

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>.

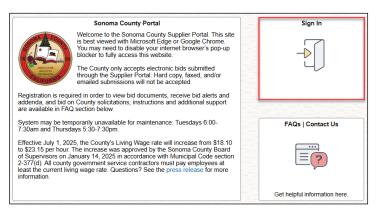
The information contained in this document is a general overview and applies to solicitations for both goods and services, including RFPs, RFQs, and RFIs. Please note that our software and documentation refer to all submissions as "bids". You can navigate to a particular topic by selecting the topic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

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Signing in to the Supplier Portal

Navigate to the <u>Supplier Portal</u> and select **Sign In** to begin.



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Log in 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.

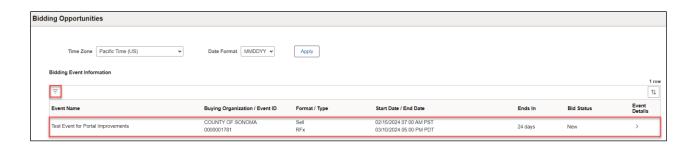


In order to view solicitations and submit bids, select the Bidding Opportunities tile.



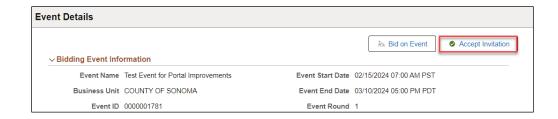
View a Solicitation Event

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.

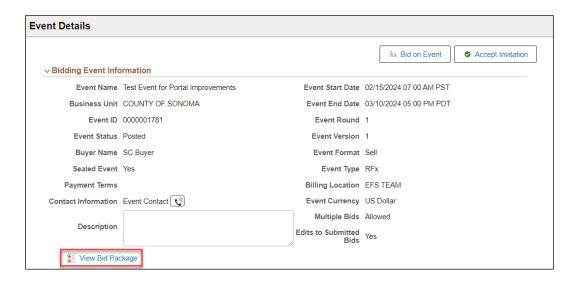


The Event Details page foryour selected event will display. To receive notifications of any addenda or changes for this event, click the **Accept Invitation** button. This does not obligate you to bid but it will place your organization on our bidders list, and you will receive notifications of any addenda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

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



Click a Filename to view the document. If the document is a PDF, it will open in a new tab. If it is 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. To return to the Event Details page, click the X icon at the top of the View Bid Package window.



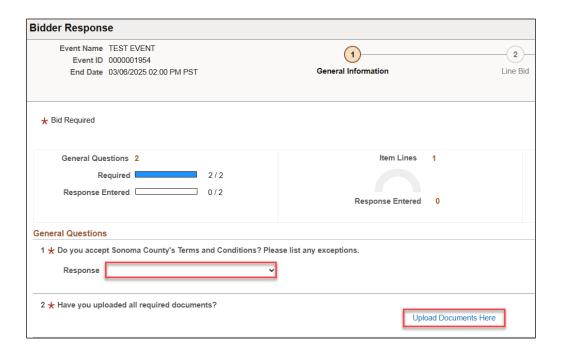
How to Place a Bid

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



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



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



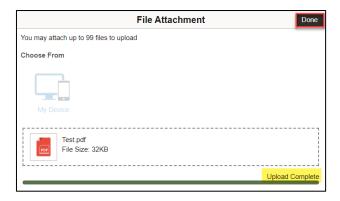
To upload one or more documents, click **Add Attachment**.



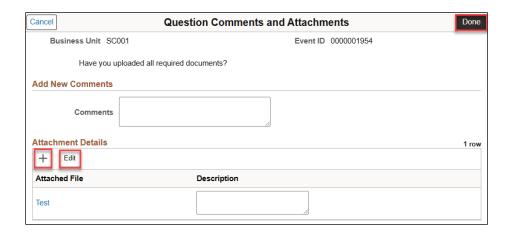
Updated: 3/10/2025 Source: Bidding Guidelines When prompted, click My Device and locate the file(s) for upload. Click Open to confirm your selection. Once all of your selected documents show in the box below, click Upload to upload your attachments.



When the attachments have uploaded, this screen will display Upload Complete. Do not click the upload button until all selected files are displayed. Large attachments may take longer to upload. Verify that the text Upload Complete is displayed, then click **Done**.



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

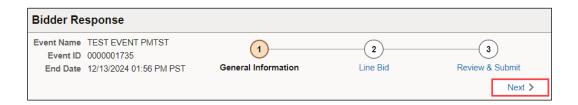


If needed, attachments can be removed using the **Edit** button. Click the check box next to each attachment you would like to delete and click **Delete**. Select **Done** when finished.

Updated: 3/10/2025 Source: Bidding Guidelines

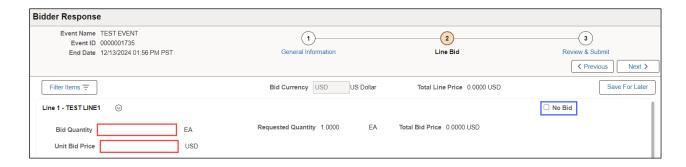


Click Next to advance to the Line Bid stage.



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 1 in the Bid Quantity Field and \$.01 in the Unit Bid Price field when submitting your bid and attaching a proposal. The County will evaluate the proposal based on the actual costs shown in the attached proposal itself.



Additional bid notes:

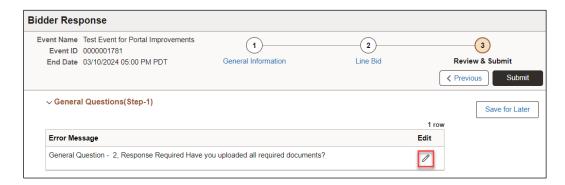
• If there is a line for Shipping/Freight, enter 1 in the Bid Quantity field, and the total shipping/freight charge in the Unit Bid Price field. If your organization is not charging for shipping/freight, enter 0.00 in the Unit Bid Price field on the Shipping/Freight line. Do not use the No Bid box or change the bid quantity on the Shipping/Freight line in this situation because this may cause errors in your bid.

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

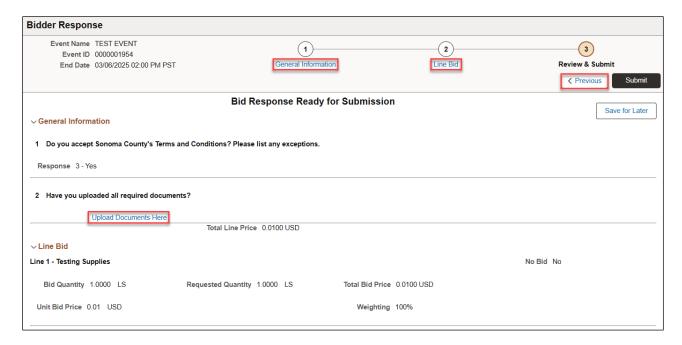
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If an error message is displayed on the Review & Submit page, click the **pencil ico** under **Edit** to return to that stage and correct the error.

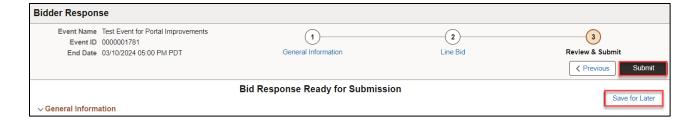


Review your bid for completeness and accuracy. To return to a previous stage and make a change, click that stage name or click the Previous and Next buttons to navigate between stages. To review your attachments, click **Upload Documents Here**.



After validating entries, you may **Submit** your bid or click **Save for Later** to save your draft in progress. Saving a draft does not complete the submission process. Retrieving saved draft bids will be illustrated later in this document.

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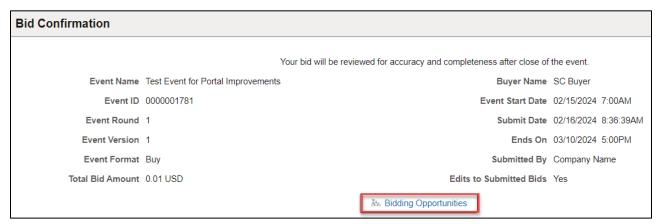


Clicking **Submit** will display a screen asking you to confirm your choice to submit your bid. Click **OK** to submit it.



An onscreen submission 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 submission. This email will include an attachment entitled **Your Bid**, reflecting your entries in response to the solicitation.

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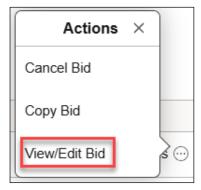
Please note that a copy of your bid responses will now appear in the attachments for the event in your supplier portal account, described as **Bid Details**. **Do not delete this attachment**. Deletion of this document could result in system errors.

Retrieving a Saved Draft Bid

From **Bidding Opportunities**, locate the event with the saved bid. Click the Event to open **Event Details**. The saved draft bid for that event will have "Saved" in the Bid Status column.



On the Actions menu, select View/Edit Bid to open the saved draft bid.

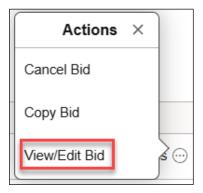


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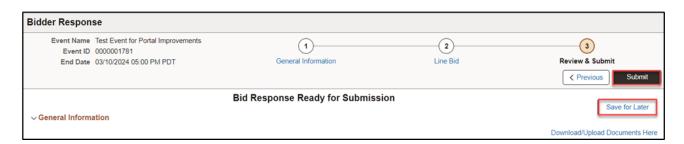
You will be returned to the **Bidder Response** page. Review or edit your draft bid following the same process outlined in the How to Place a Bid section to submit your bid.

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 How to Place a Bid section. Once updates are completed, Submit your bid or Save for Later. If you select Save for Later your edited bid will not be resubmitted and will be in an incomplete saved status. You must submit your bid again in order for it to be viewable by County Staff at the end of the bidding opportunity.

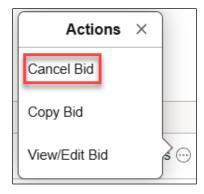


After submitting your updated bid you will receive an onscreen Bid Confirmation message and an emailed Bid Notification as illustrated earlier in this document.

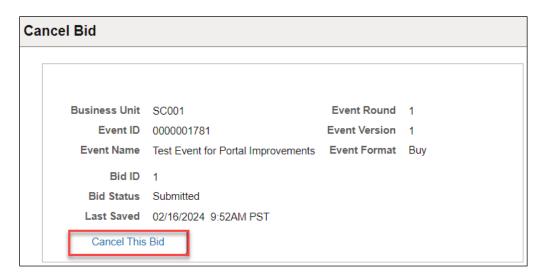
Cancelling a Submitted Bid

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.

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



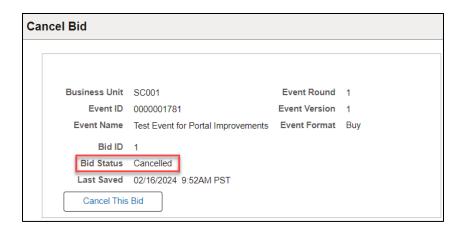
Note: Cancelled bids can be viewed but not re-submitted. If you change your mind after cancelling a bid, you will need to start a new bid in order to and submit it.

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

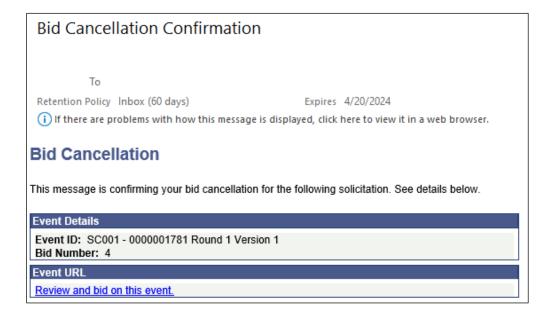


The status of the Bid will update to Cancelled.

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You will receive a Bid Cancellation Confirmation via email.



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