

# **Exercise 5**

## **Surrogate Bidding**

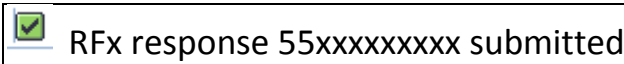
## **Exercise 5: Surrogate Bidding**

1. Click on the **‘Strategic Purchasing’** tab at the top of the screen.
2. Click on **‘Strategic Sourcing’** from the blue menu bar on the left-hand side of the screen.
3. Under the **‘Active Queries’** heading, click on **RFxs ‘All’**. This will generate a list of all solicitations regardless of their status.
4. Click on the **RFx Number** that was created in Exercise 1. This will open the RFx in a new window. NOTE: Maximize the window to complete the remaining steps.
5. Click **‘Edit’**.
6. Extend the **‘Submission Deadline’** (time and date if applicable) to allow entry of the surrogate bidder’s response. Remove the opening date.
7. Click the **‘Notes and Attachments’** Tab.
8. Click the **‘Add’** button on the left hand side of the screen and choose **‘Tendering text’** from the pull down menu so you can add an administrative statement.

**Tip:** The pull down menu will give you two choices of tendering text; the first one is for tendering text at the header level and the second is at line item level. The administrative text should be added at the header level. Below is an **example** of an appropriate administrative statement:

**“This solicitation is being opened for administrative purposes only to add surrogate bidder’s response(s). No other responses will be accepted.”**
9. Click **‘OK’** to close the Tendering text.
10. Click **‘Publish’**. The RFx must have a status of ‘Published’ in order for you to add the Surrogate Bidder’s pricing information. Click the **‘Refresh’** icon to see the status change from **‘In Process’** to **‘Published’**.

11. Click **‘Responses and Awards’**.
12. Click **‘Surrogate Bidding’** tab, if your bidder does not appear in the list on the **‘Response Activity’** Tab.
13. Enter the vendor’s name in the **‘Company Name’** 1 field using wildcards (\*) as necessary. In this exercise, enter **“RGB\*”**.
14. Click **‘Search’**.
15. Select the vendor for the surrogate bid and click **‘Register’**
16. Repeat steps 13 – 15 to add vendor Castles Engineering.
17. Click **‘Response Activity’** tab
18. Click the **‘Refresh’** icon to update the list of bidders.
19. Click **‘Expand Rows’** on the upper right portion of the screen.
20. Highlight the bidder for whom you wish to create a surrogate bid (each bidder will be displayed twice, select the one with the name of the contact person in the **‘Bidder Name’** column.). In this Exercise, choose RGB Terpworks – Robin Burgess Mack.
21. Click **‘Response on Behalf’** and select **‘Create’** from the Drop Down Box. This will open a new **‘Create Document’** window.
22. Click **‘Questions’** to enter the vendor responses to the questions in the solicitation. The answers should be in the hard copy bid response from the vendor.

23. Click **'Items'** enter the bidder's price for each Line Item in the **"Price"** field.
24. Click **'Details'**
25. Click **'Questions'** to answer any questions from the RFx at the item level.
26. Click on **'Check'** to refresh changes and to view any error messages. If you need to attach a response from the bidder, you will need to go to the **'Notes and Attachments'** tab. Bid documents are attached to a bid response the same as solicitation documents are attached to an RFx.
27. Click **'Submit'** to enter the Surrogate Bidder's response. You will see the following message;
- A screenshot of a confirmation message in a software interface. It features a small green checkmark icon in a square box on the left, followed by the text "RFX response 55xxxxxxxx submitted" in a standard sans-serif font. The entire message is enclosed in a thin black rectangular border.
28. Select **'Close'**
29. Repeat steps 20-28 to enter a surrogate bid for Castles Engineering.
30. Click **'Refresh'** to see the bidders' ten digit, Bidder Response number; this number will be in blue. **Tip:** Bidder response numbers start with **'55xxxxxxxx'**.

**Surrogate Bid Entered:** \_\_\_\_\_