyperlink in the Current Bid Document field along with the date uploaded and the name of the user who uploaded the documents.

Certification Statement

Near the bottom of the screen is a Certification Statement that you must check before submitting your online bid information.

Editing or Withdrawing a Bid

You can edit a Bid at any time up to the stated closing date and time. Click the Withdraw button to delete all Bid information that you have submitted.

5.0 NOTIFICATIONS

Messages may be delivered to you via email or fax, depending on the preference of the website owner and whether you have email and/or fax addresses in the system database.

Email messages will contain a link to the website where you can get more information. Fax messages will typically have separate instructions on how to respond.

Some email messages may request that you "Acknowledge Receipt" of that message by clicking on a link in the message. Once you click on the link, you will see a message acknowledging that

the system has recorded your response. If the system cannot acknowledge your response for some reason, you will see an error message displayed. If this happens you should call your point of contact on the Solicitation to let them know of the problem and to confirm your receipt of the message.

6.0 BIDS/AWARDS

If enabled by the client organization, the Bids/Awards feature allows Vendors to view Bid Results and Contract Awards. If enabled, you will see a Bids/Award tab at the top of the page to the right of the Solicitations tab.

After first clicking on the Bids/Awards tab, you will be presented with a tabular listing of Solicitations for which Bid Results and Contract Award information is being made available for viewing by Vendors. This information will be displayed for a certain time period determined by the website owner.

- Pending Award Status – Bids have been received and are being evaluated.
- Awarded Status – One or more Vendors have been selected to receive a contract.

Clicking on the View link will provide additional information about the status of the Bid. Such information may include the Vendors who Bid, Bid Results, Awards, and comments from the buying organization.

7.0 CONTACT US

Use the Contact Us form to contact the web site owner if you have questions about using the web site. If you are not registered and logged in, you will need to fill out all of the fields on the form. Click the Submit button to send your request. If you are logged in, the form will be pre-populated with your contact information. You need only fill out the Message field with specific information about your request for assistance.

8.0 FAQs

The FAQs feature provides a list of frequent questions and answers from Vendors, organized by subject category.