Quick guide to

ENTERSOFTONE | eSOURCE

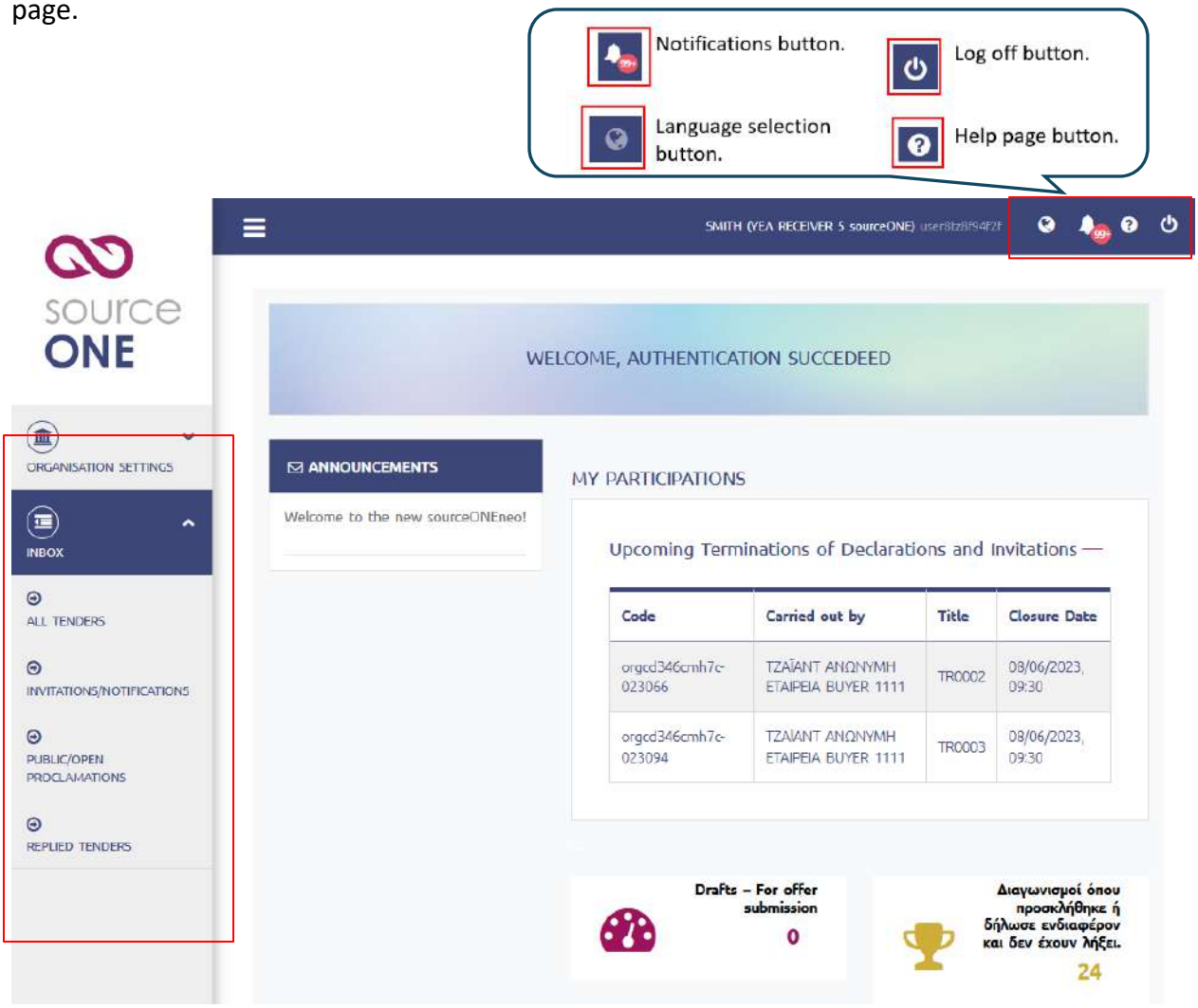
Supplier / Financial Operator

Contents

1. Steps to Find a Specific Tender 3
2. Communication 6
3. How to submit a Bid/Proposal 8
4. Bid/Proposal Submission – Tender Elements 10
5. Reviewing Submitted Information and Bid/Proposal 13
6. Digital Signature 15
7. Submission of an Improved Bid / Best and Final Offer (BAFO) 17
8. Confirming and Viewing Your Submitted Bid/Proposal 19

1. Steps to Find a Specific Tender

After selecting eSource/sourceONE from portalONE, the system will redirect you to the following page.



Clicking on INBOX opens the following options:

ALL TENDERS: Access the full list of available tenders.

INVITATIONS/NOTIFICATIONS: Access all tenders for which you have received an invitation to participate.

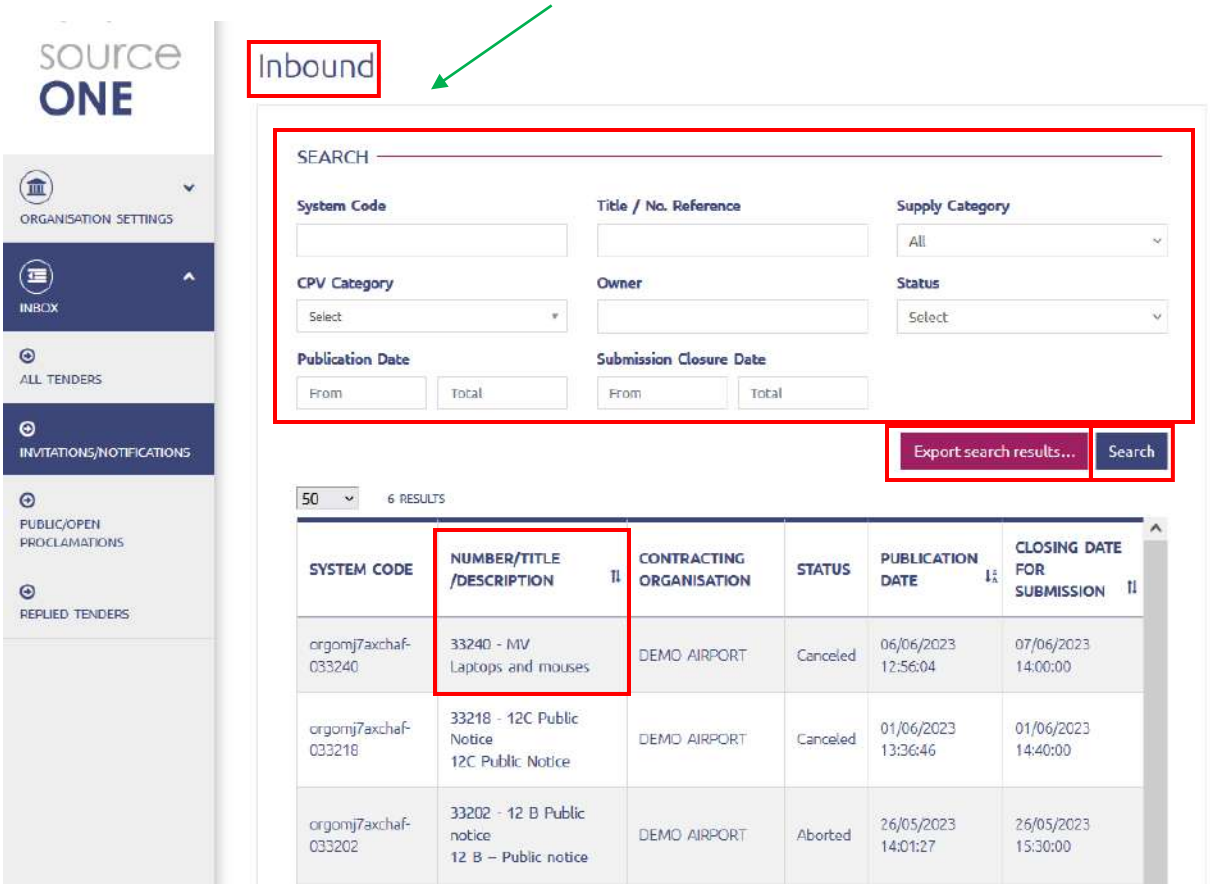
PUBLIC/OPEN PROCLAMATIONS: Access all tenders available for open participation.

REPLIED TENDERS: View tenders to which you have already submitted a bid or proposal.

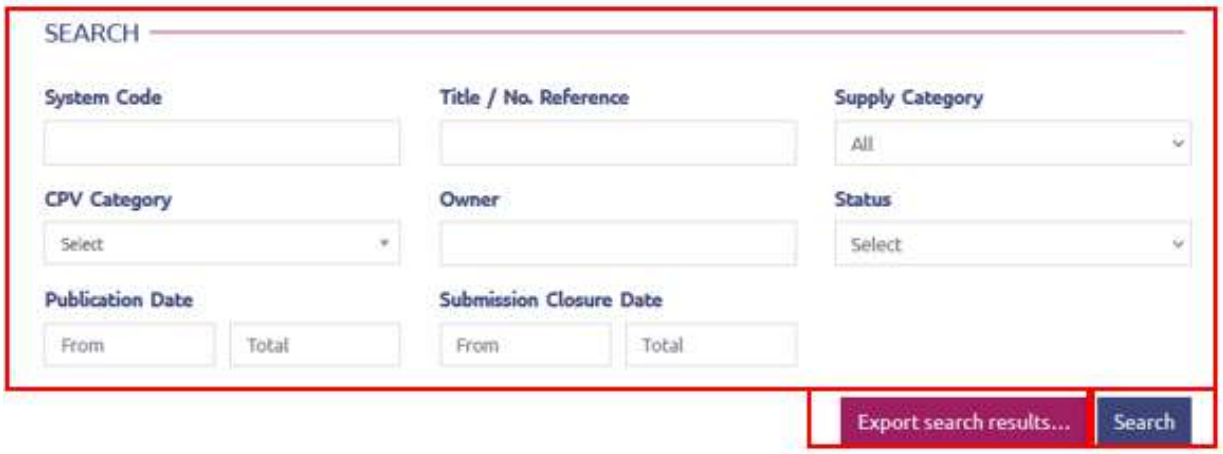
To locate a tender, you have been invited to participate in, please follow these steps:

Action 1: Click INVITATIONS/NOTIFICATIONS.

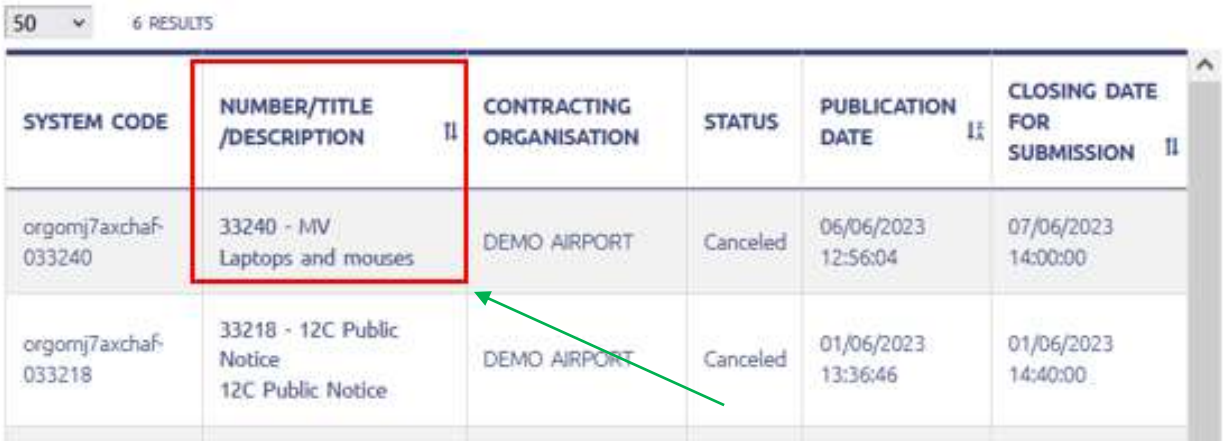
Clicking on INBOX and then INVITATIONS/NOTIFICATIONS will open the Inbound page.



There are 2 ways to locate a tender. The primary method to locate tenders is to apply search criteria, including Title, System Code, Status, and other relevant filters.



Alternatively, you can manually locate tenders by browsing through the list of available tenders.



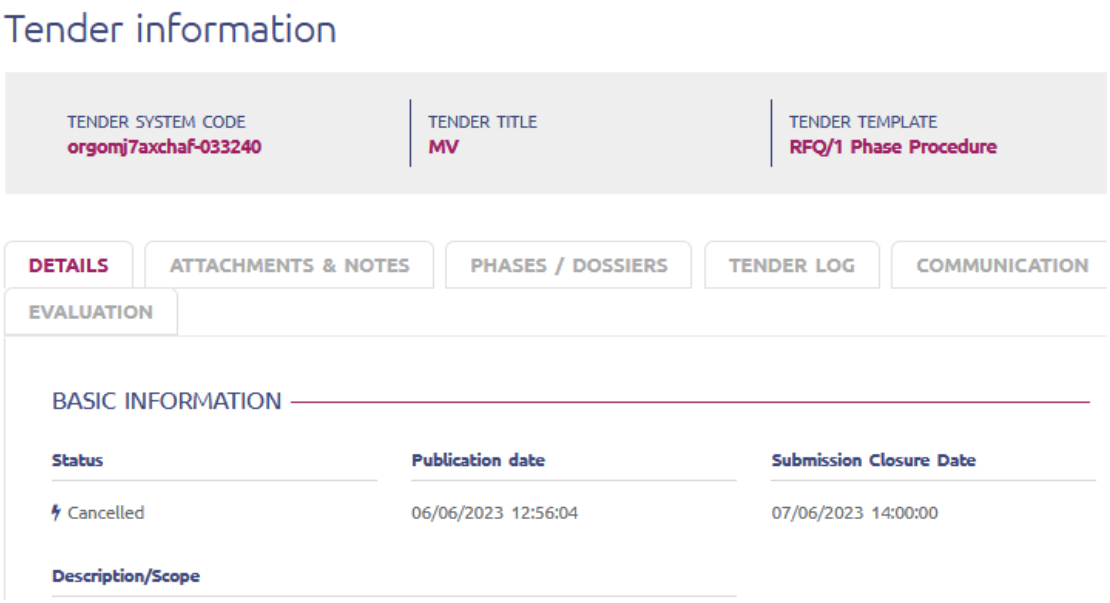
Action 1: Locate the tender by applying search criteria or by browsing through the list.

Action 2: Click the tender **TITLE** to view the Tender Information page.

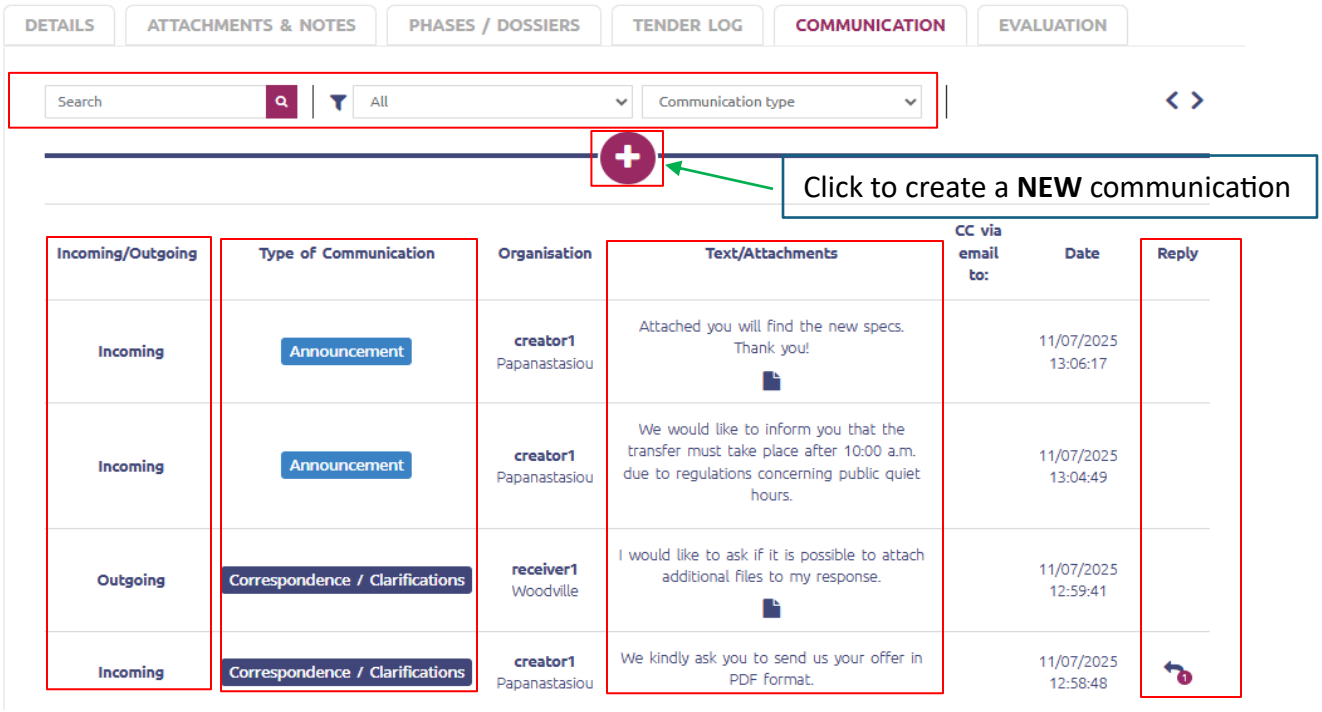
2. Communication

The Tender Information page displays details for the selected tender.

Action 1: Select the COMMUNICATION tab.



The following screen will display.

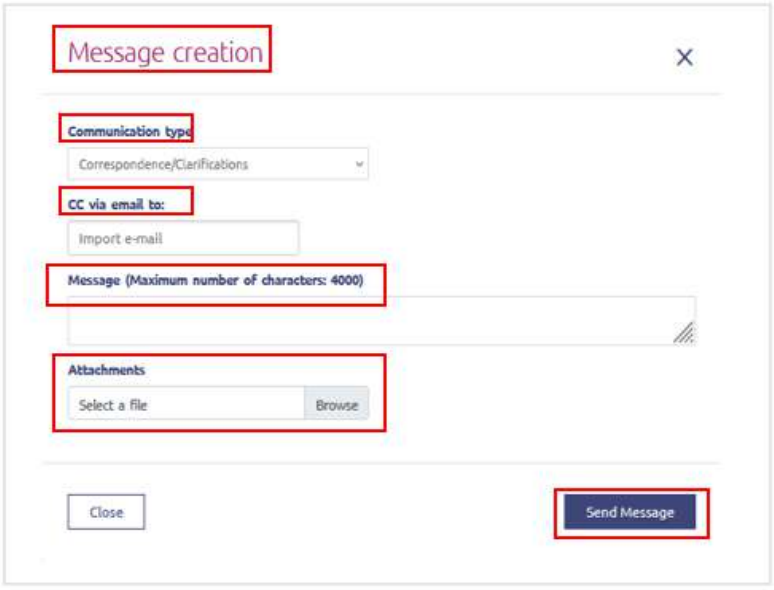


This table lists all communications you have sent and received, with each column displaying specific information.

- Incoming/Outgoing: This column indicates whether communication is incoming or outgoing.
- Type of communication: This column specifies the type of communication as either Correspondence/Clarification or Announcement.
- Organization: The user affiliated with the organization who sent the communication.
- Text/Attachments: If this icon appears, the communication includes attached file(s).
- CC via email to: Display information for all CC'd recipients.
- Date: The date on which the communication was sent / received.
- Reply: This column marks which communications can be replied to. Clicking this icon , will open the reply window.

Please note that you cannot reply to Announcements.

To create a **NEW** communication, within the COMMUNICATION tab, selecting this icon will open the Message Creation window.



Action 1: Click the COMMUNICATION tab from the Tender Information page.

Action 2: In the COMMUNICATION tab, click the to open the message creation window.

Action 3: Select Communication type.

Action 4: Optional - extra (CC) of the communication (besides the contracting entity).

Action 5: Compose your message and attach files, if necessary.

Action 6: Click Send Message to send your communication.

3. How to submit a Bid/Proposal

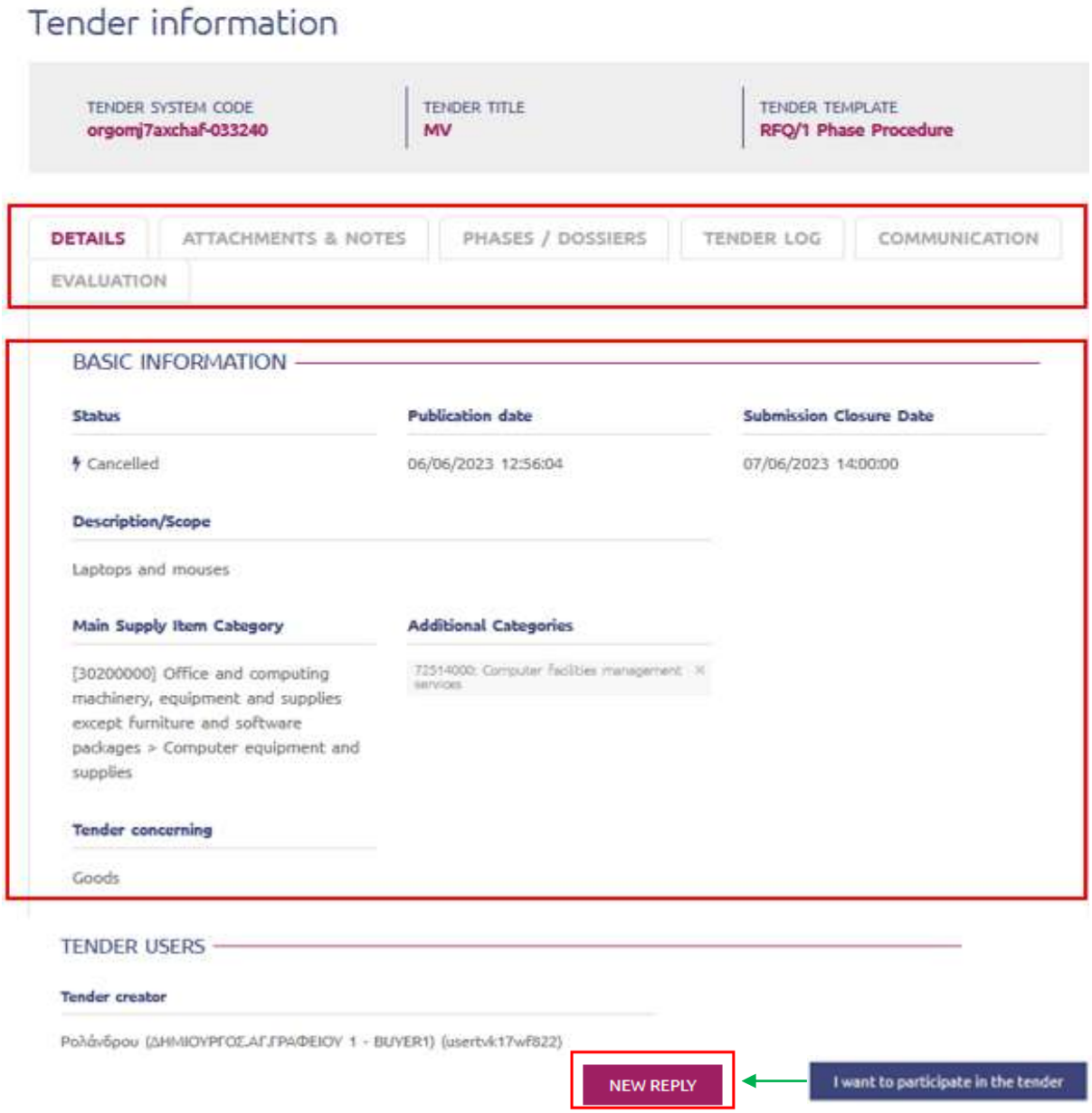
To submit a bid or proposal, please follow the procedure outlined below.

Action 1: Go to the Tender Information page.

Action 2: Click NEW REPLY.

Please note that for Public Tenders - where no invitation is sent to submit a bid/proposal – the button will display as 'I want to participate in the tender.'

After clicking this button, it will change to 'NEW REPLY', allowing you to proceed with your submission.



Selecting any of the headers at the top of the Tender Information page will navigate you to the corresponding tab:

ATTACHMENTS & NOTES: This tab includes attached files and notes made available by the Buyer/Contracting Entity to all tender participants.

PHASES / DOSSIERS: This tab allows you to preview the tender's phases, dossiers, and various elements, such as the Economic Offer Table and Documents List.

TENDER LOG: In this tab you can see the log of actions of the tender. Please note that the TENDER LOG begins recording actions only after you click NEW REPLY, which signifies the start of the bid/proposal submission process.

COMMUNICATION: This tab allows you to compose and review communications exchanged with the Buyer/Contracting Entity.

EVALUATION: This tab provides access to the tender's proceedings and minutes, made available to all participants, including phase proceedings, decisions, and related documentation.

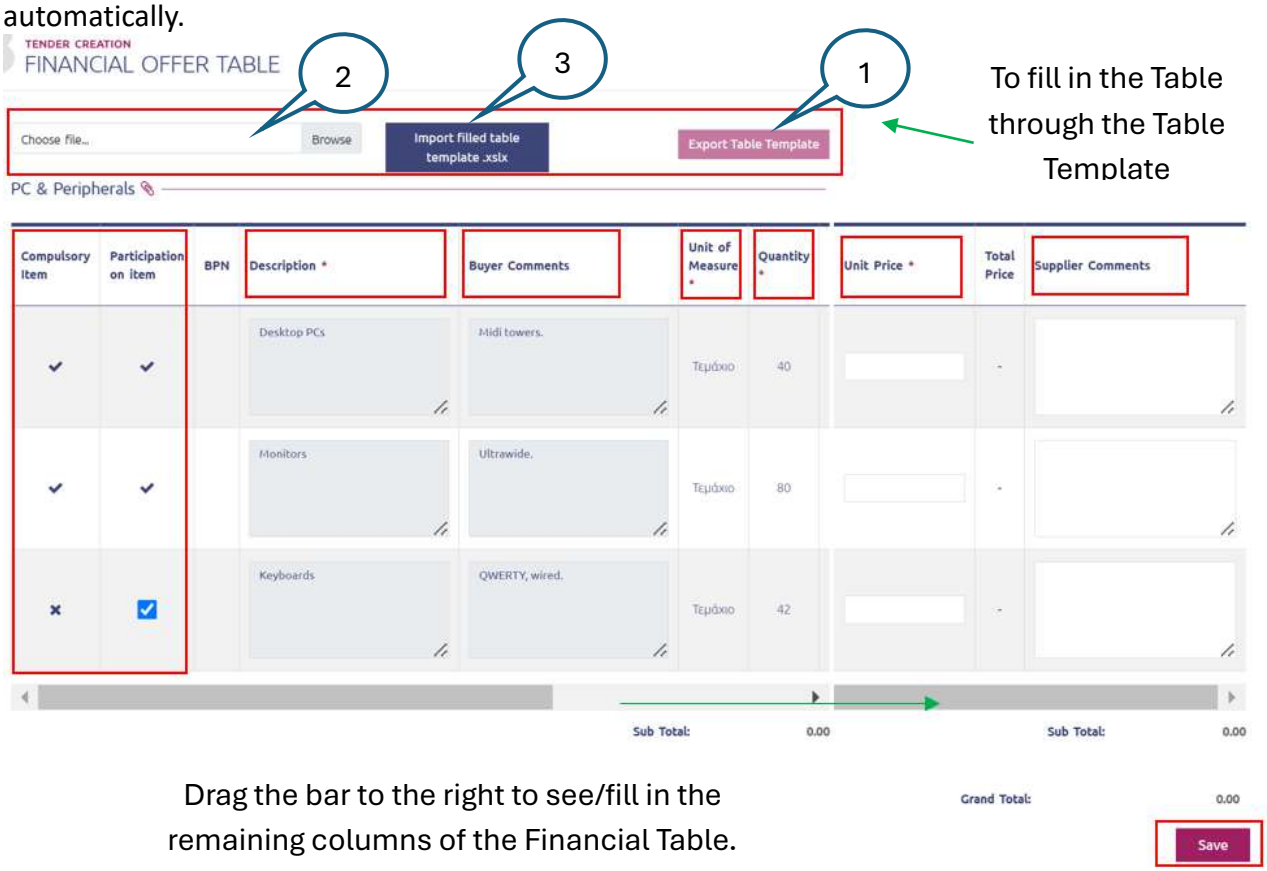
4. Bid/Proposal Submission – Tender Elements

Tender Elements - Financial Table

In this element, the Buyer/Contracting Entity requests that you complete your bid/proposal for the tender.

You can complete the Financial Table manually or by using the Table Template.

Simply export the template, fill it out, and upload it; the table will then be populated automatically.



To fill in the Table through the Table Template

Drag the bar to the right to see/fill in the remaining columns of the Financial Table.

The columns of the table are as follows:

- Compulsory Item: Marked ✔ with are the lines whose products are mandatory for the bid/proposal. Marked with ✖ are the lines whose products are not mandatory for the bid/proposal.
- Participation on item: Mandatory items/lines are marked with ✔ . If you choose to include a non-mandatory item in your bid/proposal it will be marked with ☑ . If you don't want to include a non mandatory item in your bid/proposal simply untick it.
- Description: Description of the item/line.
- Buyer Comments: Comments by the Buyer/Contracting Entity.
- Unit of Measure: The unit by which the line/item is measured.
- Quantity: The quantity asked for the item/line.

- Unit Price: The price per unit for the item/line. Please note that 0 is an acceptable price and it means you are giving it away for free.
- Supplier Comments: Your comments on the item/line.

Please note:

- This symbol * marks which columns/fields are mandatory. You cannot proceed to the next step of the tender unless all mandatory columns and fields are completed.
- A red paperclip above the financial table signifies that uploading your bid/proposal as a file is also mandatory. Click it to upload your file. The paperclip icon will turn green once at least one file has been uploaded.



- The columns and/or their titles may differ from those in the example.

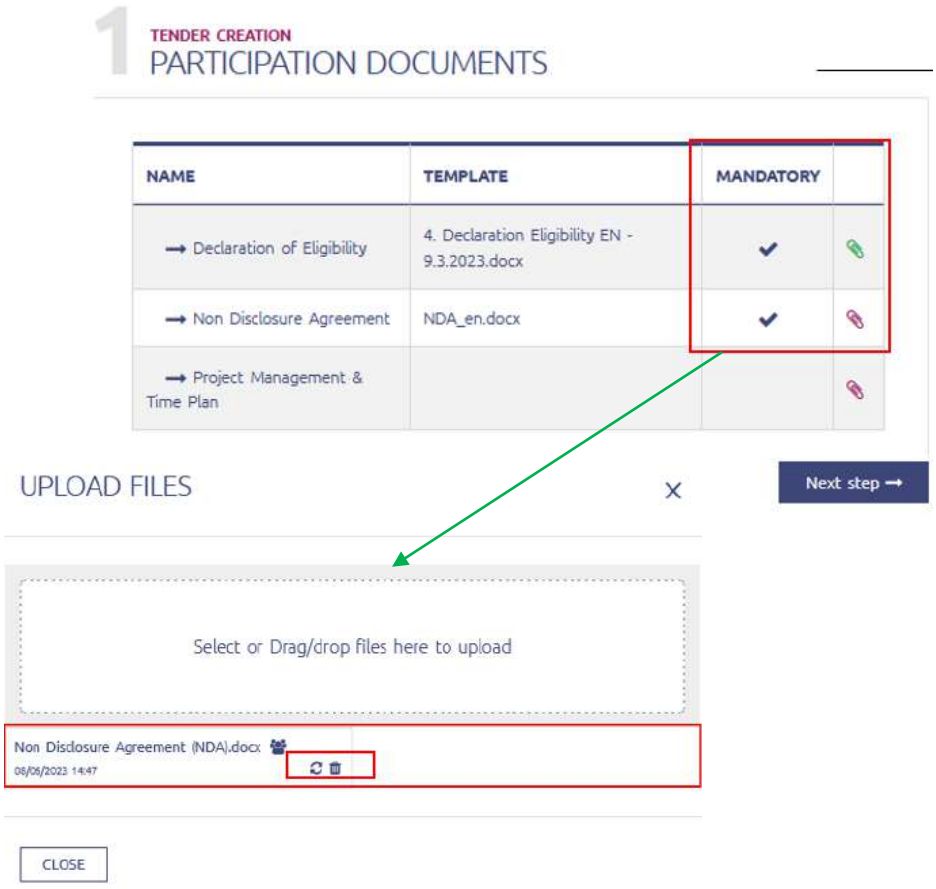
Action 1: Fill in the Financial Offer Table (manually or by exporting and importing the excel template).

Action 2: Click Save.

Action 3: Click Next Step.

Tender Elements - Participation Documents

This element outlines the documents the Buyer/Contracting Entity requires to be uploaded for the tender.



A red paperclip indicates that no documents have been uploaded for that line, while a green paperclip signifies that at least one document has been uploaded. Moreover, this icon ✔ denotes that uploading a document for this line is mandatory.

Clicking the paperclip opens the UPLOAD FILES window. There you can click (or drag and drop) to upload the requested files.

Clicking this icon 🗑 deletes the corresponding file, while clicking the other icon 🔄 changes the document's confidentiality settings (e.g., for a public tender).

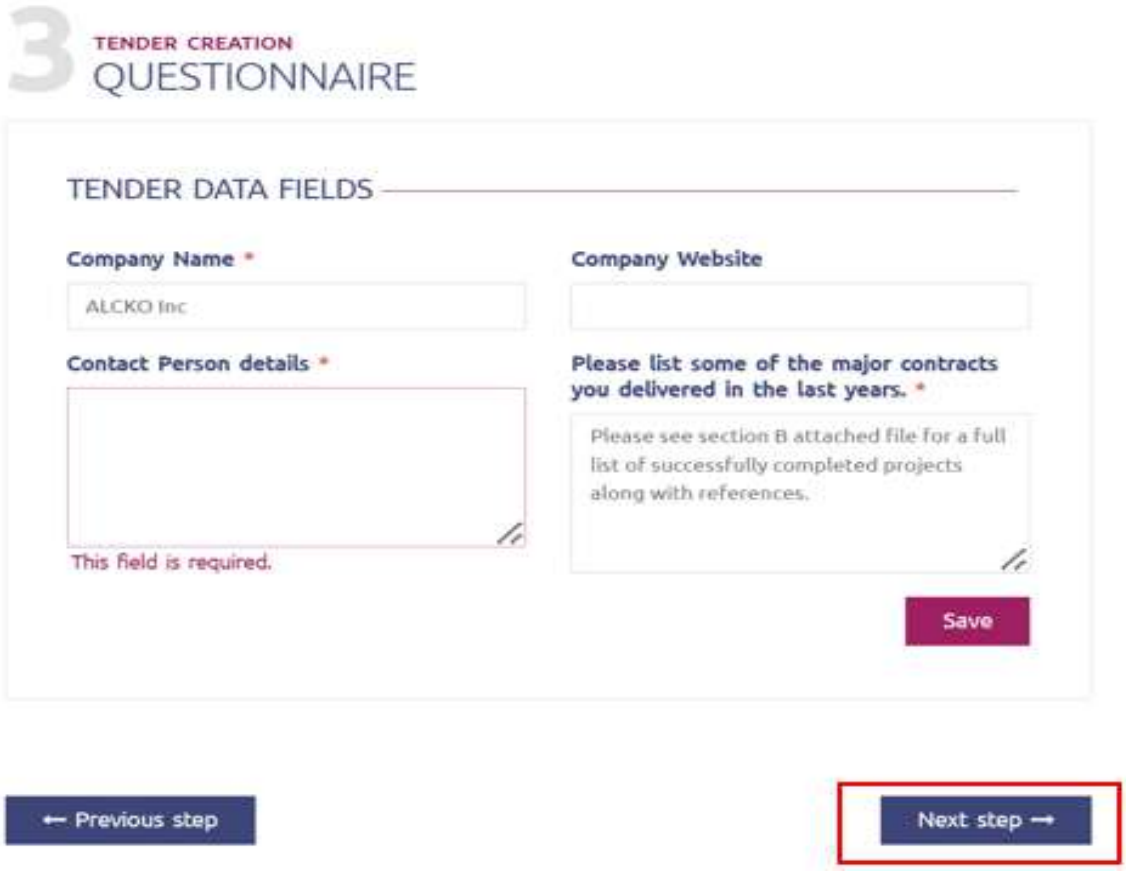
Tender Elements - Data Entry Form / Questionnaire

This element includes questions and fields defined by the Buyer/Contracting Entity for participants to respond to during the tender process. This icon * denotes the mandatory fields that must be filled out prior to advancing to the next step of the bidding process.

Action 1: Upload the required PARTICIPATION DOCUMENTS (if applicable).

Action 2: Fill in the QUESTIONNAIRE (if applicable).

Action 3: Click Next Step.



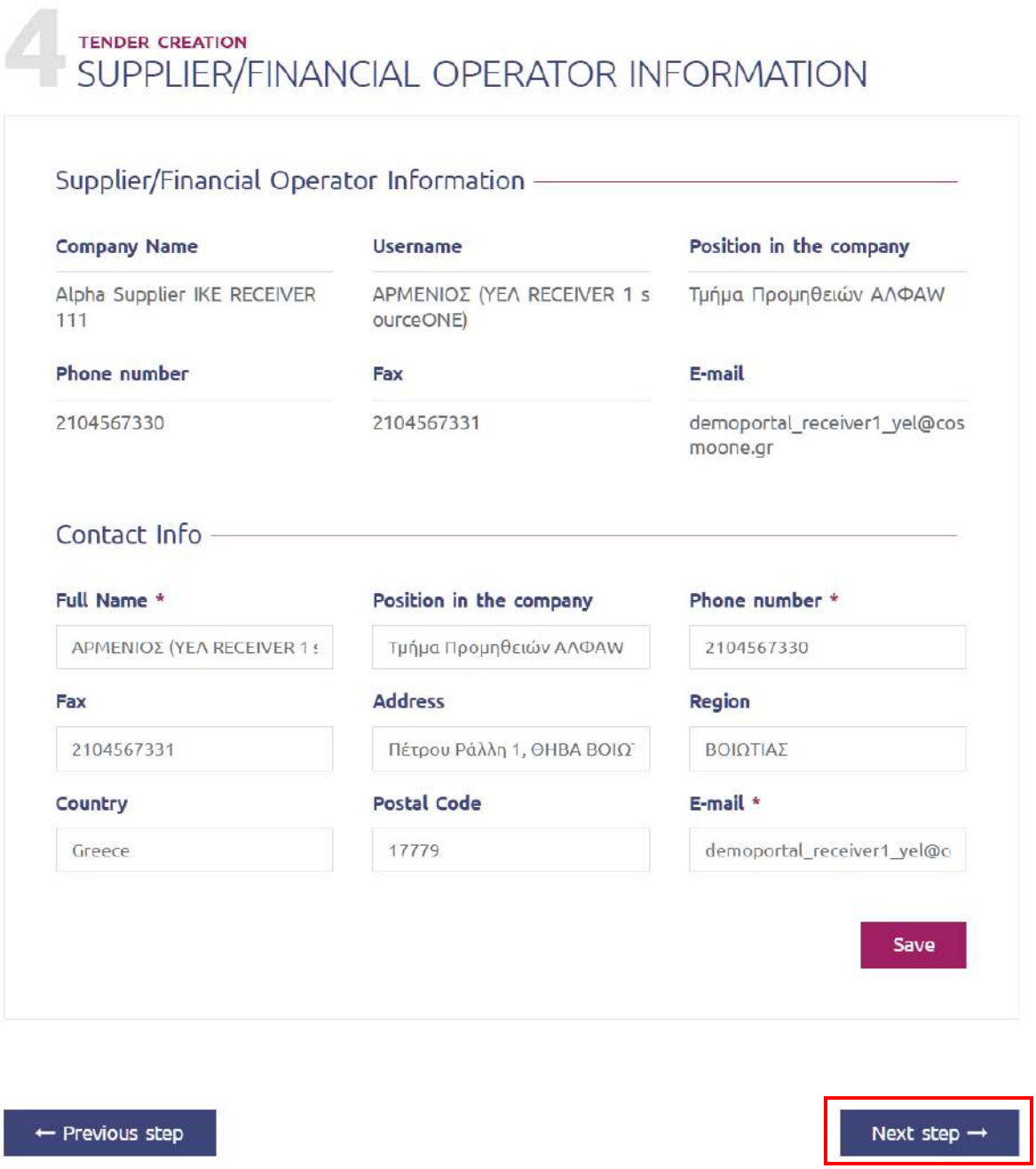
5. Reviewing Submitted Information and Bid/Proposal

During the bid/proposal submission process, the system will direct you to the SUPPLIER/FINANCIAL OPERATOR INFORMATION page, where you can fill in or verify your information.

After confirming that your information is correct, click Save and then Next Step.

Action 1: Complete and review your information.

Action 2: Click click Save and then Next Step.



The Draft Preview page allows you to review all information entered throughout the different tender elements.

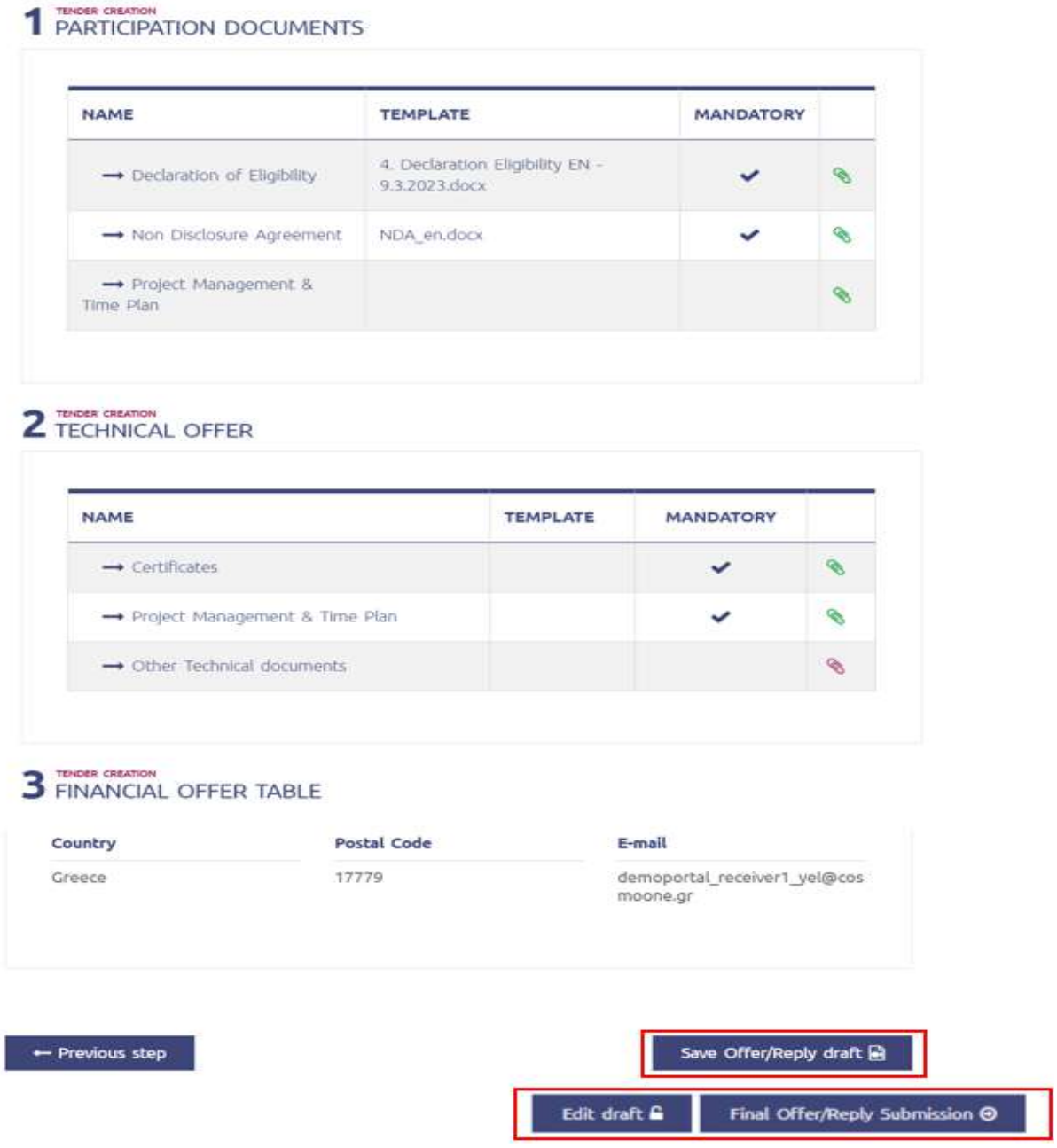
When you are ready to submit your bid/proposal, scroll down to locate one of two buttons.

- Save Offer/Reply Draft or
- Final Offer/Reply Submission,

depending on the tender type.

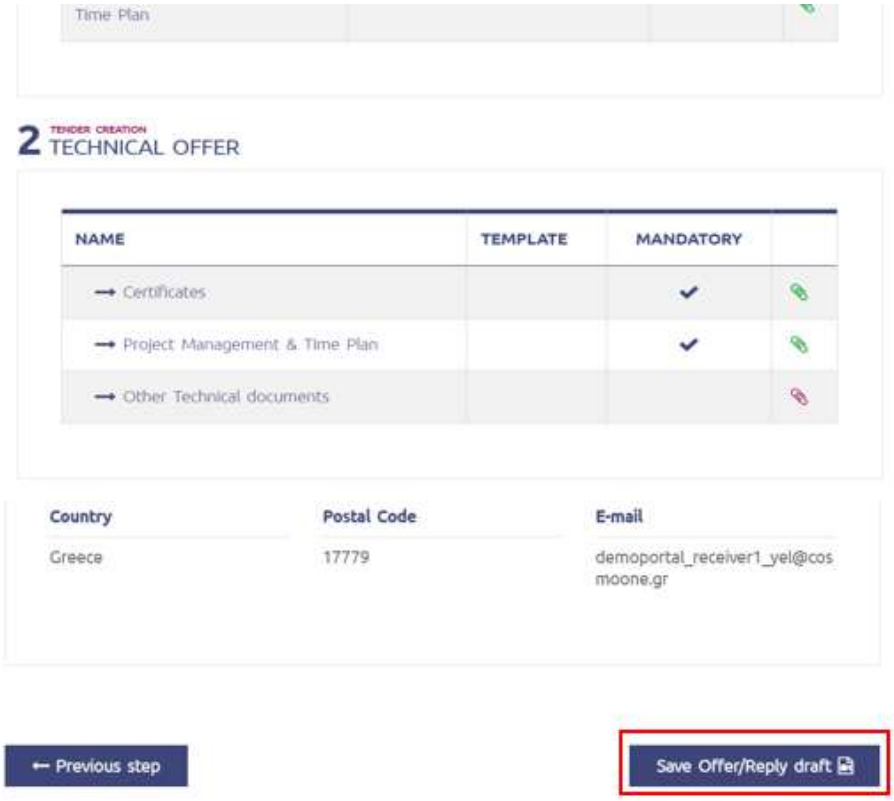
Action 1: Double-check your Bid.

Action 2: Click Save Offer/Reply draft (if applicable) and then click Final Offer/Reply Submission.



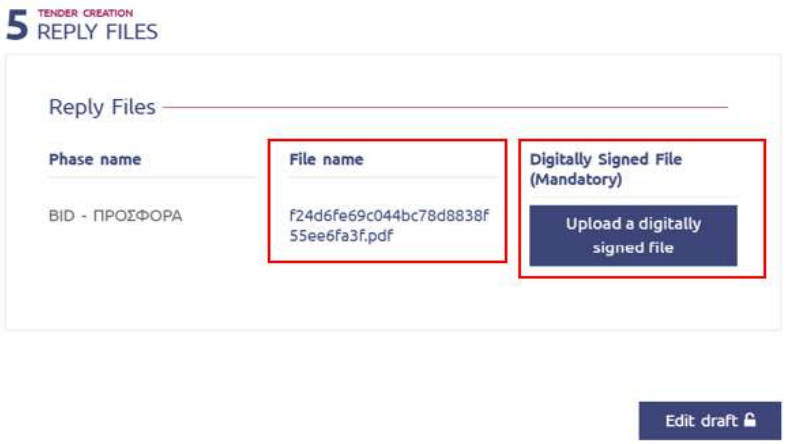
6. Digital Signature

For certain tenders that require a Digital Signature, upon completing the bid/proposal submission process, scroll down and select Save Offer/Reply Draft.



The system will then direct you to the REPLY FILES page, where you can add your Digital Signature.

In this window, clicking the file under the File Name heading will download your bid/proposal as a PDF. Open the file, add your digital signature, and then click 'Upload a digitally signed file' to proceed. This action will open the Files window. In this window, select your digitally signed file and click 'Upload Attachment'.



Please note that the system will **only accept** the file downloaded by clicking under the 'File Name' heading.



Action 1: After reviewing your bid, click Save Offer/Reply draft.

Action 2: Download your bid's PDF file under the File name header.

Action 3: Add your Digital Signature to the file.

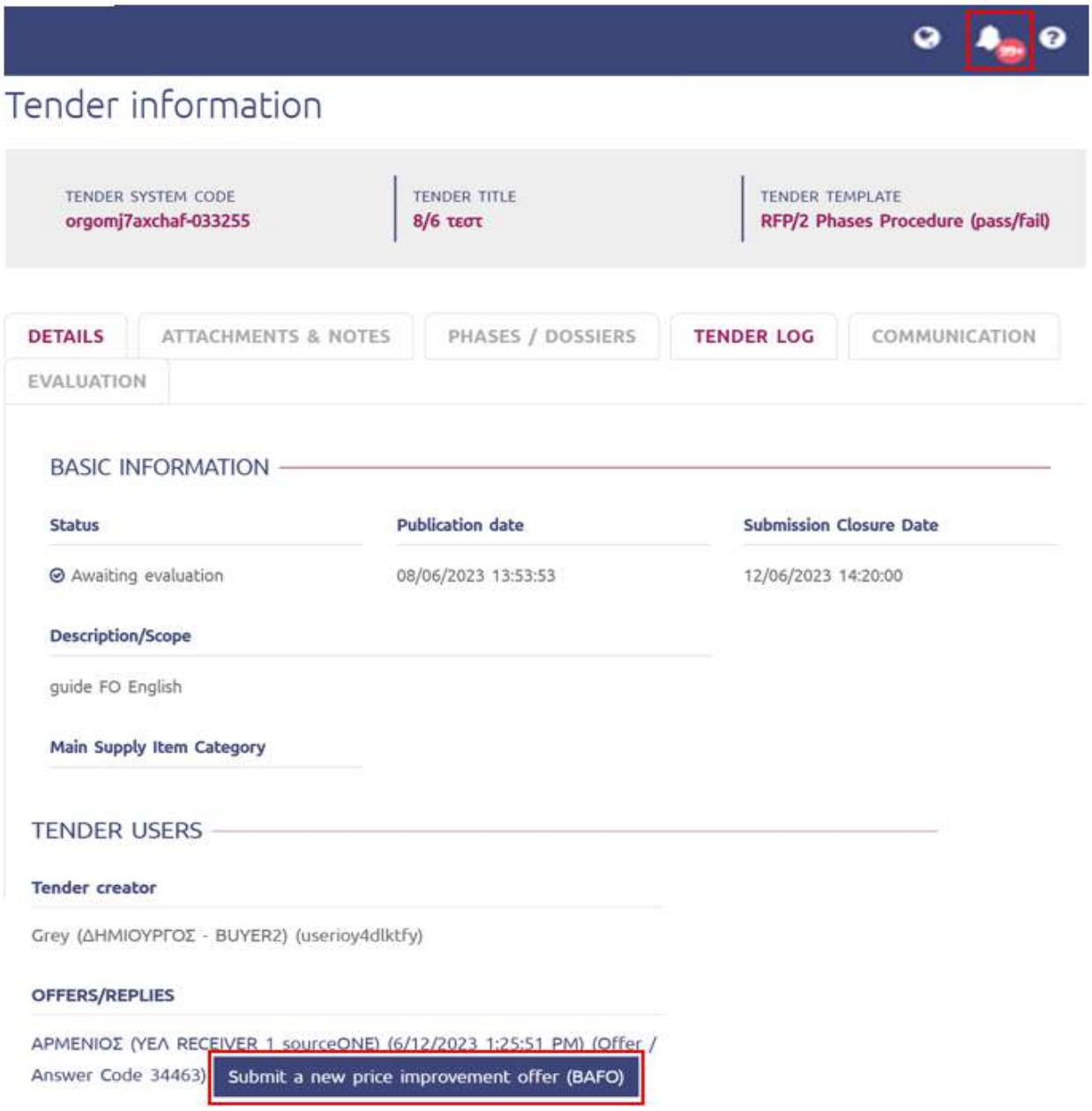
Action 4: Click Upload a digitally signed file, select the file and then click Upload Attachment.

Action 5: Submit your bid/proposal by clicking Final Offer/Reply Submission.

7. Submission of an Improved Bid / Best and Final Offer (BAFO)

The Buyer/Contracting Entity may initiate an Improved Bid/Best and Final Offer (BAFO) round. You may begin this process either from the Tender Information page or through the Notifications.

On the Tender Information page, scroll down and click 'Submit a new price improvement offer (BAFO)'.



Another way to locate the tender for which you have advanced to an Improved Bid/Best and Final Offer (BAFO) round is by clicking the Notifications button. This will open a page displaying your notifications in list form.



Clicking on the notification will open a window with the same message.

In that window, clicking Show Tender will take you to the Tender Information page.



Action 1: Begin the process to submit an Improved Bid/Best and Final Offer (BAFO) by going to the Tender Information page or from the Notifications.

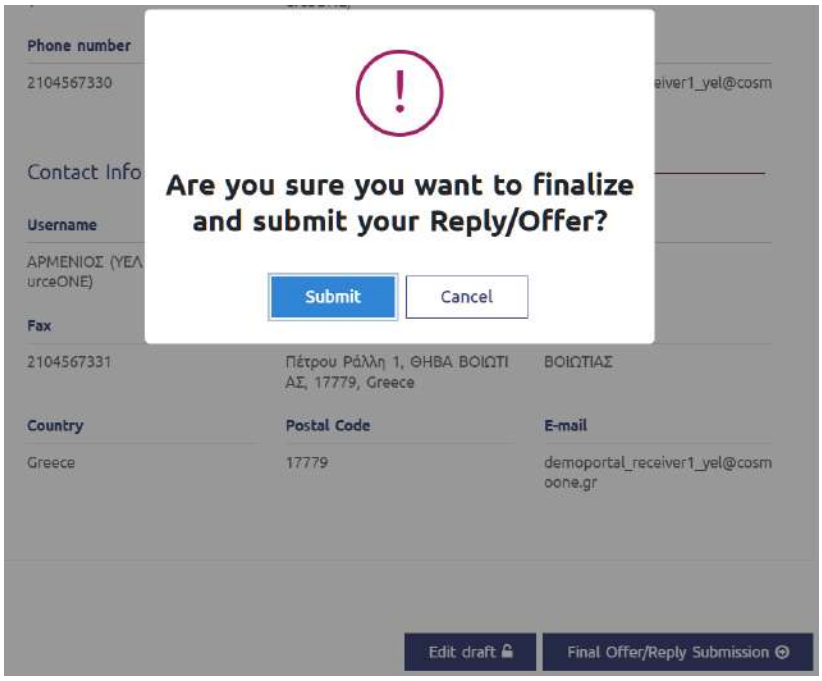
Action 2: On the Tender Information page, scroll down and click Submit a new price improvement offer (BAFO).

Action 3: Fill in your improved bid/price and submit.

8. Confirming and Viewing Your Submitted Bid/Proposal

After you have finished checking your bid/proposal (as you have seen in previous pages), click Final Offer/Reply Submission.

This will open a window asking for confirmation. Click Submit.

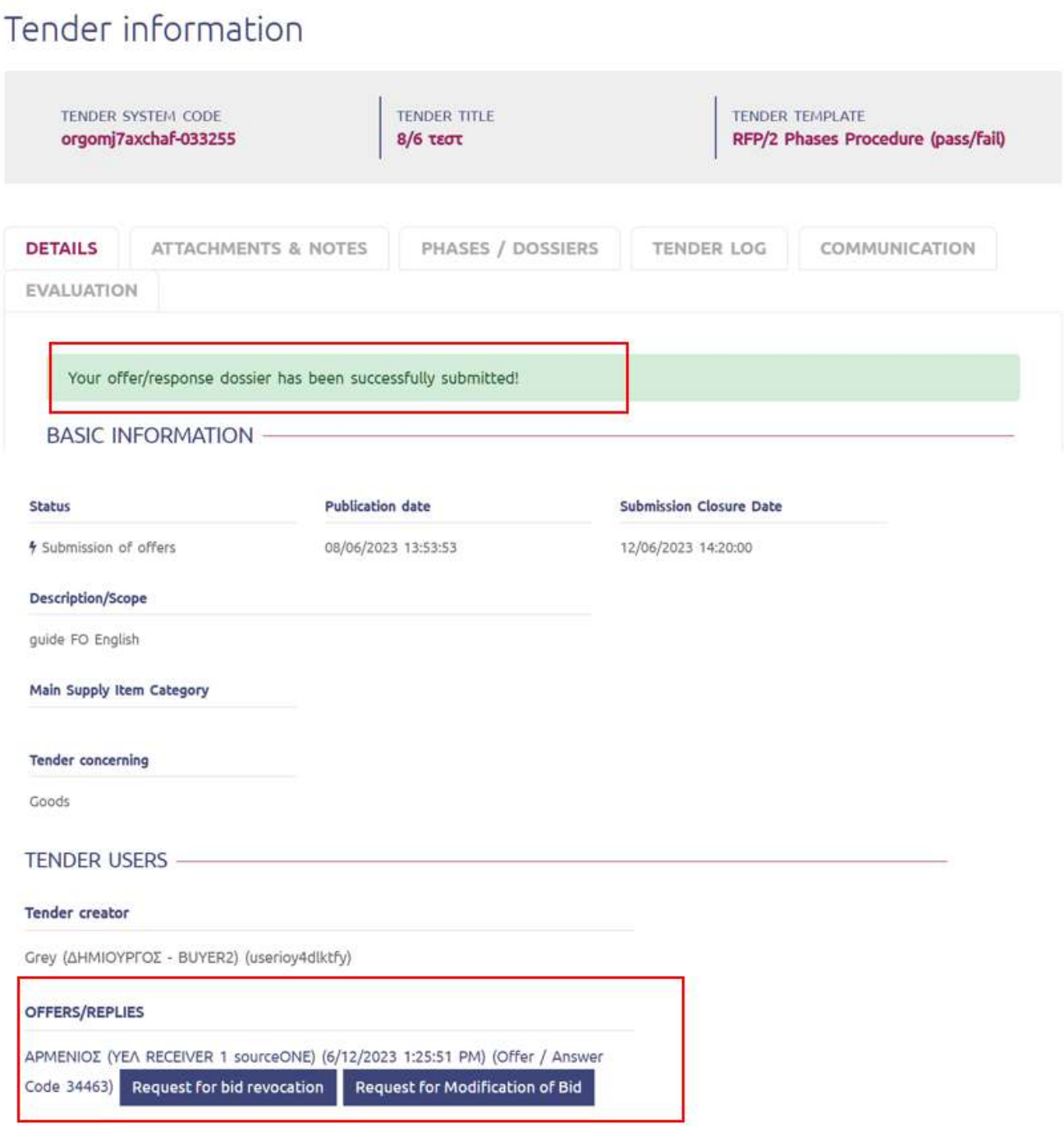


After you have clicked Submit the system will direct you to the Tender Information page.

After loading, you will see a green system message stating, 'Your offer/response dossier has been successfully submitted!' confirming that your bid/proposal/offer was **submitted successfully**.

Finally, your bid/offer will appear at the bottom of the page, displaying the submission date and time, along with options to revoke or modify it.

By clicking the file, you can open and review your submission.



Action 1: Review your bid/proposal thoroughly, then click Final Offer/Reply Submission to submit it.

Action 2: After loading has finished, you will notice on the Tender Information page the system message verifying your bid/offer submission. You will also be able to see your bid/offer's file and timestamp.