TENDERLINK
Bringing Purchasers and Suppliers Together

TenderLink Documentation

Supplier Response: Responding to an eRFx Notice

Contents Page

Introduction 3
eRFx Notice Documentation 3
Downloading the eRFx Notice Documents 3
Document Fee 5
Download Documents 7
Further Options on the Tender Details Screen 7
Requesting Physical Documents: 7
Contractors List: 8
This Tender Has an Electronic Tender Box Available 9
Post Questions or Comments to the Online Forum for This Tender 9
Upcoming TenderLink Workshops 9
Print This Tender Notice 9
Complete the Online Response Form to Respond to This Tender 9
View Support Options for this Tender Notice 9
Need Assistance in Writing Tender Responses? 9
Intention to Respond 10
Forums 10
Viewing an online forum 11
Posting a Question to the Forum 14
Print Forum 15
Submit Your Submission to an Electronic Tender Box 16
Step 1: Information 16
Step 2: Confirm 17
Step 3: Agree to Terms 18
Step 4: Make Submission 18
Updating Your Submission 22
Removing Your Submission 23
Reviewing Your Submission 25
Submit Your Submission via Online Response Form 26
Permissions 26
Administrator 26
Basic User 26
Read Only 26
Technical Support: 26
Glossary of Terms 27

Introduction

Use this manual to take you through the four simple steps of responding to an eRFx notice invitation.

When responding to an eRFx Notice you will need to:

- Have downloaded and read the eRFx Notice Documents.
- Know the Tender ID number of the eRFx notice.
- Have all the documents you wish to submit to the Electronic Tender Box(es).

*You can use the **Back** button to go back to previous steps at any time.*

eRFx Notice Documentation

eRFx Notice Documentation can be available through a Public eRFx Notice, which you can receive as an email alert. To receive the alerts you will need to have your profiles selected.

Alternatively, a purchaser may send you a **Private Invitation** to tender. Both options will allow you to click on the **Download Documents** link in the email sent. You can also access the eRFx Notice details and documents by copying and pasting the eRFx number supplied in the email into the **View a Specific Tender Link** on the Dashboard.

! NOTE:

The examples below are for a Private Invitation. To access Private eRFx Notice Documentation, you must first be invited by the Purchaser via the TenderLink system.

Downloading the eRFx Notice Documents

As a supplier you will have received an email inviting you to respond to the eRFx Notice (Figure 1).

1. Click on **Download the Tender Documents for this Notice** link within the email, which can be found under the **Options** heading.

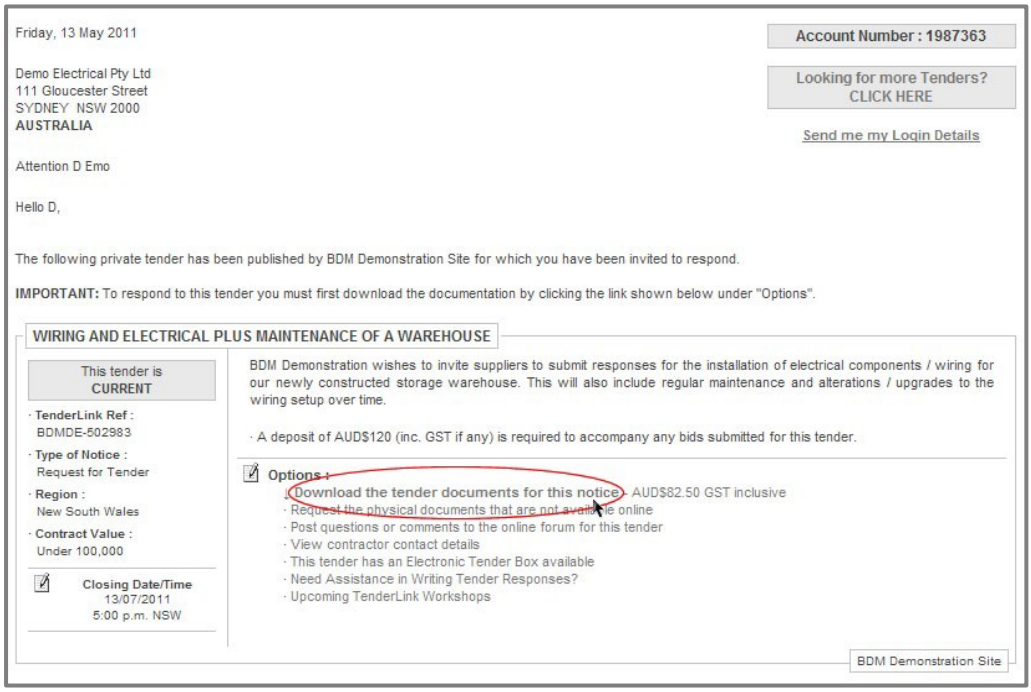


Figure 1: An Email Inviting the Supplier to Respond to the Private eRFx Notice.

Alternatively, log on to the TenderLink.com Notification E-Tendering portal (or TenderLink.com third party portal, whichever you are registered on).

1. In the portals, under the **Dashboard** menu option, click on **All Current Tenders** (under the **search tenders** heading).

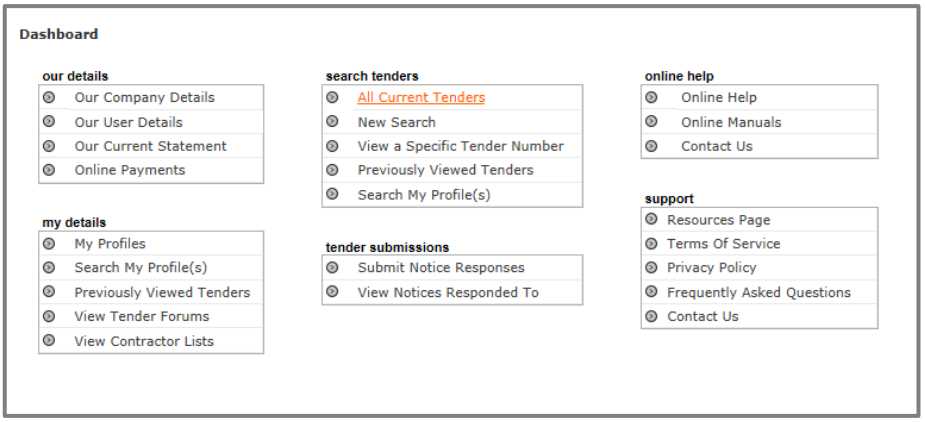


Figure 2: The Dashboard Screen, All Current Tenders.

2. Click on the eRFx reference number (Figure 3).

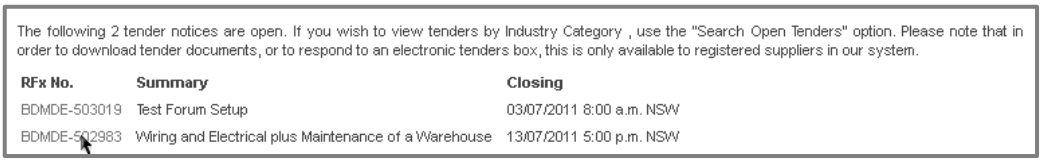


Figure 2a: The All Current Tenders Screen.

OR subscribers to https://www.tenderlink.com/notification/index.html can log into their account.

3. Click on the link **View a Specific Tender Number** from the dashboard screen.

4. Enter the eRFx Notice number provided on the tender notification email.

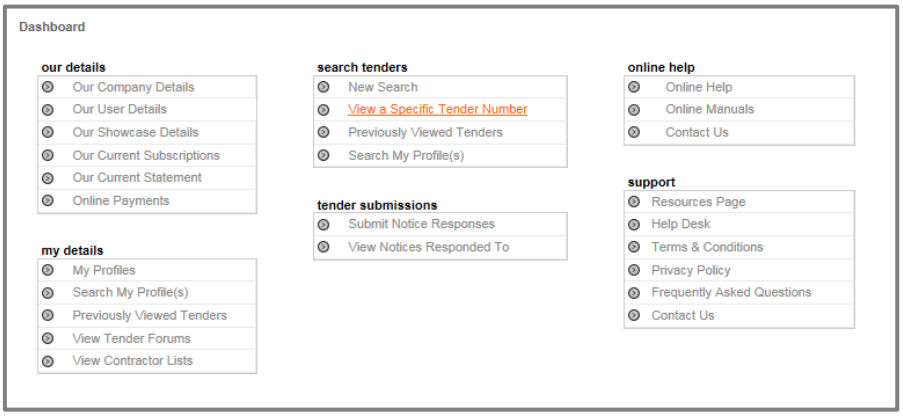


Figure 3: The Dashboard Screen, View a Specific Tender number.

5. This will take you to the **Details for Notice** Screen for the eRFx Notice (Figure 4).

6. Under the **Options** heading click the link **Download the Tender Documents**. This will take you to the **Download Authorisation for Tender** screen (Figure 5).

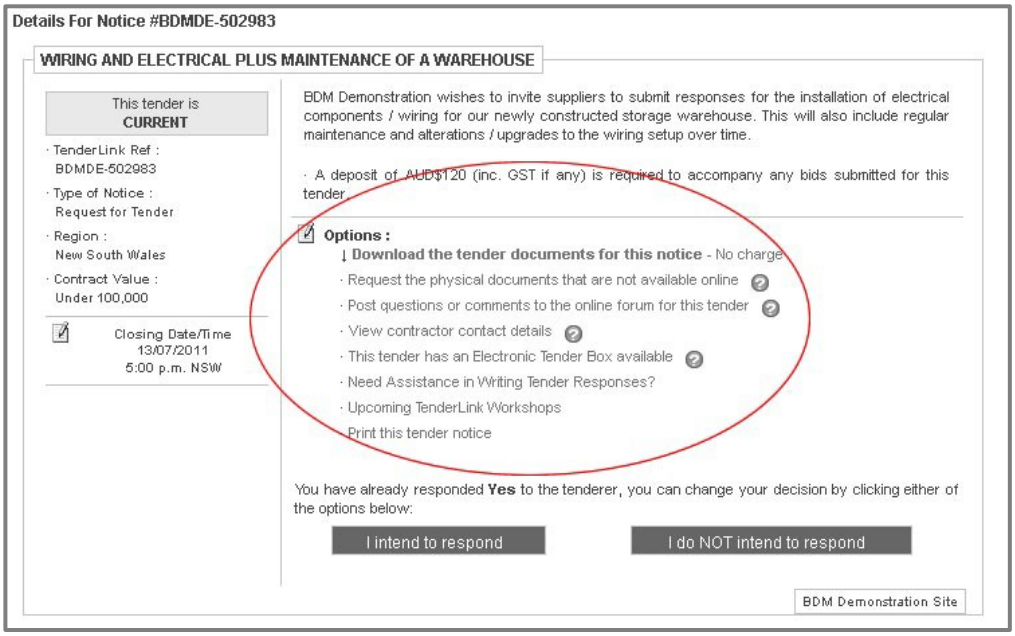


Figure 4: Details for Notice Screen.

7. Click in the box in the **Download Authorisation** screen (Figure 5) to agree to the Terms of Service.

8. Click **Request Documents** to continue.

9. If the purchaser has decided to allow other registered users to view the supplier details you will also need to check a second box to agree that your contact details can be made available. This is the contractors list (Figure 5).

Figure 5: Requesting the eRFx Notice Documents.

Document Fee

The purchaser may wish to charge a fee for the download of the eRFx notice documents, (AUD $82.50 in this example. Figure 7). If this is the case:

1. Click **OK** and you will be taken to a secure **Payments Options** screen (Figure 7).

2. Enter your **Card Number, Expiry Date, Name on Card, Security Code** and an order number (if you require one).

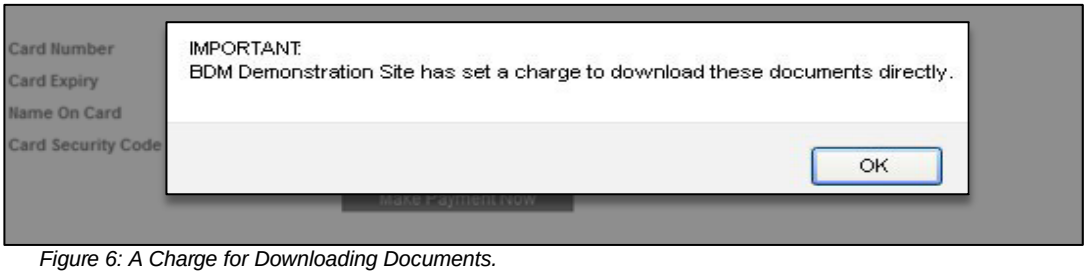


Figure 6: A Charge for Downloading Documents.

3. Click on **Make Online Payment** button to complete the transaction.

4. A payment accepted message will appear to confirm your payment (Figure 8).

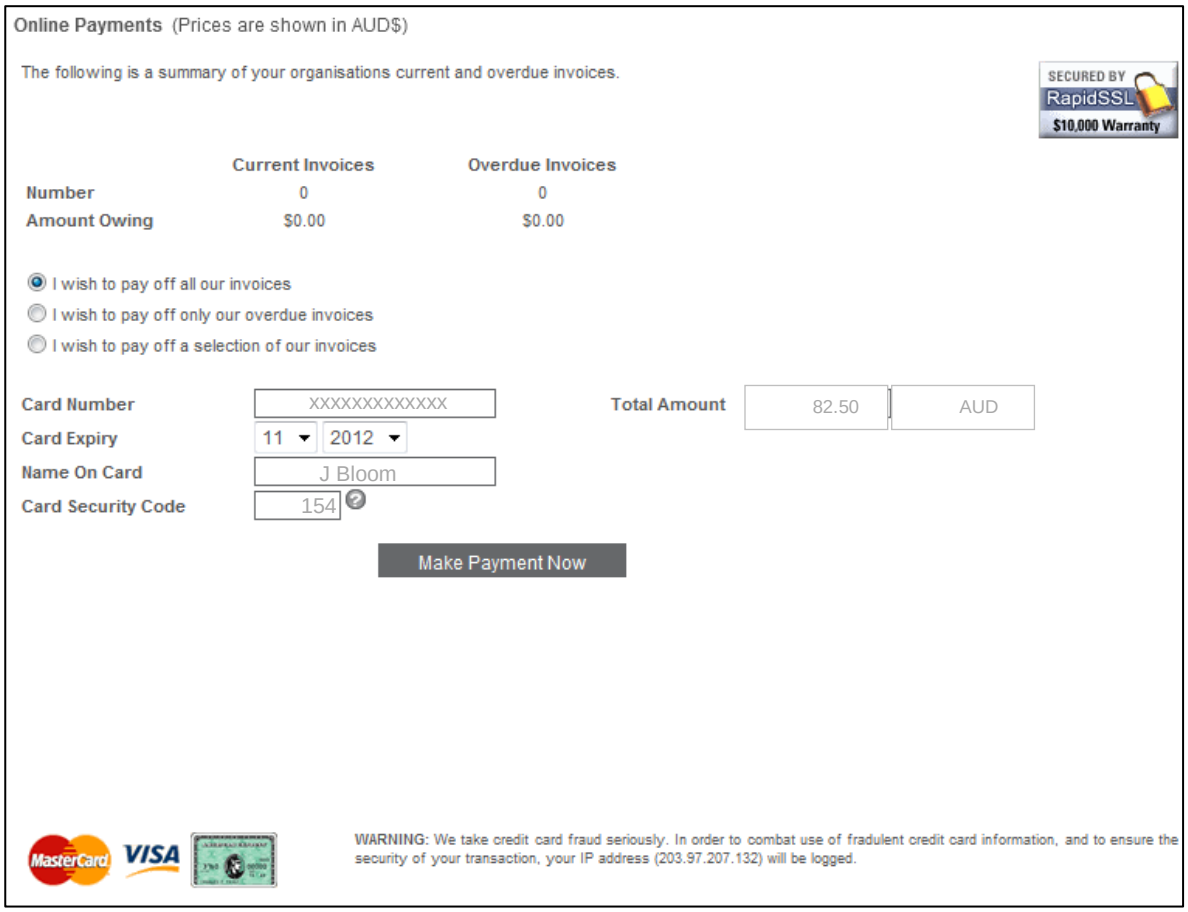


Figure 7: The Payment Options Screen.

5. Click **OK**.

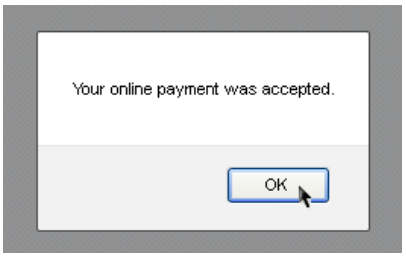


Figure 8: Payment Confirmation.

Download Documents

1. In the **Download Documents** screen (Figure 9) click on the **Download Documents** link to download the eRFx Notice Documents.

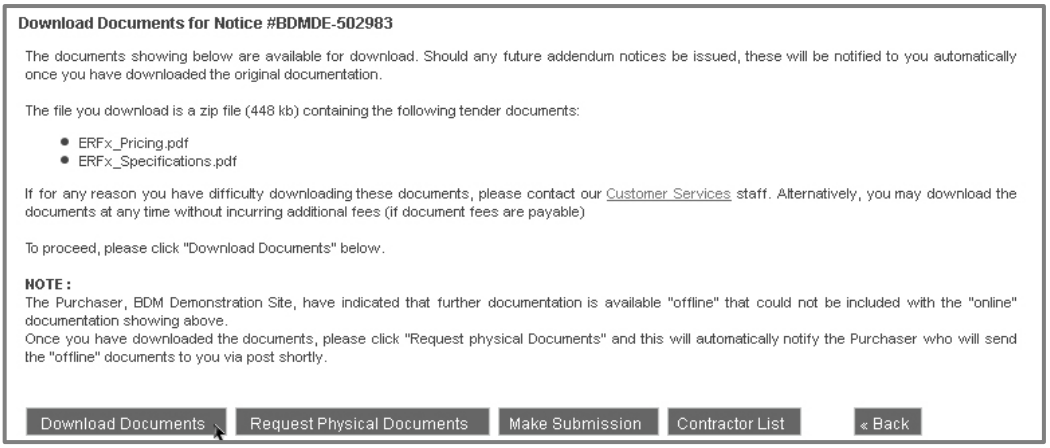


Figure 9: The Download Documents Screen.

2. You will be prompted to save (or open) the Zip file to your computer.

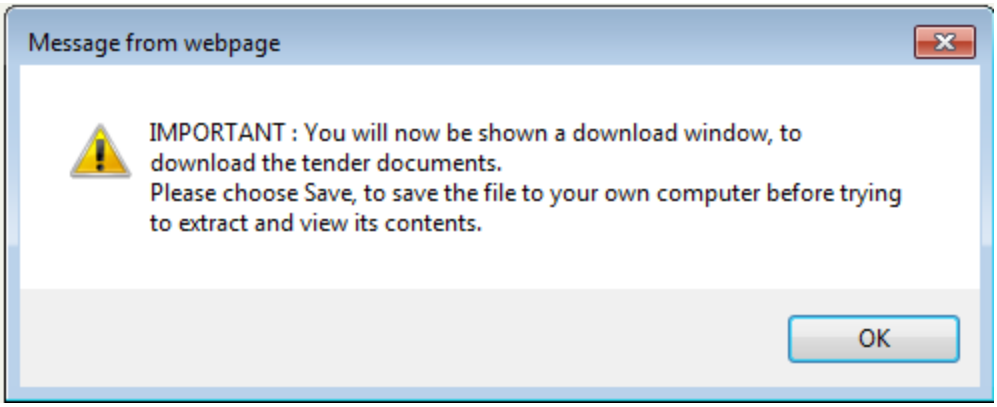


Figure 10: Important Download Note.

3. Click **OK** (Figure 10)**.**

Further Options on the Tender Details Screen

The **Tender Details** screen (Figure 4) has a list of actions available as links under the Options heading.

Requesting Physical Documents:

If there are physical documents that need to be obtained, you can request these via the document downloads screen.

1. Click on the **Request Physical Documents** button (Figure 9).
2. This will bring up the **Physical Documents for Tender** screen(Figure 11).
3. Ensure your address and phone number are correctly entered into the '**Your Physical Address'** fields.

4. Click on the **Request Physical Documents** button (Figure 10).

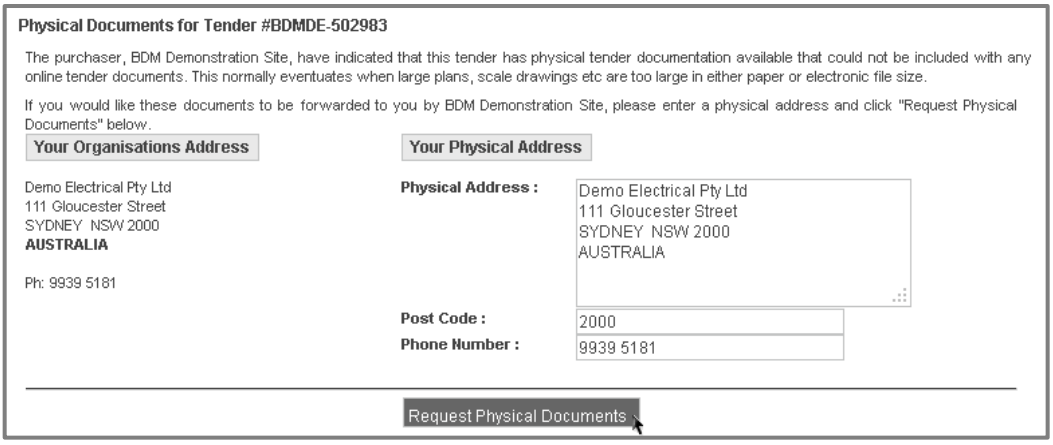
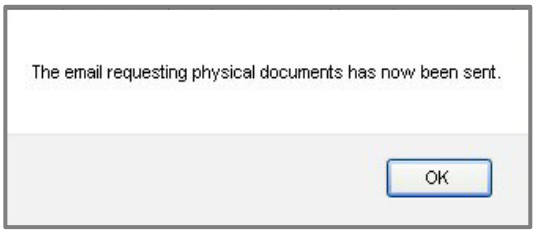


Figure 11: Request Physical Documents screen.



5. An alert screen will confirm that the documentation is being sent out to you.

Contractors List:

If the **Contractors List** link is available in the **Details for Notice** screen (Figure 4), you can view a list of suppliers (Figure 12) who have downloaded the eRFx Notice Documents, or have registered their interest.

1. Click on the link **Contractors List** (Figure 12).

2. Click the **Print** button to print the list. Note that the list is continuously updated as additional users download the documents.

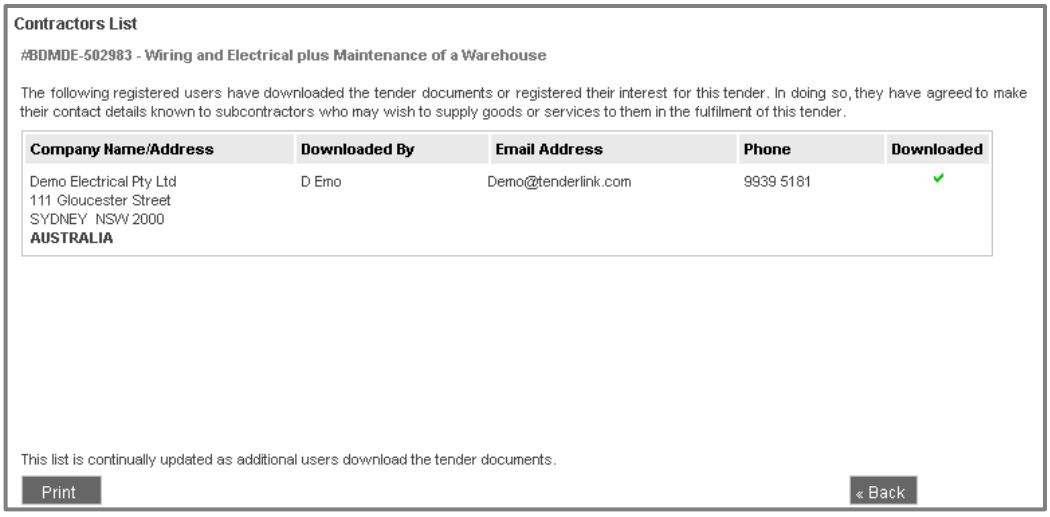


Figure 12: Contractors List Screen.

This Tender Has an Electronic Tender Box Available

Clicking on this link will take you through the four-step process outlined in this manual in the **Submissions** section.

Post Questions or Comments to the Online Forum for This Tender

Click this link to go to the forum posting screen. See the **Forums** section for more details.

Upcoming TenderLink Workshops

Click on Upcoming TenderLink Workshops to go to the Tendering For Success Seminars and Workshops page and view upcoming events.

Print This Tender Notice

Clicking on **Print this Tender Notice** will bring up your computers printing screen, enabling you to print the Tender Details.

Complete the Online Response Form to Respond to This Tender

For detailed instructions on submitting your response via the Online Response Form please refer to the Tender- Link Documentation: '**Evaluation For Suppliers: Responding to Tenders Via Online Response** Form '.

View Support Options for this Tender Notice

Clicking this link will display the options available for finding out more information about the eRFx Notice. These include a link to the Online Forum (for all enquiries relating to the eRFx Notice) and the email address and phone numbers of TenderLink's **Technical Support team**.

Need Assistance in Writing Tender Responses?

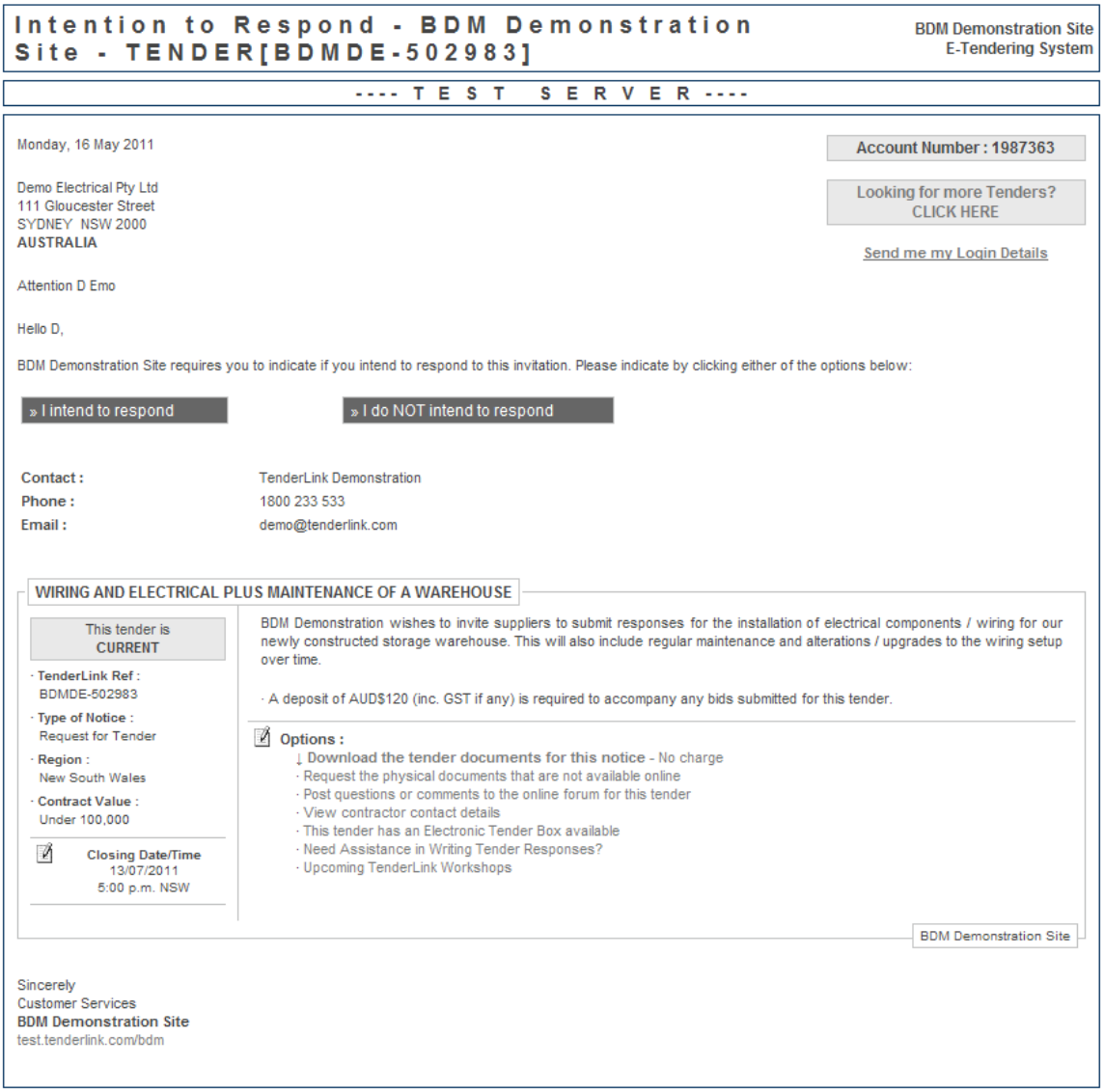
Clicking on **Need Assistance in Writing Tender Responses?** Will display a screen with links to experienced tender writers in Australia and New Zealand. TenderLink is not associated in any way with these service providers.

Intention to Respond

A purchaser may select to send an **Intention to Respond** email. This is typically sent out for private (select) eRFx notices. The purchaser sets how many days after the supplier has downloaded the documents that the Intention to Respond emails are sent.

1. Click on the '**I Intend to Respond'** to let the purchaser know that you will be making a submission.

2. Click on the '**I do NOT intend to Respond,** if you are not going to be making a submission.



Intention to Respond - BDM Demonstration Site - TENDER[BDMDE-502983]

BDM Demonstration Site
E-Tendering System

---- TEST SERVER ----

Monday, 16 May 2011

Account Number : 1987363

Demo Electrical Pty Ltd
111 Gloucester Street
SYDNEY NSW 2000
AUSTRALIA

Looking for more Tenders?
CLICK HERE

Send me my Login Details

Attention D Emo

Hello D,

BDM Demonstration Site requires you to indicate if you intend to respond to this invitation. Please indicate by clicking either of the options below:

» I intend to respond » I do NOT intend to respond

Contact : TenderLink Demonstration
Phone : 1800 233 533
Email : demo@tenderlink.com

WIRING AND ELECTRICAL PLUS MAINTENANCE OF A WAREHOUSE

This tender is CURRENT

· TenderLink Ref : BDMDE-502983
· Type of Notice : Request for Tender
· Region : New South Wales
· Contract Value : Under 100,000

Closing Date/Time
13/07/2011
5:00 p.m. NSW

BDM Demonstration wishes to invite suppliers to submit responses for the installation of electrical components / wiring for our newly constructed storage warehouse. This will also include regular maintenance and alterations / upgrades to the wiring setup over time.

· A deposit of AUD$120 (inc. GST if any) is required to accompany any bids submitted for this tender.

Options :
↓ Download the tender documents for this notice - No charge
· Request the physical documents that are not available online
· Post questions or comments to the online forum for this tender
· View contractor contact details
· This tender has an Electronic Tender Box available
· Need Assistance in Writing Tender Responses?
· Upcoming TenderLink Workshops

BDM Demonstration Site

Sincerely
Customer Services
BDM Demonstration Site
test.tenderlink.com/bdm

Figure 13: Intention to Respond Email.

3. Once you have selected your option, this will be reflected in the **Details of Notice** screen (Figure 4). You can change your selection by clicking on the button on the screen, or within the email that is sent out.

Forums

An online forum is an online discussion page where purchasers and suppliers can hold conversations in the form of posted messages. A supplier asks a question and the purchaser can respond. The question is not visible to other suppliers until the purchaser has responded to the question.

Viewing an online forum

1. In the **Dashboard** click on **All Open Tenders** (under the **Search Tenders** heading).

2. If an online forum has been established for an eRFx Notice by the purchaser, there will be a link in the eRFx notice details (also contained within the email sent to you).

3. Click on the eRFx Notice ID to view the notice details.

4. Click on **Post Questions or Comments to the Online Forum for this Tender** (Figure 14) to go to the forum.

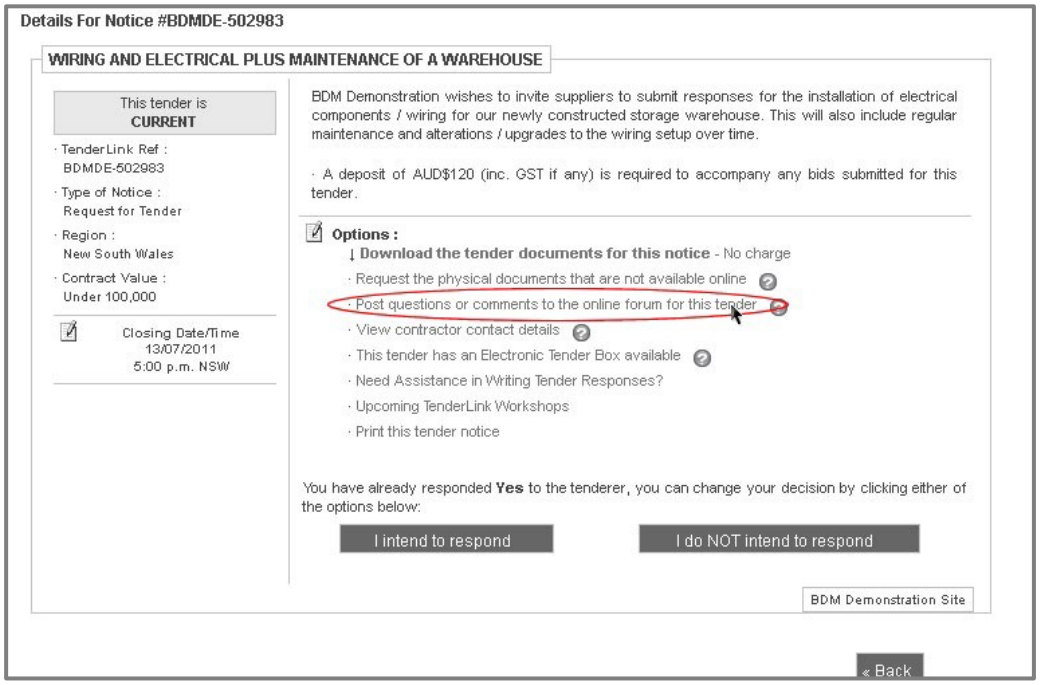


Figure 14: Navigation to Forum.

5. Alternatively you can click on **View Tender Forums** from the **Dashboard** screen (Figure 15)**.**

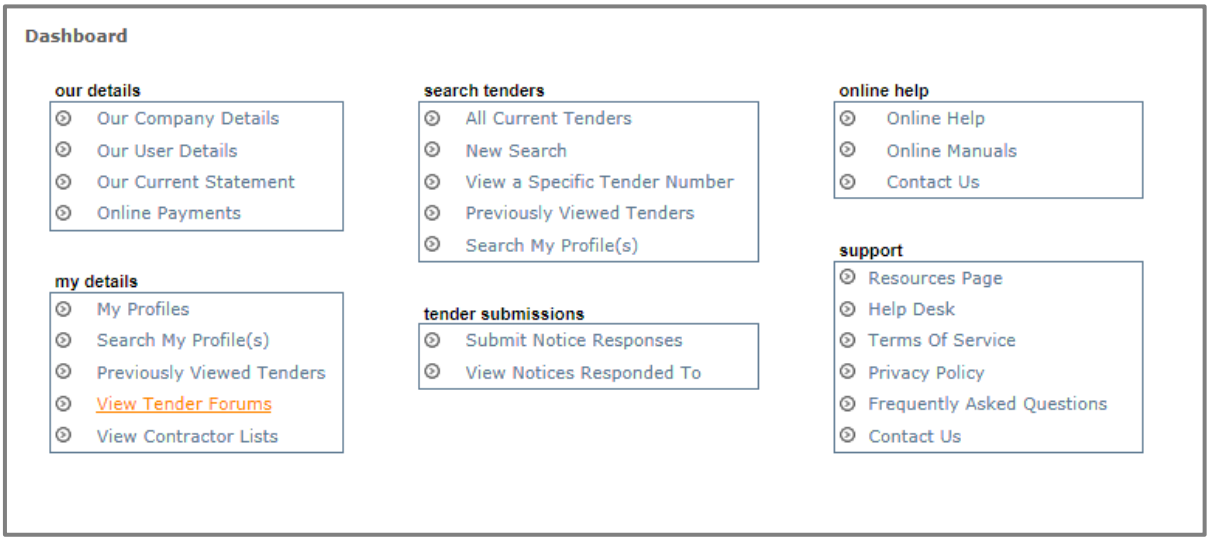


Figure 15: Navigation to Forum on the Dashboard.

6. Enter eRFx tender reference into the search field, or click List Tender Forums, to select eRFx Tender Notice (Figure 16).

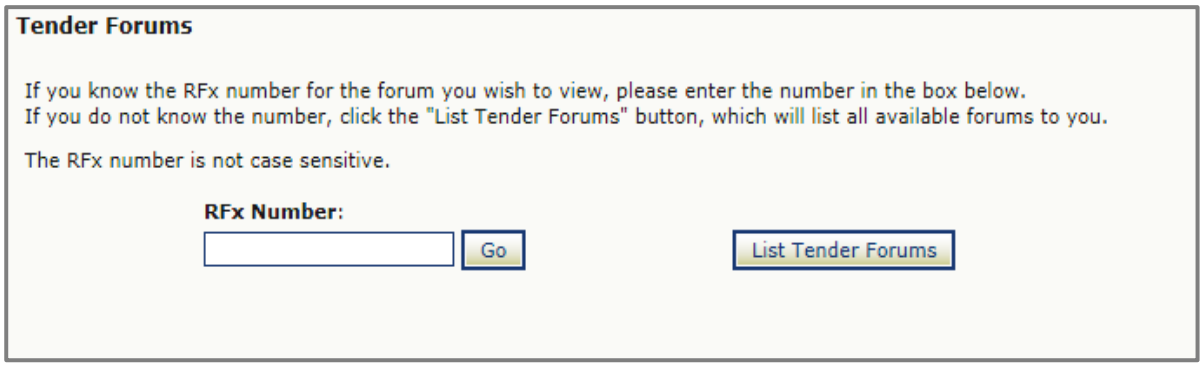


Figure 16: Select Forum for specific eRFx Tender Notice.

7. Once you have selected the eRFx Tender Notice, read and agree to the **E-Tendering Forum Code of Conduct** (Figure 17).

8. Click on the '**I agree to this Code of Conduct'** button to continue to the forum (Figure 17).

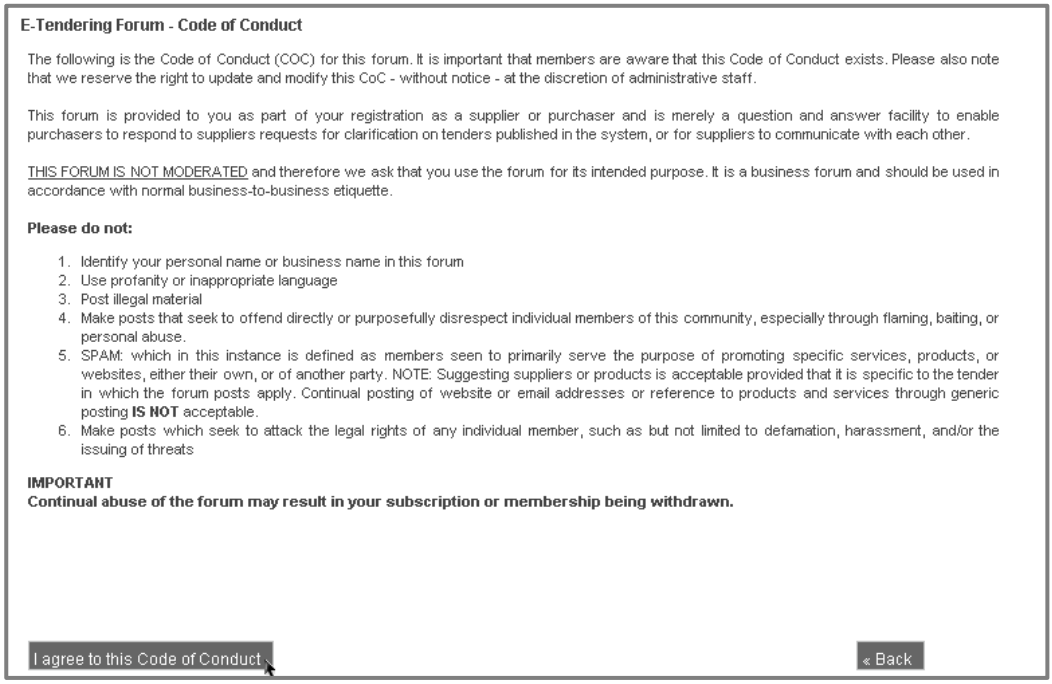


Figure 17: E-Tendering Forum - Code of Conduct screen.

Figure 18: Forum screen.

9. Click on the forum question subject under the **Question/Comment** heading, or the "notice board" icon to view the question and its replies.

10. You can also click on the **icon** to the right of the **Last Reply** heading. Holding the mouse over the icon will display the last reply.

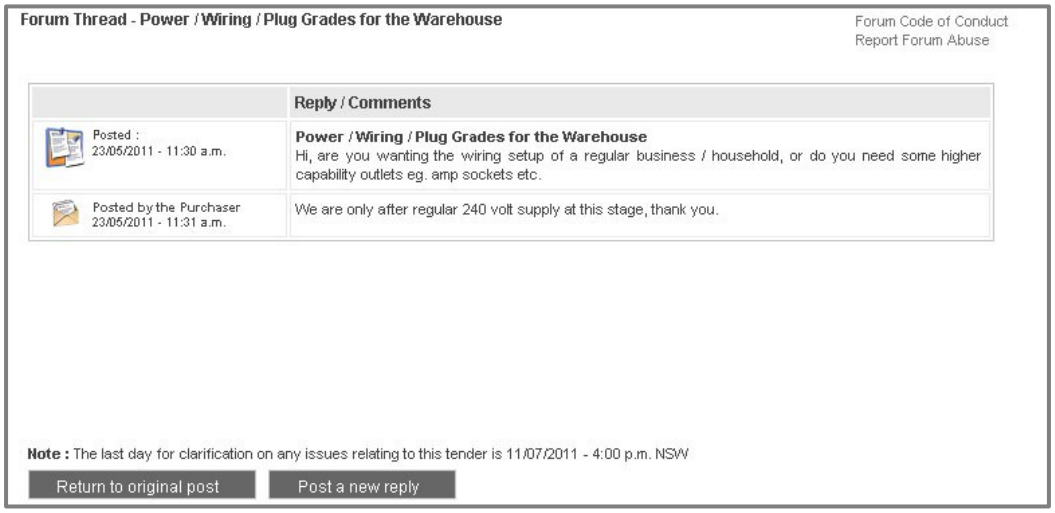


Figure 19: Forum Thread.

11. Click on the **Return to Original Post** button to go back to the list of forum questions (Figure 19).

! NOTE:

You can view the eRFx notice details and options again by clicking on the **Show Notice** button (Figure 18). Click on the forum question subject under the **Question/Comment** heading, or the "notice board" icon to view the question and its replies.

Posting a Question to the Forum

1. Click on the **Post a New Question** button in the forum screen (Figure 20).

Figure 20: Post a forum question.

2. In the **New Posting** screen (Figure 21) type a subject for your question into the **Subject field.**

3. Then type your question into the **Question / Comment to Add** field.

4. Click on the **>> Add Posting** button to add your question to the forum (Figure 21).

Figure 21: Add posting.

5. Click on **OK** to confirm your posting. Your details will not be displayed in the forum.

Figure 22: Confirm posting.

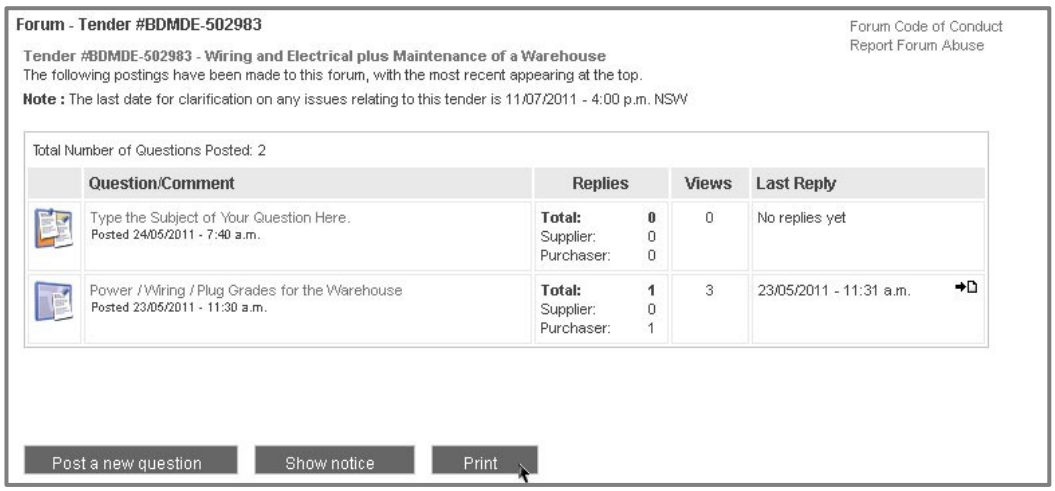


Figure 23: Question Posted.

Print Forum

1. Click the **Print** button (Figure 23) to print all questions / comments and replies for this tender forum.

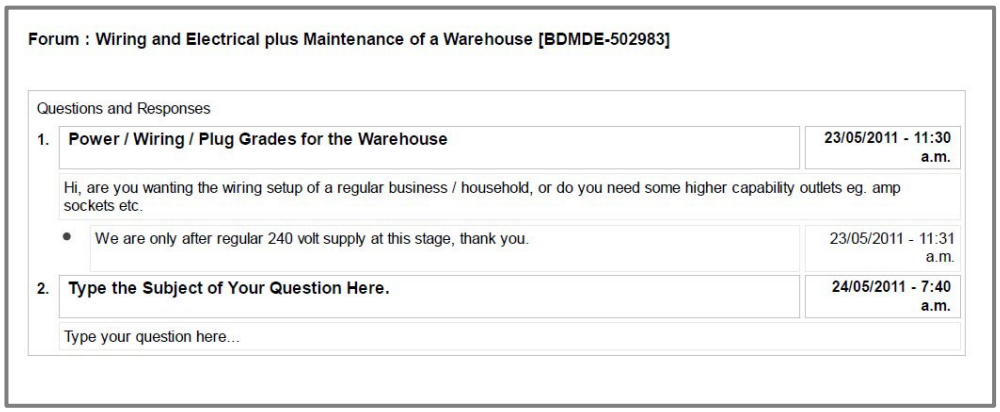


Figure 24: Forum questions and responses printed.

Submit Your Submission to an Electronic Tender Box

Use this manual to take you through the four simple steps of responding to an eRFx notice invitation.

1. In the **Dashboard** screen under the **Tender Submissions** heading, click on **Submit Notice Responses** (Figure 25)**.**

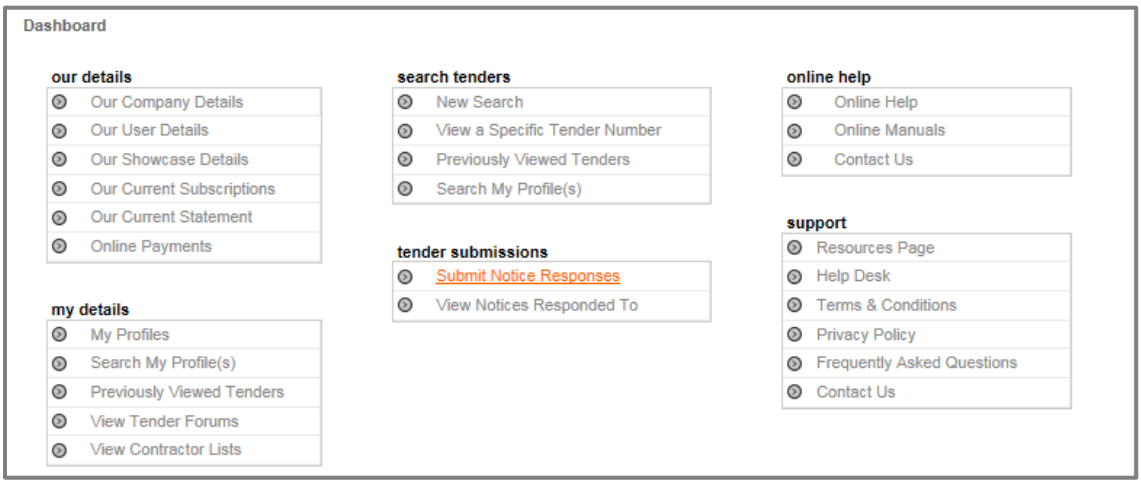


Figure 25: Select Make a Submission on the Dashboard.

2. Select the eRFx Notice you wish to make your submission to by clicking on the eRFx Notice ID. Alternatively, enter the eRFx Notice ID into the search field and click **Go** (Figure 26).

3. You will be taken through the four-step process, with the fourth step (uploading files to the ETBs) now called **Update Submission** (Figure 3).

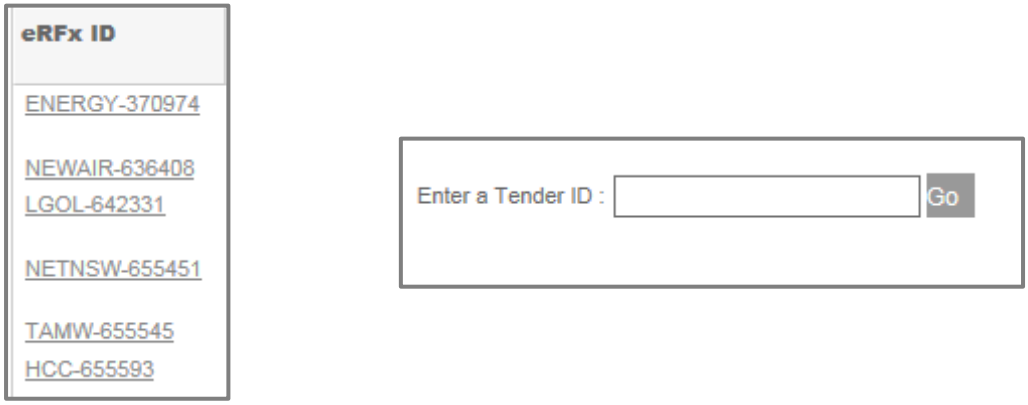


Figure 26: Select eRFx Notice to Make a Submission to.

Step 1: Information

The information screen (Figure 27) displays:

- Information about submitting files to the eRFx Notice.
- Approximate upload times for files of 10 MB/100 MB in size, dependent on your upload speed. This enables you to ensure you will have enough time to get your documents uploaded to the Electronic Tender Box(es) (ETBs) before the closing time.
- Click **Next** to go to step two - the **Confirm** step.

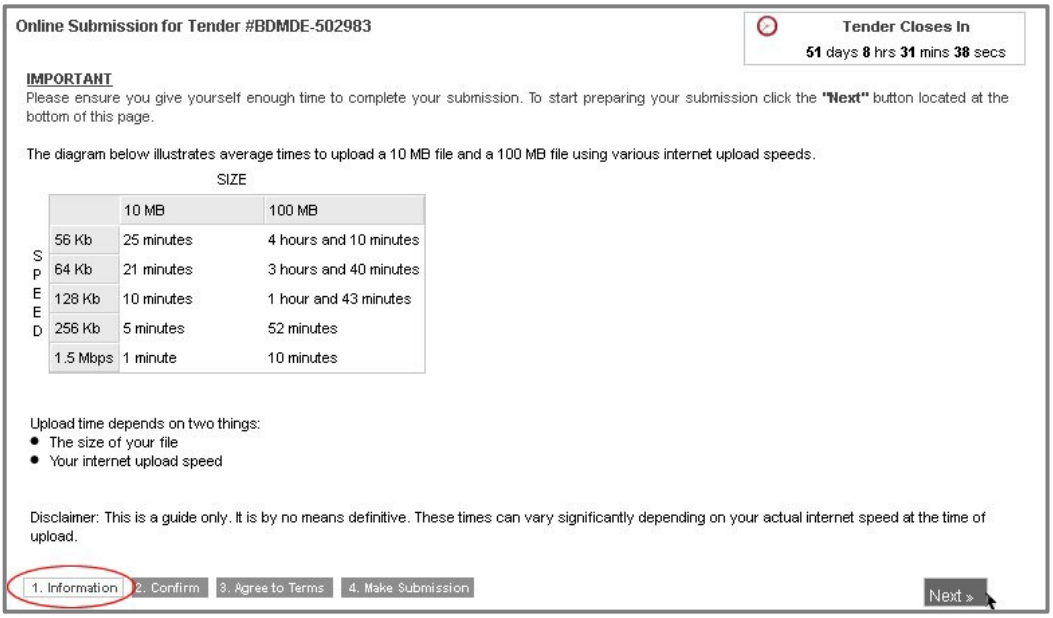


Figure 27: Online Submission step 1 – Information

Step 2: Confirm

Review the information about the eRFx Notice in the **Confirm** screen (Figure 286) to ensure that this is the notice you wish to make a submission to. This screen displays:

- The tender ID
- The number of ETBs
- The region
- Closing date and time
- Contract value (if available)
- Purchaser's description of the goods/services required

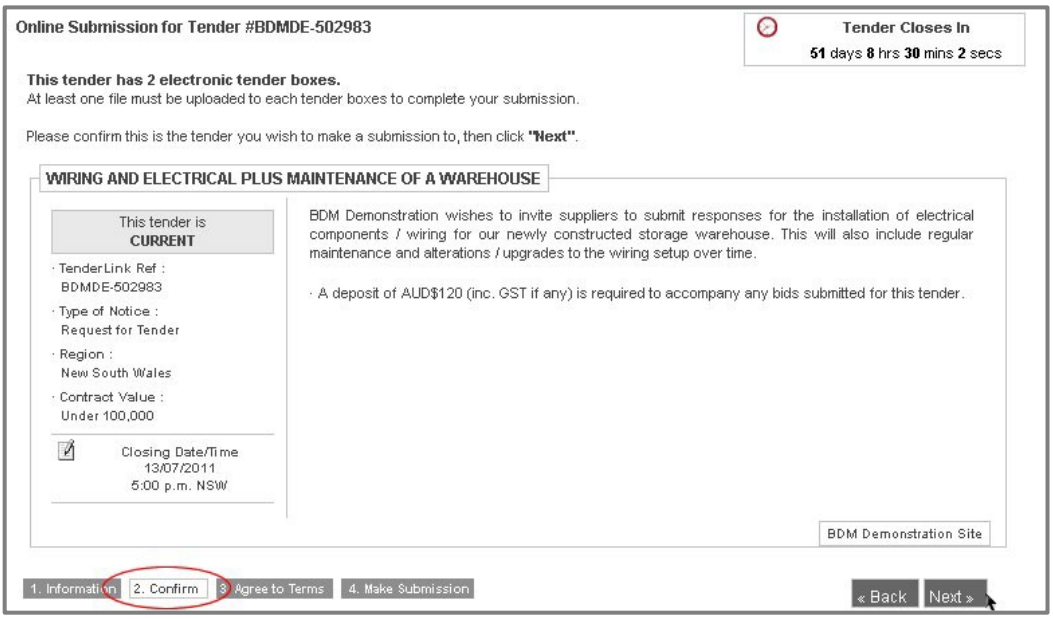


Figure 28: Online Submission step 2 – Confirm.

1. Click **Next** to go to **Step 3**, the **Agree to Terms** step.

Step 3: Agree to Terms

2. If the tender is a public tender, tick the box in the **Agree to Terms** screen (Figure 29), to agree to your company details being made public once the tender has closed.

3. Tick the box to agree to the TenderLink **Terms of Service.** The **Terms of Service** can be viewed by clicking on the word **here** in the last sentence (or under Support in the Dashboard menu).

4. Click **Next** to go **Step 4**, the **Make Submission** step.

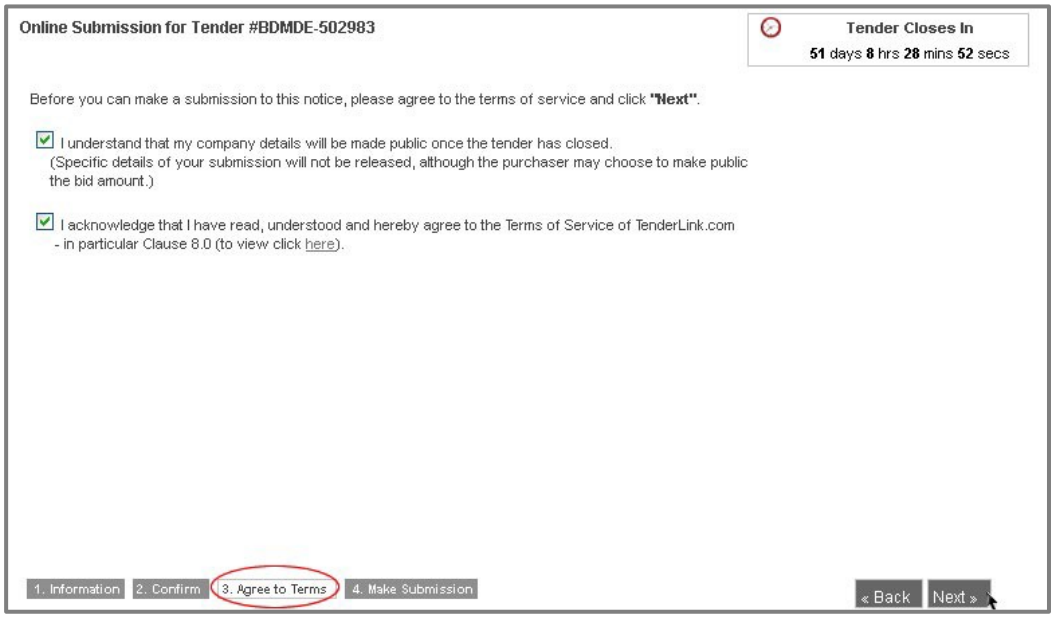


Figure 29: Online Submission step 3 - Agree to Terms.

Step 4: Make Submission

Uploading Files to the Electronic Tender Box

5. There may be one or more ETBs for a tender.

6. The example below shows that each has a separate tab within this screen the **eRFx Pricing** & **eRFx Specification** tabs (Figure 30).

7. Click on the tab to select the desired ETB, and then click on **Browse** to locate the file to be uploaded from your computer.

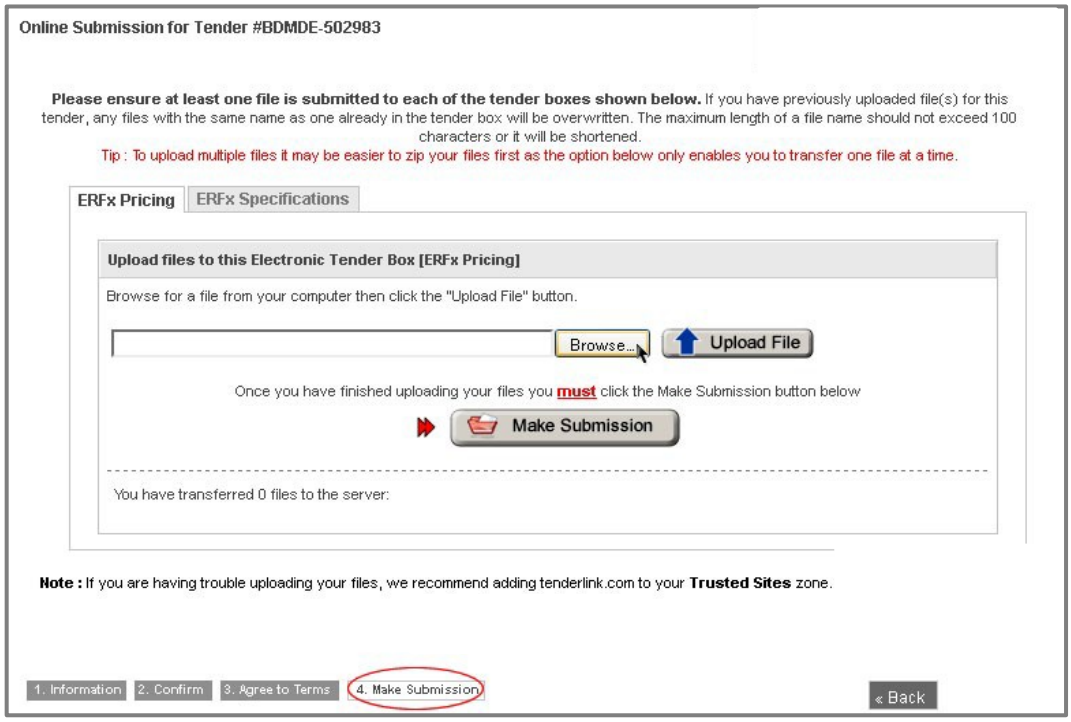


Figure 30: Online Submission step 4 - Make Submission.

8. Select the file to be uploaded and click on **Open**.

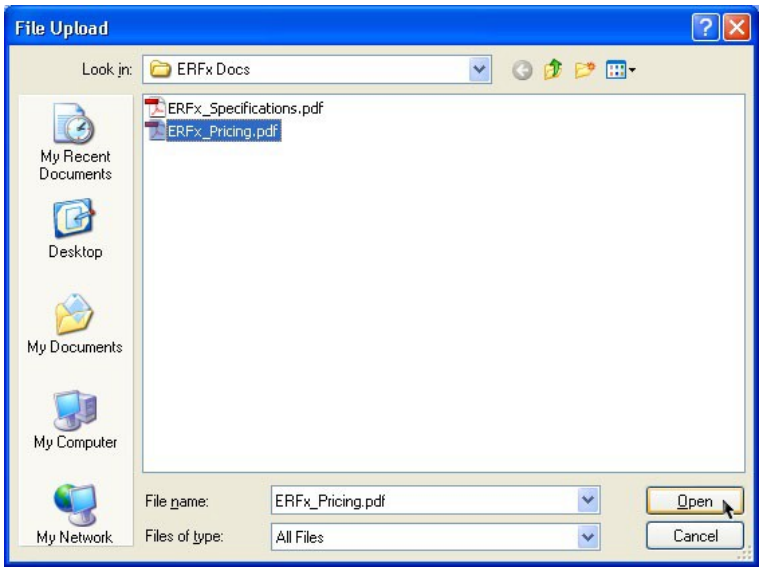


Figure 31: Select document to upload.

9. Click on **Upload File** (Figure 30). You can upload more than one file per ETB, just repeat this process.

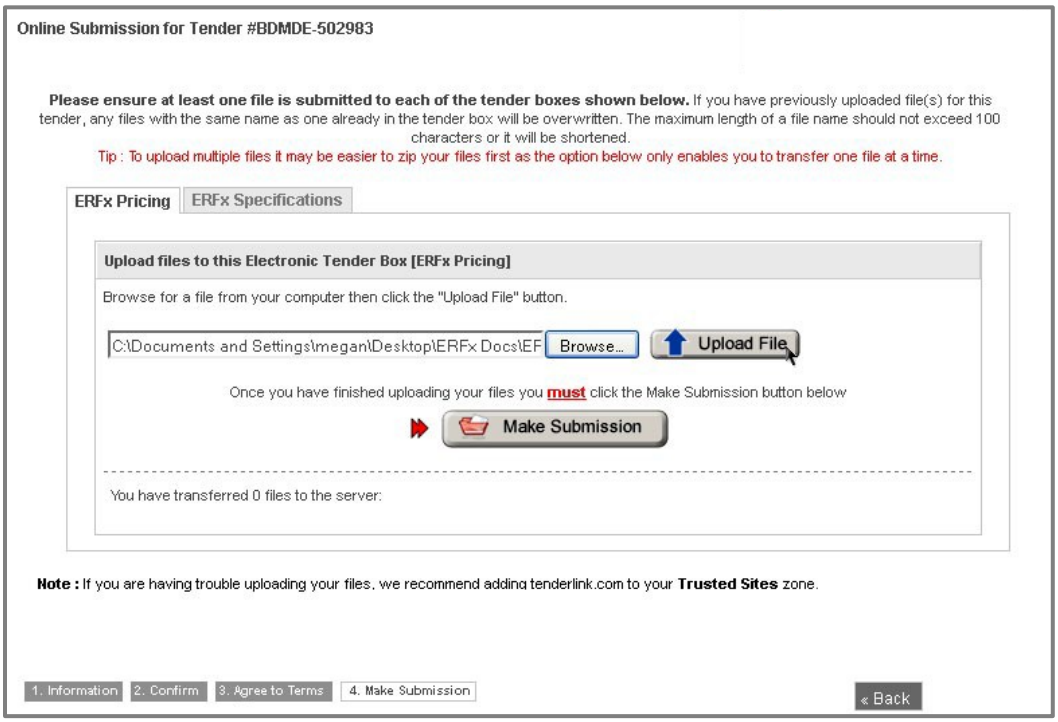


Figure 32: Upload file.

10. Files will be listed under the '**You have Transferred X Files to the Server'** heading, once upload is complete (figure 33).

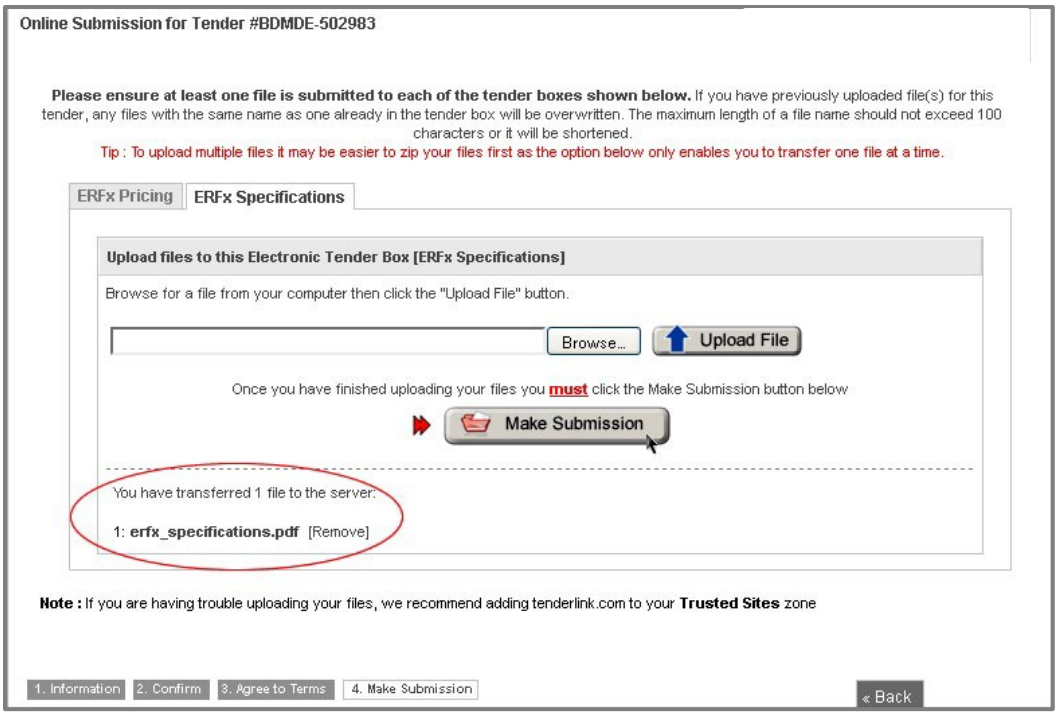


Figure 33: File uploaded ready to make submission.

11. You can click on **[remove]** (next to the transferred files' names) if you wish to delete any of your uploaded files (also see the **Updating Your Submission** section).

! NOTE:

When updating, the **[remove]** button will only appear next to files if you have at least two files uploaded, as a current submission must always have at least one file in each ETB.

12. When you have uploaded at least one file to each ETB click on the **Make Submission** button (you cannot make a submission without at least one file uploaded to each ETB).

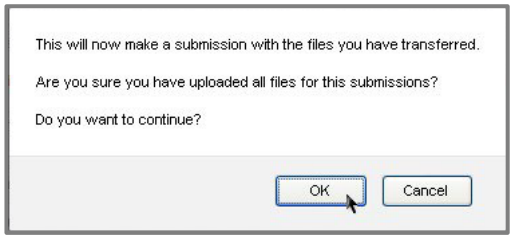


Figure 34: Confirm submission.

13. Click on **OK** to confirm your submission.

14. You must click on **Make Submission** before the close time of the eRFx Notice. If you have uploaded your files, but have not clicked the **Make Submission** button before the closing time, your eRFx response will not be accepted.

15. You will then be sent a **Receipt of Submission** (Figure 35) in an email, listing the submission details.

Receipt of Submission for TENDER [BDMDE-502983]

BDM Demonstration Site
E-Tendering System

---- T E S T S E R V E R ----

Monday, 23 May 2011

Account Number : 1987363

Looking for more Tenders?
CLICK HERE

Send me my Login Details

Demo Electrical Pty Ltd
111 Gloucester Street
SYDNEY NSW 2000
AUSTRALIA

Attention D Emo

Hello D,
This is an automated message from BDM Demonstration Site

Notice Type :	Request for Tender
TenderLink Ref Number :	BDMDE-502983
Closing Date/Time :	13/07/2011 - 5:00 p.m. NSW
Summary :	Wiring and Electrical plus Maintenance of a Warehouse
For :	BDM Demonstration Site

SUBMISSION DETAILS :

The following submission was made to the tender box **ERFx Pricing** :

Submission Made :	23/05/2011 - 8:37 a.m. (NSW)
Files Submitted :	erfx_pricing.pdf
Status :	Lodged in Tender Box

The following submission was made to the tender box **ERFx Specifications** :

Submission Made :	23/05/2011 - 8:36 a.m. (NSW)
Files Submitted :	erfx_specifications.pdf
Status :	Lodged in Tender Box

Submission of your tender has been time and date stamped as above. Once the tender has closed, the procuring party (Purchaser) will access the Electronic Tender Box to retrieve your submission file.

Have a nice day!

Sincerely
Customer Services
BDM Demonstration Site
test.tenderlink.com/bdm

Powered by www.tenderlink.com © TenderLink.com 2011. All rights reserved.

Figure 35: Receipt of Submission email.

Updating Your Submission

1. In the **Dashboard** screen under the **Tender Submissions** heading, click on **View Tenders Responded To.**

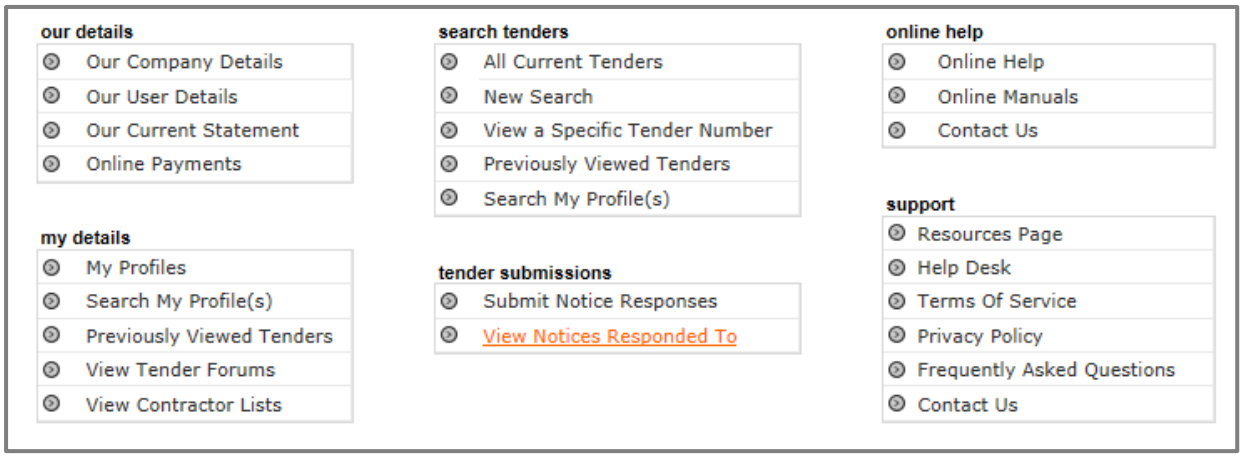


Figure 36: The Dashboard Screen.

2. Select the eRFx Notice you wish to update your submission for by checking the adjacent radio button and then click on the **Update Submission** button (Figure 37). This will allow you to add, overwrite and/or delete files from your submission.

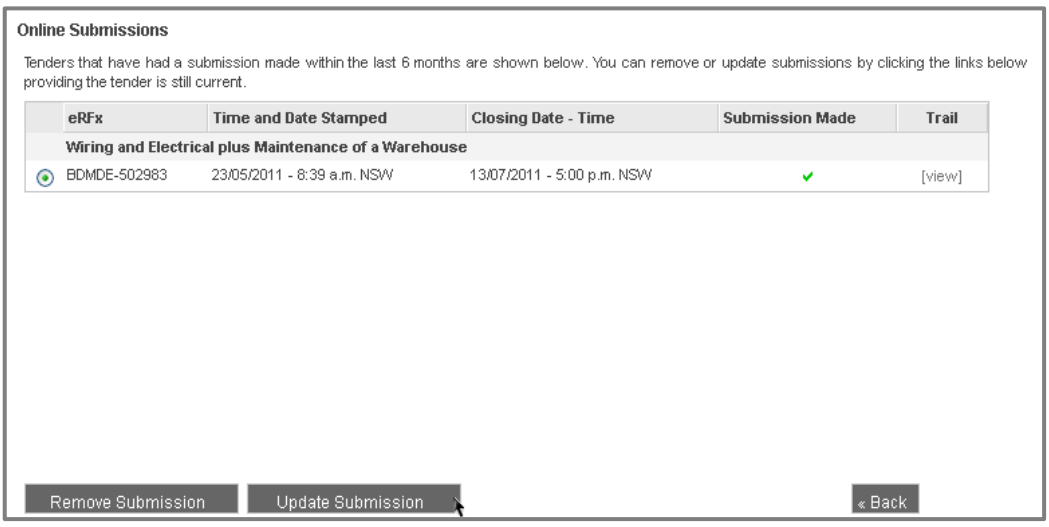


Figure 37: Online Submissions screen.

3. You will be taken through the four-step process again, with the fourth step (uploading files to the ETBs) now called **Update Submission** (Figure 38).

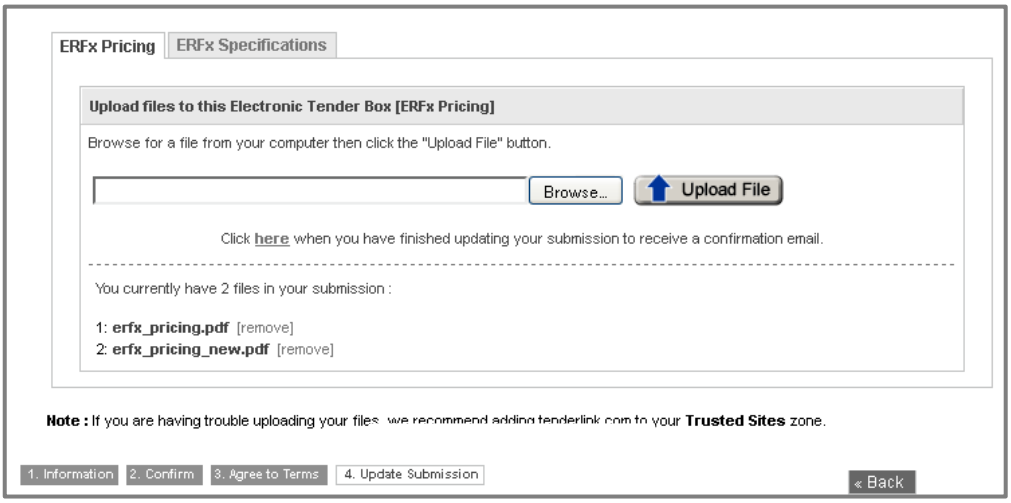


Figure 38: Update Submission screen.

Removing Your Submission

You may decide that you wish to withdraw your submission to an eRFx Notice.

1. To remove your submission, check the radio button to the left of that eRFx Notice in the **Online Submissions** screen (Figure 37).

2. Click on **Remove Submission**. You will be taken to the **Withdraw Tender Submission** screen (Figure 39).

3. Check that the Tender ID number is correct and then click on the **Remove My Submission** button.

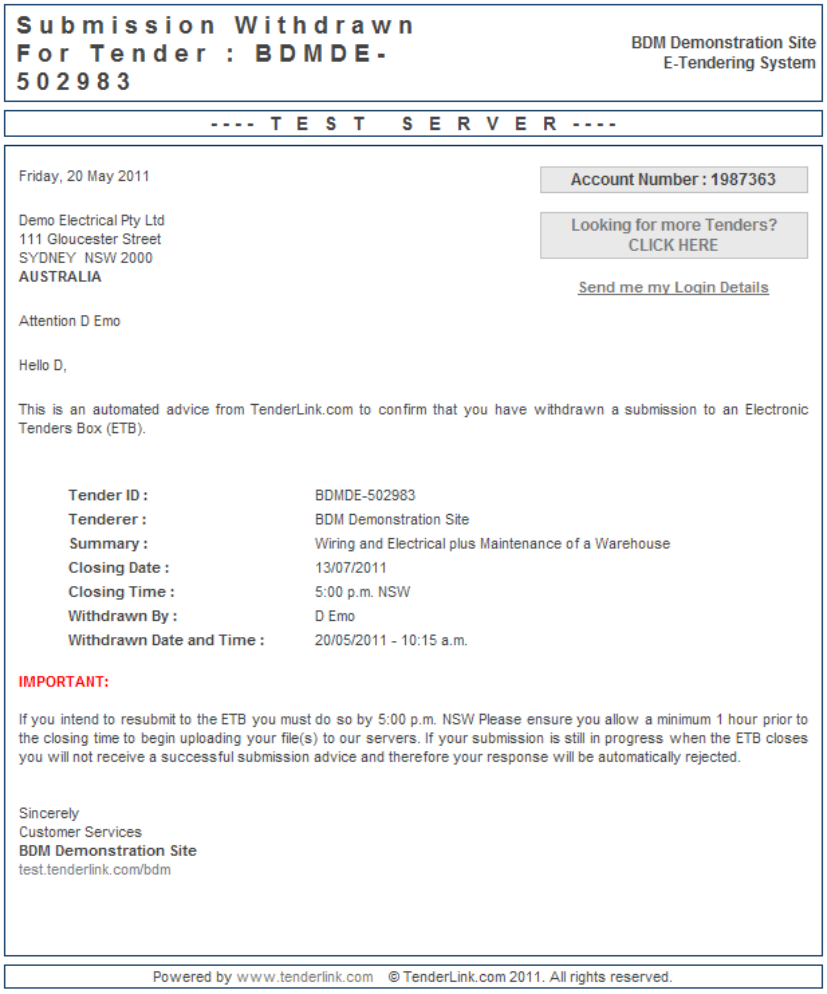
Figure 39: Withdraw Tender Submission screen.

! Warning

Clicking on **Remove My Submission** will completely remove your submission and all files associated with it.

4. After removing your submission you will be returned to the **Online Submissions** screen and a red X will have appeared next to the eRFx Notice in the **Submission Made** column.

5. You will then receive a **Submission Withdrawn** email (Figure 40).



Submission Withdrawn For Tender : BDMDE-502983

BDM Demonstration Site
E-Tendering System

---- TEST SERVER ----

Friday, 20 May 2011

Account Number : 1987363

Demo Electrical Pty Ltd
111 Gloucester Street
SYDNEY NSW 2000
AUSTRALIA

Looking for more Tenders?
CLICK HERE

Send me my Login Details

Attention D Emo

Hello D,

This is an automated advice from TenderLink.com to confirm that you have withdrawn a submission to an Electronic Tenders Box (ETB).

Tender ID :	BDMDE-502983
Tenderer :	BDM Demonstration Site
Summary :	Wiring and Electrical plus Maintenance of a Warehouse
Closing Date :	13/07/2011
Closing Time :	5:00 p.m. NSW
Withdrawn By :	D Emo
Withdrawn Date and Time :	20/05/2011 - 10:15 a.m.

IMPORTANT:

If you intend to resubmit to the ETB you must do so by 5:00 p.m. NSW Please ensure you allow a minimum 1 hour prior to the closing time to begin uploading your file(s) to our servers. If your submission is still in progress when the ETB closes you will not receive a successful submission advice and therefore your response will be automatically rejected.

Sincerely
Customer Services
BDM Demonstration Site
test.tenderlink.com/bdm

Powered by www.tenderlink.com © TenderLink.com 2011. All rights reserved.

Figure 40: Submission Withdrawn email.

Reviewing Your Submission

In the **Dashboard** screen:

1. Click on **'View Tenders Responded To'** in order to go to the **Online Submissions** screen and see if your submission has been made successfully.

2. A **green tick** under the **Submission Made** heading means your submission was successful and a red X means a submission has not been made, was unsuccessful or has been removed.

3. Under the **Trail** heading, click on **[view]** to see the Submission Trail (Figure 41).

Figure 41: View submission trail.

4. This displays the Actions Performed (the files that were uploaded/changed in each ETB) and that you were sent a confirmation email for that submission.

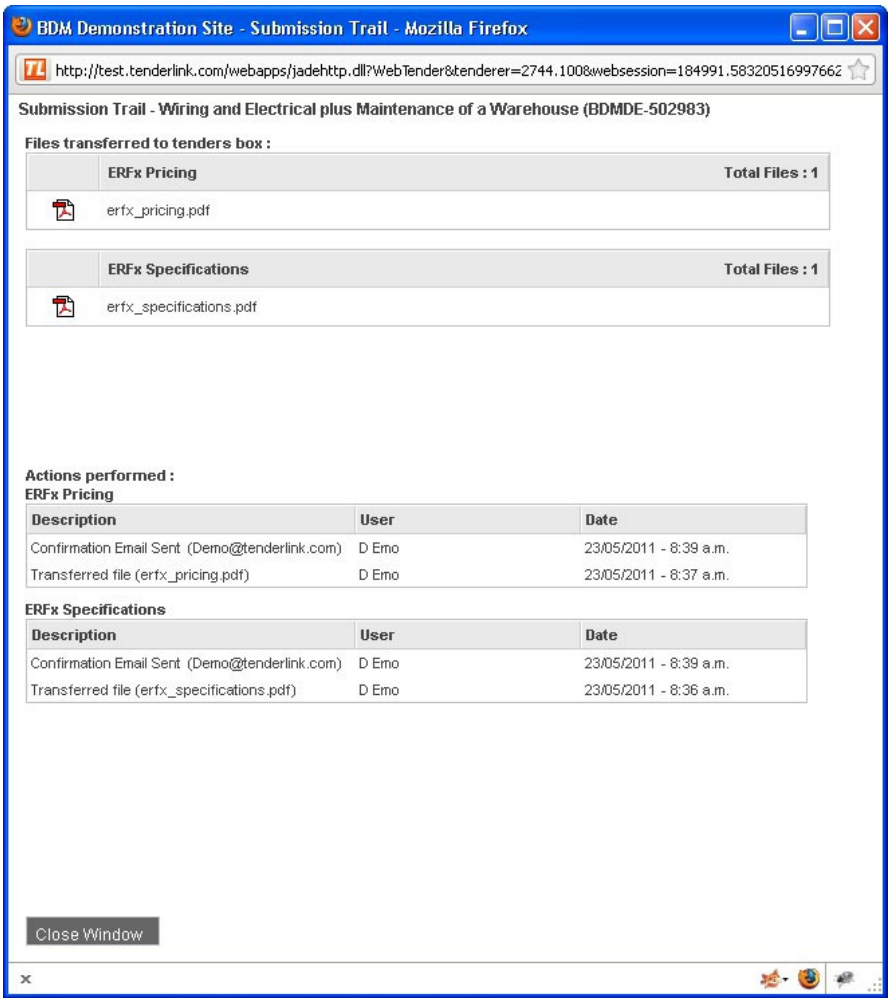


Figure 42: Submission Trail screen.

Submit Your Submission via Online Response Form

Some purchasers request that your submission be made by **Online Response Form**. This option will be available in the Tender Details Options list if this is the case.

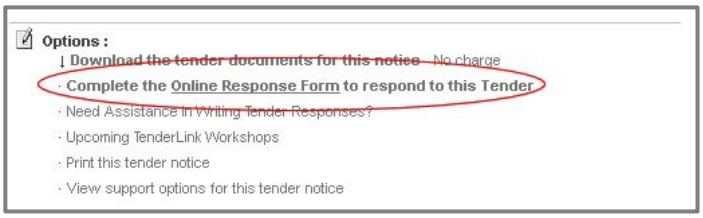


Figure 43: Online Response Form option.

An **Online Response Form** is a part of TenderLink's Evaluation Module and is completed by Suppliers within the browser. The Response Form will allow you to enter answers to Criteria / Requirements comprising the specification for a procurement exercise.

For detailed instructions on submitting your response via the Online Response Form please refer to the TenderLink Documentation - **'Evaluation For Suppliers: Responding to Tenders Via Online Response Form '**.

Located on the **Dashboard** under the heading **Online Help:**

1. Click on **Online Manuals**.

Permissions

Administrator

If a user has Administrator Permissions they may perform all functions related to the tender process, such as viewing tender details, submitting and editing tender responses. Administrators can also set up users and assign permissions.

Basic User

If a user has Basic Permissions they may perform all functions related to the tender process, such as submitting and editing tender responses.

Read Only

If a user has Read Only Permissions they cannot perform any functions related to the tender process, such as viewing tender details, submitting and editing tender responses. They can only view tender details and responses.

Technical Support:

Phone: **1800 233 533 (Australia)**
0800 698 363 (New Zealand)

Email: **support@tenderlink.com**

TenderLink employees are not able to assist with general enquiries about an eRFx Notice. Use the forum or any contact details for the purchaser as provided within the tender documentation.

Glossary of Terms

E-Tendering Portal
Electronic tendering web site.

SaaS
Software-as-a-Service.

Supplier
A Supplier or Vendor completes a response to an eRFx Notice.

Purchaser
A Purchaser completes an eRFx Notice to obtain responses for a tender.

Electronic Tender Box - ETB
Contains Responses to a tender.

Evaluation Module
Available for Purchasers to use that enables Suppliers to complete a response to an eRFx Notice, providing answers to criteria / requirements in an online form.

Dashboard
Summarises the options available to you and provides links to these. Also provides links to resources and your personal / company settings.

ZIP File
The ZIP file format is a data compression format. A ZIP file contains one or more files that have been compressed, to reduce file size.