



Vendors – Responding to a Solicitation

The following will guide a vendor through the process of responding to a solicitation. In APEX, a solicitation is referred to as a **Bid** document.

All solicitations offered by the EVENTS DC in APEX will be managed online, including solicitation responses by vendors. In order to respond to a solicitation, a Vendor must be a fully registered vendor in APEX. If the vendor is not registered, they should register by accessing the APEX login screen and selecting **Register**.

For vendors who are fully registered, log in with the User ID and Password.

Creating a Response to the Solicitation

In APEX, a response to a solicitation is referred to as a “quote.”

Once you are viewing an active, open solicitation, you can create a response by clicking the **Quote** button on the bottom of the screen. This will display the **New Quote** screen.

The following provides a description of the fields provided on the **General** tab of the quote. Please note that the * denotes a required field.

- Quote Number –** Will be auto assigned upon completion of the General tab
- Description –** Same as the bid description. This can be edited to provide a description of your response, if appropriate
- Delivery Days –** If applicable, number of days for delivery (if response is for an ongoing, orderable set of goods or services)
- Discount Percent –** If entered, will apply the discount to all items on quote. If discount is item by item, please use the Items tab
- Is “No Bid” –** Selecting no bid will notify the agency that you do not wish to submit a response
- Alternate Bid –** If the vendor submits multiple quotes, the vendor can flag specific response as “alternate”
- Terms –** Defaults to terms selected during vendor registration. These can be modified by selecting the appropriate term from the drop down menu
- Promised Date –** If applicable, promised date for delivery of the requested good or service (for one-time delivery)
- Info Contact –** Enter Vendor primary contact information for the solicitation response
- Comments –** Enter in any comments for the quote. This will display to the buyer and be considered part of your



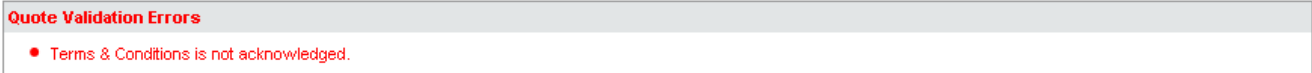
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response

Once the vendor has entered in the necessary fields, click **Save and Continue**. The screen will refresh and a quote number will be assigned.

Error Messaging

While working on the quote, the vendor may see red or yellow error messages. Red error messages indicate a something that must be corrected before submitting a response. A yellow warning indicates a component of the response that may be non-standard; however the response can be submitted even if yellow warnings display.



Items Tab

The items tab is where the vendor will enter pricing information for the items requested.

Quote 00000147 - Tim's Laptops

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

General Notes

Sort by Column: Sort Descending

Item #	Print Sequence	Questions Exist	Description								
			Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1	1.0	No	20" Flat Screen Monitor								
			10.0	EA	0.00	0.0	<input type="text" value="v"/>	0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		Alternate Description:	<input type="text"/>								
								Quote Response Total	\$0.00		

The following fields allow for the vendor to enter in information:

- Unit Cost** – Enter in the unit cost per item. APEX will automatically multiply the unit cost by the quantity.
- Discount Percent** – Enter in the discount for the specific item, if applicable. APEX will automatically calculate the amount
- Tax Rate** – If applicable, choose the Tax Rate. APEX will automatically calculate the amount
- Freight** – If applicable, enter the freight
- No Bid** – If checked, the vendor is not supplying a quote for this specific item
- No Charge** – If checked, the item is considered to be included provided the vendor is awarded the contract
- Alternate Description** – An alternate description can be provided, either to supplement the description provided in the Authority's solicitation or to replace the Authority's description. For example, you can use this field to indicate if you are providing a different brand, or if your pricing is based on a specific unit of measure that is different than indicated in the solicitation.

Once completed, click **Save & Continue**



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Questions Tab

The questions tab allows the vendor to respond to questions posted on the bid. Please note that if responses to questions are required, the vendor must respond in order to allow the quote to be submitted. Unanswered questions will generate red error messages.

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

Question #	Required	Question	Response
1	No	What brand of monitor is it?	<input type="text"/>

Save & Continue

Subcontractor Tab

If indicated as part of a solicitation, a response may require you to indicate if you are using subcontractors. If subcontractors are used, you may be asked to provide the following information:

- Identify the specific vendor/subcontractor. The vendor must be registered in APEX. You can search for the vendor by clicking **Lookup and Add Vendor**. If the subcontractor is not registered, they must register prior to submitting your response, or you may be considered non-responsive.
- Provide a proposed dollar amount being paid to the subcontractor if you are awarded the contract.
- Identify whether the subcontractor is a specified category, such as small or minority business.

Notes Tab

The Notes tab allows vendors to record internal comments. For example if multiple vendor users are working on a response, the Notes tab can be used to track changes from one user to another. **Please note the organization issuing the solicitation will NOT see any notes when evaluating the responses.**

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

i The quote notes tab is for vendor users to enter useful information about the quote. Only authorized users who have access to this profile can view the information added to this tab. This information is not viewable by the agency.

Delete	Note Date	User	Note
<input type="checkbox"/>			<input type="text"/>

Save & Continue Reset



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Terms & Conditions Tab

The Terms & Conditions tab allows the vendor to view or download any attachments to the solicitation. The vendor is also asked whether or not they accept the terms and conditions of the solicitation.

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[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
Winter~1.jpg (Winter~1.jpg)		105,542 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:

If the Terms and Conditions are accepted, select **Yes** and click Save & Continue

If the vendor selects **Yes with Exceptions** or **No**, the field below becomes required and the vendor must Authority the reasons for not accepting the Terms and Conditions.

Attachments Tab

The Attachments tab allows the Vendor to add any necessary documentation for the quote. This can include specifications, statement of work, pricing sheets and any other relevant information.

To add an attachment, click Add Attachments. The following screen will appear.

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.

Name*:

Description:

File*:

Location: vendor/000000003/quote

Use the Browse button to search for the file to upload from your computer. Once chosen, the vendor can edit the name of the file as well as giving it a description. Once completed, click Save & Exit.

The Attachments tab will then list all attachments on the Quote. The Vendor may select an attachment and mark it Confidential.



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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.

Name	Description	Confidential	Attached By	Attached Date	Delete
Quick Reference Guide.doc		<input checked="" type="checkbox"/>	Timothy Garza	09/02/2009	<input type="checkbox"/>

Save & Continue Add Attachment

Summary Tab

The Summary Tab is the Vendor's opportunity to review all the information entered on the quote. If any changes need to be made, select the tab to go back to that screen and edit the information.

The **Print** button allows the Vendor to print a copy for records.

The **Submit Quote** button will submit the quote into the system. No changes can be made to the quote unless the vendor withdraws the Quote.

The **Cancel Quote** button cancels the quote.

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

Header Information

Quote #: 00000147 Bid #: **00000093** Status: In progress

Organization: Morning Training Sessions

Description: Monitors 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: \$4,000.00

Comment:

Date Last Updated: 09/02/2009 10:25:21 AM User last Updated: Timothy Garza

Vendor accepts the terms & conditions with no exceptions.

Questions:

Question #	Required	Question	Response
1	No	What brand of monitor is it?	

Attachments: [Quick Reference Guide.doc](#)

Item Information

Print Sequence # 1.0 : (204 - 54) 20" Flat Screen Monitor

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
10.0	EA	\$400.00	0.0%	0.0%	\$0.00	\$4,000.00	No	No

Print Submit Quote Cancel Quote

Withdrawing a Quote

Once the quote is submitted, no changes can be made. If changes need to be made either due to an amendment or by vendor decision, the Withdraw Quote button will appear on the Summary tab. Click this button, then choose the Reopen Button at the bottom of the Summary tab if you would like to modify and resubmit the response. The quote will be fully open



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to make changes.

Please note the quote must again be submitted before the Bid Opening Date/Time or the Quote will not be accepted.

Amendments and Acknowledgements

If the Agency makes an amendment to the bid, the Vendor must acknowledge the amendment. The vendor will receive an email and the amendment will be shown on the Seller homepage. On the bids tab, a new section will appear labeled as Bid Amendments Unacknowledged.

Bids / Bid Amendments (Un-Acknowledged)

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Pre-Bid Conference	Bid Holder
00000068	Afternoon Training Sessions		Afternoon Trainee1	printing services	08/25/2009 01:30:00 PM	Scheduled	
00000069	Default Organization		Chris Harris	Laptops and related equipment	08/27/2009 09:15:00 AM		
00000070	Morning Training Sessions		Morning Trainee10	Police Bicycles	08/27/2009 09:15:00 AM	Scheduled	
00000072	Morning Training Sessions		Morning Trainee8	computer software	08/27/2009 09:15:00 AM	Scheduled	
00000073	Morning Training Sessions		Morning Trainee6	Residential Placement	08/27/2009 09:15:00 AM		

[View More...](#)

Clicking on the bid number will bring the vendor to the Bid Detail view. Once the vendor has read the amendments, click the Acknowledge Amendments button. Please note that if the Amendment makes a change to the items, the Vendor may wish to withdraw any quotes in the system and make updates based on the Amendment before resubmitting the quote.

Amendments:			Amendment #	Amendment Date	Amendment Note
			1	09/02/2009 10:46:04 AM	Header 1. Bid Opening Date changed from "09/30/2009 09:49:00 AM" to "10/30/2009 09:49:00 AM".

Item Information						
Item # 1: (204 - 54) 20" Flat Screen Monitor						
Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
10.0		EA - Each				
Manufacturer:			Brand:		Model:	
Make:			Packaging:			

Revisions

Once the bid is officially opened, during the tabulation and evaluation process the Agency may ask the Vendor for a Revision. The Revision may be clarifications or a Best and Final Offer. The vendor will receive an email containing the instructions for the Revision.

Request for Revision

Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
00000133-R1	Afternoon Training Sessions	00000087	08/27/2009 01:30:00 PM	08/27/2009 01:34:27 PM

On the Seller Homepage, the Request for Revision section will appear. The Vendor can click on the Quote number, and then following the guide above for responding to a bid they can edit and update the revised quote. Once completed, the



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quote must be submitted via the Submit Quote button on the Summary Tab.
