

BOARD OF COUNTY COMMISSIONERS PURCHASING DEPARTMENT

E-PROCUREMENT TOOL

VENDOR REGISTRATION GUIDE And ONLINE BIDDING MANUAL

1. <u>Introduction and Overview</u>

Thank you for your interest in providing goods and/or services to the divisions, departments and agencies under the Collier County Board of County Commissioners.

This step by step guide has been developed to assist you in the registration and online bidding process of our e-procurement tool.

With the Collier County Purchasing Department e-procurement tool, you will have the ability to:

- Ability to maintain your company's profile online any day, any time
- Be electronically notified of all solicitations for commodities you are registered under
- Ability to view and download solicitations, including construction plans online
- Be electronically notified of any addendums issued on solicitations you have downloaded
- Ability to ask questions and receive answers online
- Ability to see all questions asked and the responses given
- Ability to submit solicitation responses online when indicated
- Ability to view Planholder list for bids downloaded online
- Ability to view and download tabulations online

To fully befit from all the features of this system you will need:

- Internet access with Microsoft Internet Explorer 5.5 or later (DSL or cable most efficient)
- Have email access that can accept PDF file attachments (If you have spam software, allow our email transmissions to be received)
- Have scanning capabilities

If you do not have these capabilities, solicitation responses can still be submitted in hard copy form prior to the denoted time and date.

2. The Registration Process

The first step is to click on your Microsoft Internet Explore browser and proceed to the Collier County Purchasing Department website: www.colliergov.net/purchasing.



On the left hand side you will see the following menu

Purchasing

Archives of Bid Tabulations & RFP Submittals
Current Bid Tabulations and RFP Submittals
CC Technical Requirements / Procurement
Current Solicitations (Bid, RFP, RFQ, ITQ, ITN)
Disaster Preparedness Vendor List
Frequently Asked Questions
First Word Newsletter
Non-Bid / RFP Response Form
Notice of Recommended Award
Organizational Meetings
Policies and Procedures

Purchasing Staff
RFP Short Listed Firms
Selection Committee Meetings
Surplus Property / Auction Information
Vendor Registration
Download Current Solicitations

Next, click on Vendor Registration, and you will see this page.

Vendor Registration

Collier County offers online vendor registration to all prospective vendors. This no cost required online registration offers our vendors many benefits including:

- Ability to maintain your profile 24/7, 365 days per year
- Electronic notification of all solicitations for the products/services indicated on your application
- View online and download solicitations, including construction plans
- Be electronically notified of any addendums issued on solicitations you have downloaded
- Ability to ask questions and receive answers online
- Ability to see any questions asked and answers given online
- Ability to submit solicitation responses online, when indicated on solicitation
- Ability to view Planholder lists online
- View and download solicitation tabulations
- View "The First Word" newsletter, which includes a listing of future Bids/RFPs

This new e-procurement tool is electronically based, and to partake in its benefits, your firm should have the following resources:

- Computer with Internet access (DSL or cable most efficient)
- Have a email address and be able to accept PDF file attachments
- Have access to a scanner to submit certain response documents

If you have any questions regarding this new registration process or need assistance in completing the registration form, please contact us at (239) 252-8407 to have our capable staff assist you.

To register, click www.colliergov.net/bid/register

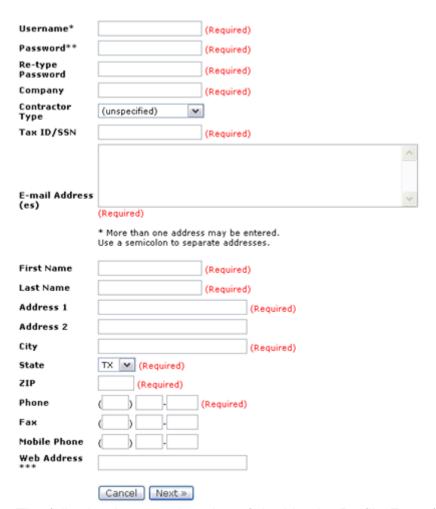
To View the guide, click Vendor Registration Guide

To View Commodity Codes, click Commodity Codes, Alpha-Numeric

Please note: Collier County Purchasing Department does not use any private notification service. Automatic advance notification of the County's solicitations, downloading of solicitation packages and other specified data are available **solely** to our registered vendors.

We welcome your comments, questions, suggestions, etc. We can be reached by e-mail.

To register, click on the link: www.colliergov.net/bid/register and you will see Vendor Registration (Profile) Form, which looks like this.



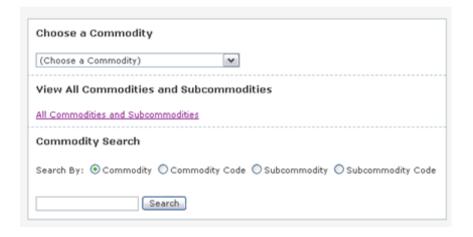
The following is an explanation of the Vendor Profile Form fields. Fields that are required are indicated on the form (Required).

Field Name	Description
Username	Enter a username. This must be unique in the system. Usernames are case-sensitive and may contain between 4 and 16 alphanumeric characters. No spaces or special characters are allowed.
Password	Enter a password. Passwords are case-sensitive and may contain between 4 and 16 alphanumeric characters and the following special characters: ~! @#\$ %^&*(). No spaces allowed.
Retype Password	You must retype the password here to confirm it.
Company	Enter your company name.

Contractor Type	Select the type of contractor you are (General or Subcontractor)
Contractor Type	leave blank if does not apply.
T 10/0011	
Tax ID/SSN	Enter 000-00-0000 for Tax ID or SSN. Collier County does not
	require this information for registration or for response to
	solicitations.
E-mail Address	More than one address may be entered. Use a semicolon to
	separate addresses. Addresses entered here will receive all
	solicitation-related notifications.
First Name	
First Name	Enter the first name of the vendor contact person.
Last Name	Enter the last name of the vendor contact person.
Address 1	Enter the vendor's address, line 1.
Address 2	Enter the vendor's address, line 2.
City	Enter the vendor's city.
State	Select the vendor's state.
ZIP	Enter the vendor's ZIP code.
Phone	Enter the vendor's phone number.
Fax	Enter the vendor's fax number.
Mobile Phone	Enter the vendor's mobile phone number.
Web Address	Enter the URL of the vendor's website. Web address must be
	complete and contain the http:// or https:// prefix, e.g.
	http://www.yahoo.com
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When you have finished, click the **Next** button to save your information and move to the next step, selecting commodities. For your convenience, the commodity list link is noted on the Vendor Registration page (To View Commodity Codes, click <u>Commodity Codes, Alpha-Numeric</u>).

The next step in registering is to select commodities the vendor wants to be associated with. (Vendors receive e-mail notifications when solicitations are created in commodity groups the vendor has selected.) The screen is as follows:



There are three different options you can use for finding commodities to add to the vendor.

Revised 1/2008

- 1. **Choose a Commodity**: You can use the pulldown menu on the top to choose a commodity. When you choose one, that commodity is displayed in a list at the bottom.
- 2. You can click the **View All Commodities** link to get a full list of all commodities available in the system.
- 3. **Commodity Search**: You can enter keywords to search for specific commodities. Search results are displayed on the bottom of the page.

Check the box next to a commodity to add it to your preferences, and click the **Add Commodities** button to save your changes. You can repeat this commodity selection process for multiple different commodities if desired. You can also log in later in the future to make changes to these selections if needed.

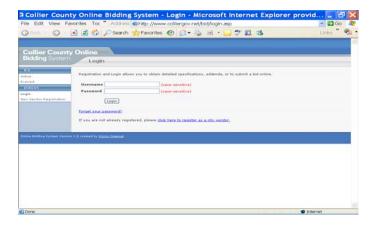
Once a commodity is selected, it will appear in a list labeled **My Subscribed Commodities** at the bottom of the page. In this list, you can click the **Delete** link next to a commodity to remove it from your preferences. When finished adding commodities, click the **Finish Registration** button. You will receive an e-mail confirming your registration. You are now logged into the system, and you can and begin responding to solicitations. The next portion of this manual will take you through the steps of viewing, downloading, and submitting solicitation responses online.

Please note, this is your profile and it is your responsibility to properly maintain your file to ensure accurate notification of solicitations in your field of interest.

3. Solicitation Response Process

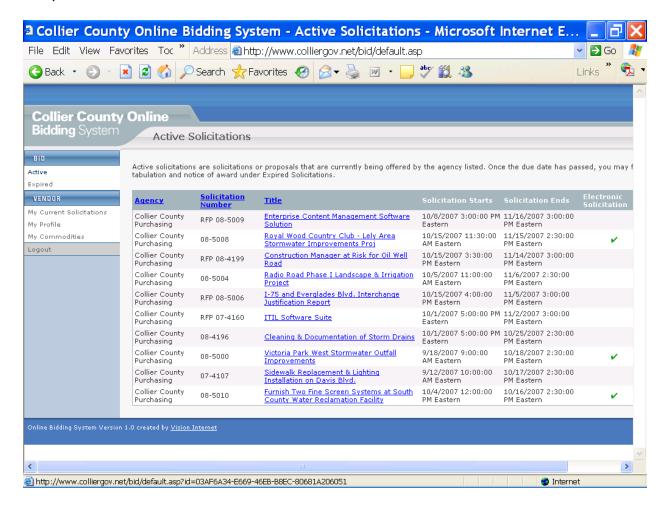
You have successfully registered and now wish to participate in the solicitation process. You may have gotten an email notification about a solicitation associated with a commodity you registered under, or you could just browse the active solicitations on the website. The following steps will assist you in achieving your endeavor.

To log into the Collier County Purchasing Department E-Procurement Tool, open your Microsoft Internet Explorer and enter the following URL in the address bar: www.colliergov.net/bid/login. The login page will be displayed as shown below.



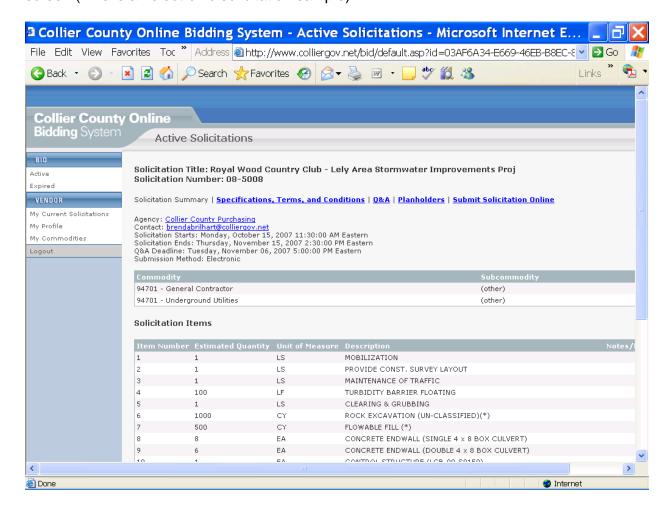
Enter the username and password established in your registration and click the login button.

After successfully logging in, you will see the list of the current Active Solicitations as sample shown below.



This list shows the Agency letting the solicitation, solicitation number, solicitation title, the start and end time for responding to the solicitation, and wheter the solicitation is manual or electronic. Manual solicitations are downloaded and submitted in hard copy, and electronic solicitations are responded to online with no hard copies required.

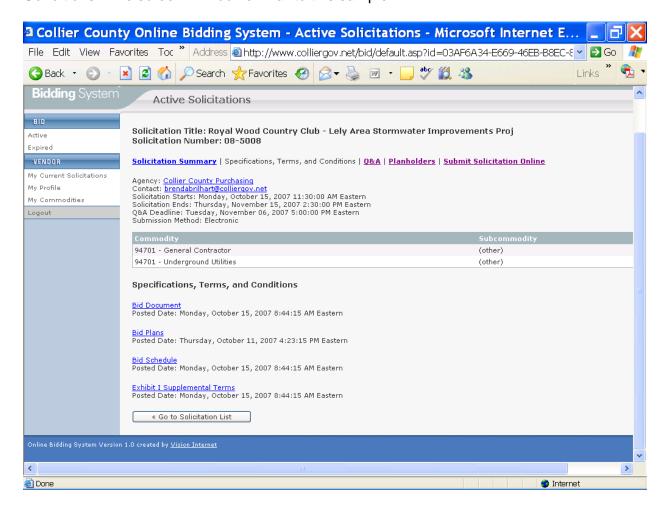
Click on the solicitation title you are interested in and you will see the following sample screen (This is an electronic solicitation sample).



What you see above is the Solicitation Summary. The summary enables you to view the relevant aspects of the solicitation and assists you in determining whether or not you wish to pursue (ie: dates and times, contact information, and since this is an electronic submission, you also see the items to be bid). From this page you can also review the solicitation Specifications, Terms, and Conditions, view and/or ask any questions asked and answers given, the Planholders (firms) that have downloaded the solicitation (this is a valuable tool for subcontractors wishing to promote their goods or services to prime contractors), and, in this case, Submit response online. The following pages will take you through each step to ensure your participation success.

Please note, if you view the solicitation document, you are automatically placed on the Planholder list for this solicitation only, and not place under the commodity code. Additionally, as a Planholder, you will receive email notifications of all questions and answers, or any addenda issued. You cannot be removed from the Planholder list of active solicitations.

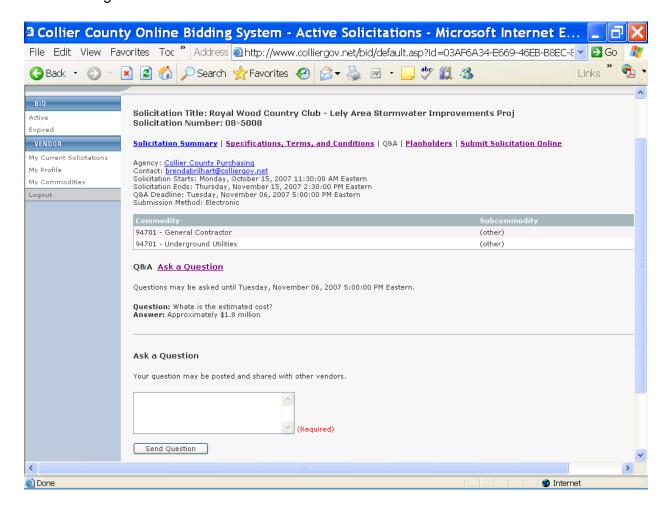
The next step in the process is to click on the highlighted Specifications, Terms, and Conditions. This screen will look similar to this sample.



To be able to submit a response to a solicitation, you must first open and download the details of the solicitation. In the above example, you will note there is the Bid Document, Bid Plans, Bid Schedule, and Exhibit 1, Supplemental Terms. All these files must be opened and downloaded.

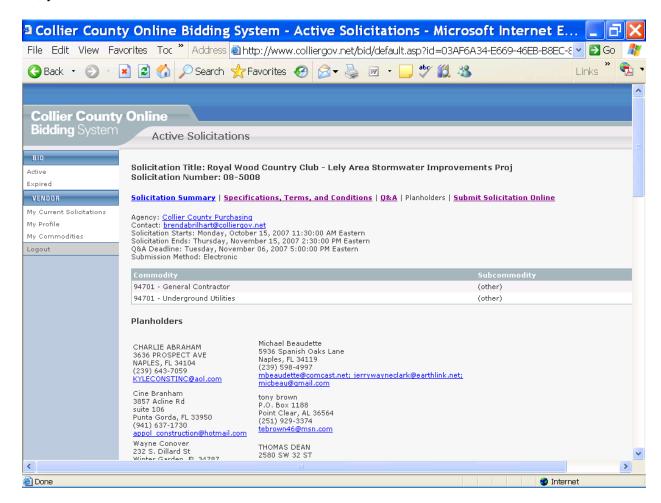
You have downloaded the required files and during the process you have questions. These questions may be in regard to the specifications, the plans, or maybe even on the solicitation submittal. All questions regarding a solicitation must be asked online and answers given online for two reasons. First, only questions answered in writing by the County are the official answers. Verbal answers are not official. Second, all prospective solicitation submitters are entitled to see any and all questions asked and answers given.

To ask a question, or to view questions previously asked and answers given, click on the highlighted Q&A. The sample screen below shows that a previous question was asked and the answer given.



To ask a question, type your inquiry in the box and click on the send question button. Your question will be sent electronically to the appropriate individual in the agency letting the solicitation. When your question is answered, you will receive an electronic notification that answers have been issued to questions asked. You will need to return to this screen to see the answers.

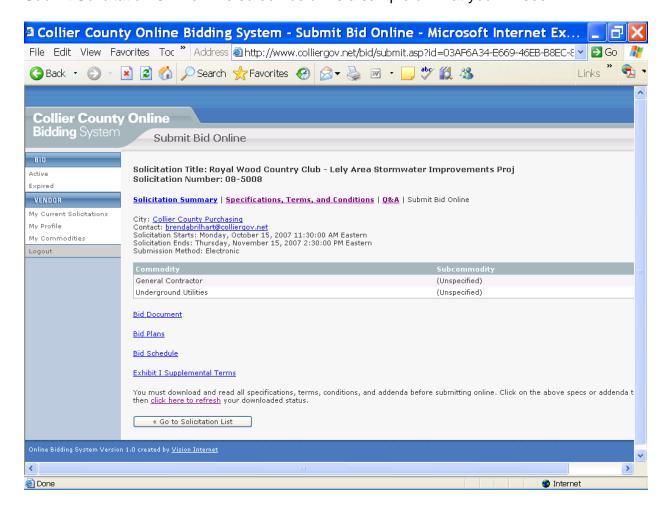
To see who has downloaded the solicitation, click on the highlighted Planholders. By doing so, you will see a screen as shown below.



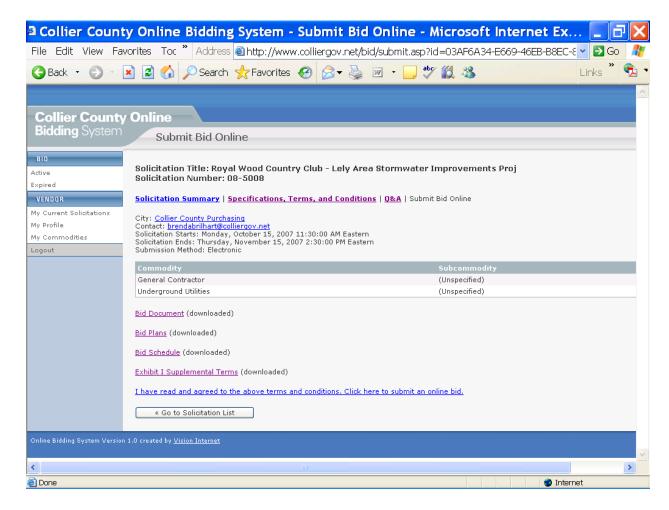
You now have a clear understanding of the solicitation requirements, all your questions have been answered, you know who else may submit a response, and now you want to submit a solicitation response online. The following pages will take you through the submittal process.

Please remember, if for any reason you are unable to submit a solicitation response online, you may still participate in a competitive process by submitting a hard copy response.

When you are ready to submit an electronic solicitation response, click on the highlighted Submit Solicitation Online. The screen below is a sample of what you will see.



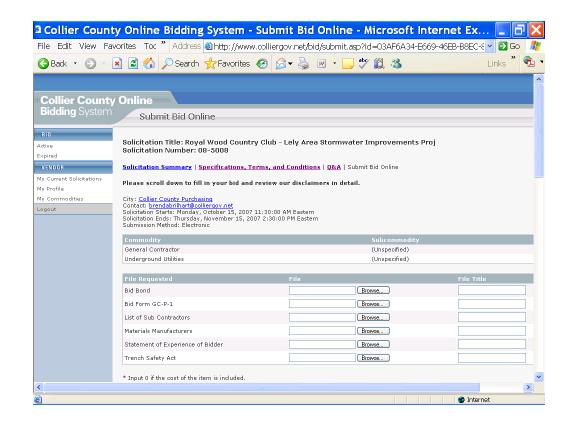
Before you are able to submit your solicitation response, you will need to open each of the required files. Once you have viewed all of the required documents on this screen, the system will verify your action by placing a (downloaded) after each of the items. Additionally, a link will appear that reads, "I have read and agreed to the above terms and conditions. Click here to submit solicitation online". Click this link to go to the next step. The sample screen below will appear as a result of your actions.

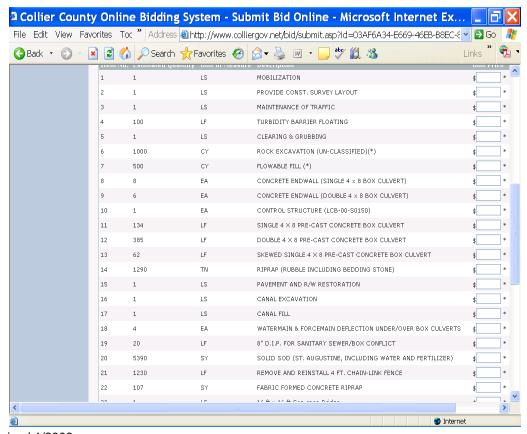


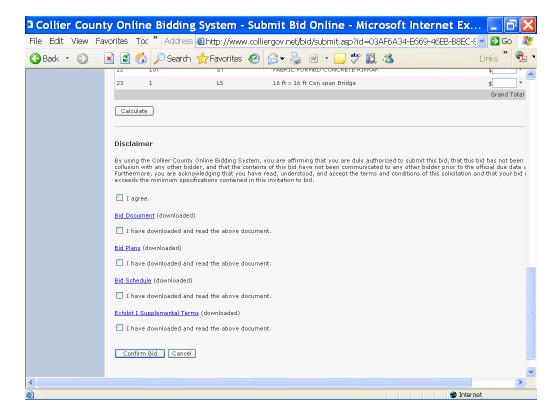
The next screen samples below will appear after you click the "I have read and agree" statement. I have split this screen into three separate screens to show and explain the submittal requirements for this particular solicitation. Not all solicitations are exactly alike, yet there are similarities.

On the first screen you will be required to upload the file requests from your computer. Some file requests require signatures and/or notarized signatures. These types of documents will require you to scan them to your computer in order for uploading. All request files must be submitted for solicitation response acceptance.

The second screen shows the items that require pricing. Items that you do not wish to submit prices for, input a 0 in the unit price column. After you have input all your prices, click on the calculate button as shown on the third screen. This will give you the opportunity to verify your unit prices, see the extended prices, and verify your total offer. If you see that a price is incorrect, you have the opportunity to correct before confirming your solicitation response.







Once you are confident with your price submittal, read and acknowledge the Disclaimer and click the confirm bid button. Your solicitation response has now been submitted, and you will receive an email notification confirming your submission.

At any time prior to the solicitation end date and time, you can edit your solicitation response and/or withdraw your solicitation response by logging on to the website and clicking on the appropriate solicitation and clicking edit. You will then be given the options of editing your solicitation response, or withdrawing your response.

After the appointed date and time, you can view the solicitation tabulations online. Logon to the website and under the bid menu, click on expired. Select the appropriate solicitation and click on tabulation to see all bids submitted.

We hope this guide has been of value to you in your participation of the Collier County competitive procurement process.