The purpose of this guide is to provide support to vendors in responding to a solicitation. In PHLContracts, a solicitation is referred to as a Bid document.

All solicitations offered by the City of Philadelphia in PHLContracts will be managed online, including responses to Bids by vendors. In order to respond to a Bid, a vendor must be a fully registered vendor in PHLContracts. If the vendor is not registered, they should register by accessing https://www.phlcontracts.phila.gov and selecting Register. A guide to assist vendors in the registration process may be accessed at http://www.phila.gov/procurement/Documents/SA_Vendor_Registration.pdf.

For vendors who are fully registered, login with your User ID and Password.

Electronic Payments Now Available

Electronic payments are now available for:

- Bid Processing Fee
- Annual Bid Security Fee
- Performance Security Fee

To make an electronic payment via debit card, credit card, or e-check:

1. Go to www.phila.gov
2. Scroll to the middle of the page where you see Pay, then select Procurement Payments from the dropdown menu
3. If you are on beta.phila.gov select Pay a bill
4. You will be redirected to the City of Philadelphia Payment Center website
5. Scroll to the bottom of the page until you see Other section
6. Select the desired Procurement Payment
7. After clicking a payment type, you will be directed to a secure payment website to complete payment

Creating a Response to the Solicitation

In PHLContracts, a response to a solicitation is referred to as a Quote.

The first step is to find the Bid in question so that you can review what is being solicited and instructions on how to respond provided by the Buyer.

When you have logged in, make sure that if you have both the Seller and Seller Administrator roles, that you have the Seller role selected. This is the role that allows you to view and respond to Bids in PHLContracts. Click on the Bids tab on your home screen, or search for Bids using the Bid dropdown menu in the navigation bar near the top of your screen. Open Bids are bids that are still open for Quotes, and Closed Bids are bids that are no longer accepting Quotes from vendors.
Once you are viewing an active, open Bid, you can create a response by clicking the Quote button on the bottom of the screen. This will display the New Quote screen.

The following provides a description of the fields provided on the General tab of the quote. Please note that the * denotes a required field.

- **Quote Number**
  - Will be auto assigned upon completion of the General tab
- **Description**
  - Same as the Bid description. This can be edited to provide a description of your response, if appropriate.
- **Delivery Date**
  - If applicable, number of days for delivery (if response is for an ongoing, orderable set of goods or services)
- **Discount Percent**
  - If entered, will apply the discount to all items on quote. If discount is item by item, please use the Items tab
- **Is “No Bid”**
  - Selecting no bid will notify the City of Philadelphia that you do not wish to submit a response
- **Alternate Bid Terms**
  - *This functionality is not being used by the City of Philadelphia.* If the vendor submits multiple Quotes, the vendor can flag a specific response as “alternate” Defaults to terms selected during vendor registration. These can be modified by selecting the appropriate terms for the dropdown menu. If “Terms” (which include Shipping, Freight and Payment terms) are requested by the City as part of a solicitation, they will be asked for on a bid by bid basis through instructions to Sellers.
- **Promised Date**
  - If applicable, promised date for delivery of the requested goods or service (for one-time delivery)
- **Info Contact**
  - Enter Vendor primary contact information for the Quote
- **Comments**
  - Enter in any comments for the Quote. This will display to the buyer and be considered part of your response

Once you have entered in the necessary fields, click Save & Continue. The screen will refresh and a Quote number will be automatically generated by PHLContracts.
Error Messaging

While working on the Quote, you may see red or yellow error messages. Red error messages indicate something that MUST be addressed or corrected before submitting the Quote. A yellow warning indicates a component of the Quote that may be non-standard (e.g., not fulfilling subcontractor goals/requirements fully); however, the Quote can be submitted even if the yellow warnings display.

Items Tab

The Items tab is where you enter pricing information for the items requested. Please read any attached instructions on the Bid or instructions appearing on the Items tab of the Bid carefully to ensure that your response is entered as requested by the City of Philadelphia.

The following fields allow you to enter in information:

- **Unit Cost**
  - Enter in the unit cost per item. PHLContracts will automatically multiply the unit cost by the quantity (if applicable)

- **Discount Percent**
  - Enter in the discount for the specific item, if applicable. PHLContracts will automatically calculate the net item price based on the unit cost and discount

- **Tax Rate**
  - Enter the tax rate, if applicable

- **Freight**
  - Enter freight, if applicable

- **No Bid**
  - If checked, the vendor is not supplying a quote for this specific item

- **No Charge**
  - If checked, the item is considered to be included, provided that the vendor is awarded the PO/Contract, unless stated in the instructions for the Bid to which you are responding

- **Alternate Description**
  - An alternate description can be provided, either to supplement the description provided in the City’s solicitation or to replace the City’s description

Once completed, click **Save & Continue**
Questions Tab

The questions tab allows you to respond to questions posted on the Bid. Please note that if responses to questions are required, you must respond to the questions in order to allow the Quote to be submitted. Unanswered questions that are required will generate red error messages.

Subcontractor Tab

When the Bid is configured for Subcontractor Participation, you can view participation requirements and enter subcontractors and related participation data on the Subcontractors tab.

Once you have accessed the Subcontractors tab, navigate to the bottom of the screen to add your subcontractors. Click on the “Lookup & Add Vendors” button. A pop-up window will appear that allows you to search for registered vendors (i.e., subcontractors) and add them to your Quote.
You may search and locate your subcontractors by entering their vendor name (or other identifying data), or you may search across the vendor database for any Minority-owner Business Enterprise (MBE), Women-owned Business Enterprise (WBE), Minority Women-owned Business Enterprise (MWBE), or Disabled-owned Business Enterprise (DSBE).

Note: a subcontractor must be registered as a vendor in PHLContracts in order for you to add them to your Quote.

Once you have located the subcontractor, click the “Select” box next to the vendor name, scroll to the bottom of the pop-up screen and click Save & Exit.

After a subcontractor has been added to your Quote, you should select the goal type that is being fulfilled by the subcontractor (MBE, WBE, etc.) and the estimated dollars that will be allocated to the subcontractor under the contract.

Once you have completed the entry of this information, click Save & Continue. PHLContracts will calculate the estimated percentage associated with the subcontractors participation based on the estimated dollars entered and the total value of your Quote.

You may continue to add subcontractors to fulfill all of the requirements associated with the Bid.
Notes Tab

The Notes tab allows you to record internal comments, reminders, etc. that may be viewed by other Sellers in your vendor organization. For example if multiple Sellers are working on a response, the Notes tab can be used to provide information on changes from one user to another user within your organization. Please note: the Buyer issuing the solicitation will NOT see any notes when evaluating the responses.

Terms & Conditions Tab

On the Terms & Conditions tab the vendor accepts the terms and conditions of the Bid (or not). Action on this tab is required in order for the Quote to be submitted. Also, all attachments associated with Bid are shown on this tab (generally terms and conditions will be the first or second attachment) and should be downloaded for your review and use.
If the Terms and Conditions are accepted, select Yes, and click Save & Continue.

If the vendor selects Yes with Exceptions or No, the field below becomes required and the vendor must state the reasons for not accepting the Terms & Conditions. The Seller should be mindful that some Bids do not allow exceptions to Terms and Conditions. Be sure to review the Terms and Conditions and Instructions to Sellers attachments for each Bid to which the Seller responds.

Attachments Tab

The Attachments tab allows you to add any necessary documentation associated with your Quote. Attachments may include product specifications, completed pricing spreadsheets, standard price sheets, or other documents that need to be conveyed to the Buyer.

To add an attachment, click Add Attachments. The following screen will appear.

Use the Browse button to search for the file to upload from your computer. Once chosen, the vendor can edit the name of the file as well as give it a description. Once completed, click Save & Exit.

The Attachments tab will then list all the attachments on the Quote. The vendor may select an attachment and mark it Confidential. Any attachment to the Quote that contains proprietary information should be marked as Confidential.

Some Bids may also require you to complete an online Form. If the instructions for the Bid provide such guidance, you should click on Add Form on this tab. When you click on that button, a new search screen will appear. You may search for the form by its title or simply click the Find It button to view all forms available for editing.
Once you have located the correct form, you should click on the select button and then click **Edit & Attach Form**. You will now be directed to the online form for completion. The form will typically display a number of blank fields that should be completed by you.

Once you have completed the form, scroll to the bottom of the form and **Save**. The system will indicate that the form data has been saved, and you should then click the **Exit** button.

During the process of completing a complex form, you may need to save and exit several times. Each time you would like to edit the online form, you simply click on the name of the form.

When you click the name of the form, the window that appears will show the versions of the form that exist.
To edit the form, click on the **Edit Primary Form** button. The form will open for editing. Each time you save the form, a new version will be created. The most recent version of the online form is marked as **Primary**. The Primary version is the version that will be evaluated by the Buyer.

### Summary Tab

The **Summary** tab is your opportunity to review all the information entered on the quote. If any charges need to be made, select the desired tab to go back to that screen and edit the information.

The **Print** button allows the vendor to print a copy for records.

The **Submit Quote** button will submit your Quote into the system. No changes can be made to the quote unless you withdraw the Quote.

The **Cancel Quote** button cancels the Quote (and it may not be submitted later).

### Withdrawing a Quote

Once the Quote is submitted, no changes to it may be made unless it is withdrawn first. Changes to Quotes may be made up until the Bid Opening Date/Time (after that all submitted Quotes are locked). If changes need to be made to a submitted Quote, click on the **Withdraw Quote** button on the Summary tab. Then choose the **Reopen** button at the bottom of the **Summary** tab if you would like to modify and resubmit the response. The Quote will be fully open to make changes.

Please note that the Quote must again be submitted before the Bid Opening Date/Time or the Quote will not be accepted.
Amendments and Acknowledgements

If the Buyer makes an Amendment to the Bid, the vendor must acknowledge the amendment. The vendor will receive an email, and the Amendment will be shown to the Seller homepage. On the Bids tab, a new section will appear labeled as Bid Amendments Unacknowledged.

<table>
<thead>
<tr>
<th>Bid #</th>
<th>Organization</th>
<th>Alternate Id</th>
<th>Buyer</th>
<th>Description</th>
<th>Bid Opening Date</th>
<th>Bid Holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>64999929</td>
<td>Procurement</td>
<td>0014</td>
<td>Jessica</td>
<td>Training Equipment - Informal Quotes</td>
<td>04/15/2016 10:20:00 AM</td>
<td>List</td>
</tr>
<tr>
<td>64999930</td>
<td>Procurement</td>
<td>0014</td>
<td>Jessica</td>
<td>Demolition Services</td>
<td>04/15/2016 10:20:00 AM</td>
<td>List</td>
</tr>
<tr>
<td>61756643</td>
<td>Procurement</td>
<td>0014</td>
<td>Jessica</td>
<td>Prequalification for Bike &amp; Training Center Access Drive</td>
<td>07/15/2014 01:00:00 PM</td>
<td>List</td>
</tr>
<tr>
<td>61756647</td>
<td>Procurement</td>
<td>0014</td>
<td>Jessica</td>
<td>Prequalification for Pernoze Playground</td>
<td>07/15/2016 03:00:00 PM</td>
<td>List</td>
</tr>
</tbody>
</table>

Clicking on the Bid # will bring the vendor to the Bid Detail view. Once the vendor has read the Amendment(s), click the Acknowledge Amendments button. Please note that if the Amendment makes a change to the items, the vendor may wish to withdraw any Quote(s) related to the Bid and make updates based on the Amendment before resubmitting the Quote.