

HOW TO VIEW SOLICITATION EVENTS AND SUBMIT BIDS

County of Sonoma Supplier Portal

You must be registered in the County of Sonoma's <u>Supplier Portal</u> in order to view solicitation documents, receive emailed solicitation notifications, and submit bids. Register as a <u>Bidder</u> if your company has not done business with the County of Sonoma in the past. If your company has previously done business with the County, register as a <u>Supplier</u>.

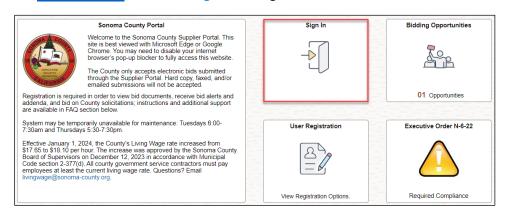
The information contained in this document is a general overview and applies to solicitations for both goods and services, including RFPs, RFQs, and RFIs. Please note that our software and documentation refer to all submissions as "bids". You can navigate to a particular topic by selecting the topic from the table of contents.

Contents

Signing in to the Supplier Portal.	1
View a Solicitation Event	2
How to Place a Bid	3
Retrieving a Saved Bid	9
Editing a Submitted Bid	

Signing in to the Supplier Portal

Navigate to the Supplier Portal and select Sign In to begin.

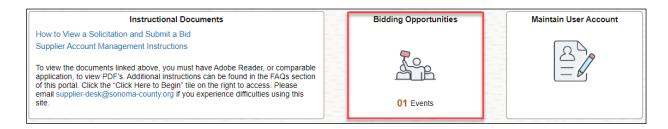


Updated: 3/10/2024 1 / 12

Login using your User ID and password. If you forgot your User ID or experience technical issues while viewing an event or submitting a bid, email our Supplier Desk for prompt assistance. If you have your User ID but forgot your password, please select "Forgot Password?" to reset.

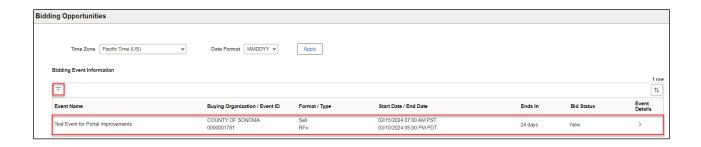


In order to view solicitations and submit bids, select the **Bidding Opportunities** tile.



View a Solicitation Event

Active public solicitation events are listed on the **Bidding Opportunities** page. To search for a specific event or keyword use the Find function in your browser (keyboard shortcut Ctrl-F) or use the filter in the upper left corner. Click anywhere on the line of the event you want to view.

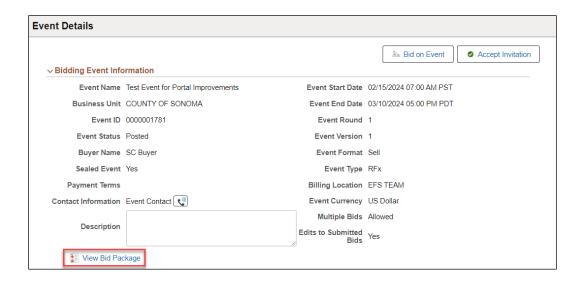


You will be taken to the Event Details page foryour selected event. To receive notifications of any addenda or changes for this event, click the **Accept Invitation** button. This does not obligate you to bid, but it will place your organization on our bidders list, and you will receive notifications of any addenda or changes for this event.

Updated: 3/10/2024 2 / 12



To view or download documentation related to the Solicitation event, click the View Bid Package link.

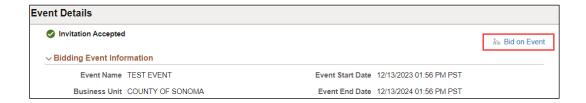


If these documents are a PDF, they will open in a new tab. If they are a Word or Excel document, the download process will begin automatically. If the new tab does not open, or the download process does not occur, ensure pop-up blockers in your web browser are turned off. When ready to return the Event Details page, click the X at the top of the View Bid Package window.



How to Place a Bid

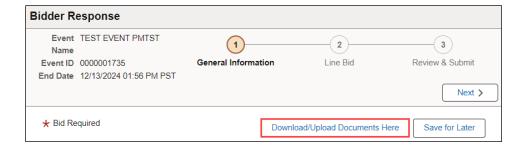
From the Event Details Page click the Bid on Event button to initiate the bid process.



To upload documents specified in the solicitation, click **Download/Upload Documents Here**.

Updated: 3/10/2024

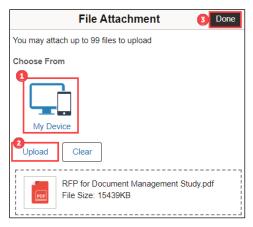
3 / 12



To upload one or more documents, click Add Attachment.

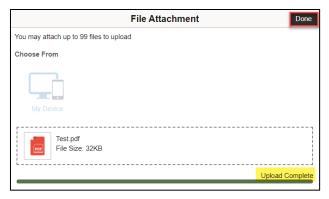


When prompted, click the My Device button and locate the file(s) for upload. Click Open to confirm your selection. Once all of your selected documents show in the box below, click Upload to upload your attachments.

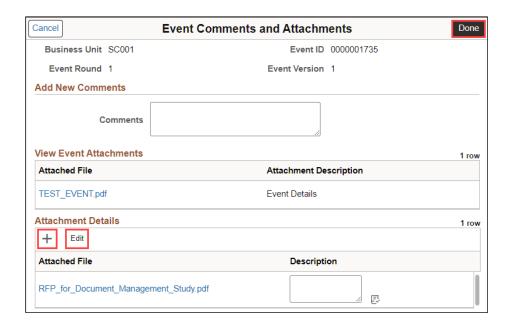


When the attachments have uploaded, this screen will display Upload Complete. Large attachments may take longer to upload. Verify that Upload Complete is visible, then click **Done**.

Updated: 3/10/2024 4 / 12



Descriptions may be added for each attachment. To upload additional attachments, select the **Plus** button then repeat the steps above. Select **Done** when finished.

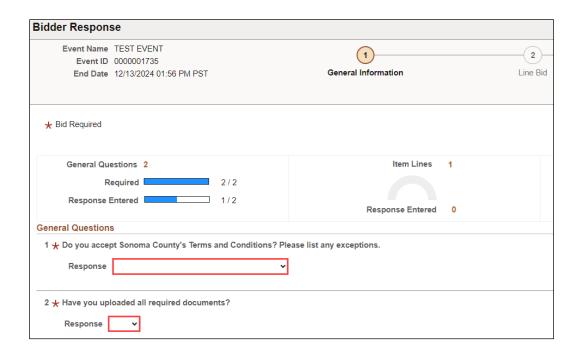


If needed, attachments can be removed using the **Edit** button. Click the check box next to each attachment you would like to delete and click **Delete**.

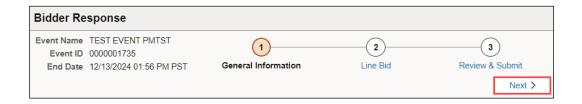


On the **General Information** stage, use the dropdown menus to answer the required questions. Any exceptions must be listed in your uploaded documentation.

Updated: 3/10/2024 Source: Bidding Guidelines

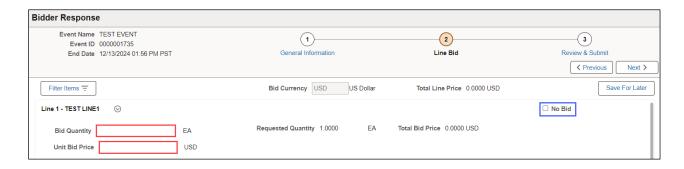


Click Next to advance to the Line Bid stage.



Enter your Bid Quantity and Unit Bid Price for each line. Select No Bid (blue box) if you are not bidding on a particular line.

Note – if you are submitting a proposal for RFP or RFQ, enter \$.01 in the Your Unit Bid Price field when submitting your bid and accompanying proposal. The County will evaluate the proposal based on the actual costs shown in the proposal itself.



Additional bid notes:

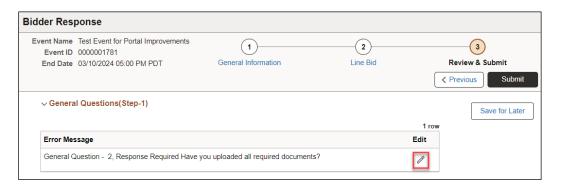
If there is a line for Shipping/Freight, enter 1 in the Bid Quantity field, and the total shipping/freight charge in the Unit Bid Price field.

Updated: 3/10/2024 6 / 12 • If there is no charge for Shipping/Freight, enter 0.00 in the Your Unit Bid Price field. Do not use the No Bid box or change the bid quantity on the Shipping/Freight line, as errors will result.

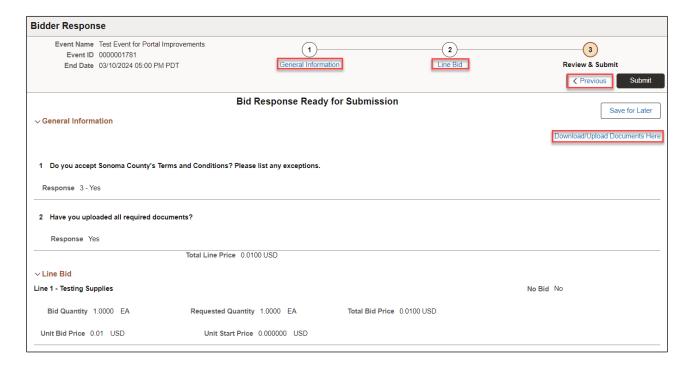
After entering all pricing, confirm all entries and make any corrections. If prices are correct, click **Next** to advance to the Review & Submit stage.



If an error message is displayed, click the **Edit** button to return to that stage to correct the error.

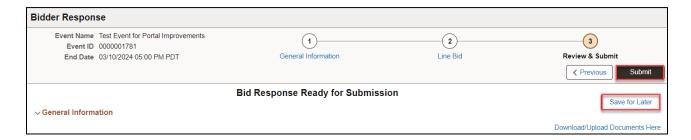


Review your bid for completeness and accuracy. To return to a previous stage and make a change, click that stage name or click the Previous buttons. To review your attachments, click **Download/Upload Documents Here**.



Updated: 3/10/2024 7 / 12

After validating entries, you may **Submit** your bid, or **Save for Later**. The submission process is not complete until Submit Bid is selected, and you receive onscreen confirmation of bid receipt. Retrieving saved bids will be illustrated later in this document.

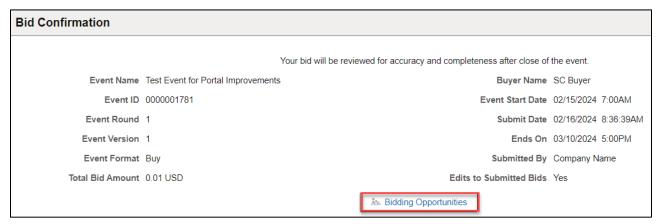


Clicking **Submit** will display a screen asking you to confirm your choice to submit your bid. Click **OK** to submit it.



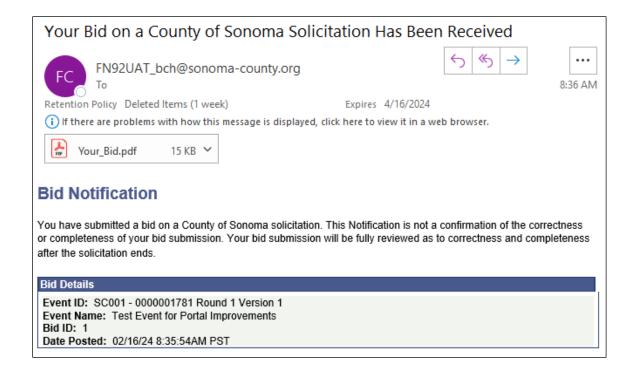
An onscreen confirmation will immediately appear after your submission; however, your bid will not be reviewed for accuracy or completeness until after close of the event.

Click **Bidding Opportunities** to return to the Bidding Opportunities page.



You will also receive an email confirming receipt of your bid. This email will include an attachment entitled **Your Bid**, reflecting your entries in response to the solicitation.

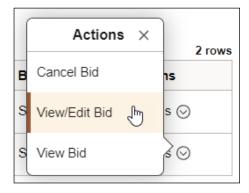
Updated: 3/10/2024 8 / 12



Please note that a copy of your bid will now appear in the attachments for the event in your account, described as **Bid Details**. **Do not delete this attachment** - deletion of this document could result in system errors.

Retrieving a Saved Bid

From Bidding Opportunities, locate the event with the saved bid. Click the Event to open Event Details – the saved bid will have Saved in the Bid Status column. On the Actions menu, select View/Edit Bid to open the saved bid.

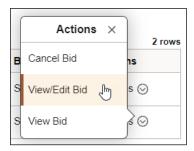


You will be returned to the **Bidder Response** page. Review or edit your bid, following the same process outlined in the <u>How to Place a Bid</u> section, to submit your bid.

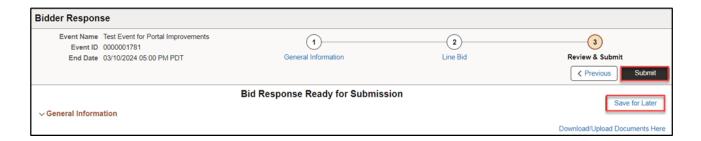
Updated: 3/10/2024 9 / 12

Editing a Submitted Bid

From Bidding Opportunities, locate the event with the saved bid. Click the Event to open Event Details – the submitted bid will have Submitted in the Bid Status column. On the Actions menu, select View/Edit Bid to open the submitted bid.



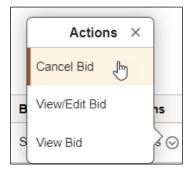
This will open the Bidder Response page. Edit your bid, following the same process outlined in <u>How to</u> <u>Place a Bid</u> section. Once updates are completed, <u>Submit</u> your bid or <u>Save for Later</u>. If you select Save for Later, your edited bid will not be resubmitted, and will be in an incomplete saved status.



After submitting your updated bid, you will receive an onscreen Bid Confirmation message and an emailed Bid Notification as illustrated earlier in this document.

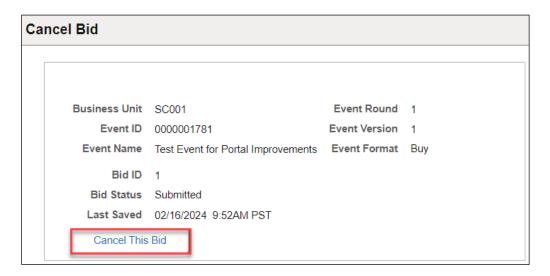
Cancelling a Submitted Bid

From **Bidding Opportunities**, locate the event with your submitted bid. Click the Event to open **Event Details** – the submitted bid will have Submitted in the Bid Status column. On the Actions menu, select **Cancel Bid**.



Updated: 3/10/2024 10 / 12

On the Cancel Bid page, confirm this is the correct bid that you wish to cancel and click Cancel This Bid.

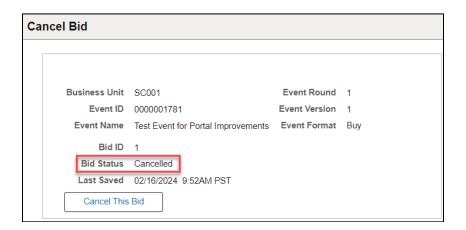


Note: Cancelled bids can be viewed but not re-submitted. If you change your mind after cancelling a bid, you will need to start a new bid in order to submit it.

If you are sure you want to cancel the bid, click Yes. If you do not want to cancel, click No.

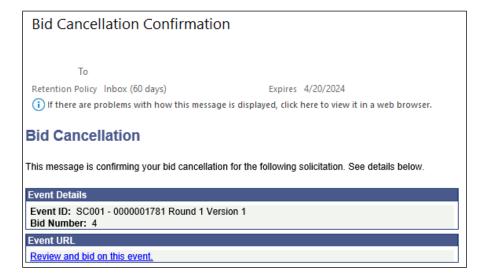


The status of the Bid will update to Cancelled.



Updated: 3/10/2024 11 / 12

You will receive a Bid Cancellation Confirmation via email.



Updated: 3/10/2024 12 / 12