eTenderBox User Manual

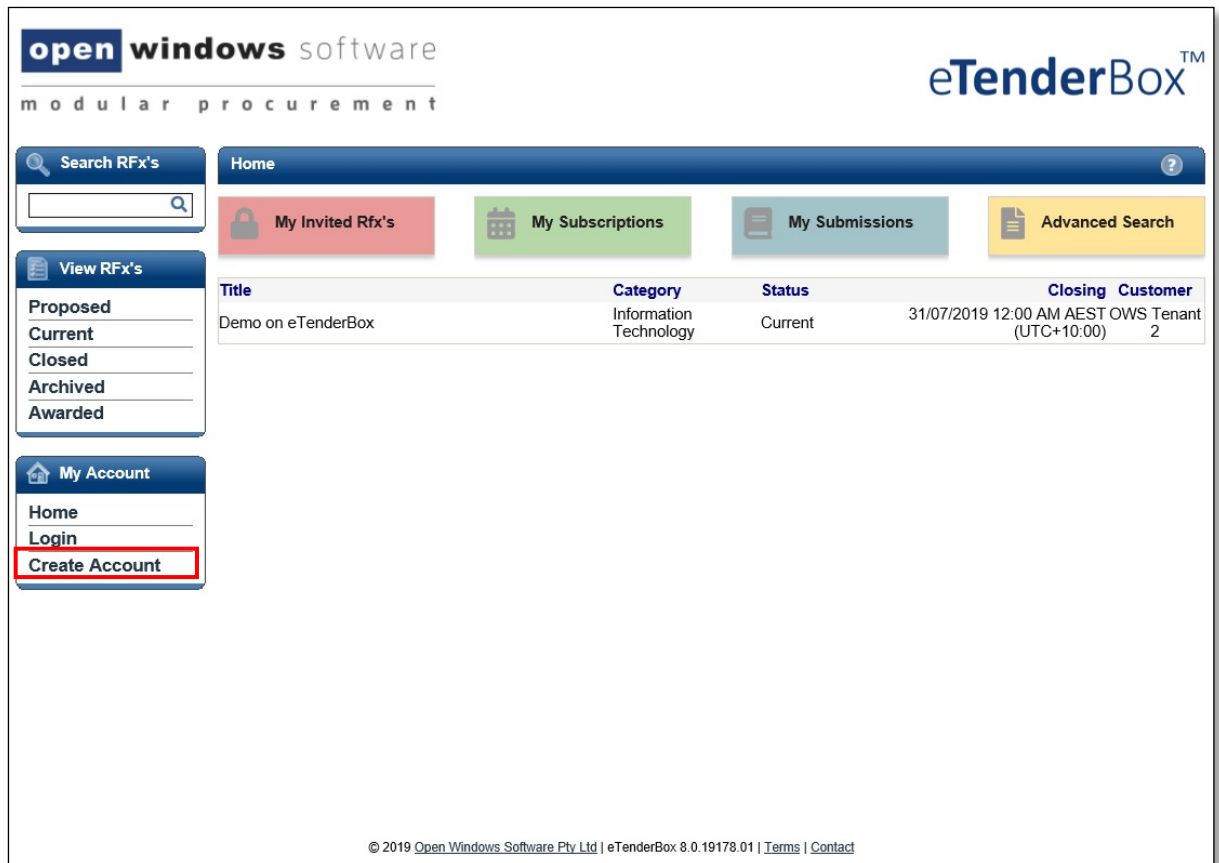# Table of Contents

1. Introduction

This user manual will assist you in using the eTenderBox to view and lodge electronic Submissions to RFx's. This document covers the following functions:

- Registering and logging in as a Respondent

- Viewing RFx details

- Register/deregister your interest in an RFx

- Download RFx Documentation

- Lodge and modify a Submission to an RFx

- View RFx communications and submit queries via the eTenderBox

- Viewing RFx updates during the RFx Period.

- Managing your account details (including resetting your password)

2. Registering on the eTenderBox

You are required to register on the eTenderBox to lodge submissions and access invited tenders. Use the following instructions to register, you will only need to do this if you have not previously registered and/or do not have an eTenderBox account.

1. From the **My Account** widget, select the **Create Account** link.

2. Complete your details on the **Respondent Registration** page. Note all fields marked with ***** are mandatory.

   (Take care with using an email that you have access to and that has not been previously registered. This email will be used for all eTenderBox correspondence).

   Take note of the password rules.

3. Review the **Conditions of Use** and select the checkbox. Select **Submit** to complete the registration.

4. A message will appear indicating you have successfully registered and notify you that an email has been sent to you with instructions on how to complete the registration process.

5. Log into your email account, you will see an email like the following from the eTenderBox. Click the verification hyperlink to complete the registration.

   NOTE: *Your email security settings may prevent this hyperlink from being active. If this is the case copy and paste the link into the address bar of your internet browser.*

6. The link will open the eTenderBox to the **Respondent Account Registration** page. Enter your password to log into your account.

Create Respondent Account

Congratulations!

You have successfully confirmed your details as a respondent.

Login Details

Email	SRMOW04@gmail.com
Password	

[Login]

If you have forgotten your password click here.

Once logged in you will be directed to the **eTenderBox Desktop.**

Search RFx's

View RFx's
Proposed
Current
Closed
Archived
Awarded

My Account
Home
Login
Create Account

My Invited Rfx's	My Subscriptions	My Submissions	Advanced Search
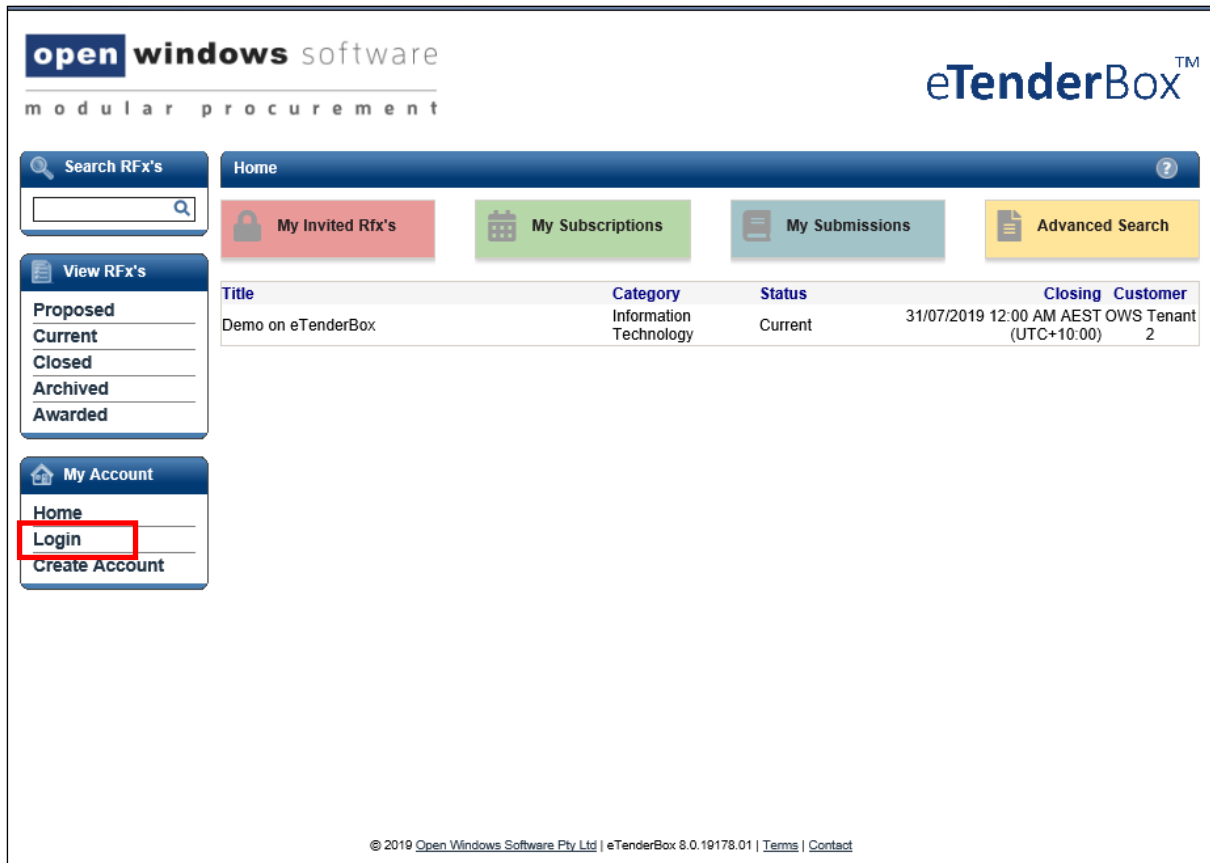
Title	Category	Status	Closing	Customer
Demo on eTenderBox	Information Technology	Current	31/07/2019 12:00 AM AEST (UTC+10:00)	OWS Tenant 2

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3. Logging into the eTenderBox

Once you have registered an account on the eTenderBox you may use the **'login'** link to access your account. It is important you remember the email account you used to register on the portal, to ensure probity you are the only one who can modify your account.

To log onto the eTenderBox select the **Login** link.

Enter your registered email address and password on the Login screen. If you have forgotten your password, click this hyperlink Forgotten Password .

Once you are successfully logged in to the eTenderBox, you will be presented with your desktop where you can now search for your RFx, view all your current and closed RFx's, and view your Submissions history.

4. The eTenderBox Desktop

The eTenderBox supports procurement and sourcing processes by providing a secure, web-based solution in which respondents can view upcoming and current RFx's and lodge responses electronically.

a.   How to locate an RFx

There are 2 methods you can use to locate an RFx within the eTenderBox.

1. **RFX Search**:

Click on the **Search** menu option to search across all current and expired RFX's within the System

2. View RFx's:
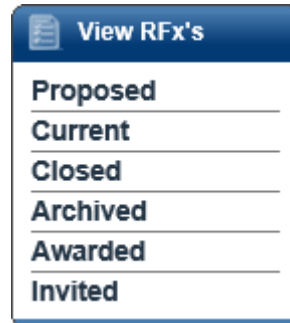
Located on the left-hand menu is a widget called View RFx's. Here you will find links that will allow you to locate the following RFx's:

a. **Proposed:** Displays an organisations proposed RFx's.

b. **Current:** All current public RFx's. These RFx's are currently accepting Submissions.

c. **Closed:** All closed public RFx's and all RFx's to which you were previously invited and have passed their Closing Date. These RFx's are no longer receiving Submissions. All RFx's will stay in a **'closed'** state for Ninety (90) days before moving to the archived folder.

d. **Archived:** RFx's will be visible within this folder for thirty (30) days after which the records will be removed from the eTenderBox.

e. **Awarded:** Displays information about the awarded RFx. Please note the decision to publish this information is at the discretion of the organisation.

f. **Invited:** Displays a list of all RFX's that you have been invited to submit a response against.

b. Locating an Invited Only RFx

An invited only RFx is not visible to the public and can only be responded to by those suppliers who have been invited to respond. If you are invited to respond to an RFx you will receive an email with an **Access Code** like the example below.

NOTE: *You must log into the eTenderBox with the email address that was sent the access code. Only this account can access the Invited Tender.*

Dear Sam Supplier,

RFx Details

Request for Tender Number: RFP24
Request for Tender Title: Engineering Services
Request for Tender Category: Building & Construction
Request for Tender Opening Date: 23/12/2014 11:00 AM (AEDT UTC+11:00)
Request for Tender Closing Date: 09/01/2015 05:00 PM (AEDT UTC+11:00)
Request for Tender Location: Melbourne
Request for Tender Description: Provide consulting services on council projects.

All times listed above are displayed in Canberra, Melbourne, Sydney time

Accessing the RFx

If you are a first time user of eTendering please click here and follow the registration process detailed below to access the Tender. Already registered users can login to the eTendering Portal and enter your Access Code, provided below, to access the RFx.

Access code "quoodi25" (without quotes).

Please do not reply to this email. Any enquiries related to this tender should be directed to the contact person shown on the information for the tender.

Buyer, Bob
Ph: 00 9999 9999
Email: bob.buyer@supplier.com.au

c. Viewing an Invited Only RFx

To view the RFx use the following instructions
      i.   Log into the eTenderBox.
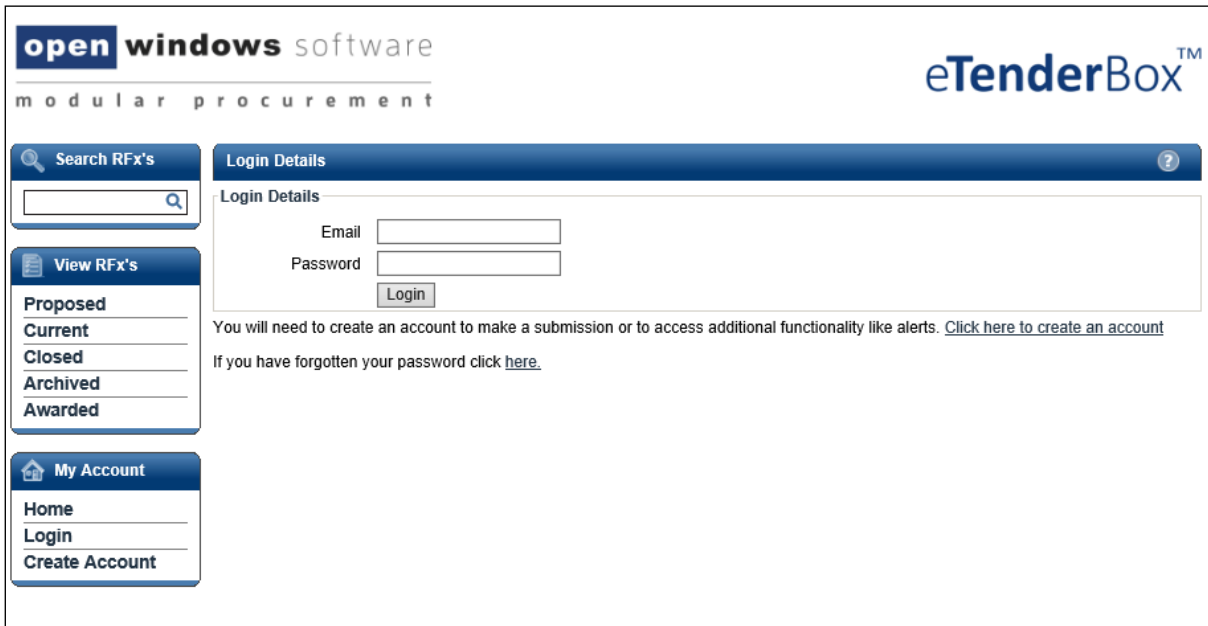
ii.   Select the **Invited** View. Enter the **Access Code** in the **RFx Invited Code** field and the relevantorganisation, then select the **Get RFx** button.
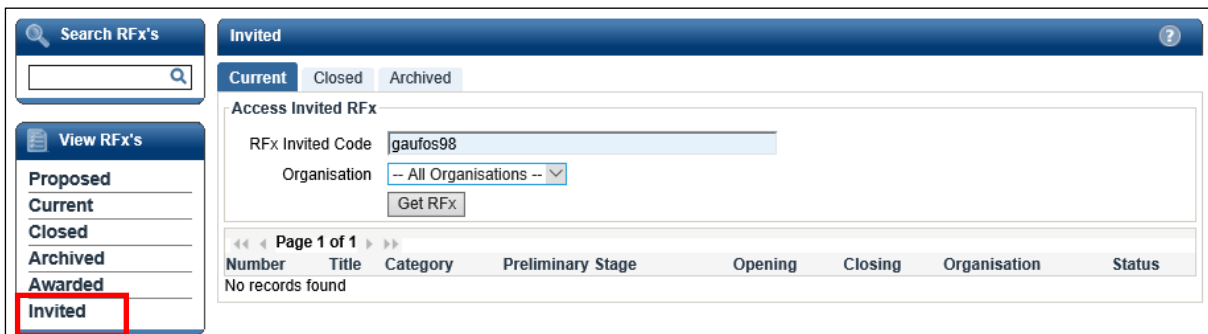
iii.   The **RFx** will now display in the list.
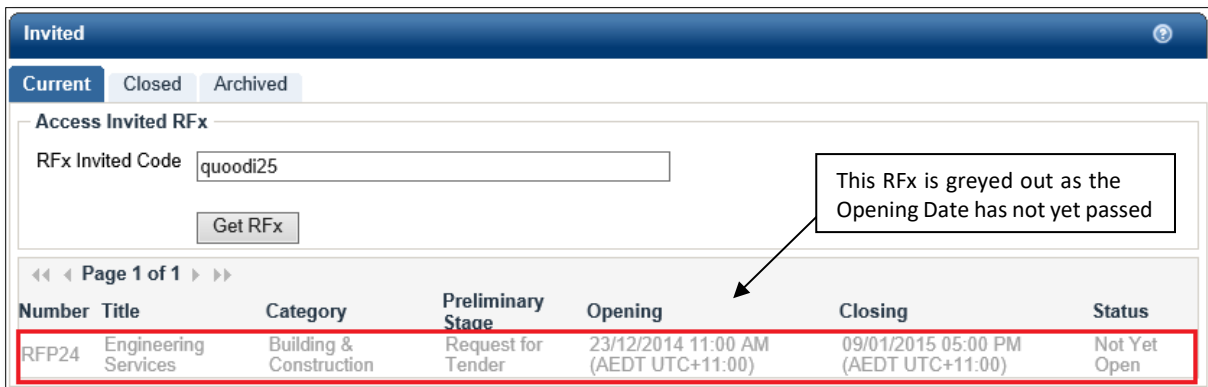
d. Viewing All Public Tenders

You can view tenders for other organisations who use this platform, i.e., other local councils. Locate and select **'All Public Tenders'** under the '**View RFx's'** left hand menu.

5. Navigating within an RFx

Once you have located an RFx you are interested in, select the **Current** option on the side menu, then click on RFx to view more details.

You will be directed to the RFx Details screen, where you can navigate through the different tabs of information relating to the RFx. These tabs are further explained in the next sections.

Document Tab: Download RFx documents here. **Note:** You must register first.

Contacts Tab: View Contact details for the RFx.

Communications Tab: View and send communications to the RFx contact.

Details Tab: Provides a summary of the RFx details.

a. The Details Tab

The **Details** tab shows all the key details about the RFx.

Details			?
RFx Number:	**CON98**		
RFx Title:	Demo on eTenderBox		

Details	Documents	Contacts	Communications

Number	**CON98**
Title	Demo on eTenderBox
Description	dsfsdgf
Preliminary Stage	EOI
Category	Information Technology
Location	Starthfield
Opening Date	16/07/2019 01:00 AM AEST (UTC+10:00)
Closing Date	31/07/2019 12:00 AM AEST (UTC+10:00)
Communications Closing Date	31/07/2019 12:00 AM AEST (UTC+10:00)
Last Updated	16/07/2019 09:58 AM AEST (UTC+10:00)
Status	Current

Close

b. The Documents Tab

The Documents tab lists all RFx Documents issued with the RFx. In order to access the **Download all documents** button you will first need to **Register as a Respondent.**

Details			?
RFx Number:	**CON95**		
RFx Title:	Catering Services		

Details	**Documents**	Contacts	Communications

Filename	**Last Updated**
Sample document.docx	20/05/2016 11:10 AM AEST (UTC+10:00)

* You must register your interest for this RFx before you are able to download documents or make a submission

Register As a Respondent   Close

c. Registering as a Respondent / Downloading RFx Documents

In order to view RFx documents you will be required to login using your eTenderBox account and register for the RFx, if you do not have an eTenderBox account please see section 3. Registering on the eTenderBox. To register for an RFx and download the RFx documents:

1. Ensure that you are on the **Documents** tab of the RFx.

2. Click on the **Register as a Respondent** button.

3. If you are not logged into the eTenderBox you will be required to enter your account details at this point.

4. Select the **Click here to download all documents** button, this will only be available once you have registered as a respondent to the RFx.

d. Unregistering as a Respondent

At any time during the RFx Period you can unregister your intent to participate in the RFx.

1. Navigate to the Documents tab of the RFx and click on the **Unregister as a Respondent button.**

2. Click **Confirm** to acknowledge that you no longer wish to receive communications regardingthe RFx.

3. Once you have unregistered you will notice that your access to the RFx has reverted to **"ReadOnly"** as it was prior to your registration. This means you are no longer able to download RFx Documents (including any addendums), send communications or lodge a Submission.

e.   The Communications Tab

The Communications tab acts as a repository for all RFx communications and queries that have been submitted to the RFx Contact since the RFx Opening Date.

NOTE: *Your use of the Communications tab will be restricted until you have registered as a respondent for the RFx. Communications may close at a different date to the actual RFx, please note the Clarification Closing Date listed on the RFx details tab.*

f.   Sending a Communication

You may submit a query or clarification for RFx's at any time while the RFx is open and once it has been closed. The RFx contact will receive an alert to notify them of the query once it has been submitted. Follow the steps below to send a query to the RFx Contact:

1. Click the link **Click here to add a new RFx Communication.**

Details ⑦

| RFx Number: | **CON95** |
| RFx Title: | Catering Services |

Details   Documents   Contacts   **Communications**

Click here to add a new RFx Communication.

No Communications have been recorded for this RFx

[Unregister As a Respondent]   [Update or Lodge A New Submission]   [Close]

2. Enter a **Subject** for the communication and populate the detail of your query in the text box.

Details ⑦

| RFx Number: | **CON95** |
| RFx Title: | Catering Services |

Details   Documents   Contacts   **Communications**

Compose new Communication

| Subject | |
| | RFx Interview |

Please confirm if an interview is required as part of the selection process.

Path: p

Attachment(s)   [_____] [Browse...]   [Remove]

[Send] [Close]

[Unregister As a Respondent]   [Update or Lodge A New Submission]   [Close]

3. Attach any relevant documentation using the **Browse** button to locate the document.

NOTE: *If you would like to attach more than 1 document, these can be uploaded as a Zip File. To remove an attachment simply click on the **Remove** button.*

4. Click **Send** to lodge the communication.

Click on the icon to download an Excel spreadsheet of all communications
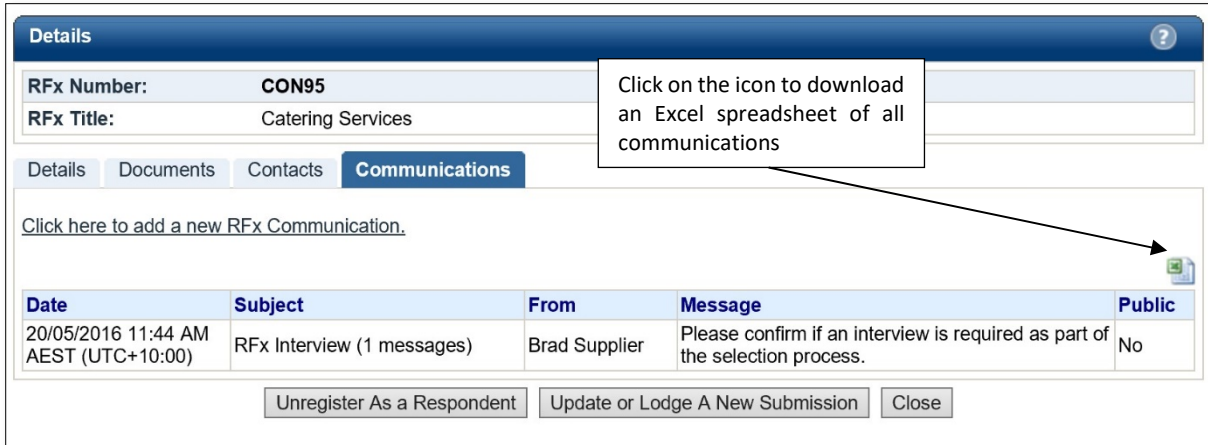
5. The Communications screen lists all public communications for the RFx including any you have submitted. Upon successfully submitting a communication your communication item will appear in this log.

6. Once the RFx contact has responded to your communication you will receive an email with the details of their response. You will also be able to view the details of the response within the Communications tab.Responding to an RFx

In order to respond to an RFx and lodge a submission you must first ensure that you:

A. Register as a Respondent to the RFx
B. Download all RFx documentation

The following instructions assume you have already completed these steps.

6. Lodging a Submission

The following steps will guide you through lodging a Submission.

NOTE: *There are limits on the acceptable file types, file size and number of documents per Submission, as explained below.*

    i. Locate the RFx you wish to respond to using one of the methods indicated earlier.

    ii. Click on the RFx to open the RFx details.
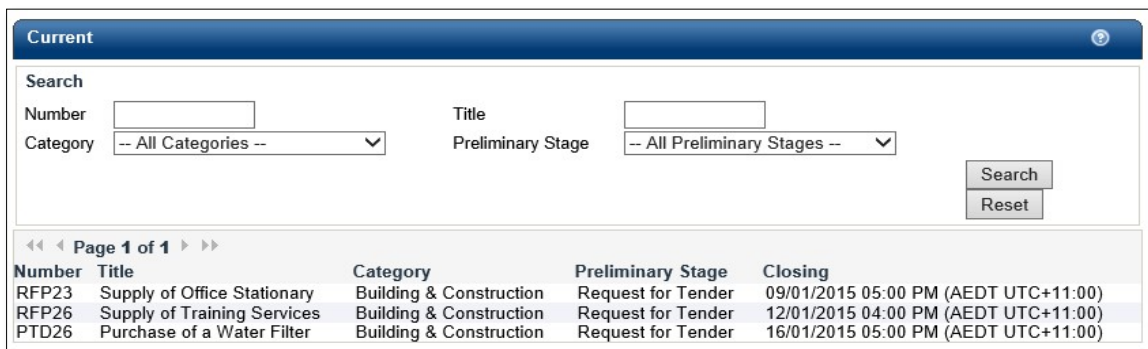
6.1 Firstly, you will need to Register as a Respondent by clicking the button (if you have already done this move on the next step).

6.2 Click on the **Update or Lodge a New Submission** button.

6.3 You will be directed to the **Update or Lodge a New Submission conditions page**. Click on the **Continue** button to agree with the terms and conditions of the RFx process

6.4 You will be navigated to the screen where you are able to upload your Submission. Before you start uploading documents and lodging your Submission, please locate the RFx name and check that you are lodging your Submission against the correct RFx.
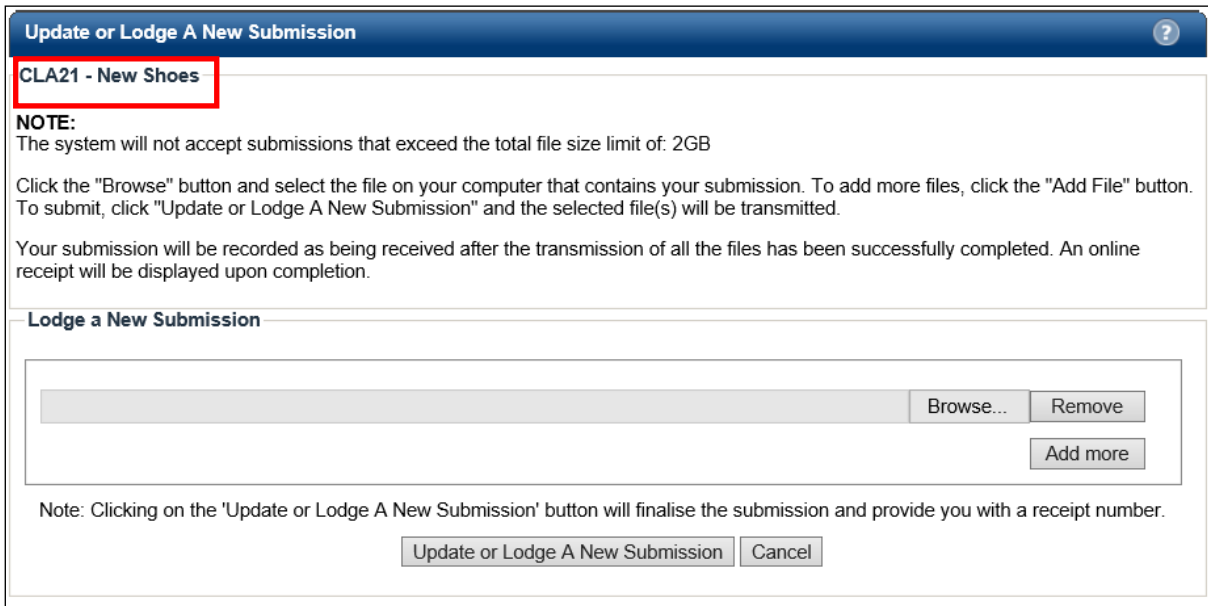
6.5 To upload a Submission document, click on the **Browse** button to locate your document.

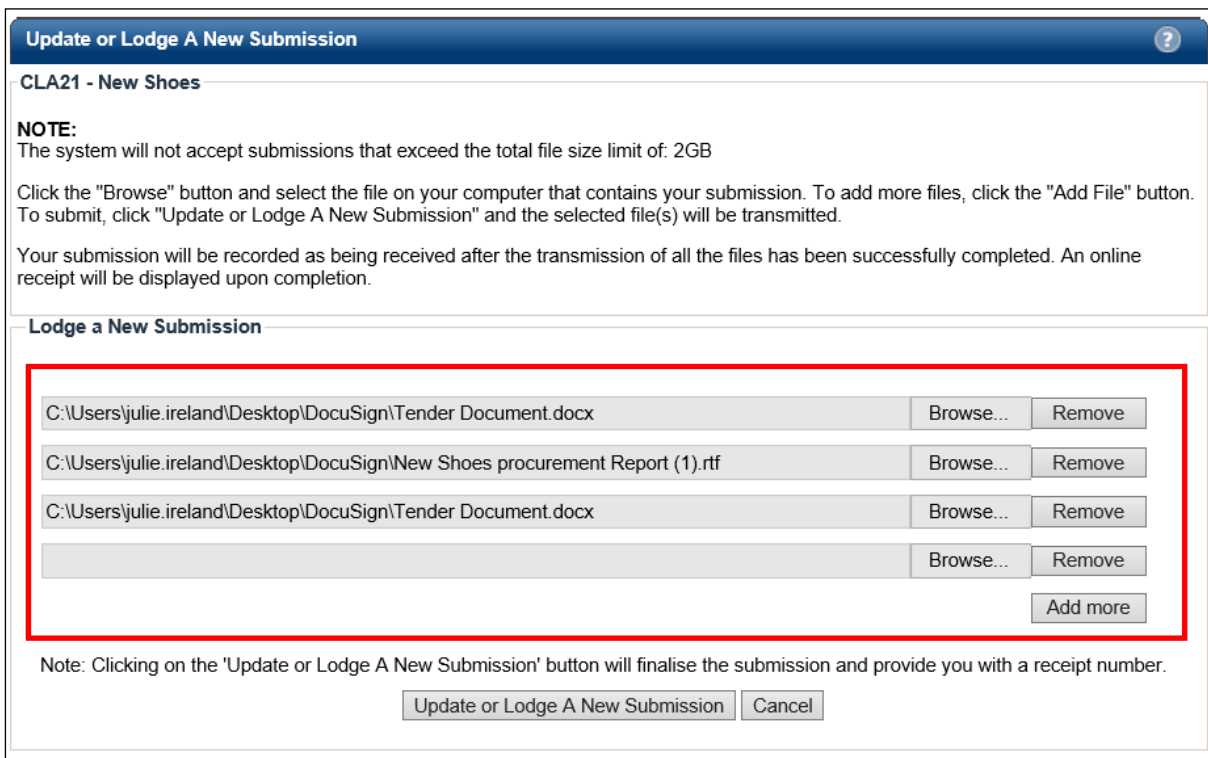6.6 To upload additional documents, click on the **Add More** button. Repeat this process for all remaining documents, remembering there is a limit of 5 documents per Submission. You can make multiple submission against the RFx if you have more than 5 documents to upload.

6.7 If you make a mistake and need to remove a document from your Submission, click on the '**Remove'** button next to the file you wish to remove.

6.8 Click on the '**Update or Lodge a New Submission'** button to lodge your Submission. You may see an '**Upload in progress'** screen which indicates the Submission is being uploaded.

6.9 Once your Submission has been successfully lodged, you will be navigated to the Submission Receipt screen. On this screen, please:

6.9.1 Locate and note your Submission receipt number for future reference; and

6.9.2 Check that all your Submission documents have been successfully lodged.

You will receive a reference number for each lodged Submission

You will also receive an **eTenderBox: RFx Submission Lodged Notification** email which is a copy of your Submission Receipt.

To retrieve your Submission history against an RFx, return to the **Details** screen of the RFx and click on the **My Submission** button.
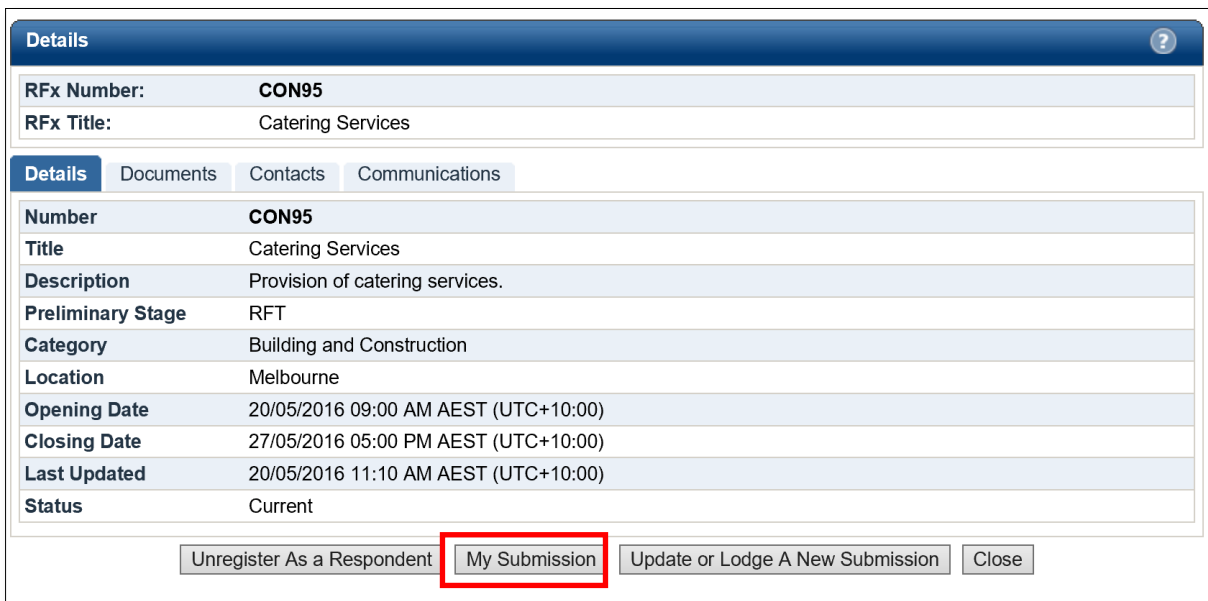
You can click on the view submission files to see the filename, the size of the doc and the time and date that you uploaded them.

7. Modifying your Submission

At any time before the Closing Time, you can modify your previously lodged Submission(s).

7.1 Log into the eTenderBox and navigate to the RFx.

7.2 On the **Details** screen of the RFx, click on the **Update or Lodge A New Submission** button

7.3 Click on the **Continue** button to accept the terms and conditions of the RFx process.

7.4 You will be navigated to the **Update or Lodge a New Submission** screen. Since you have previously

lodged a Submission, the screen will now display **Lodged Documents** and an area to **Lodge a New Submission** as shown below:
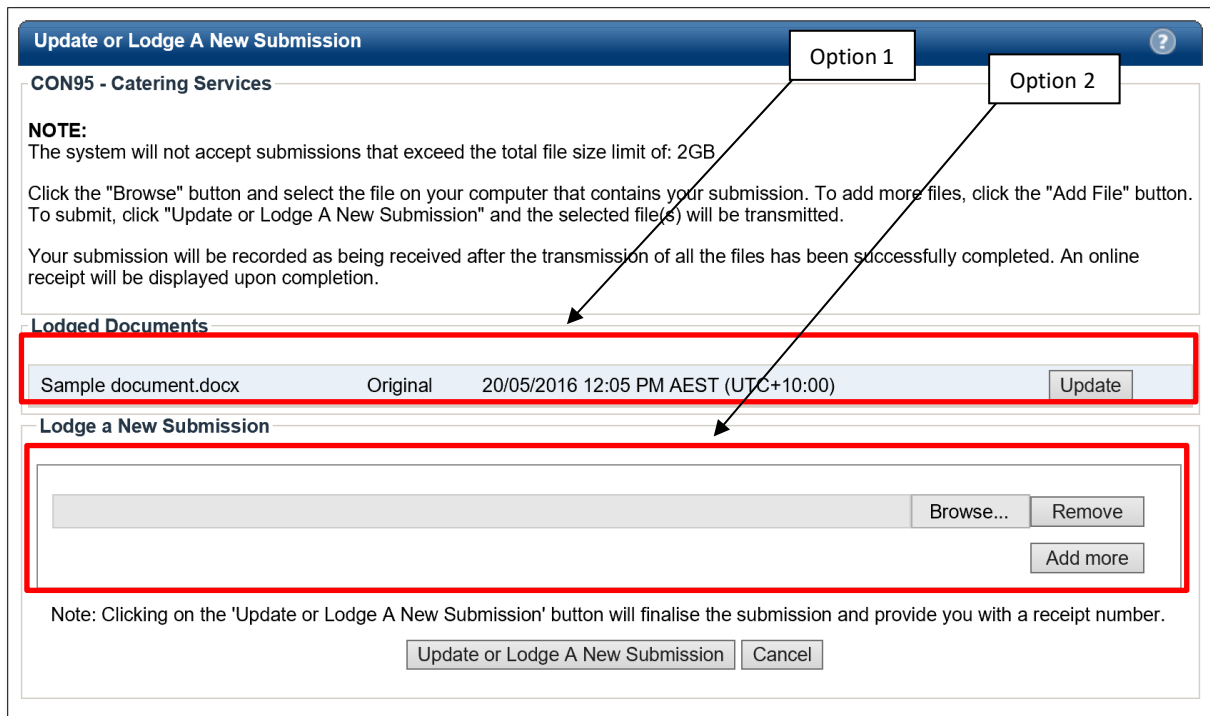
You are now ready to make amendments to your Submission(s). There are two (2) options for updating your previously lodged Submission:

Option 1 – **Update a previously lodged Submission document**

This option allows you to update specific documents that you have lodged as part of a previously lodged Submission.

1. Locate the **Lodged Documents** area on the top half of the **Update or Lodge a New Submission** screen; all your submitted documents will be listed in this area.

2. Click on the **Update** button next to the document that you wish to update.

3. A browse documents pop up will appear under the document record that you are modifying.

4. Click on the' **Browse'** button and locate your revised/modified document. If you have selected the incorrect document, click on the **'Remove'** button and repeat this step. Click on the **'Update or Lodge a New Submission'** button at the bottom of the screen to finalize your modification.

5. You will receive another **Submission Receipt**. Please note your Submission receipt number for future reference and check your modified document(s) has been successfully uploaded. Your Submission Receipt will also be emailed to you.

Option 2 – Submit additional Submission documents:

This option allows you to add more documents to your Submission.
1. Locate the **Lodge a New Submission** area at the bottom half of the **'Update or Lodge a New Submission'** screen.

2. Click on the '**Browse'** button and locate the document you wish to lodge. If you have selected the incorrect document, click on the **'Remove'** button and repeat this step. Click on the **'Update or Lodge a New Submission'** button at the bottom of the screen to finalise your submission.

Update or Lodge A New Submission

CON95 - Catering Services

NOTE:
The system will not accept submissions that exceed the total file size limit of: 2GB

Click the "Browse" button and select the file on your computer that contains your submission. To add more files, click the "Add File" button. To submit, click "Update or Lodge A New Submission" and the selected file(s) will be transmitted.

Your submission will be recorded as being received after the transmission of all the files has been successfully completed. An online receipt will be displayed upon completion.

Lodged Documents

Sample document.docx   Original   20/05/2016 12:05 PM AEST (UTC+10:00)

Browse...   Remove

Lodge a New Submission

Browse...   Remove

Add more

Note: Clicking on the 'Update or Lodge A New Submission' button will finalise the submission and provide you with a receipt number.

Update or Lodge A New Submission   Cancel

3. You will receive another Submission Receipt. Please note your Submission receipt number for future reference and check your modified document(s) has been successfully uploaded. Your Submission Receipt will also be emailed to you.

8. Setting up / Managing Subscriptions

You may wish to setup subscriptions alerts to ensure you are notified by email when an advertised tender matches a category you have subscribed to.

8.1 Adding Subscription Alerts

1. Click the **'My Subscriptions'** button on the dashboard.
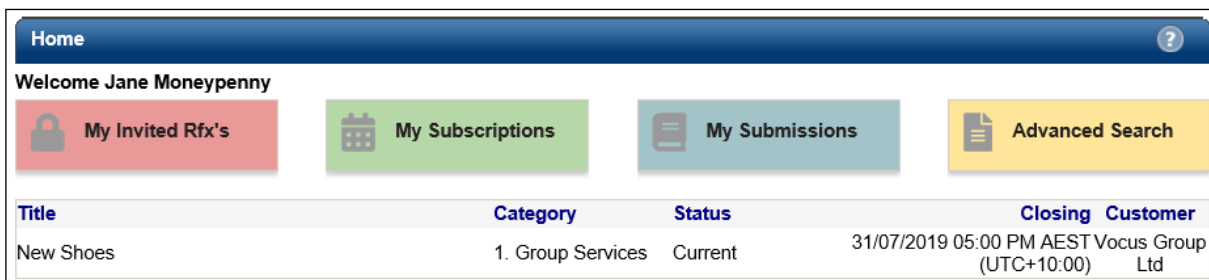
2. Select the link **'Click here to add a new RFx Subscription'**.

3. The following screen will appear:

RFx Subscriptions

Fields marked with * are required.

My RFx Subscriptions

Create New Alert

Key Words [   ]

Key word searches RFx Title, Category and Region. Separate multiple word searches using a comma.

States [--Not Set--   ▼]

Subscribe to all OWS
Tenant 2 RFx's   ☐

Search Category (UNSPSC): [🔍]

Category (UNSPSC)   **Selected Category (UNSPSC)**
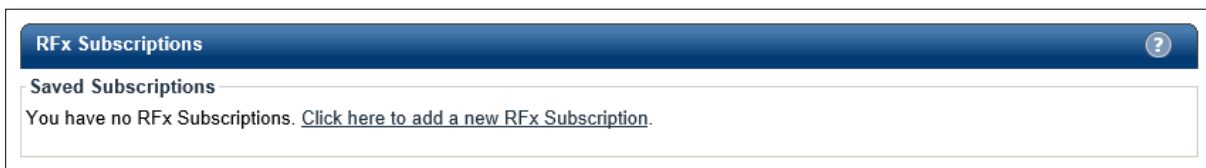
⊕ 10000000 - Live Plant and Animal Material and
Accessories and Supplies

⊕ 11000000 - Mineral and Textile and Inedible Plant
and Animal Materials

⊕ 12000000 - Chemicals including Bio Chemicals and   [Add >>]
Gas Materials
                                                        [<< Remove]
⊕ 13000000 - Resin and Rosin and Rubber and Foam
and Film and Elastomeric Materials

⊕ 14000000 - Paper Materials and Products

⊕ 15000000 - Fuels and Fuel Additives and
Lubricants and Anti corrosive Materials

⊕ 20000000 - Mining and Well Drilling Machinery and

☐   Select All   ☐   Select All

Alert Expiry Date * [   ]

Alert Frequency

As Added ⦿
Daily Summary ◯
Weekly Summary ◯

[Search] [Add Alert]

Saved Subscriptions

Below is a list of RFx Subscriptions. You have the ability here to add a new RFx Subscription, or you can select an Item from the list below
to modify an existing RFx Subscription.

4.   Enter the combination of search criteria required for the subscription:
   • Key Words – enter key words to perform a word search. i.e. **'After Hours'**, this will search for
      all tenders with RFx titles that match the title of **'After Hours'** and any relevant States**.**

   • The Key Words subscription option includes the 'Region' field in key word match. The
      'Region' field is populated each time you publish a RFx to eTenderBox and is meant as a
      narrowed down location beneath the 'State' drop-down.

   • As above, 'State' is also a subscription option either on its own, or in conjunction with a
      'Region' key word match.

   • Select the **'Category'** using the UNSPSC categories.

   • Add an **'Alert Expiry Date'** sometime into the future.

   • Choose from either **'As Added'**, **'Daily Summary'** or **'Weekly Summary'** for the frequency of
      the alert to be provided.

5.   Select **'Add Alert'**.If you select **'Test Alert'** you will receive an email as a test for that alert.

6.   Your alert will be listed in the RFx Subscriptions screen, at any time you can come back and
      adjust the alert.

NOTE: A hyper link directly to the Current Tenders List screen has been added to the bottom of the subscription email.

- Customer column has been added to the matching subscription tenders table.

8.1.1.1 Subscription to all RFX's published by a specific customer

If you have navigated to the https://etenderbox.com.au site to view all current RFx's from the Home screen and then selected a current RFX to view the details, you are taken to the sub-site of that Open Windows customer – https://customername.etenderbox.com.au where clicking on the 'Current' screen in the left-side menu will then only display Current RFx's for that customer. Similarly, if you are invited to a RFx, the links provided in the eTenderBox emails are to the customer sub-site. This has allowed us to add a 'Subscribe to all *customer* RFx's option in the My Subscriptions.

- From within a customer sub-site (accessed by the supplier via the abovementioned methods, or via a specific link our customers may have published to their website) an additional subscription option will be available:

When creating a subscription and selecting this checkbox you will receive a notification of ALL RFx's published by that customer, or you can use it in conjunction with the other options tocustomise the notifications within that customer's published RFx's

8.2 Modifying Subscription Alerts

1. Click the **'My Subscriptions'** button on the dashboard.

1. To modify information on an Alert, simply click on the **'Edit'** button next to the alert:

2. Modify the required details and click **'Update Alert'** to save the changes:
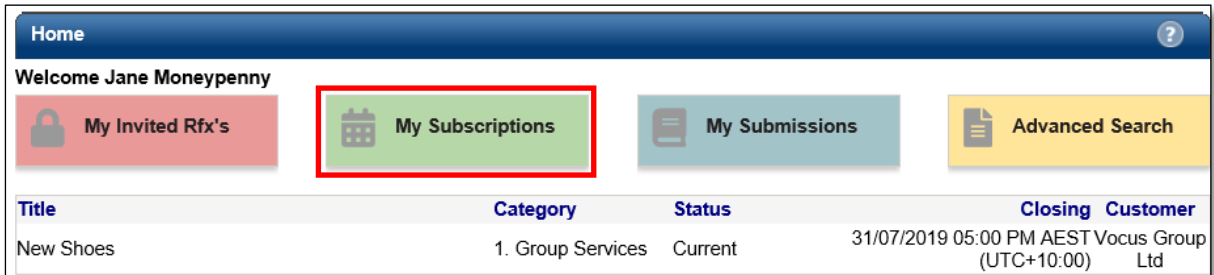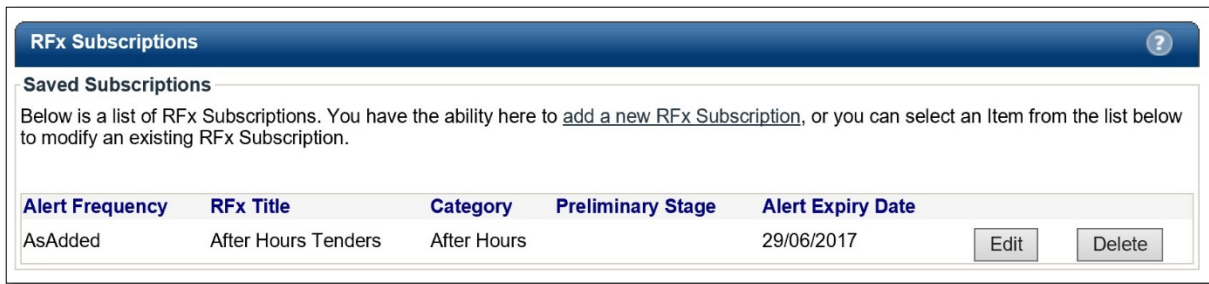

3.

8.3 Deleting an Alert

1. Click the **'My Subscriptions'** button on the dashboard.

2. To delete an Alert, simply click on the **'Delete'** button next to the alert:

9. Forgotten Password

The organisations that you are submitting tenders for do not have access to your account on the eTenderBox, therefore they cannot change or reset your password on your behalf. If you have forgotten, or wish to change, your password please refer to the guidelines below.

If you have forgotten your password to the eTenderBox, you are able to obtain a new password using the Forgot Password function.

     i.   Locate and select 'Login' under the 'My Account' left hand menu.

     ii.   Locate the 'If you have forgotten your password click here' information below the LoginDetails area. Click on the here hyperlink.

     iii.   You will be navigated to the Forgot your password screen where you are required to enteryour email address for confirmation purposes. Click 'Send password information'.

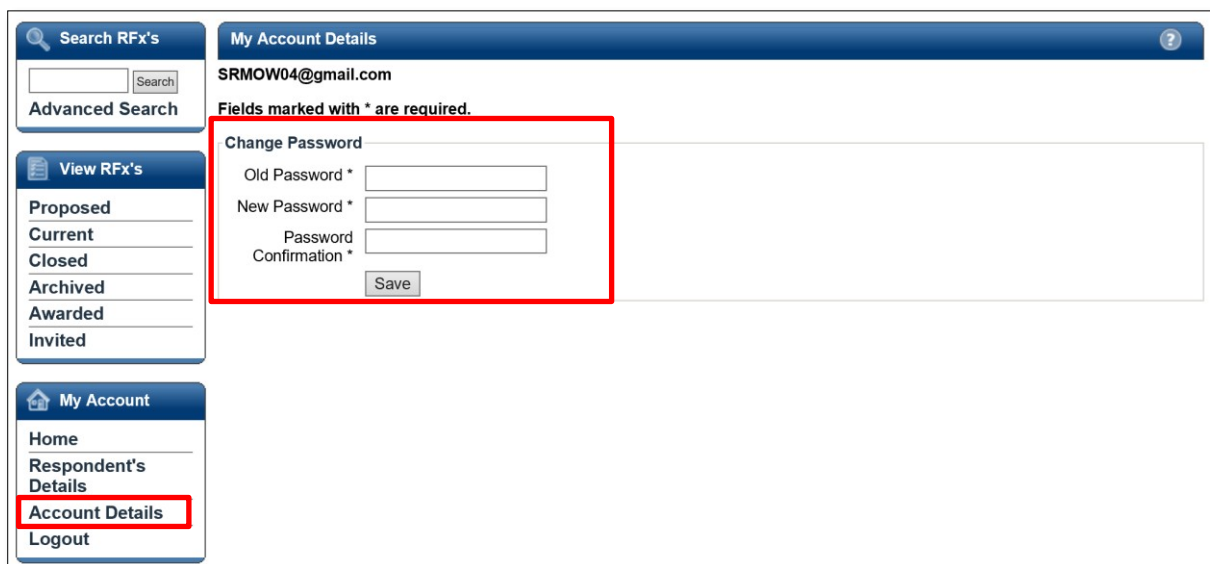NOTE: *Your email address must match the one you used to initially register on the eTenderBox.*

iv. You will receive an on-screen notification, notifying you that your new password request has been successful. Your new password will be contained in an **eTenderBox: New Password Notification email**.

10. Changing your Password

You may change your password at any time by following the steps outlined below:

Log into the eTenderBox. If you do not remember your password, please refer to Section 8.4, **'Forgotten Password'** to receive a temporary password.

1. Navigate to **the My Account** left hand menu and click on **Account Details**.

2. On this screen you will be required to enter in your old password into the Old Password* field.

3. Enter a new password and confirm this password in the New Password* and Password Confirmation* fields. Your new password must be at least seven (7) characters long and contain letters and numbers. The password is case sensitive, and cannot have a spacebetween letters and numbers.

4. Click the 'Save' button to reset your password. Your password has been reset when you receive a successful on-screen message