## Project Name:
IITB – ERP(SAP) Implementation

## Process Stream
SRM

## Document Name:
User Manual for RFx Response submission by Bidders for two envelope bids

## Document ID:
SRM-004

## Version
1.1

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

**Participation Intend and Create RFx Response**

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.
System opens a new window with the relevant RFx details required for the Bidder. Bidder needs to enter the GST details, competitive base price and also maintains conditions in the response (as mentioned in the steps below).
System opens a new window with the relevant RFx details required for the Bidder.

Select appropriate data. Mention the relevant inco terms as shown in screenshot below.
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 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. Since 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.

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.

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)

If required Bidder also need to maintain the HSN / SAC Code and GST tax rates as shown in screenshot below.

Click on “Details” button, under the “Items” tab Tax details can be maintained.
Press “F4” button to select correct tax code from the available list.

If Bidder/Vendor is GST registered then the relevant tax codes will be displayed. 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>
<th>Process Stream</th>
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</tbody>
</table>
Create Technical Response

To access the technical documents uploaded by the IITB, click on “Technical Rfx Response” button as highlighted below.

A new window will open a new SAP PLM window. Navigate to “External Area” folder and click on the document name to open as highlighted below -

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A pop-up message will be displayed as below. Click on either “Open” to view the document or click on “Save” button to store the document on your desktop and view later.

Bidder need to upload the document's in the response by navigating to the “Notes and Attachments” option which is located under the “RFx Information” tab.

Click on “Add Attachment” button as highlighted below –
A new window will be opened and user will be prompted to add the file. Click on “Browse” button and select appropriate folder to hold the document.

Select “TECH_BID” folder to upload the document and will be available for the technical evaluator to view the details.

If the “COLLABORATION” folder is selected, then the document / details will be viewable by all.
System prompts to select the digital signature. Select the digital signature and click on "Sign" button.

User will be further prompted to provide the PIN (password). Maintain the PIN(password) and click on "OK" button.

Once the PIN (password) is verified below screen will be displayed.
The technical document uploaded will be digitally signed and will be displayed as shown in screenshot below.

**Maintaining Commercial Details**

Under the Items tab, mention the competitive price.

Select the item for which the pricing detail has to be maintained. There may be situations where there are no conditions to be maintained. In such cases price can be maintained directly as shown below.

Bidder can enter the values for the conditions as maintained by the IITB.

For the items requiring the conditions (i.e. discounts) below steps need to be followed
After selecting the respective item, click on the “See Conditions” link as highlighted below.
System will open the details tab as shown below. Maintain the basic price for condition type “Price (Contract/Bid)” field. Percentages / absolute prices can be maintained for the defined condition types as mentioned in below screen.

For service items, the price and conditions has to be maintained for the service line items and not the service item itself.

Follow below steps for maintaining the pricing and conditions for the services.

Select the service item and then click on the arrow button as shown below.
Once clicked, system will display the service line items along with the “See Conditions” link active for the services. See screenshot below.

Click on “See Conditions” link for example -- service item 0002.AA. System displays the details tab as shown below. Under the “Conditions” tab maintain the price and allowed condition details.
Prices and conditions can also be maintained by clicking on “Conditions” tab and maintain the condition records at header and item level.
Once all the header and item level conditions are maintained the screen details will look as below –

**Response Submission**

Once all the details are maintained, click on “Check” button to ensure no errors. Click on “Submit” button.
System again prompts to enter the password. Enter the password and press on “OK” button.

Once the password is verified below screen will be displayed.

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 certificated 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.