Select “Ctrl+Click” to follow links below

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Submitting an Offer

Step 1: Follow the Portal Path:
- Suppliers → Bid Management → Enter Offers
- Under “Processed Since”, select the blank option so that no date appears and is blank.

Figure 1.
Step 2: Enter Bid Invitation, also referred to as the Solicitation Number, in the “Bid Invitation Number” box.

- After entering the number and select “Start”

Step 3: Select “Maintain Vendor Response”
Step 4: Select “Create”

![Image](Figure 4)

- Note: After selecting “Create” a pop up window will display error messages regarding attribute questions and a request to check the offer. These error messages will go away after entering the required data. The pop up window also opens the “Basic Data” link under the RFx Information Tab.

Step 5: Enter “Vendor Plant” and “Shipping Point” either by typing the number or clicking the white box (0) to the right (Figure 5).

- Shipping Point ID numbers are 7-digits and start with “12…..”
- Vendor Plant ID numbers are 7-digits and start with “11…..”
- A list of your approved plants will pop up. Click on the blue box next to the plant you wish to select and click on “OK” to confirm your selection (Figure 6). Repeat the same process for selecting your Shipping Points.
Figure 5.

Figure 6.
Step 6: Click on the “Questions” link under the RFx Information tab (Figure 7).

- Click the **right arrow** on the horizontal scrollbar to scroll to the right to see all the questions (Figure 8).

![Figure 7](image1.png)

![Figure 8](image2.png)
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Step 7: Answer all required attributes questions if applicable.

Figure 9.

UPLOADING DOCUMENTS

Step 8: To upload documents if required by the solicitation, under the RX Information tab, select “Notes and Attachments” (Figure 10).

- Scroll down to Attachments and click on “Add Attachments” (Figure 11).
- A pop up will be displayed; select “Browse” (Figure 12).

Figure 10.
Step 9: After selecting browse, find the desired file to be attached and click on “Open”.
Label the document to be attached in the “Description” field then click on “OK” (Figure 14) and confirm that the document(s) uploaded appear at the top of the attachment screen (Figure 15).
- Note: Attaching PDF files is recommended. Multiple documents can be attached using the same process.
Figure 13.

Figure 14.
Note: Adding attachments is more for RFP—if they require you to submit documents.

**Entering Pricing**

Attention! For the Vendor View: Export/Import provided the ability for the vendor/bidder to export solicitation details to an external Microsoft Excel File, and then import the file back to WBSCM with prices included during offer creation. This self-service export/import function takes the place of the “Vendor View” file previously provided by AMS along with each solicitation issuance.

- Note that the export/import function is **not** a mandatory part of the offer/response process; it is an **optional** tool. However, we encourage vendors to become familiar with this function as AMS will no longer be providing the Vendor View file directly along with our distribution of a Solicitation.
- For procedures on how to use the export/import function, click the link below or visit the AMS website, Selling Food to USDA, WBSCM: Export-Import Procedures (PDF)

To enter prices manually, follow the steps below:

**Step 10:** To enter commodity line item pricing for the bid response (offer), click the on the “Items” tab.
Step 11: Click on the “Expand All” link to show all line items

Figure 17.

Step 12: To personalize the item view screen, click on the “Settings” link

Figure 18.

Step 13: Under “Advance Settings” tab, change the Number of Visible Rows to “-1” and click “OK”
- Note: -1 will bring up all the line items. If you have a really large solicitation, we recommend displaying 20 line items at a time and scrolling down.
Figure 19.

- When “Expand All” is selected - all rows will display. To navigate, use the scroll bar on the right to scroll up or down the line items (Figure 20).

Figure 20.

**Step 14:** Clicking on “Settings” (refer to Figure 18) and select the “Basic Settings” tab. The “Basic Settings” tab allows you to rearrange or hide columns in the Response Screen.
To move the order of a column, begin by highlighting the column title and click the up arrow key. In the below example we are moving the Price to the beginning by highlighting the column and clicking the up arrow key. When the column is in the desired location click “OK”.

- **Note:** Moving the “Price” and “Required Quantity” columns closer to the “Description” column will make it easier to see what is being bid on and how much.

- To remove columns from the view, highlight the column that you do not want to display and click on the remove button.
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- Notice the Price column has been moved next to the Description column.
  - Note: Currency was also moved in the previous step to align next to the “Price” column.

![Image of RFX Response form]

Figure 22.
For instructions on “How to Bid to Port” see page 14

**Step 15:** Enter prices in the “Price” column.
- If the “Currency Column” shows **USDN**, prices can be entered up to 4 decimal places to the right of the decimal point.
- If the “Currency Column” shows **USD**, prices can be entered up to 2 decimal places to the right of the decimal point.
  - **DO NOT** enter in prices for offshore destinations! Instructions on “Bidding Offshore vs. Final Destination” can be found on page 18.
  - **DO NOT** enter anything in the “Price Per” field!
- Continue entering prices on all pages until all desired prices are entered.
Figure 23.

**Step 16:** Click “Save” to save all prices just entered.
- Note: On larger solicitations it is recommended to periodically click “Save” in case of Internet Explorer accidentally closing and it can also be used to save work to complete at a later time.

Figure 24.
If you save your entries, a message will display that the response has been saved.
  - Note: Clicking “Save” also changes the page into “Display” mode, so to continue entering prices click on “Edit”.

Figure 25.

Clicking “Print Preview” will display a PDF document of answered attribute questions and offer prices entered.
  - Reviewing the PDF document is recommended before submitting an offer.
  - Note: “Print Preview” is only available in display mode.
Figure 26.

- Open the PDF file and review the offer for accuracy before submitting.

Figure 27.

Figure 28.
Bidding Offshore vs. Final Destination:

If prices are entered on the screen below (Figure 29) in the “Price” column this indicates to USDA that the product will be delivered to the final destination by the vendor.

- Example: If is a price entered for Hawaii, then that is signaling you are going to deliver to Hawaii.

**Step 17:** To bid on an Offshore location, select the line item number hyperlink for the material under the offshore location.

![Figure 29](image-url)

![Figure 30](image-url)
Step 18: Scroll down to the Detail screen and click the “Conditions” tab.

Figure 31.

Step 19: Go to the “Condition Type” column and click the down arrow.

Figure 32.

- Select the applicable condition: Price Contract/Bid (deliver directly to offshore location or Offshore Port Costs Location-Dependent (FAS Vessel)

Figure 33.
Go to the Location column and click on the white box on the right side of column.

Step 20: A pop up window is displayed. Place an asterisk (*) in the “Business Partner Box” and click "Start Search".

Note: the “Business Partner Box” can also be left blank when you select “Start Search”
• Ports that are available for that particular destination will show at the bottom of the screen. Select the port you wish to ship to.
  o Note: If a location does not display, contact the Contract Specialist responsible for the solicitation.

Figure 36.

• Verify the port is displayed in the “Location” column (Figure 37).
Step 21: Go to the Amount column and enter offer price to that port in the “Amount” column

- Proceed to the next off-shore location or scroll back to the top of the page and continue to enter prices delivered to destination location.
  - Note: Items with price conditions entered will show "See Conditions" in the price column
Step 22: After entering all desired offshore and final destination prices, select the “Submit” button.

Figure 40.

- After submitting, a message will appear confirming the submission has been **SAVED**.
  - Note: This is **NOT** the final submission.
- To preview and display submitted prices and view the offshore ports, click “Print Preview”.

Figure 41.
- Follow **Step 16** (pg. 15) to preview and display the port as pdf. In the example below, item number 40 will be delivered to the port where item number 60 will be delivered to the final destination.

<table>
<thead>
<tr>
<th>Item Material Description</th>
<th>Required by Date</th>
<th>Zip Code</th>
<th>Tgt Qty/UOM</th>
<th>Offer Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 FRUIT, CANNED</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20 PEARS DICED CAN-8/10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 OFFSHORE: JUNEAU AK</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40 130235 PEAR DICED CAN-6/10</td>
<td>10/01/2011-11/10/2011</td>
<td>99611</td>
<td>912 CA</td>
<td>3.0000 USD/1 CB</td>
</tr>
<tr>
<td><strong>Offshore Port Costs</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>O-SEA</strong></td>
</tr>
<tr>
<td>50 OFFSHORE: KING COVE AK</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60 130225 PEAR DICED CAN-6/10</td>
<td>10/01/2011-11/10/2011</td>
<td>99612</td>
<td>912 CA</td>
<td>2.0000 USD/1 CB</td>
</tr>
</tbody>
</table>

Figure 40.
Optional: To modify an offer prior to the final submission

Step 1.1: Once all of the entries have been entered for offshore locations and final destinations, to modify an offer prior to the final submission of the vendor response or under an authorized change to a previously submitted offer, click on “Withdraw”.

- Once withdraw, a message will display “RFx response________________withdrawn”
- This is ONLY if you need to make a change; this is NOT a mandatory step.
- Note: This is not the same as withdrawing an already submitted vendor response.

Figure 41.

Step 2.1: Select “Edit” to make any changes to the prices.

Figure 42.
Step 3.1: After all prices have been entered click on “Check”

A message should display stating “RFx response is complete and contains no errors”.

If you do not receive the message stating that the RFx contains no errors, a list of error messages will be displayed at the top of the screen. Make any corrections necessary and if additional assistance is required, contact the AMS helpdesk at: WBSCMAMSHELPDESK@AMS.USDA.GOV

Step 4.1: After confirmation of no errors, click on “Submit”.

Again, this is NOT the final submission.
Figure 45.
➢ **READ THE NEXT MESSAGE CAREFULLY!!!** “RFx response _________ saved. Submit the vendor response to complete the process.”

**Step 5.1:** Close the “Display Bid” window/tab to go back to the WBSCM “Offers” screen.

Figure 46.
Optional: Reviewing a Pending Offer

Step 1.2: Should any changes need to be made or to review the offer data entered, click on “Offer Number” hyperlink.

Notice the status is in “Pending” which means the offer has been saved and has not been submitted in WBSCM. If the status is “Created” it means the offer has been created and held.

Step 2.2: A new window displays, select the “Items” tab then click on “Withdraw”.

Figure 47.
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Figure 48.

Step 3.2: A new message will display that response has been withdrawn. To make changes/corrections, select “Edit”.

Figure 49.
Step 4.2: After changes are made, click on “Submit”
- Note: Only one offer can be submitted per plant per solicitation, however, multiple offers can be submitted under one response for different plants.

Optional: Entering an Offer for Multiple Plants

Step 1.3: To create a new offer for a different plant follow the steps below, otherwise skip to page 24
- Click on “Create”.

Figure 50.

Figure 51.
A window displays, follow the same steps as before when selecting your plants and entering prices following Steps 5-22 (Pages 4 through 24).

Figure 52.

**Step 2.3:** After the offer has been submitted for the second plant, close that window. On the “Offers” screen, click on “Refresh”.

**Offers - Fruit and Vegetable Vendor A**

Figure 53.
Notice that two offers are now submitted in pending status

**Entering Constraints**

- Constraints are the maximum quantity a company is willing to or able to produce/ship within a given delivery period. Do not assume this is the quantity listed on the solicitation; a vendor may enter constraints that are more than or less than the solicitation quantity. Most solicitations allow constraints, however not all do. If constraints are allowed we encourage them to be entered.

- **If no constraints need to be entered skip to page 31**
  - Note: The offer(s) MUST be in pending status prior to entering constraints.

**Step 24:** Click on the blue box next to the offer number to select the offer that needs constraints entered and click on “Constraints.”

- Note: Use the “ctrl” key to select multiple plants in order to create constraints for several plants at once.
Step 25: Click on “Create”

- Examples of entered constraints are provided on page 34-37. **If no constraints, click on the “No Constraints” box and skip Step 27 (page 37).**
Enter the maximum capacity in the “Capacity” field, be mindful of the unit (TRK/LB/CS)

Entering a “0” indicates NOTHING to be awarded

At least ONE thing must be selected in each field that has data, depending on the solicitation there may not be delivery dates to select from.

If there is only one option, you must click on it so it turns blue
To select multiple items in a field Hold “Ctrl” or “Shift” key while selecting

After all information is entered/selected then click “Create”

Step 26: The information just entered will be displayed on the constraints page (Figure 58). If additional constraints need to be entered click “Create”. After all constraints have been entered click on “Back”

Example 1: Company has a maximum constraint of 20 trucks for a particular delivery period
In this example there are several delivery periods, however the company will be awarded no more than 20 trucks during 4/16/13 through 4/30/13.

If an offer was entered on other delivery periods then a new constraint would need to be entered. Otherwise, not specifying a constraint (leaving blank) would indicate to USDA that the company has NO constraint requirements for a given plant, product, ship point, or delivery date. Thus, the company could potentially be awarded product for any plant, product, ship point, or delivery date where a constraint is not entered and an offer was submitted.
Figure 58.

- **Example 2: Company has a maximum constraint of 10 trucks for all delivery periods on solicitation**

Constraints were created using a capacity of “10” and selecting *ALL* delivery dates. Thus, indicating that the company is able to produce and ship in any of the delivery periods, however not more than 10 trucks should be awarded across all delivery periods.

Figure 59.

- **Example 3: Vendor has a maximum constraint of 20 trucks for all delivery periods AND a maximum constraint of 2 trucks per delivery period**

A total of 4 constraints will need to be created for this example:
1) Enter “20” in capacity box, select plant/product/ship point, and select all delivery periods

Figure 60.

2) Enter “2” in capacity box, select plant/product/ship point, and select delivery period 4/1/13 to 4/15/13

Figure 61.

3) Enter “2” in capacity box, select plant/product/ship point, and select delivery period 4/16/13 to 4/30/13

Figure 62.

4) Enter “2” in capacity box, select plant/product/ship point, and select delivery period 5/1/13 to 5/15/13

Figure 63.
Notice that 4 constraints are now displayed. This indicates that the company is able to produce and ship 2 truckloads per selected delivery period but no more than 5 truckloads total.

Figure 64.

Step 27: When all constraints have been entered click “Back” on the constraints screen to go back to the Offer screen. Click on “Refresh”

Notice, an “X” will appear in the “C” column, indicating that there are constraints. (Enter constraints for other plants now, if applicable)
Step 28: Click on “Back” to return to the Vendor Response Page

Step 29: Click “Check” on Vendor Response Page
Step 30: A pop-up will display, click on “OK” to close the box

Figure 68.

- Note: If a vendor is willing to produce all of the product under the solicitation and does not want to enter a constraint, click on the “No Constraints” button. However, if a vendor has created constraints under this offer, by clicking the “No Constraints” button, it will delete all previously entered constraints.

Step 31: Click on “Submit Response” This step will submit the offer to the USDA for review after bid closing.

Figure 69.
A pop-up message will confirm the submission. Click on “OK” to close the box.

The response status should indicate “Submitted – On-time”

Note: An offer can always be edited, changed, withdrawn, or modified prior to bid closing.
Reviewing a Submitted Offer

Step 32: To review the offer submitted click on “Vendor Response Log”

Vendor Response - Fruit and Vegetable Vendor A

[Figure 72]

Step 33: A pop-up displays of the vendor response overview

This will display date submitted, Solicitation #, plant, shipping point, business data (from SAM), constraints entered, attribute questions, file names of the documents uploaded, and prices entered

[Figure 73]
Optional: Changing an Offer after Submitting

**Step 1.4:** If any changes need to be made after an offer has been submitted click on “Change”.

![Vendor Response - Fruit and Vegetable Vendor A](image)

Notice that two responses are now displayed, one status shows “Submitted- On- Time” and the other status shows “New”.

**Step 2.4:** Click on the box to the left of the “New” vendor response number (row will be highlighted in yellow).

- Click on “Offers”

![Vendor Response - JODS, INC.](image)
Step 3.4: Click on the hyperlink offer number that you would like to change and follow steps 1.1-5.1 (pg. 25-27).

![Image of offer submission interface]

Figure 76.

➢ Note: When submitting the final offer, the “New” offer line should be highlighted in yellow before clicking on submit.

Step 4.4: After offer is submitted, the status of the first offer has changed to “Historical” and the updated offer shows a status of “Submitted – On-time”.

![Image of offer status change]

Figure 77.

Optional: Withdrawing a Submitted Offer

Step 1.5: To withdraw an offer that has been “Submitted - On-time”, click on “Withdraw”
The Offer is now displayed in New Status

- Note: Changes can be made to this offer and it can be resubmitted prior to bid closing.
- Note: USDA highly recommends saving the vendor response log to show the status of the vendor response, which should show “Submitted on Time”.
Figure 80.