Proposal Manager

Reference Guide

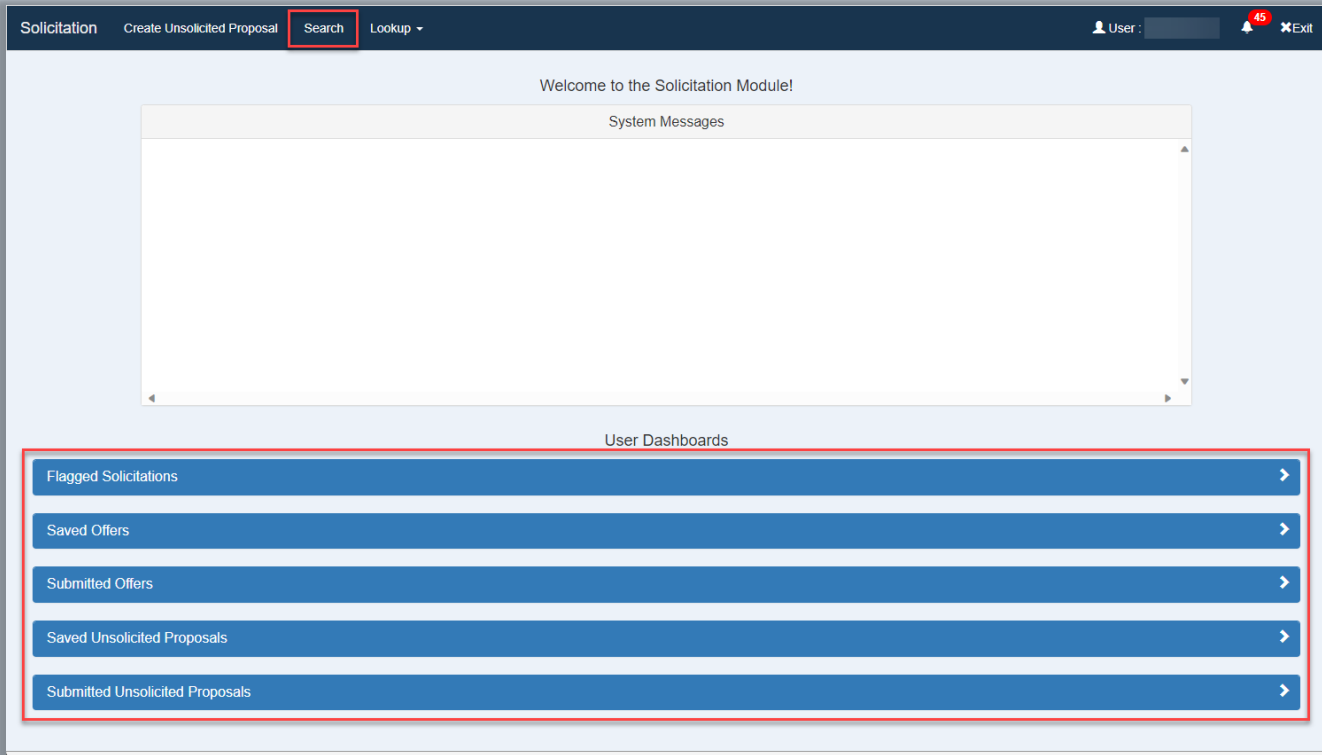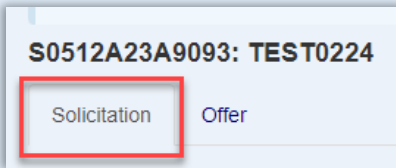| Solicitation Homepage | Solicitation | Solicitation/Offer Tab |

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View Solicitation

A Solicitation may be viewed by the Proposal Manager via the dashboard or Search page.

Note: When using the Search form to locate Solicitations, multiple codes may be entered in the **Product or Service** and **NAICS** fields as a comma-delimited list or selected from the Lookup tool.

Upon selecting the Solicitation Number link in the Dashboard or Search results, the user is navigated to the Solicitation page. Solicitation information and Offer details are located on the Solicitation and Offer tabs, respectively.


The Solicitation details will be displayed on the **Solicitation** tab with all information as read-only. All attachments on the Solicitation will be located in the Attachments section. The user may view any attachments restricted to their CAGE code.

Solicitation Notifications

The Proposal Manager may request to receive notifications regarding Amendments made to a Solicitation by selecting the checkbox at the top of the Solicitation tab. If the Notice Type of the Solicitation is Presolicitation or Sources Sought, the Proposal Manager will also be notified if the Solicitation is posted as final.

Attachments
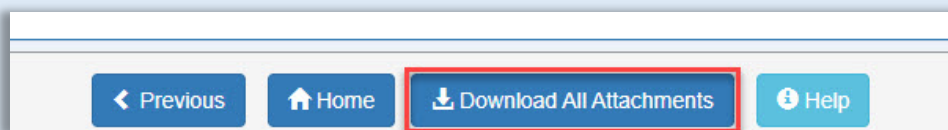
The **Download All Attachments** button will complete the download of all attached files to the local directory.

Access to Restricted Attachments

Proposal Managers may request access to restricted attachments on Solicitations and Amendments. To submit a request for access:

1. Select the **Request Access to Restricted Attachments** button in the Attachments section. (This button will not display if there are no restricted attachments or if the Proposal Manager was granted restricted access to all attachments.)
2. On the Restricted Attachment Access Request modal, complete all necessary fields, including Reason for Access Request.
3. Select the **Confirm** button to submit the request.

The request will be sent to the Solicitation Manager on the Solicitation for review. If access is granted, the Proposal Manager will be notified via email and system notification of the approval.

Amendments

When viewing a Solicitation with Amendments, Proposal Managers will be provided with a list of Amendments to that Solicitation. Selecting an Amendment link will navigate the user to a page displaying information for that Amendment.

<u>Create Offer</u>

To submit an Offer on an open Solicitation, select the desired Solicitation with Open status via the dashboard or Search page.
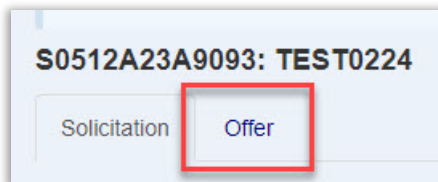
Navigate to the Offer tab at the top of the page. Any existing offers will be displayed.

1. Select the **Add** button to begin creating an Offer. The Offer may be saved for completion at a later time by selecting the **Save Offer** button at the bottom of the page.
2. Complete all required fields. If applicable, select the **Alternate Offer** checkbox.
3. Select the **Choose Files** button to select a file(s) from the local directory to attach to the Offer.
   a. If the Solicitation Manager subsequently indicates that all or part of the file is unreadable, the Proposal Manager will be notified by email. The attachment section will then include a link under the Unreadable File column on the Offer tab.
4. Enter the current date in the **Signature Date** field.
5. Select the **Signature** button to post the Offer.
6. The Sign Document modal will be displayed, requiring the user to enter a Digital PIN. If the PIN has not previously been created, select the **Manage Digital PIN** button to complete the process.
7. Select the **Sign and Submit** button to post the Offer. The offer will be displayed on the Offer tab of the Solicitation.

Withdraw Posted Offer

To withdraw a previously posted Offer, navigate to the related Solicitation via the Submitted Offers dashboard or the Search page and select the Solicitation Number link.

1. On the Offer tab, expand the Offer to be withdrawn. The Offer details will display.
2. Select the **Withdraw Offer** button.
3. Select **Yes** on the Withdraw Offer modal to complete the process.

Upon withdrawal of the Offer, the following users will be notified via email and system notifications:
- Solicitation Managers listed on the Solicitation
- Proposal Manager that withdrew the Offer