# **Creating A Late Proposal – Proposal Manager**

# **Training Document**

Homepage

Solicitation

Solicitation Homepage

Search

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# Roles

The role(s) required to Create a Late Offer submitted for review by a Solicitation Manager in the Solicitation module:

Proposal Manager

This guide provides an overview of how a **Proposal Manager** creates a Late Offer in the **Solicitation** module for solicitation with a **Response Date** in the past for review by an assigned Solicitation Manager.

Log in to PIEE as a Proposal Manager user to access the Solicitation application. Select **Search** in the navigation bar to begin the Late Offer process.

# User Navigation





Enter known data of the existing notice in the Notice Search Criteria fields.

# Notice Search Criteria

#### Notice Search Criteria Fields:

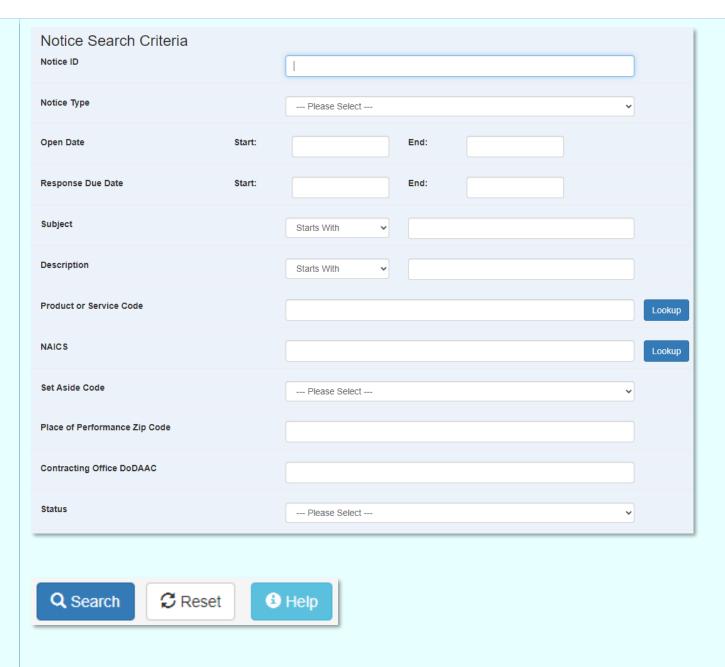
- Notice ID (up to 127 alphanumeric characters including special characters)
- Notice Type (options: Special Notice / Solicitation / Combined Synopsis/Solicitation / Presolicitation / Sources Sought / Consolidate/(Substantially) Bundle / Justification and Approval / Award Notice)
- Open Date (subfields: Start / End: format YYYY/MM/DD)
- Response Due Date (subfields: Start / End; format YYYY/MM/DD)
- Subject (parameters: Starts With / Equal To / Contains / Ends With)
- Description (parameters: Starts With / Equal To / Contains / Ends With)
- Product or Service Code (must be valid codes in database)

- NAICS (must be valid codes in database)
- Set Aside Code (searchable drop-down)
  - Total Small Business Set-Aside
  - Partial Small Business Set-Aside
  - o 8(a) Set-Aside
  - Historically Underutilized Business (HUBZone) Set-Aside
  - o Service-Disabled Veteran-Owned Small Business (SDVOSB) Set-Aside
  - o Women-Owned Small Business (WOSB) Program Set-Aside
  - Economically Disadvantaged WOSB (EDWOSB) Program Set-Aside
  - 8(a) Sole Source
  - o Historically Underutilized Business (HUBZone) Sole Source
  - o Service-Disabled Veteran-Owned Small Business (SDVOSB) Sole Source
  - o Women-Owned Small Business (WOSB) Program Sole Source
  - Economically Disadvantaged WOSB (EDWOSB) Program Sole Source
  - Local Area Set-Aside
  - Competitive 8(a)
  - Economically Disadvantaged Woman Owned Small Business
  - Emerging Small Business
  - o HUBZone
  - Partial HBCU / MI
  - Partial Small Business
  - Service-Disabled Veteran-Owned Small Business
  - Total HBCU / MI
  - Total Small Business
  - Veteran-Owned Small Business
  - Woman Owned Small Business
- Place of Performance Zip Code (must be 5 numeric characters)
- Contracting Office DoDAAC (must be 6 alphanumeric characters; excluding special characters)
- Status (options: Open / Closed / No Response Due Date)

Click the **Search** button to view search results.

#### **Buttons:**

- Lookup (button displays beside the 'Product or Service Code' and 'NAICS' fields; leads to Lookup search pop-ups)
- Search (leads to search criteria results screen)
- Reset (clears fields in search form)
- Help (displays help information)



NOTE: If a search is generated without any criterion, all notices created in the database to which the user has access (regardless of status) are returned in the search results.

NOTE: 'Product or Service Code' and 'NAICS' codes are populated in field once selected from Lookup pop-up.

# **Product or Service Code Lookup Pop-Up:**

To search for the Product or Service Code, click the **Lookup** button. A pop-up displays.

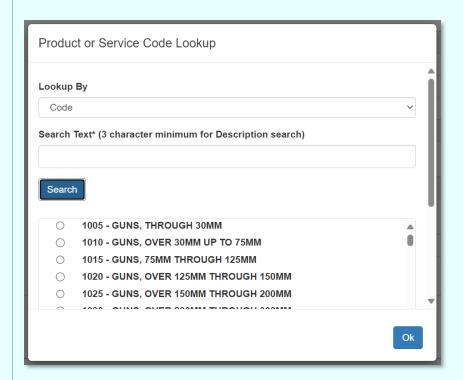
Enter required fields and click the **Search** button. The results for **Product or Service Code** appear at the bottom of the pop-up. Select a code and click **OK**.

## Product or Service Code Lookup Pop-Up Fields:

- Lookup By (option: Code / Description)
- Search Text \* (user must enter at least 3 characters to search by "Description"; field can remain blank if searching by "Code")

#### Pop-Up Buttons:

- Search
- Ok (closes the pop-up if fields are blank; if the Product or Service Code is selected, closes pop-up, and populates name in designated field)



NOTE: Select the entry best describing the overall acquisition for notices with multiple goods or services.

# **NAICS Lookup Pop-Up:**

To search for the NAICS, click the **Lookup** button. A pop-up displays.

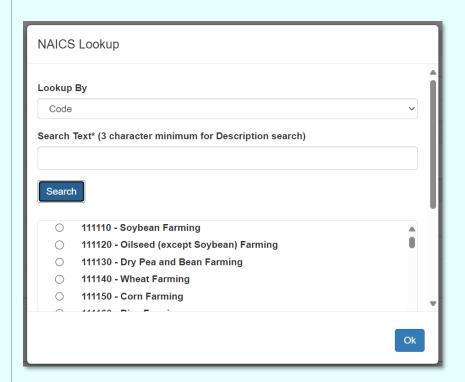
Enter required fields and click the **Search** button. The results for **NAICS** appear at the bottom of the pop-up. Select a code and click **Ok**.

# NAICS Lookup Pop-Up Fields:

- Lookup By (options: Code / Description)
- Search Text \* (user must enter at least 3 characters to search by "Description"; field can remain blank if searching by "Code")

#### Pop-Up Buttons:

- Search
- Ok (closes the pop-up if fields are blank; if the NAICS is selected, closes pop-up and populates name in designated field)



NOTE: Select the entry best describing the overall acquisition for notices with multiple goods or services.

Search Results appear on a new screen. Select the Notice ID hyperlink to view the existing notice.



#### Search Result Headers:

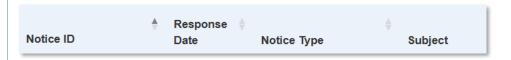
- Notice ID (hyperlink)
- Response Date
- Notice Type
- Subject
- Description
- Restricted
- Status
- PIEE Posted Date
- PSC
- NAICS
- Contracting Office Name
- Set Aside
- Number of Updates

#### Search Result Fields:

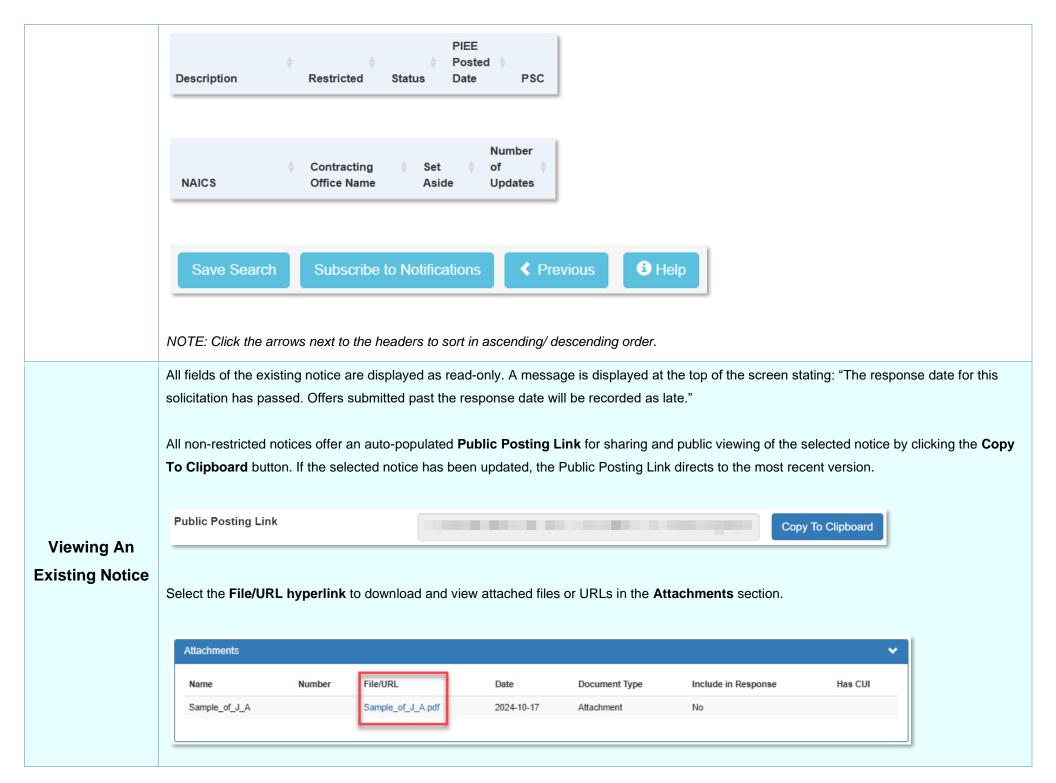
- Show # Entries (options: 20 / 40 / 60 / 80 / 100; controls number of entries appearing on each page)
- Search (can filter results by keywords entered by the user)

#### **Buttons:**

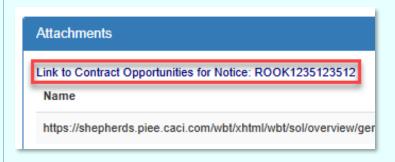
- Save Search (leads to Save Search pop-up)
- Subscribe to Notifications (leads to Subscribe to Notifications pop-up)
- Previous (to navigate back to Create Notice screen)
- Help (displays help information)







Notices that have been successfully posted to Contract Opportunities display directs links to their corresponding entries on SAM.gov.



#### **Buttons:**

- Save as PDF (to download opened notice to local machine)
- Previous (leads back to Search Results)
- Home (to navigate back to the Solicitation Module home screen)
- Download All Attachments (to bulk download attachments)
- Help (displays help information)

# **Update / Notice History**

An Update / Notice history section is displayed at the bottom of the page documenting the number of updates of the selected notice. Updates are listed on the table in order of most recent Posted Date.

Click the **Update / Notice ID** hyperlink to view previous updates.

# Update / Notice Headers:

- Update / Notice ID (hyperlink)
- Description
- Posted Date (format: YYYY/MM/DD HH:MM UTC)
- Response Date (format: YYYY/MM/DD HH:MM Time Zone)



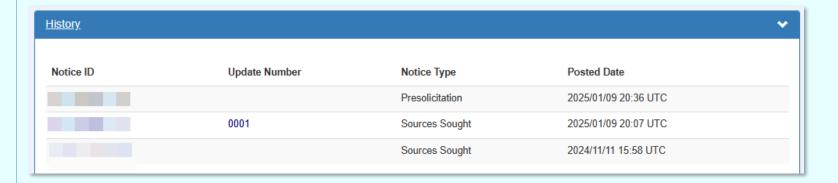
# **Related Notice History**

A **History** section is displayed at the bottom of the page listing the history and updates of the base notice and all previously created related notices in order of most recent Posted Date.

Click the **Notice ID** or **Update Number** hyperlink to view the related notice or update.

# History Headers:

- Notice ID (hyperlink)
- Update Number (hyperlink)
- Notice Type
- Posted Date (format: YYYY/MM/DD HH:MM UTC)

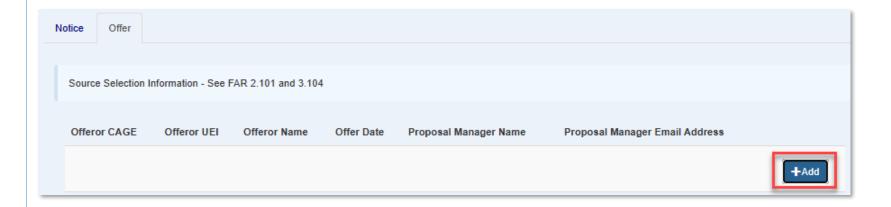


Offer Tab

Click the Offer tab. The Offer screen displays.



Click the Add button to expand the Offer Details fields and begin the Late Offer process.



#### Offers Headers:

- Offeror CAGE
- Offeror UEI
- Offeror Name
- Offer Date
- Proposal Manager Name
- Proposal Manager Email Address

#### Buttons:

- Offer Tab (leads to the Offer screen)
- Add (to expand offer details)

NOTE: If the notice has been updated, then access to the Offer tab is available on the latest update of the notice. Select the Alternate Offer checkbox to indicate that the offer varies from the solicitation requirements. If the notice has updates, a mandatory checkbox is displayed with a message stating: "Solicitation (Notice ID) has updates that require your acknowledgment. To be considered for award you must acknowledge each update and submit (or resubmit) your response to ensure your response complies with the changes. By checking this box you acknowledge that you have read the terms and conditions of each update." Select the checkbox. Offer Details Fields: Alternate Offer (checkbox) Offer Identifier (up to 80 alphanumeric characters) Proposal Manager CAGE Code (drop-down; displays Proposal Manager's CAGE Codes) Company Name (auto-populated from CAGE code; read-only) Update Acknowledgment (checkbox; if applicable) Offer Details Offer Details ☐ Alternate Offer Offer Identifier Proposal Manager CAGE Code \* --- Please Select ---Company Name Solicitation S0512A25R1014 has updates that require your acknowledgment. To be considered for award you must acknowledge each update and submit (or resubmit) your response to ensure your response complies with the changes. By checking this box you acknowledge that you have read the terms and conditions of each update.

# Offer Template

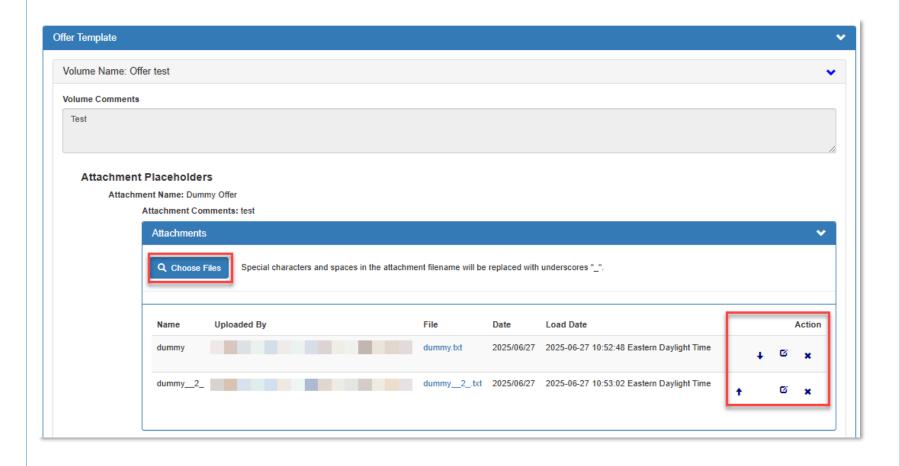
The **Offer Template** is an optional feature that helps standardize proposal structures and lets the Solicitation Manager specify required volumes and attachments when creating a solicitation. Proposal Managers then use this template to format their offers according to the given guidelines.

Solicitation Manager's Volume Comments are displayed as read-only.

Select the **Choose Files** button to add the appropriate attachments to Volumes.

Added attachment files are displayed in the table below with populated information. Click the buttons in the **Action** column to reorder, edit, or delete attachments.

Click the x icon to delete the file and remove the file from the Attachments table.



#### Attachments Headers:

• Name (up to 255 alphanumeric characters including special characters; excluding specific characters: <>'&")

- Uploaded By (defaults to user's name and email address)
- File (up to 2000 alphanumeric characters)
- Date (defaults to date of original uploaded or resubmitted file)
- Load Date (displays original date, time, and time zone of uploaded file)
- Action
  - Move Up
  - Move Down
  - Edit
  - Delete

#### **Buttons:**

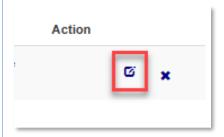
• Choose Files (select to locate and attach a file from the local directory)

#### Action Buttons:

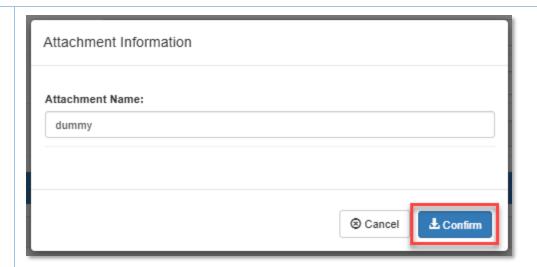
- Move (arrows display to reorder multiple attached files)
- Edit (leads to Attachment Information pop-up)
- Delete (x icon; removes the line item and cannot be restored)

# **Edit Offer Template Attachment Name:**

To edit an attachment name, select the **Edit** icon in the Action column. The Attachment Information pop-up displays.



To modify the attachment's name, enter the new file name in the **Attachment Name** field. Click the **Confirm** button to save changes.



# Attachment Information Pop-Up Field:

- Attachment Name (up to 255 alphanumeric characters including special characters; excluding specific characters: <>'&")
- Document Type (options: Attachment / MSDS; defaults to "Attachment"; available for MSDS required offers)

#### Attachment Information Buttons:

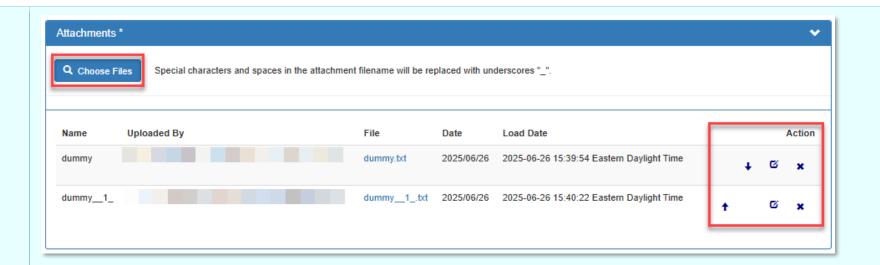
- Cancel (to disregard changes and close pop-up)
- Confirm (to confirm attachment name change)

To add attachments to the offer, click the **Choose Files** button.

# **Attachments**

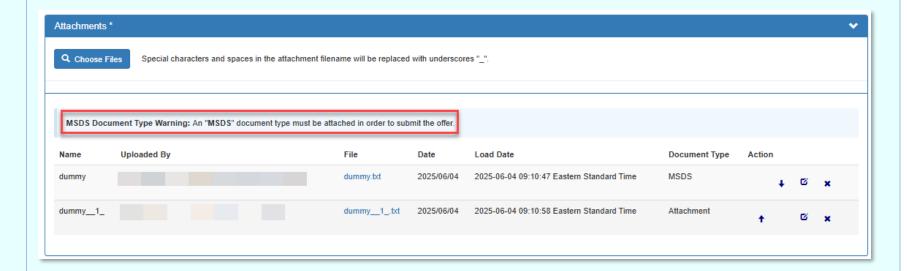
Added Attachment files are displayed in the table below with populated information. Click the buttons in the **Action** column to reorder, edit, or delete attachments.

Click the **x** icon to delete the file and remove the file from the Attachments table.



# **Material Safety Data Sheet (MSDS)**

Vendors are required to submit a Material Safety Data Sheet (MSDS) as an attachment with their offers if it has been designated as mandatory by the Solicitation Manager. Material Safety Data Sheets are identified in the **Document Type** field of the **Edit Attachment Information Pop-Up**.



Submitting an offer without attaching the MSDS document displays a message stating: "An "MSDS" document type must be attached in order to submit the offer in accordance with FED-STD-313 or MIL-STD-882E."

An "MSDS" document type must be attached in order to submit the offer in accordance with FED-STD-313 or MIL-STD-882E.

# Attachments \* Headers:

- Name (up to 255 alphanumeric characters including special characters; excluding specific characters: <>'&")
- Uploaded By (defaults to user's name and email address)
- File (up to 2000 alphanumeric characters)
- Date (defaults to date of original uploaded or resubmitted file)
- Load Date (displays original date, time, and time zone of uploaded file)
- Document Type (options: Attachment / MSDS; defaults to "Attachment"; available for MSDS required offers)
- Action
  - Move Up
  - Move Down
  - o Edit
  - Delete

#### **Buttons:**

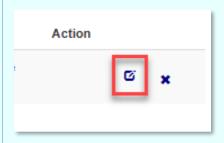
• Choose Files (select to locate and attach a file from the local directory)

#### Action Buttons:

- Move (arrows display to reorder multiple attached files)
- Edit (leads to Attachment Information pop-up)
- Delete (x icon; removes the line item and cannot be restored)

# **Edit Attachment Information Pop-Up:**

To edit an attachment name, select the **Edit** icon in the Action column.

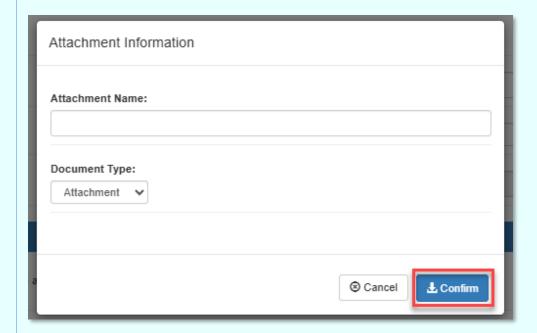


To modify the attachment's name, enter the new file name in the **Attachment Name** field.

For notices requiring a Material Safety Data Sheet (MSDS) document, select MSDS in the Document Type drop-down menu.



To confirm all edited attachment information, click the **Confirm** button. All edits are now visible in the Attachments section.



# Attachment Information Pop-Up Fields:

- Attachment Name (up to 255 alphanumeric characters including special characters; excluding specific characters: <>'&")
- Document Type (options: Attachment / MSDS; defaults to "Attachment"; available for MSDS required offers)

#### **Buttons:**

- Cancel (to disregard changes and close pop-up)
- Confirm (to confirm attachment changes)

Enter the date in the Signature Date field.

Click the Signature Button to display the Sign Document pop-up and submit the offer.



## Signature Field:

Signature Date\* (format: YYYY/MM/DD)

# **Signature**

#### **Buttons:**

• Signature (*leads to Sign Document pop-up*)

# **Sign Document Pop-Up:**

Enter the Proposal Manager's Digital Pin and OTP (One-Time Password).

Click the Sign And Submit button to submit offer.

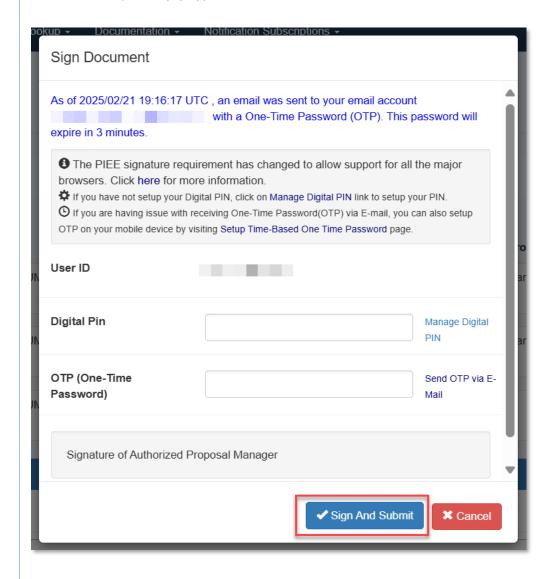
# Sign Document Pop-Up Fields:

- User ID (auto-populated; defaults to user's name)
- Digital PIN (must be 6 numeric characters)
- OTP (One-Time Password)

#### **Buttons:**

• Sign and Submit (to submit offer)

• Cancel (to close pop-up)



NOTE: Digital PIN can be created clicking the Manage Digital PIN hyperlink; also located at My Account > Setup Digital PIN.

NOTE: OTP (One-Time Password) can be sent by clicking the **Send OTP via E-mail**; also located at **My Account > Setup Authenticator App/Time Based One Time Password**.

# Late Offer Submission Success

Successfully submitting an offer displays a confirmation message stating: "The response date for this solicitation has passed; therefore, this Offer has been recorded as late. The offer was submitted on (Signature Date, Time, Time Zone) (Signature Date and UTC Time Zone) by (Proposal Manager Name). Please print this page and maintain for your records."

An email is sent to the Solicitation Managers associated with the notice informing them of the late offer submission.