State of Illinois

Vendor Functional Manual

#23 V1.1

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Vendor Help Desk

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The information contained in this document is a general guideline for the processing of procurements using the State of Illinois BidBuy system. State of Illinois procurements shall be conducted in accordance with applicable statutes and rules, including the Illinois Procurement Code 30 ILCS 500/. For any questions, please contact the State of Illinois Vendor Administrators at il.bidbuy@illinois.gov or (866) 455-2987.

Overview

This manual assists registered vendors navigate BidBuy, search for active contracts, review bids, submit quotes, and receive purchase orders in BidBuy. Vendors not registered in BidBuy can do so by selecting Register on the BidBuy login page.

Vendor users have two user roles available in BidBuy, Seller Administrator and Seller.

- **Seller Administrator - manages a vendor's company information and is responsible for creating user accounts. See Seller Administrator manual for instruction on Seller Administrator functions, as Seller Administrator will not be granted to all vendor users.**
- **Seller Role - allows users to review bids, submit quotes, and receive purchase orders in BidBuy.**

This manual will cover general BidBuy navigation and functions of the Seller user role. Throughout the document, numbers on screen prints correspond with numbered instructional text.

Home Page	Informal Quote Process	Bid Process	Purchase Order
Header Menu	Review Quote	Review the Bid	Receive the Award
Navigation Menu	Respond to Quote	Create the Quote	Receive the Purchase Order
Control Center	Submit Quote	Submit the Quote	Receive the PO Change Order

BidBuy Terminology

The BidBuy Vendor Functional Manual includes several terms specific to the State procurement process. Please find definitions of commonly used terms below.

Terms Crosswalk

Current	Future
Solicitation/Notice	Bid
IPB Registered User	Bidders
Addendum	Amendment
Bid/Offer/Response	Quote
Award Information	Bid Tab
Contract	Purchase Order (PO)
Amendment	Change Order
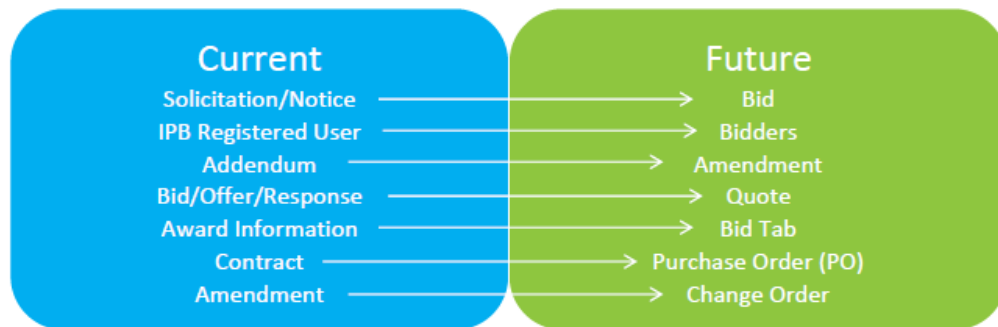
General Process Workflows

Included below is a high level walkthrough of the most common BidBuy process workflows.
- Each process step affords the opportunity for approvals to occur based on identified criteria, including Agency department, location, procurement amount, NIGP codes, user role and accounting.

Small Purchase – Begins with an Open Market Requisition, then converted to a Purchase Order.

Requisition → Bid ($10,000 to Formal Solicitation Threshold) → Purchase Order

Competitive Solicitation – Begins with an Open Market Requisition, which is converted to a Bid for public solicitation. Once quotes are obtained, the Bid Tab is opened and vendor is awarded. The Bid Tab is then converted to a Purchase Order.

Requisition → Bid → Bid Tab → Purchase Order

Release (Order Against Contract) – Begins with a Release Requisition, then converted to a Purchase Order.

Release Requisition → Purchase Order

Renewal – Begins with an Open Market Requisition referring to the associated Purchase Order/Contact. The Requisition is converted to a Bid and the Bid Tab is completed with the renewal amount(s). Finally, a Change Order is created against the original Purchase Order/Contract for the Renewal terms.
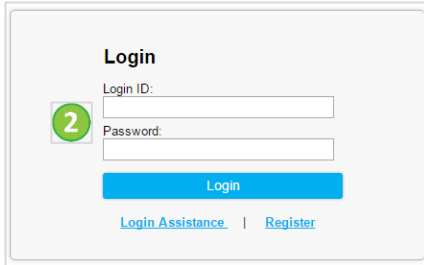
Requisition → Bid → Bid Tab → PO Change Order

Change Order – Begins with an Open Market Requisition referring to the associated Purchase Order/Contact. The Requisition is converted to a Bid and the Bid Tab is completed with the change order amount(s). Finally, a Change Order is created against the original Purchase Order/Contract based on the Change Order terms.

Requisition → Bid → Bid Tab → PO Change Order

Log into BidBuy

Login Instuctions

1. Go to BidBuy at https:/bidbuy.illinois.gov
2. Enter **Login ID** and **Password**, and click **Login**

Login

Login ID:

Password:

Login

Login Assistance | Register

3. Select Seller Tab from the user role tabs

> **If you have multiple roles, then each user role appears as a different tab.**

Home Page Navigation

Under the Seller tab, the Home page is divided into four areas. If you do not have tabs at the top of your screen *and* your screen looks different than the screen below, you have only a Seller Administrator role (please see Seller Administrator manual).

1. **User Role Tabs** – allows users to navigate between Seller and Seller Administrator user roles (only viewable if the user has multiple roles)
2. **Header Menu** – NIGP browse, account setup, search, help manual, and exit
3. **Navigation Menu** – navigation to PO, Bid, and Quote documents

4. **Control Center** –navigation of News, Vendor Communication, Bids, PO, and Quotes. The State does not use Invoices or Vendor Performance.

User Role Tabs

If the vendor user has both Seller and Seller Administrator user roles within BidBuy, the user sees tabs in the upper-right corner of the header as indicated below. Each role within the application has its own Control Center (see 4 above).

The Seller user role can:

- **Search for active contracts**
- **Respond to Informal Quotes and Formal Bids**
- **Pick up and acknowledge Purchase Orders and PO Change Orders**

The Seller Administrator user role focuses on company account maintenance in BidBuy. Seller Administrators can:

- **Maintain company information**
- **Maintain and add users to the company profile**

Header Menu

The **Header Menu** is always displayed at the top of each page. This menu allows the user to access:

- ❖ NIGP Code Browse
- ❖ My Account
- ❖ Customer Service
- ❖ About
- ❖ BidBuy Date & Time
- ❖ Advanced Search
- ❖ Help Manual
- ❖ System Log out

Header Menu: NIGP Code Browse

The NIGP Code is a coding system used to classify products and services procured by state and local governments in North America. The **NIGP Code Browse** allows a search of commodity and service codes by NIGP Class and Class Item codes.

Note: The NIGP Code Browse is a search only function. The Browse function is not used to identify goods or services to receive Bid opportunities. The Seller Administrator selects the NIGP Codes that are associated with the good and services offered by their company that are used by the State to send Bid opportunities from BidBuy.

1. Click **NIGP Code Browse** on Header Menu

1

NIGP Code Browse | My Account | Customer Service | About   March 14, 2016 6:06:52 PM CDT 🔍 ❓ ◗ 🡒
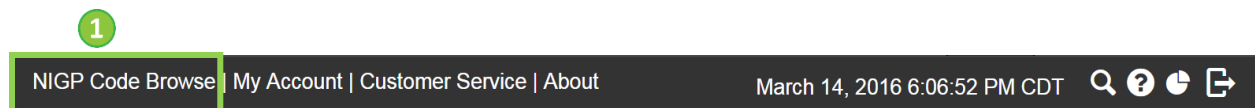
2. Select **NIGP Class** code from pulldown menu to filter by the 3 digit code
3. Select **NIGP Class Item** from pulldown menu to select a 5 digit code
4. Enter **NIGP Keyword** to search for a code based on code descriptions
5. Select search type criteria by Search Using pull-down
6. Click **Search** to execute search

7. To browse all **NIGP Class** codes, scroll-down to **NIGP Code Browse**
8. Click **NIGP Class code** to view NIGP Class Item

Header Menu: My Account

The **My Account** link allows the user to update some information on their user profile. Seller users may receive email communications from the State at the email address provided. Modifying personal user profile information does not change a company's general information.

1. Click **My Account** on **Header Menu**

①

NIGP Code Browse | My Account | Customer Service | About   March 14, 2016 6:06:52 PM CDT   🔍 ❓ ◔ ⎗
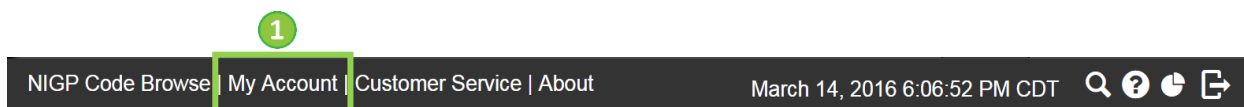
2. Click **Edit** to change user profile information
3. Update information
4. Click **Save and Exit** to leave the page
5. Click **Save & Continue** to save and add more information
6. Click **Cancel & Exit** to remove updates and leave the page

> ⓘ **All required fields must be complete prior to saving. Users are required to enter their current password before saving updates.**

Header Menu: Customer Service

The **Customer Service** link allows the user to email the State BidBuy Support team for additional information or assistance.

NIGP Code Browse | My Account | Customer Service | About   March 14, 2016 6:06:52 PM CDT   🔍 ❓ ◔ ⎗

Header Menu: About

The **About** screen shows the current product version of BidBuy.

1. Click **About**

①

NIGP Code Browse | My Account | Customer Service | About   March 14, 2016 6:06:52 PM CDT   🔍 ❓ ◔ ⎗

Header Menu: System Date & Time

The **System Date & Time** is very important when submitting a Quote in the BidBuy System. The date & time determines the official Bid Available date/time and the Bid Opening date/time. If a vendor's Quote is not sent to the State prior to the official Bid Opening date/time, BidBuy will not allow the vendor to submit it electronically.

NIGP Code Browse | My Account | Customer Service | About   March 14, 2016 6:06:52 PM CDT   🔍 ❓ ◔ ⎗

Header Menu: Advanced Search

The **Advanced Search** allows the vendor to search in BidBuy for Bids, Purchase Orders, and Master Blanket Purchase Orders. Tip: The full document number does not need to be included in the search, users can enter a portion of the document number from the email notification.
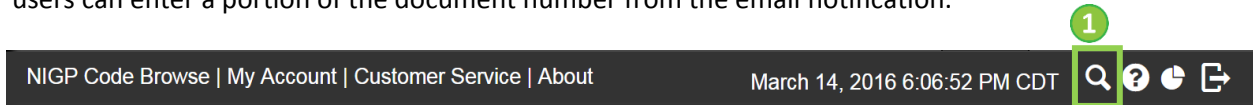
1. Click **Advanced Search** Icon
2. Select **Purchasing Module**
3. Select **Document Type** to search from the dropdown

> ⓘ **The State only uses Purchasing Module.**
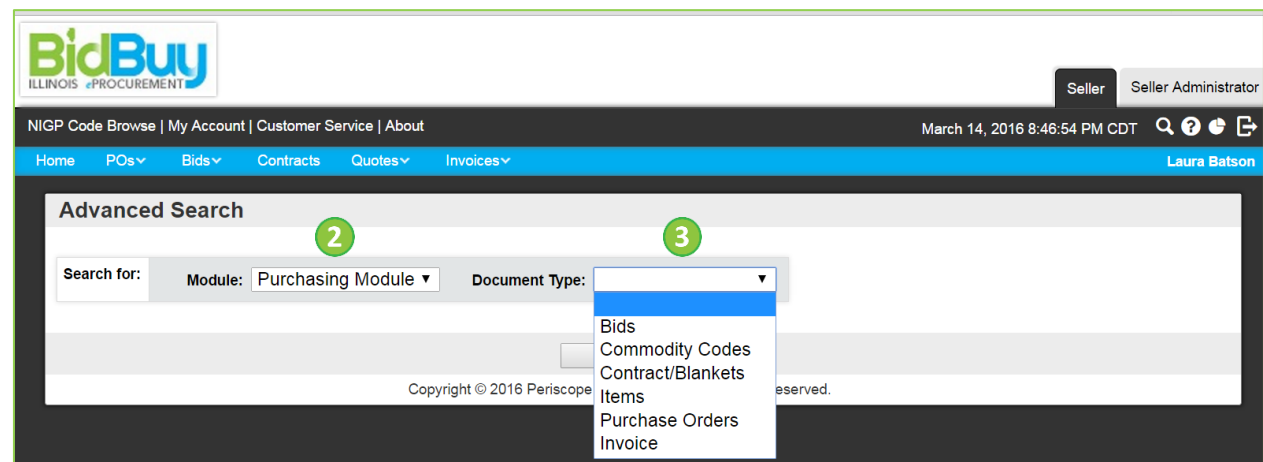
4. Enter **Search Fields** criteria
5. Click **Find It**

Header Menu: Help

If a BidBuy specific reference is needed, selecting the **Help** Icon displays a reference manual for the BidBuy software. Manuals and videos on the BidBuy login page provide reference materials for State usage of BidBuy.

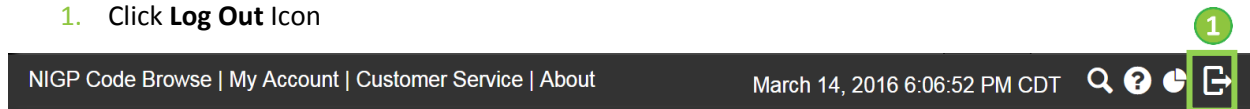1. Click **Help** Icon
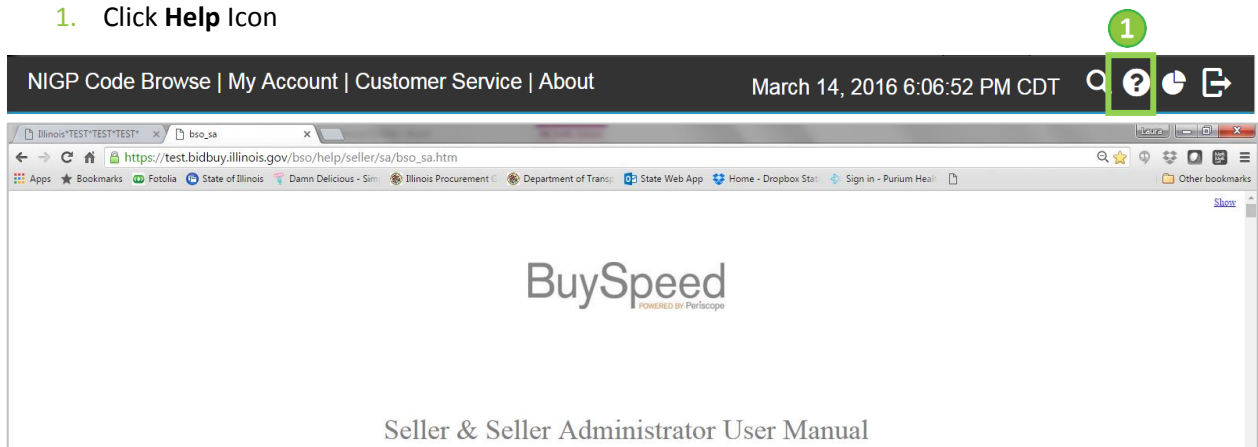
Header Menu: Administrative Reports

The **Administrative Reports** Icon will not be used by the State.
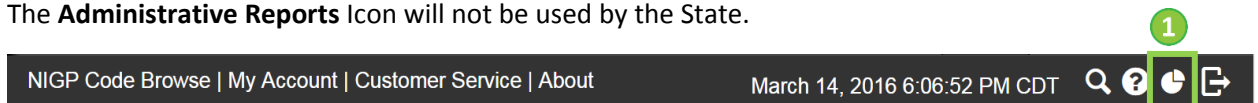
Header Menu: Log Out

The **Log Out** Icon allows the user to exit BidBuy. BidBuy automatically logs users off of the system after 30 minutes of inactivity.

1. Click **Log Out** Icon

Navigation Menu

The **Navigation Menu** allows the user to move through BidBuy and gives access to Bids, Purchase Orders, and Quotes.

The **Navigation Menu** displays at the top of each page. This menu allows the user access to:

- ❖ Home
- ❖ POs
- ❖ Bids
- ❖ Contracts – Not used by the State
- ❖ Quotes
- ❖ Invoices – Not used by the State

Navigation Menu: Home

The **Home** tab displays the tabs covered in the Home Page and Control Center Navigation sections.
1. Click **Home**
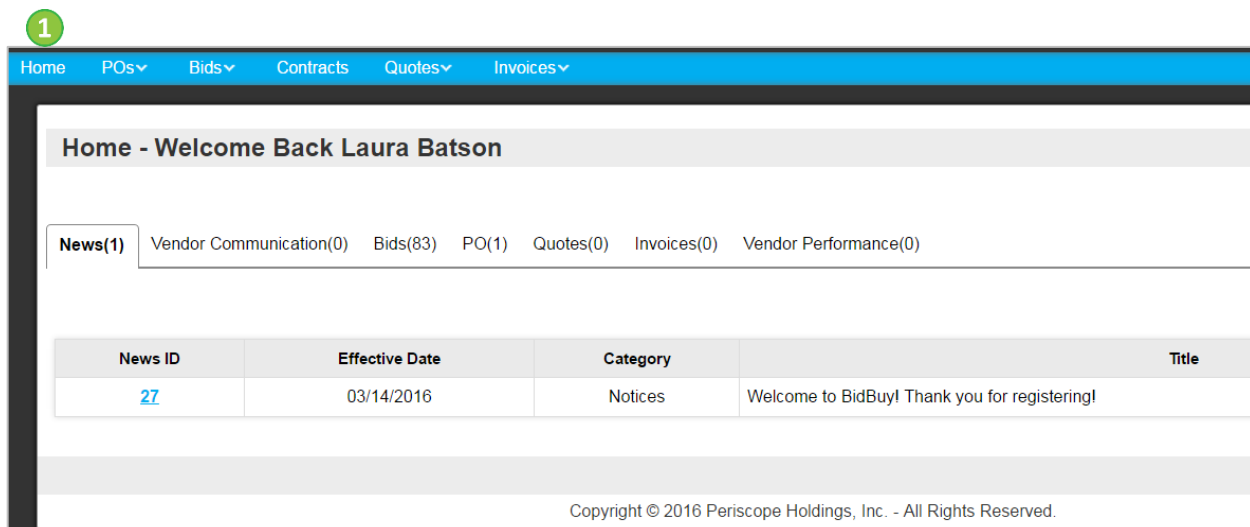
Navigation Menu: POs

The **PO** tab shows the user the status of Purchase Orders sent by the State through BidBuy. POs can include either Master Blanket Purchase Orders or Release Purchase Orders. The Purchase Order is the contract with the State of Illinois.

1. Click **POs** and select one of the following:
   - Sent to Vendor (Purchase Order that has been awarded to the Vendor)
   - Partial Receipt (State is not using receipts in BidBuy)
   - Complete Receipt (State is not using receipts in BidBuy)
   - **Closed (State is not closing POs in BidBuy)**
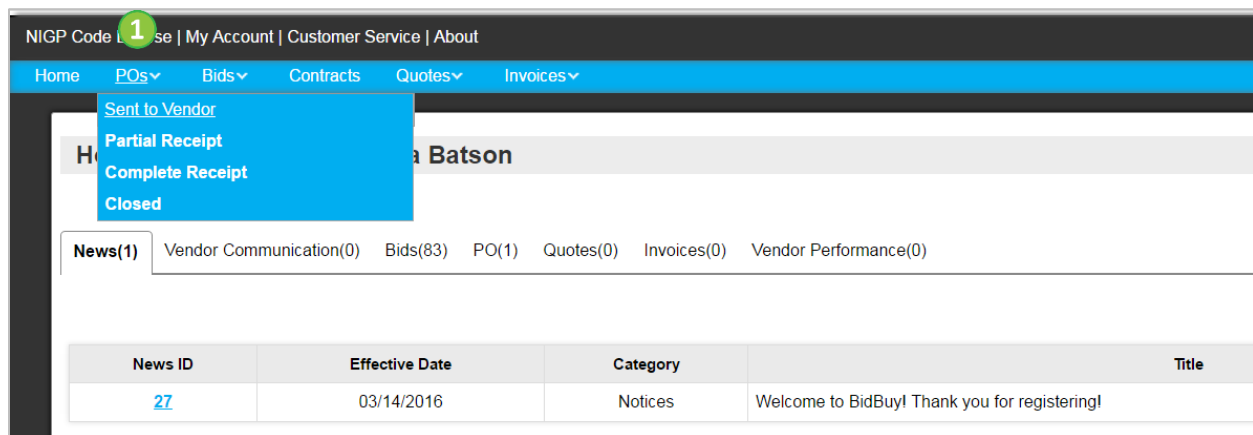
Navigation Menu: Bids

The **Bids** tab shows the user the status of open and closed Bids at any time. Bids are used in BidBuy for solicitations, general notices, and other public facing documents. For instructions about how to respond to a Bid, please see the Bid Process section of this manual.

1. Click **Bids** and select one of the following:
   - Open – when a bid is available for responses by vendors
   - Closed – when a bid no longer allows responses from vendors
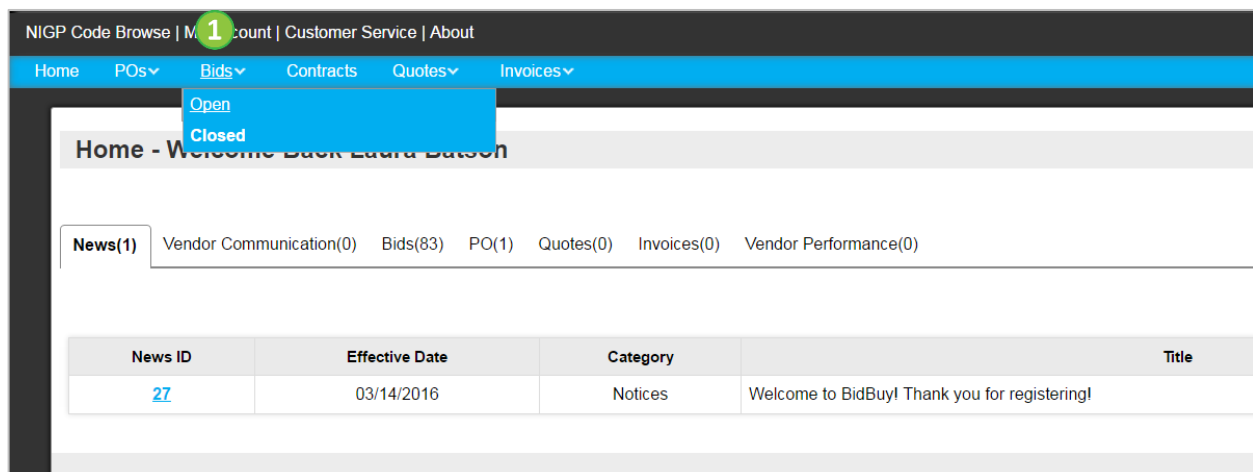
Navigation Menu: Contracts

The **Contracts** tab will allow the user to view the vendor's contracts in the sub-tab. Master Blanket Purchase Orders are used by the State when there is a recurring need for ordering goods or services. Release Purchase Orders are orders issued by the State against the Master Blanket Purchase Order and can be located under the PO tab.

1. Click **Contracts** (Vendor Contracts can be found under Master Blanket sub-tab)
2. Click **Master Blanket** sub-tab to view Master Blanket PO
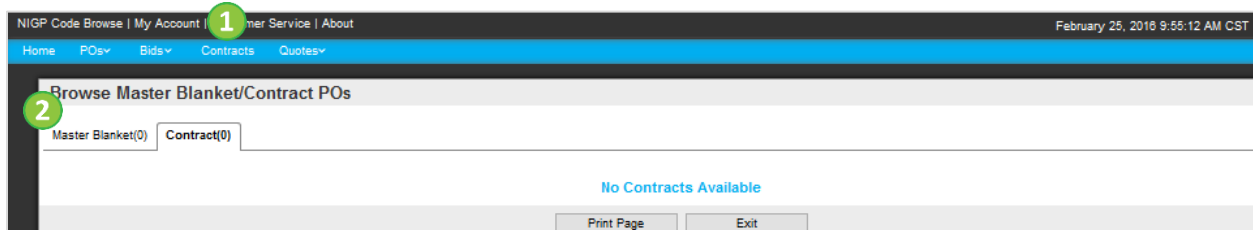
Navigation Menu: Quotes

The **Quotes** tab allows the vendor to view both Informal Quotes and Formal Quotes requested by the state, including quotes that are in process or submitted by (or for) the vendor. Informal Quotes are simple price quotes requested by the State. Formal Quotes are a vendor's response to Bid documents in BidBuy.

When a procurement is not submitted electronically in BidBuy, the State may manually enter Quotes on behalf of the vendor. Once the procurement is awarded, the vendor may view the manually entered Quote.

1. Click **Quotes**
   a. Select **Informal Quotes** – To view a list of informal quotes that have been requested by the State and those the vendor has responded to in BidBuy.

b. Select **Formal Quotes**:
   i. Working: Quotes in process and not yet submitted, may be modified
   ii. Submitted: Quotes that have been submitted to the State, may not be modified
   iii. Withdrawn: Quotes withdrawn by the vendor, may be modified
   iv. Un-submitted: All working quotes, regardless of bid status, may be modified based on bid status
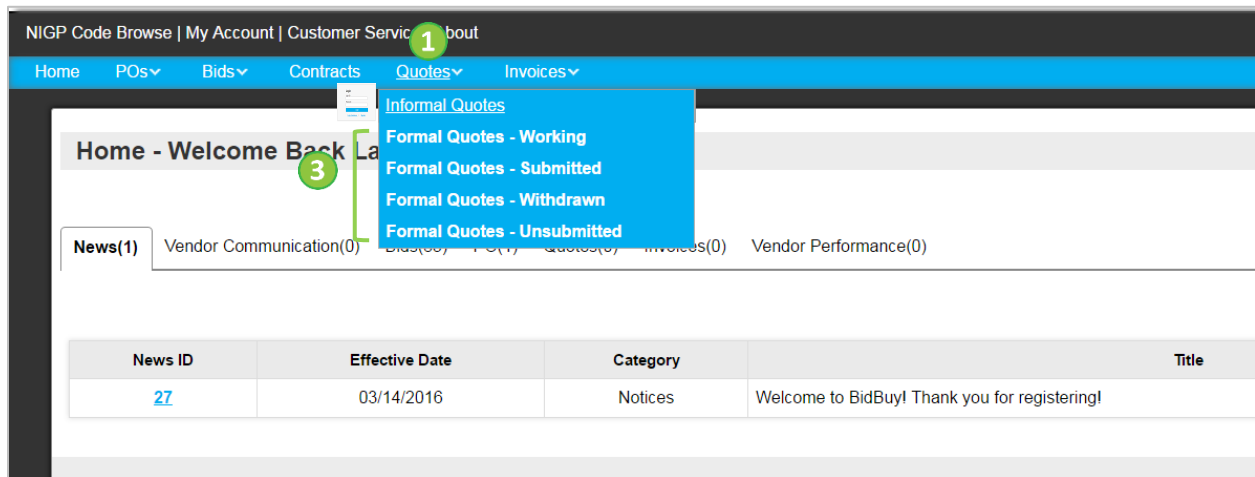
Control Center

When a Seller logs into BidBuy, the following Tabs will display:

- ❖ News
- ❖ Vendor Communication
- ❖ Bids
- ❖ PO
- ❖ Quotes
- ❖ Vendor Performance – Not used by the State

Control Center: News Tab

The **News** tab includes news messages available from the State.

1. Select **News** tab

2. Click **News ID** to view the message

3. After viewing news item, click **Exit** to return to **Home** page

Control Center: Vendor Communication Tab

The **Vendor Communication** tab includes notifications from the State.

Control Center: Bids Tab

All **Bid** opportunities or general notices that are active will appear on the Control Center under the Open Bids section.

❖ Request for Revision – Request from the State for a vendor to revise their bid submission (Revisions are not used by the State in BidBuy)
❖ Bids/Bid Amendments -- Displays all Bid Amendments submitted by the State awaiting vendor review. Bid amendments are changes to a Bid currently published and available. Once a bid amendment is viewed and the "Acknowledge Amendments" button is selected on the bottom of the page, it will no longer appear as Un-Acknowledged.
❖ Open Bids – Displays bids available for responses by vendors
❖ Closed - Displays bids that no longer allow responses from vendors

Control Center: PO Tab

The **PO** tab is the status of the vendor's Purchase Orders issued by the State.

- ❖ Purchase Orders/Change Orders (Un-Acknowledged) – POs and PO Change Orders awaiting vendor review and acknowledgement
- ❖ Purchase Orders - Sent – POs received by the State and acknowledged by the vendor
- ❖ Subcontractor Purchase Orders – POs the vendor is included as a Subcontractor

Control Center: Quotes Tab

The **Quotes** tab displays the following sub-tabs:

- ❖ Working: Quotes in process and not yet submitted, may be modified
- ❖ Submitted: Quotes that have been submitted to the State, may not be modified
- ❖ Withdrawn: Quotes withdrawn by the vendor, may be modified
- ❖ Un-submitted: All working quotes, regardless of bid status, may be modified based on bid status

The **Quote-Submitted** sub-tab shows the Bid Opening Date for each quote submitted.

Control Center: Invoices Tab

The State does not use the Invoice functionality.

Control Center: Vendor Performance Tab

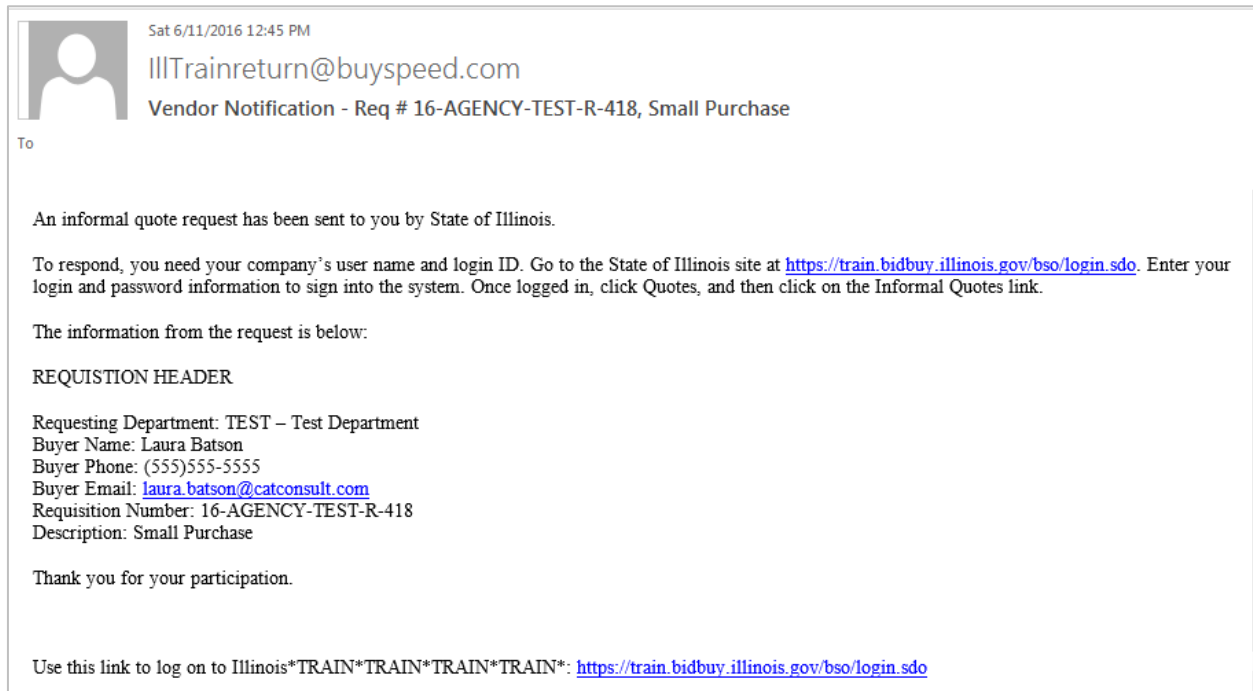The State does not use the Vendor Performance functionality

Informal Quote Process

The Informal Quote process allows the State to obtain informal price quotes from the vendor community, outside of the formal solicitation process. This process is typically used for goods or services under the small purchase threshold.

The following is a general guideline to responding to an Informal Quote request in BidBuy. All procurements are unique, so it is very important to review all attachments and specifications in each procurement for instruction on submitting the informal quote response and required attachments.

Quotes Notification

The State sends the vendor an email notification regarding the availability of an informal quote opportunity. The vendor is directed to login and is provided instructions about how to review and respond to the informal quote request. For questions or additional information, you can contact the buyer listed in the notification email.

Sat 6/11/2016 12:45 PM

IllTrainreturn@buyspeed.com

Vendor Notification - Req # 16-AGENCY-TEST-R-418, Small Purchase

To

An informal quote request has been sent to you by State of Illinois.

To respond, you need your company's user name and login ID. Go to the State of Illinois site at https://train.bidbuy.illinois.gov/bso/login.sdo. Enter your login and password information to sign into the system. Once logged in, click Quotes, and then click on the Informal Quotes link.

The information from the request is below:

REQUISTION HEADER

Requesting Department: TEST – Test Department
Buyer Name: Laura Batson
Buyer Phone: (555)555-5555
Buyer Email: laura.batson@catconsult.com
Requisition Number: 16-AGENCY-TEST-R-418
Description: Small Purchase

Thank you for your participation.

Use this link to log on to Illinois*TRAIN*TRAIN*TRAIN*TRAIN*: https://train.bidbuy.illinois.gov/bso/login.sdo

Respond to Informal Quote

Upon receipt of the informal quote opportunity email, the vendor logs into BidBuy to respond to the informal quote request.

1. Select **Quotes**, then **Informal Quotes**

2. Click **Create** to enter a quote

3. Enter **Item** amounts
   a. To respond without providing a quoted amount for an item, click **No Bid**
4. Click **Save & Continue** to save quoted amounts entered and make additional updates or add attachments
   OR
5. Click **Save & Exit** to save quote and return to the prior screen

Add Attachments and Forms

Once the quote is saved, attachments and forms can be added to the informal quote. Both files and forms can be attached by a vendor. Please see instruction from the State on the informal quote request for details regarding any required attachments for each procurement.

Attaching files to informal quotes is used to include disclosures or other documents pertaining to the procurement. The State may also have attached files the vendor must save, fill in and attach.

1. Click **view/update** under Informal Quote if reopening the Quote.

Req Number	Organization	Description	Estimated Total	Bid Ending Date	Informal Quote
16-AGENCY-TEST-R-727	State of Illinois	Test Small Purchase	Unknown	Jun 11, 2016 11:30 AM	view/update

Informal Quote list

Exit

Add Attachments

1. Click **Manage Attachments**
2. Click **Add File**

Informal Quote for Open Market Requisition 16-AGENCY-TEST-R-963

ⓘ Marking an item "Confidential" will ensure the system does not display the document publicly.

Informal Quote Vendor File Attachments

No File Attachments

Informal Quote Vendor Form Attachments

No For chments

Save & Exit | Save & Continue | Add File | Add Form | Exit

3. Add file **Name** and **Description**
4. Click **Choose File** to browse the computer for a file
5. Select **Confidential** to make a file viewable by the State and your company, but not viewable by the general public
6. Click **Save & Exit** to return to save and return to the previous screen when done with loading the file
7. Click **Save & Continue** to save changes made and remain on the same screen
8. Click **Reset** – to reset display before saving
9. Click **Cancel & Exit** to exit without adding any files

Add File

ⓘ **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.

ⓘ Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name*:
Description:
File*: Choose File   No file chosen
Location: vendor/00000041/profile
Confidential: ☐

Save & Exit | Save & Continue | Reset | Cancel & Exit

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Update Files

Attachments can be added and deleted. The following steps are options to edit attachment information or delete attachments.

1. Select **Confidential** to make a file viewable by the State and your company, but not viewable by the general public
2. Select **Delete** to delete attachment
3. Click the file name under **Name** to update description or download attachment

a. Enter a new **Description** to update

b. To download file, click

c. Click **Save & Exit**

Quote File Attachments Field Descriptions are in the Table Below

4. Click **Save & Continue**
   OR
5. Click **Save & Exit**

Quote File Attachments Field Descriptions

Field Name	Description
Name*	Required. Enter the name of the file. If left blank, the file name will default. Special characters are not allowed in this field.
Description	Enter a description of the file being added.
File*	Required. Using the browse button, search your computer for the file to be uploaded and attached to the informal quote. Special characters are not allowed in this field.
Location	Protected. This will display the repository location where the file is saved.
Confidential	When selected, the file is will not be displayed to users other than the vendor submitting the quote and the State. If submitting a redacted copy of the Bid via BidBuy, then Vendor shall include "Redacted" in the file name. When attaching the unredacted version, Vendor shall include "Unredacted" in the file name and check the Confidential box on the Attachments tab which ensures that BidBuy does not display the unredacted document to the public.

Submitting the Quote

Before exiting from the **Quote**, please review the information before clicking **Save & Exit**.

The Informal Quote is now submitted to the State for review and consideration. After the Informal Quote request expires or is converted to Purchase Order, it will no longer be viewable to the vendor.

Notification of PO

An Informal Quote, if awarded, will result in a Purchase Order to the selected vendor. BidBuy notifies the vendor that a Purchase Order is available and can be viewed by logging into BidBuy. The email supplies the vendor with the general information they will find on the Purchase Order. Steps to a purchase order are detailed in the Purchase Order section.

Bid Solicitation Process

The Bid solicitation process allows a vendor to review and respond to Bids, such as IFB or RFP, via hardcopy or electronically, if applicable. The link for Open Bids is found on the BidBuy Login page and contains formal competitive solicitations, general notices, and other notices as required by the Illinois Procurement Code. In BidBuy, Open Bids serves as the public procurement bulletin for State of Illinois – General Services.

The following is a general guideline to responding to a Bid in BidBuy. All Bid solicitations are unique, so it is very important to review all attachments and specifications in each bid for instruction on submitting the quote and required attachments.

There are two ways vendors may identify bid opportunities: (1) Bid Notification Email or (2) Open Bids.

Bid Notification Email

Bid notifications are sent to vendors via email based on NIGP codes or other criteria selected on bid solicitation or notice. The criteria may include registered vendor NIGP code selections, vendor program enrollment, or set-aside goods or services.

Upon receipt of a bid notification, the vendor is directed to login and is provided instructions about how to access the bid.

1. View **Bid notice**
2. View **Bid information**

From:	il.bidbuy@illinois.gov		Sent: Tue 7/19/2016 3:14 PM
To:			
Cc:			
Subject:	Bid Notification - Bid # 16-AGENCY-TEST-B-405, Arch Services Req		

①

A notification has been sent to you by State of Illinois.

To respond online, you need your company's user name and login ID. Go to the State of Illinois site at https://dev.bidbuy.illinois.gov/bso/login.sdo. Enter your login and password information to sign into the system. Once logged in, open formal bids are listed in the Open Bids section of the home page. All formal bids can be accessed by clicking on Bids, then Open Bids. Printed copies of the bid can be requested from _____ by calling _____ .

The information from the request is below:

Bid Header

②

Requesting Department: TEST - Test Department
Buyer Name:
Buyer Phone:
Buyer Email:
Bid Number: 16-AGENCY-TEST-B-405
Description: Arch Services Req
Opening Date/Time: 07/19/2016 03:22:00 PM
Available Date/Time 07/19/2016 03:11:00 PM

Thank you for your participation. External bid URL : https://dev.bidbuy.illinois.gov/bso/external/bidAck.sdo?parentUrl=activeBids&bidId=16-AGENCY-TEST-B-405

Use this link to log on to Illinois*DEV*: https://dev.bidbuy.illinois.gov/bso/login.sdo

View Open Bids

Vendors can respond to any available bid even if an email notification was not received. Bids available for vendors to respond are found under the Bid tab.

1. Select **Bids** tab and click **Open**

2. From drop-down menu, select a category or **All** to see all open bids
3. Click **Go**

4. Select **Bid #** hyperlink to view the Bid

Bid #	Organization	Alternate Id	Buyer	Description	Purchase Method	Bid Opening Date	Bid Q & A	Quotes	Bid Holder
16-AGENCY-TEST-B-186	State of Illinois		Laura Batson	RFP eProcurement System	Open Market	03/31/2017 12:43:00 PM	View	Create New	
16-AGENCY-TEST-B-110	State of Illinois		Brock Fotis	Checklist Test	Open Market	02/08/2017 01:24:00 PM	View	Create New	

ⓘ Thoroughly review the Bid information and all attachments to help ensure a proper response is submitted to the State agency.

The Bid solicitaiton contains important information and instruction which must be thouroughly reviewed before submitting a Quote. Please pay particular attention to the following information in the Bid solicitiation:

Description	Short description to help identify the solicitation or notice.
Bid Opening Date	Bid opening date is when the bids are opened by the State and no additional vendor quotes are accepted.
Purchaser	Procurement staff contact name.
Organization	State Agency name.
Department	Bureau/Division of the State agency.
Location	Sub-bureau/division of the State agency.
Type Code	Procurement/Notice Type
Allow Electronic Quote	Yes/No – Identifies if an electronic quote submission is allowed.
Required Date	The date the commodity or service is required.
Available Date	The date the bid or notice becomes active and posts to BidBuy so vendors may view and respond.
Info Contact	Agency contact information of the individual who can be contacted for bid or notice information.
NIGP Code Certified Required	Subcontractor must be certified in at least 1 bid item NIGP Code.
Acknowledge Inclusion Required	Yes/No – Subcontractor added to the quote must acknowledge inclusion/participation. Vendors will not be disqualified if the subcontractors do not acknowledge inclusion; the Quote will display a warning notification.
Hour of Acknowledge Inclusion	Hours from bid closing for subcontractor to acknowledge inclusion/participation. Vendors will not be disqualified if the subcontractors do not acknowledge inclusion; the Quote will display a warning notification.
Subcontractor Info	
Pre Bid Conference	Displays the details of a pre-bid conference if one is scheduled for the solicitation.
Bulletin Desc.	Overview of the solicitation/notice and may include specific instruction for the vendor.
Ship-to Address	Ship-to address.
Bill-to Address	Bill-to address.
File Attachments	Agency attachments the vendor must review. May contain required documentation the vendor must return as part of the response.
Potential BEP/VBP Part. Goal	Reminder of a potential BEP/VBP goal to check Subcontractor tab of the Quote.
Questions	Agency questions for the vendor to answer with a specified response type in the Quote. A response may be a required.
Item Information	Information specific to each item such as the NIGP Code, description, unit of measure (UOM), quantity, etc. May include cost information for notices.

Bid Solicitation: 16-AGENCY-TEST-B-400				
Header Information				
Bid Number:	16-AGENCY-TEST-B-400	Description:	Test	Bid Opening Date:	06/23/2017 02:07:00 PM

Header Information

Field	Value	Field	Value	Field	Value
Bid Number:	16-AGENCY-TEST-B-400	Description:	Test	Bid Opening Date:	06/23/2017 02:07:00 PM
Purchaser:	Amy Adams	Organization:	State of Illinois		
Department:	TEST - Test Department	Location:	TEST - Test Location		
Fiscal Year:	16	Type Code:	10 - Invitation for Bid (IFB)	Allow Electronic Quote:	Yes
Alternate Id:		Required Date:	06/23/2016	Available Date :	06/23/2016 02:07:00 PM
Info Contact:	Contact Name	Bid Type:	OPEN	Informal Bid Flag:	No
Purchase Method:	Open Market	Rolling Enrollment Enabled:	☐	Open Enrollment Enabled:	☐
NIGP Code Certified Required:	No	Acknowledge Inclusion Required:	Yes	Hour of Acknowledge Inclusion:	0.0
Subcontractor Info:					

Pre Bid Conference:	There will be a pre-bid conference.
Bulletin Desc:	This is the Bulletin Description.

Ship-to Address:	Stratton Office Building 401 S. Spring Street Springfield, IL 62706 US Email: test@periscopeholdings.com Phone: (555)555-5555	Bill-to Address:		Stratton Office Building 401 S. Spring Street Springfield, IL 62706 US Email: test@periscopeholdings.com Phone: (555)555-5555	Print Format:	Bid Print New

File Attachments: Chrysanthemum~1.jpg

Form Attachments:

SPO Name: Amy

Potential BEP/VBP Participation Goal? (Only if estimated amount is >/=$250,000): No

Link to Original Contract (for a Renewal or Change Order):

Questions:

Question #	Print Sequence	Required	Question	Response
1	1.0	No	Do I need to ask a question?	

Item Information

Item # 1: (918 - 12) Consulting services are needed for general services.

NIGP Code: 918-12
Analytical Predictive Studies and Surveys Consulting

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0		HR - Hour				

Manufacturer:		Brand:		Model:	
Make:		Packaging:			

Respond to an Open Bid

After viewing a bid, the Seller can decide to submit a quote.

1. Select **Create Quote** if viewing from the Bid Solicitation

1. or **Create New** to submit a quote from the Bid Tab

Bids - Open

Show Bids for Category [All ▼] [Go]

Bid(2)

Bid #	Organization	Alternate Id	Buyer	Description	Purchase Method	Bid Opening Date	Bid Q & A	Quotes	Bid Holder
16-AGENCY-TEST-B-186	State of Illinois		Laura Batson	RFP eProcurement System	Open Market	03/31/2017 12:43:00 PM	View	Create New	
16-AGENCY-TEST-B-110	State of Illinois		Brock Fotis	Checklist Test	Open Market	02/08/2017 01:24:00 PM	View	Create New	

[Exit]

2. Click **Yes** to acknowledge the receipt of the Bid

Acknowledge Receipt and View Solicitation

Bid #	16-AGENCY-TEST-B-138
Bid Description	Test 3-8

Click Yes to acknowledge the download of the bid. When you acknowledge a bid, you will be added to the bid holder list and you may receive any future correspondence regarding this document, including amendments. If you do not want to acknowledge click No, and the bid will be displayed. Do you want to continue?

[Yes] [No]

Bid Q & A

Prior to the Bid Opening, vendors can ask questions to the State through BidBuy if Q & A is activated for the bid. Administrative questions that point the vendor back to the procurement may be responded to within BidBuy. Other questions, such as scope of work questions, will be posted as an Amendment to the bid.

Add a question

1. On **Summary** tab, scroll to bottom page and click Bid Q & A

[Print Page] [Create Quote] [Bid Q & A] [Exit]

2. Enter **Question Subject** and **Question**

ⓘ **Q&A is activated by the State. Q&A may not be available on all Bids.**

3. Click **Save & Exit** to save question

4. Click **Save & Continue** to save question and add more

5. An alternate way to view Bid Q&A – Select Bid tab, and click View under the Bid Q&A

Create Quote

Quotes record a vendor's response to a bid or other request for pricing in the BidBuy system. This section assumes an electronic quote submission is allowed. See attachments for further instruction if electronic response is not enabled or vendor wishes to submit a paper response. The State may manually enter Quotes on behalf of the vendor for procurements that are not submitted electronically through BidBuy. Once the procurement is awarded, the vendor may view the manually entered quote.

Each vendor's response to a bid is an individual quote. Vendors can submit multiple quotes and select "Alternate Bid" on the alternate quote(s).

1. Scroll to the bottom of the Bid Solicitation and click Create Quote

Quote: General Tab

The **General** tab requires the vendor to add mandatory and other information important to the quote.

1. Enter **Description** - Description will be pre-filled from the Bid description but is editable by the vendor on the quote. Editing this field is not recommended.
2. **Enter required information**
3. Click **Save & Continue**

ⓘ **Quote General Field Descriptions are in the table below. Asterisk fields are required.**

Quote General Field Descriptions

Field Name	Description
Description*	Defaults to the description of the bid and can be modified by the vendor. Editing this field is not recommended.
Delivery Days	Days to deliver items or services from award of PO.
Discount Percent	If entered, a discount will automatically be applied to all items on quote. Discounts can be added on an item by item basis on the item tab.
Is No Bid	No Bid is confirmation that the vendor reviewed the bid but is not formally submitting a price quote. Checkmark to formally respond to bid without actually bidding on any items.
Alternate Bid	If multiple quotes for consideration are submitted by the vendor, the additional quote(s) can be flagged as an alternate bid.
Terms	Identifies Shipping, Freight, and Ship Via Terms, and Payment. Terms default from the vendor profile and can be modified when submitting the quote. These are the vendors preferred terms and are subject to change by the State upon award of the contract.
Promised Date	Date to deliver items to Agency.
Info Contact	Contact information for questions regarding quote.
Comments	Field to enter in notes to Agency.
Are you registered and active in the Illinois Procurement Gateway? *	Yes/No response
Did you attach Form B?	Reminder for vendors to attach Form B to the quote. Vendors registered in the Illinois Procurement Gateway are required to attach Form B.
Did you attach Form A?	Reminder for vendors to attach Form A to the quote. Vendors not registered in the Illinois Procurement Gateway are required to attach Form B
If there is a BEP/VBP Goal, and you are self-fulfilling the goal, please navigate to the Subcontractor Tab and enter your company name as the vendor fulfilling the goal.	Reminder for vendors regarding BEP/VBP Goal self-fulfillment.

Quote: Items Tab

Quote Items: General Sub-Tab

On the **Items** tab, there is a General sub-tab where price is entered for the Quote.

1. Enter **Unit Cost** to be quoted for the bid quantity
2. Enter a **Discount %,** if applicable
3. Enter a **Freight Charge,** if applicable
4. Enter **Alternate Description, if** applicable

5. Click **Save & Continue**

> **Quote Item Tab Field Descriptions are in the table below.**

Quote Items Field Descriptions

Field Name	Description
Unit Cost	Price quoted per item based on unit of measure.
Discount Percentage	Enter Discount here, if applicable.
Tax Rate	Not Used by the State
Freight	Enter the Freight charge, if applicable.
No Bid	Place a check in the box if the vendor is not supplying a price quote for the item.
No Charge	Check the No Charge box if item will be provided by the vendor free of charge.

Quote Items: Notes Sub-Tab

The vendor can add notes to the Quote at the item level for information considered important for that particular item; notes are internal messages for the vendor and not viewable by the State.

1. Click **Item number** to view the Item

2. Enter note information

3. Click **Save & Continue** to add more notes
4. Click **Save & Exit** to exit the screen

Quote: Questions Tab

The **Questions** tab includes questions asked by the State that the vendor may respond as part of their Quote response.   Some questions are required to be answered prior to submitting the Quote. The vendor's response will be visible to the State when the quote is submitted.

1. Enter response
2. Click **Save & Continue**

Quote: Subcontractors Tab

The **Subcontractors** tab details subcontractor requirements and allows vendors to add subcontractors to the Quote, if requested by the State. This tab also provides goal participation information such as BEP goals.

> **If there is a BEP/VBP Goal, and you are self-fulfilling the goal, please enter your company name as the vendor fulfilling the goal.**

1. Select **Lookup & Add Vendors** to add subcontractors to the Quote.

Quote Q00000594 - Kirk Enterprises

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

Participation information:	BEP Certified
Subcontractors must be certified in at least 1 bid item NIGP Code:	No
Subcontractors must acknowledge inclusion:	No
Hours from bid closing for subcontractors to acknowledge inclusion: 0.00	

Goal Type	Mandatory	Certification Required	Target %	Your %
BEP Certified	No	No	10.0%	0.00%

ℹ Enter subcontractor participation, and select vendor category participation type and amount. Note that this solicitation has targeted goals as listed below. If the vendor is a general subcontractor, and not part of the participation goal, select none for the goal type. Also note that if the vendor certified flag is yes, the subcontractor must be certified in order to be used. To list a vendor for more than one goal type, enter the vendor selected goal type for each.

Quote Total: $10,000.00

Please click lookup and add vendor button to add subcontractor item.

(1)

Save & Continue   Save & Exit   Lookup & Add Vendors

2. Enter search criteria to find subcontractors to add to the bid, and select **Find It**

Lookup & Add Reference Vendors - Bid Q00000594
Vendor Lookup ⊟

Search Using:	ALL of the criteria ▼		
		Find It Clear	
Search Fields:	Vendor ID [ ]	Vendor Name	[ ]
	Vendor Tax ID [ ]	Show ☐ Vendor Legal Name	[ ]
	Vendor Keyword [ ]	Alternate ID	[ ]
	Integration ID [ ]		
	ZIP Code [ ]	County	[ ]
	State [▼]		
	☐ Emergency Suppliers ☐ Reference Vendor		
	NIGP Class [▼]		
	NIGP Class Item [▼]		
	NIGP Keyword [ ]		
	Ethnic Origin Asian / Pacific Islander		
	Gender Female Owned		
	Veteran Status Veteran Owned		
	Type of Firm Broker		
	Annual Gross Sales < $500,000		
	Number of Employees Less than 15		
	BEP Certified Minority Owned		
	Veteran Owned Business Veteran Owned Business		
	State Use Vendor Yes		
	Active vendor in the Illinois Procurement Gateway Yes - Prime		
	Small Business Set-Aside Yes		
Browse by:	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z		
	0 1 2 3 4 5 6 7 8 9 10		
	(2) Find It Clear		

3. **Select Checkbox** for the vendor to return as a subcontractor on the Quote
4. Click **Save & Exit**

After the subcontractor(s) is returned to the Quote, enter the Goal Type and Estimated Dollar for their participation.

1. Select **Goal Type** from the dropdown list
2. Enter **Estimated Dollars**
3. Click **Save & Continue**

Quote: Notes Tab

The **Notes** tab enables vendors to add general notes that can be used as internal communication when submitting a Quote. Notes are for vendor use and are not viewable by the State.

1. Enter note information

2. Click **Save & Continue**

Quote: Terms & Conditions Tab

The **Terms & Conditions** tab requires the vendor to indicate acceptance of the State's Terms and Conditions. Attachments are provided by the state to include the terms and conditions which may also include additional information specific to the bid opportunity. Modifying the terms and conditions, or failing to accept the state's terms and conditions, may result in the quote being disqualified.

1. Select acceptance terms
2. Enter exception information if applicable (may result in disqualification of the quote)
3. Click **Save & Continue**

Quote: Attachments Tab

Attachments allow the vendor to add required and supporting documents. The attachments may be Files uploaded from the vendor's computer (e.g., PDF, Word, etc.), or predefined published Forms the State has directed the vendor to populate within BidBuy. Review the Bid document for specific File and Form requirements.

Add a File

1. Select **Attachments** tab and click **Add File**

2. Add file **Name** and **Description**
3. Click **Choose File** to browse the computer for a file
4. Select **Confidential** to make a file viewable by the State and your company, but not viewable by the general public
5. Click **Save & Exit** to return to save and return to the previous screen when done with loading the file
6. Click **Save & Continue** to save changes made and remain on the same screen
7. Click **Reset** to reset display before saving
8. Click **Cancel & Exit** to exit without adding any files

Update Files

Files can be added and deleted.

1. Select **Confidential** to make a file viewable by the State and your company, but not viewable by the general public
2. Select **Delete** to delete attachment
3. Click **Save & Continue**
4. Click **Name** to download attachment

5. Click **(View Details)** to modify **Description**
6. To download file, click ![download icon]
7. Click **Save & Exit**

> ℹ️ **Quote File Attachments Field Descriptions are in the Table Below**

Quote File Attachments Field Descriptions

Field Name	Description
Name*	Required. Enter the name of the file. If left blank, the file name will default. Special characters are not allowed in this field; i.e. commas, quotations, etc.
Description	Enter a description of the file being added.
File*	Required. Using the Choose File button, search your computer for the file to be uploaded and attached to the quote. Special characters are not allowed in this field.
Location	Protected. This will display the repository location where the file is saved.
Confidential	When selected, the file is will not be displayed to users other than the vendor submitting the quote and the State.

If submitting a redacted copy of the Bid via BidBuy, then Vendor shall include "Redacted" in the file name. When attaching the unredacted version, Vendor shall include "Unredacted" in the file name and check the Confidential box on the Attachments tab which ensures that BidBuy does not display the unredacted document to the public. |

Add a Form

1. Click **Add Form**

Quote Q00000155 - Sample Inc.

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

ⓘ Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

Name	Description	Confidential	Attached By	Attached Date	Delete
Justification.docx		☐	John Public	02/28/2016	☐

Forms

ⓘ Click Add Form to add form attachments.

No Form Attachments   ①

[Save & Continue]   [Add File]   [Add Form]

2. Enter search criteria or leave blank to return all forms
3. Click **Find it** to find form
4. Click **Clear** to restart search
5. Click **Exit** to exit

Quote Form Attachment Field Descriptions

Field Name	Description
Search Using	You can search using *all the criteria* in the search results to return only results that all entered criteria is met; or *any of the criteria* to return results that any of the selected criteria is met.
First Name	Not for vendor use.
Last Name	Not for vendor use.
Form Title	Enter the title or partial title of the form title.

Update Form

Forms can have multiple versions. If anything is added to a form, it then becomes the primary form.

1. Select radio button for **Form Title**
2. Click **Edit & Attach Form** to edit form and attach to Quote
   - Enter form information, then click **Save** and **Exit** buttons
3. Click **Attach Form** to quote

Quote: Summary

The Summary Tab allows the vendor to review and evaluate all the information entered on the tabs. To edit any information, return to the specific tab, revise and save. When satisfied with the quote, it is submitted.

1. To submit quote, scroll to the bottom of the Summary tab and click **Submit Quote**
2. Click **OK**
3. Click **Print** for a copy of the quote
4. Click **Cancel Quote** to cancel the entire quote

Verification of Quote

BidBuy sends an email notification to the vendor contact that submitted the quote that it has been submitted to the State and is ready to be opened for review on the Bid Opening date and time. Quotes in BidBuy cannot be submitted electronically after the Bid Opening date and time. All quote numbers are unique.
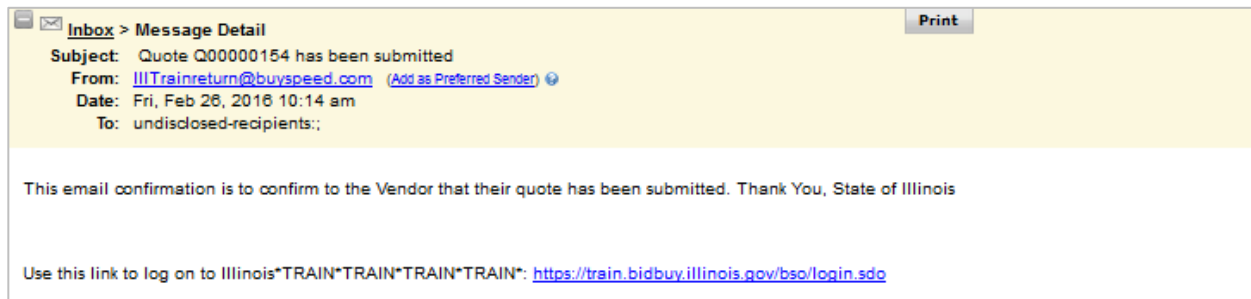
Notification of Bid Award

At the formal award of the bid, an email is sent to notify vendors of the vendor(s) the State intends to award.
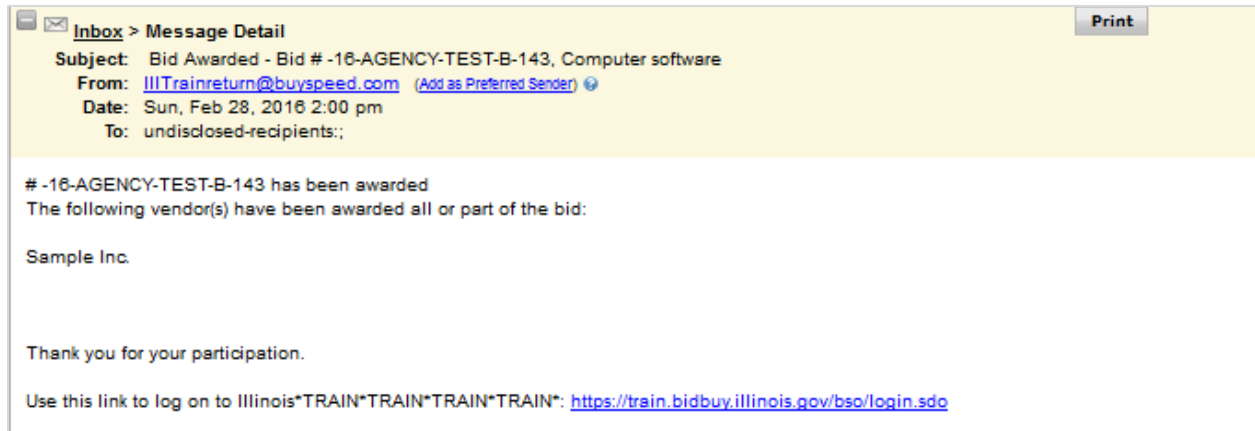
Notification of PO

After all post-award requirements have been met, the State will finalize the resulting Purchase Order.
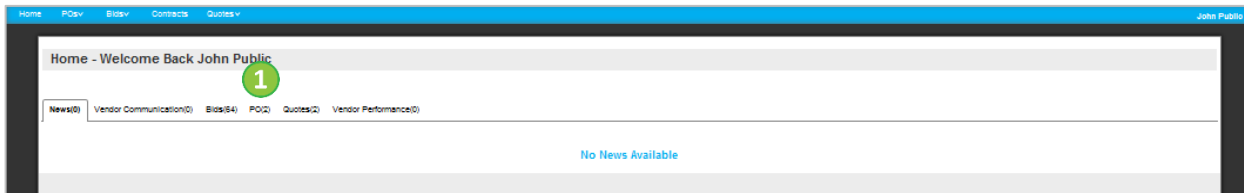

BidBuy notifies the vendor that a Purchase Order is available and can be viewed by logging into BidBuy. The email supplies the vendor with the general information they will find on the Purchase Order.
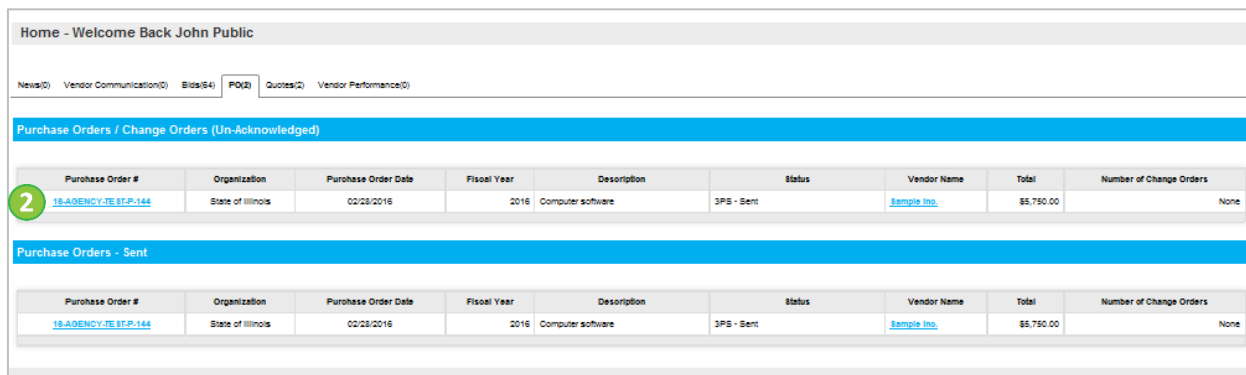
Purchase Order

Open the PO

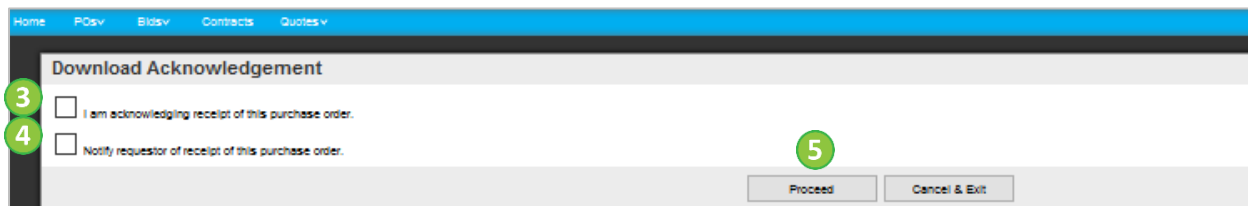To review or print the Purchase Order, the vendor will log into BidBuy.

**1.** Click **PO tab**

2. Click **Purchase Order #**

3. Select the box marked **I'm acknowledging receipt of this purchase order** - this selection documents the date and time that the vendor acknowledges receipt of the PO.

4. Select the box marked **Notify requestor of receipt of this purchase order –** this selection sends an email notification to the State informing them the PO has been acknowledged.

5. Click **Proceed** to view the Purchase Order. Acknowledgement of receipt of the purchase order may be required to view the document.

Review the Purchase Order

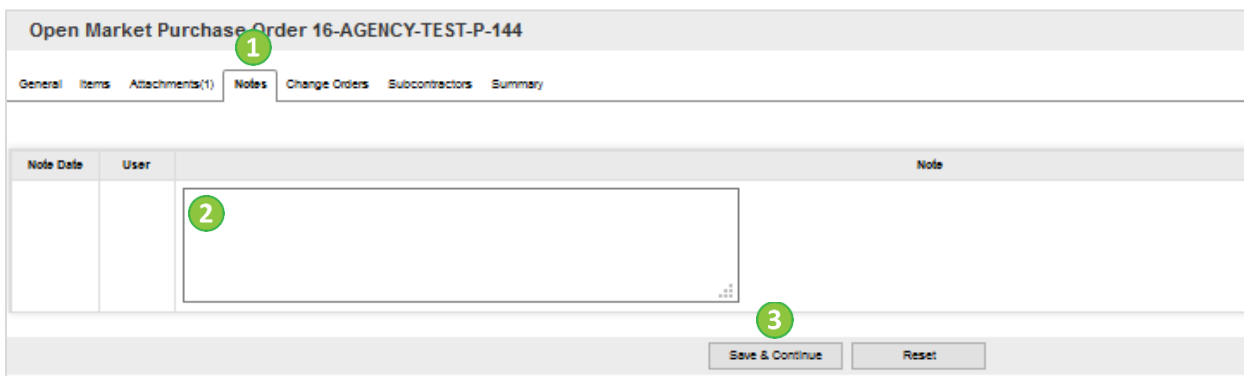The Purchase Order will open to the Summary tab.

To print the Purchase Order, scroll to the bottom of the Summary tab and select **Print**. A PDF of the Purchase Order opens in a new tab and can be saved or printed.

Exit	Print
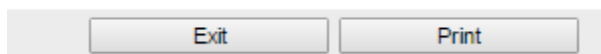
To review the Purchase Order electronically, select each tab to view detail:

Open Market Purchase Order 16-AGENCY-TEST-P-144

General   Items   Attachments(1)   Notes   Change Orders   Subcontractors   Summary

- ❖ **General Tab:** The Header information
- ❖ **Items Tab:** The line item and PO price
- ❖ **Attachments:** The name of the files and forms attached to the PO
- ❖ **Notes Tab:** Allows the vendor to add an additional text note that will not show on the printed PO but will be viewable by the state.
  1. Click the **Notes** Tab
  2. Enter note text
  3. Click **Save & Continue**

Open Market Purchase Order 16-AGENCY-TEST-P-144

General   Items   Attachments(1)   Notes   Change Orders   Subcontractors   Summary

Note Date	User	Note

| Save & Continue	Reset

- ❖ **Change Orders Tab:** Formal changes to the PO will be detailed here
- ❖ **Subcontractor Tab:** Any Subcontractor information will be found here

When the Purchase Order has been awarded, a PO document can be issued to the vendor electronically or via standard mail. This Purchase Order document can serve as the contract between the state and the vendor. Alternatively, detailed contract documents may also be required. The vendor shall follow any instructions in these documents, which includes executing the PO or contract documents prior to fulfilling the contract. Detailed instructions can be provided in the Notes Tab or the template documents.

Purchase Order Change Order

Change Orders allow the agency to modify a purchase order and request the vendor to approve the change. When a vendor is asked for approval of a change order, an email is sent to notify the vendor. The notifications are also visible on the vendor's homepage on the PO tab.
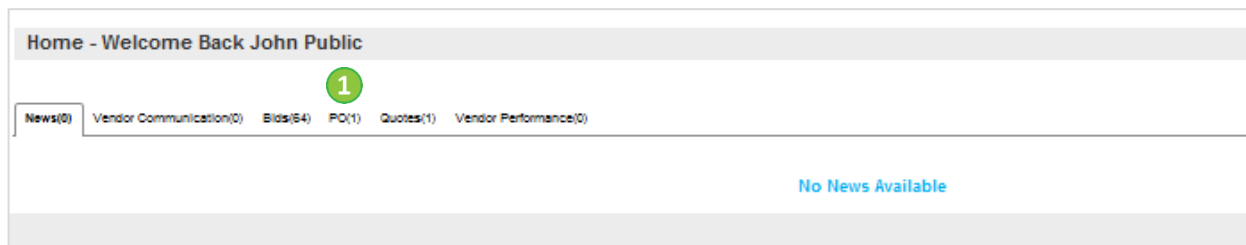
Following the approval of the PO modification, an email with details of the changes is sent to the vendor by BidBuy. After receiving the email, vendors will log into BidBuy to review details.
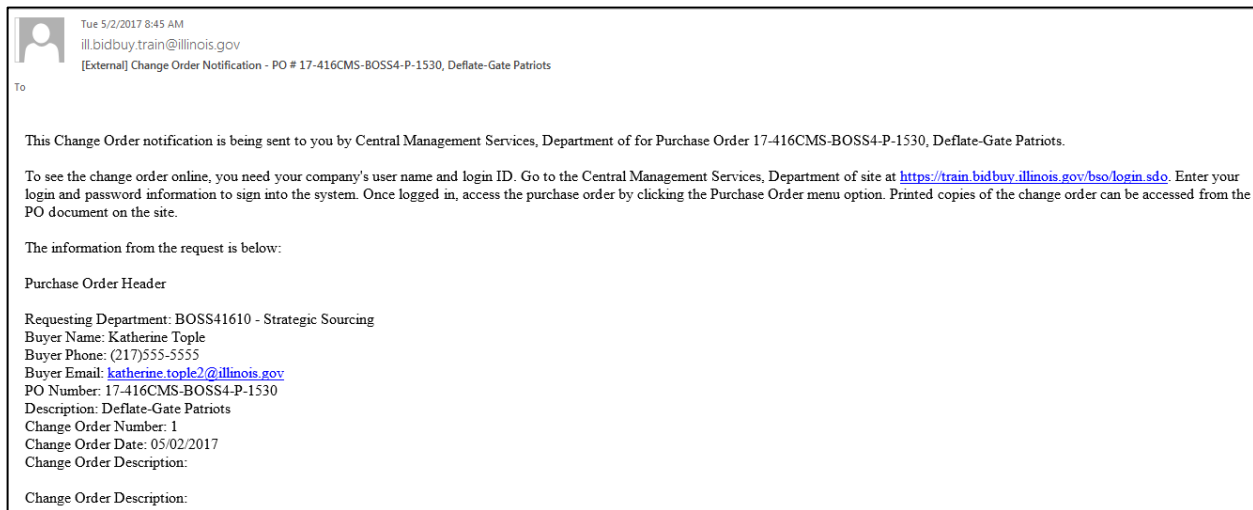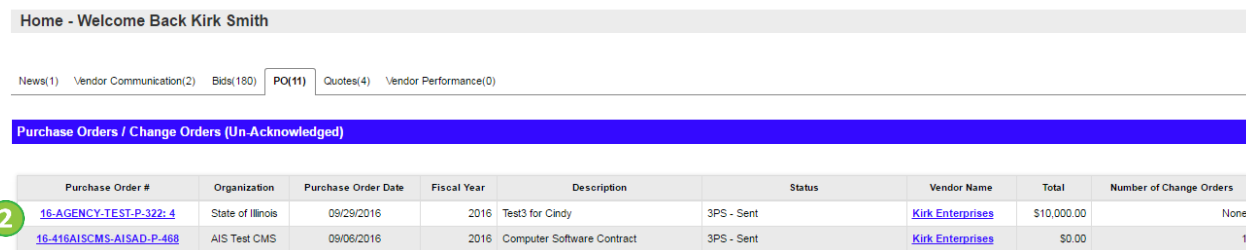

Accessing a Purchase Order Change Order

To review the PO Change Order details, the vendor will log into BidBuy.

1. Click **PO**

2. Select **Purchase Order #** under Purchase Orders/Change Orders (un-Acknowledged)

Acknowledge Receipt of Change Order

1. Select the box marked **I'm acknowledging receipt of this purchase order and/or its change order(s)** – this selection documents the date and time the vendor acknowledges receipt of the PO Change Order
2. Select the box marked **Notify requestor of receipt of this purchase order and/or its change order(s)** – this selection sends an email notification to the State informing them the PO Change Order has been acknowledged.
3. Click **Proceed**

Open the Summary Page

The Purchase Order will open to the Summary tab. To print the modified Purchase Order, scroll to the bottom of the Summary tab and select **Print**. A PDF of the modified Purchase Order opens in a new tab and can be saved or printed.

1. Click the **Change Orders** tab

The

Change Order opens to the Change Order Note

1. Click the **Change Order (#)**

2. Review the detail of the **Change Order** based on what is included in the Change Order Note
3. Click **Exit** to return to the Change Order tab general display

To print the modified Purchase Order, scroll to the bottom of the Summary tab and select **Print**.

For additional questions, please contact the State of Illinois Vendor Help Desk at il.bidbuy@illinois.gov or (866) 455-2987.