## Bidder Training Manual

<table>
<thead>
<tr>
<th>Project Name: IITB – ERP(SAP) Implementation</th>
<th>Process Stream</th>
<th>SRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Name: User Manual for RFx Response submission by Bidders for single tender bids</td>
<td>Module SRM</td>
<td></td>
</tr>
<tr>
<td>Document ID: SRM-002</td>
<td>Version 1.1</td>
<td></td>
</tr>
</tbody>
</table>

1. Portal Login by Bidders.................................................................2
2. Search RFx............................................................................................2
3. Participation Intend and Create RFx Response........................................3
4. Maintaining GST & Tax details..................................................................4
5. Maintaining EMD details............................................................................7
6. Performance Bank Guarantee......................................................................8
7. Uploading technical documents & digitally signing....................................9
8. Maintaining Commercial Details................................................................11
9. Response Submission..................................................................................12

**Note:** Bidders are requested to go through “System Requirement Manual” for preparedness of the bidding process.

<table>
<thead>
<tr>
<th>Process Stream</th>
<th>Module</th>
<th>Business Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRM</td>
<td>SRM</td>
<td>Procedure RFx Response submission by Bidders for single tender bids</td>
</tr>
</tbody>
</table>
Portal Login by Bidders

Login to URL using the bidder / vendor number and password.

Click on “Log On” button. System will direct you to the IIT SRM portal page.

Search RFx(Tender)

Select “Rfx and Auctions” folder. List of RFx will be displayed showing the status of each document.

Select the RFx for which the response needs to be entered and submitted.

A new window will be displayed containing all the RFx details. Bidder can view all the details and intend whether to participate and create the response as explained in next step.
Bidder can intend to IITB for their participation in the bidding process by clicking on “Participate” button.

If bidder is not sure about his participation he can click on "Tentative".

If bidder does not want to be part of the bidding process then he can click on "Do not Participate" button

Once the RFx start date & time is reached, system will automatically activate the “Create Response” button. Bidder need to click on “Create Response” button.

Click on “Participate” button, system issues an message as shown in screenshot below.

Click on “Create Response” button. System opens a new window with the relevant RFx details required for the Bidder.
Bidder Training Manual

Note: RFx Target Value will be visible, based on the discretion by IITB.
System opens a new window with the relevant RFx details required for the Bidder. Bidder is required to enter the information whether it is GST registered. This can be done by selecting “Yes/No” from the drop-down list.

**Maintaining GST & Tax details**

While creation of RFx response, system prompts few error messages to maintain the GST related information and maintain the prices as shown below.

Bidder need to provide the information whether they are GST registered. A drop-down list will appear and bidder selects appropriate values i.e. (Y – Yes / N – No)
Select appropriate data. Mention the relevant INCO terms as shown in screenshot below.

Irrespective of whether Bidder is GST registered or non-registered, system provides an option for the Bidder to maintain the tax codes for each line item as shown below.

Click on the “Items” tab, under Item overview click on the “Details” button and then select the line item and scroll down the screen. Maintain the tax code.
Press “F4” button to select correct tax code from the available list. If Bidder/Vendor is non-GST registered then the RCM tax codes will be displayed.

For any corrections required in HSN/SAC Code, bidder can input his details. Under the “Items” tab, select the relevant item and then scroll down and check on “Corrections Needed” option. Bidder can maintain his code under the field as highlighted in the below screenshot.

<table>
<thead>
<tr>
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<th>Module</th>
<th>Business Process</th>
</tr>
</thead>
<tbody>
<tr>
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<td>SRM</td>
<td>Procedure RFx Response submission by Bidders for single tender bids</td>
</tr>
</tbody>
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Maintaining EMD details

If EMD is made mandatory by the IITB in the RFx, then in that case Bidder would be required to maintain the EMD details before the EMD submission date & time deadline. RFx Response could not be submitted unless the EMD details are maintained.

Bidder can view the EMD details in the screen as shown below -

Please refer below screenshots for maintaining the EMD details in response.
In the above screenshot we saw, EMD details are maintained by the IITB and it is mandatory to submit EMD details.
Check the field "EMD Submitted" as highlighted below.

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<thead>
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<th>Business Process</th>
</tr>
</thead>
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<td>SRM</td>
<td>SRM</td>
<td>Procedure RFx Response submission by Bidders for single tender bids</td>
</tr>
</tbody>
</table>
Provide the relevant details in the fields such as Payment mode, amount and instrument number as shown in screenshot below.

If Bidder selects payment mode as any of KVIC, MSME or NSIC then in this case the EMD amount will be exempted.

Please see the screenshot as shown below.

Once the appropriate payment mode is selected, the amount field will be non-editable. Bidder has to upload relevant documents as highlighted below.

Click on “Browse” button, select the document to be uploaded and then click on “Upload” button.
Performance Bank Guarantee

If IITB maintains the PBG details and has marked it as mandatory, then Bidder will be able to view the PBG information in the response screen as shown below.

Uploading technical documents & digitally signing

Bidder can upload the technical documents in the response by navigating to the “Notes and Attachments”. Click on “Add Attachment” button as highlighted below –

A new window will get displayed. Click on “Browse” button.
Bidder Training Manual

You can maintain the description of the file uploaded else also can be left blank. Select appropriate folder name from where the file has to be uploaded.

Select General Data if the document is to be available at Header level.

Click on “OK” button to add the document in the respective folder.

Below is the list of folder’s provided by SAP and there usage details.

**General Data:** Documents added will be at header level

**Single Item:** Documents can be added for every individual line item in the RFx

System prompts to select the digital signature. Select the digital signature and click on “Sign” button

System prompts to enter the PIN (password). Enter the PIN (password) and press on “OK” button.

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Once the PIN (password) is verified, below message window will be displayed. Click on “Ok” button to proceed further.

The technical document uploaded will be digitally signed and will be displayed as shown in screenshot below.

**Maintaining Commercial Details**

Click on “Conditions” tab and maintain the condition records at header and item level.

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</tr>
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Once all the header and item level conditions are maintained the screen details will look as below –

System will issue an error message to enter the valid amount and conditions for each item when clicked on “Check” button.
Response Submission

Once all the details are maintained, click on “Check” button to ensure no errors. Click on “Submit” button.

Since the password was already maintained while digitally signing the document uploaded, system will not prompt to maintain any password now, instead the below screen will be displayed.

To sign the document, select one of the certificates and choose Sign.

Click on “Ok” button to proceed further.

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System then prompts to encrypt the data. Select the proper certificate and click on “Encrypt Bid” button.

RFx response will be submitted and available to IITB for further evaluations. The value fields will be encrypted and masked with “XXXXX”.

Bidder can edit the RFx response and re-submit the bids until the submission deadline date and time is reached.

To re-edit the response click on “Edit” button as shown below.

System will open a window and prompt to de-crypt the response. Select the proper certificate and the click on “Decrypt bid” button as shown below.
Once response is decrypted the amounts / conditions will be visible and Bidder will be able to modify the pricing conditions or add any other required information in the response.

After performing the relevant modifications, bidder can resubmit the bids by clicking on the “Submit” button. System again prompts to digitally sign and encrypt the document as explained in the above steps.