



# Vendor's Guide

# Contents

<b>1</b>	<b>Introduction</b>	<b>2</b>
1.1	A Quick Overview of Bid Locker . . . . .	2
1.2	Supported Browsers . . . . .	2
<b>2</b>	<b>Getting Started</b>	<b>3</b>
2.1	Creating Your Account Login . . . . .	3
2.2	Logging In . . . . .	5
2.2.1	Resetting Your Password . . . . .	5
<b>3</b>	<b>Your Vendor Dashboard</b>	<b>7</b>
<b>4</b>	<b>Bid Locker's Agencies and Organizations</b>	<b>8</b>
4.1	Browsing the Agency List . . . . .	8
4.1.1	The Agency Landing Page . . . . .	8
4.2	Sharing Your Profile With an Agency . . . . .	9
4.2.1	Additional Questions . . . . .	9
<b>5</b>	<b>Bid Opportunities and RFPs, or, the Virtual Bid Window</b>	<b>11</b>
5.1	The Bid Opportunity and RFP Details Pages . . . . .	11
5.2	Adding a Solicitation to Your Watchlist . . . . .	12
5.3	The Interested Parties List . . . . .	12
5.3.1	Seeing the Interested Parties and Planholders Lists . . . . .	13
5.4	Downloading Solicitation Documents . . . . .	13
5.4.1	Notices of Intent to Award . . . . .	14
5.5	Participating in Q&A . . . . .	14
<b>6</b>	<b>Submitting a Bid or Proposal</b>	<b>16</b>
6.1	Starting Your Bid Submission . . . . .	16
6.1.1	The Pre-Submission Review Page . . . . .	16
6.2	Step 1: Uploading Your Bid Documents . . . . .	17
6.2.1	Line-Item Bidding . . . . .	18
6.2.2	Bid Requirements . . . . .	19
6.2.3	Bid Document Types . . . . .	20
6.2.4	Saving Your Submission in Progress . . . . .	21
6.3	Step 2: Reviewing and Confirming Your Submission . . . . .	21
6.3.1	Downloading a Submission Receipt . . . . .	22
6.3.2	Additional Documentation and Multi-Stage Bids . . . . .	23
6.4	Reviewing Your Completed Submissions . . . . .	25
6.4.1	The Bid Review Page . . . . .	26
6.4.2	Revising Your Bid Submission . . . . .	26
6.4.3	Withdrawing Your Bid Submission . . . . .	27
<b>7</b>	<b>Additional Options</b>	<b>29</b>
7.1	Your Vendor Profile . . . . .	29
7.2	Your Registered Agencies . . . . .	30
7.3	Your Account Login . . . . .	30
7.3.1	Your Account, Using a Social Login . . . . .	31
7.4	Your Account History . . . . .	32
<b>8</b>	<b>For Additional Help</b>	<b>34</b>

# 1 Introduction

Bid Locker is a secure e-procurement and bid submission platform that you can use to submit bids and proposal responses to the government agencies, universities and community colleges, and other types of organizations — anyone who has told you to submit your bid and proposal responses via Bid Locker.

Bid Locker works entirely in your web browser. You don't need to install anything and you don't need any additional software to use Bid Locker.

## 1.1 A Quick Overview of Bid Locker

If you're new to Bid Locker, the first thing you'll do is to create a profile for your business.

Once you've created your business profile, you can use that same profile for any agency that accepts bids through Bid Locker. You'll only need to set up a profile once.

All of your business information is stored securely, and it's only shared with the government agencies you choose. We'll never sell your information.

For each bid opportunity or RFP, Bid Locker creates a virtual bid window — this works just like the bid window in the procurement department. You can submit, revise, or withdraw your bid response or proposal right up until the due date. After the due date, the virtual bid window closes, and you can no longer submit a response or revise your submission.

Some government agencies also use Bid Locker to post their notices of intent to award and their bid tabulations. You'll want to check with the purchasing department for each bid or proposal you submit, as this varies by agency.

## 1.2 Supported Browsers

**We support the following web browsers:**

- Chrome or Chromium
- Firefox
- Safari
- Vivaldi

We do not support Microsoft Internet Explorer. If you're not using one of the supported browsers, we can't guarantee that Bid Locker will function properly.

**Please note:** some PDF and document viewer software is set up to open the Bid Locker website directly within their viewer when you click on a link in a PDF document. This is also unsupported. If your PDF viewer doesn't open a new browser window with one of our supported browsers, Bid Locker won't work for you. If this happens, you'll need to reopen Bid Locker in one of our supported browsers.

## 2 Getting Started

If you're new to Bid Locker, the first thing you'll do is to set up a vendor profile for your business. Your vendor profile is what you'll use to submit bids, ask questions, express interest in solicitations, and more.

The sign-up process will take between 5 to 10 minutes.

### 2.1 Creating Your Account Login

First, head over to Bid Locker: <https://bidlocker.us>

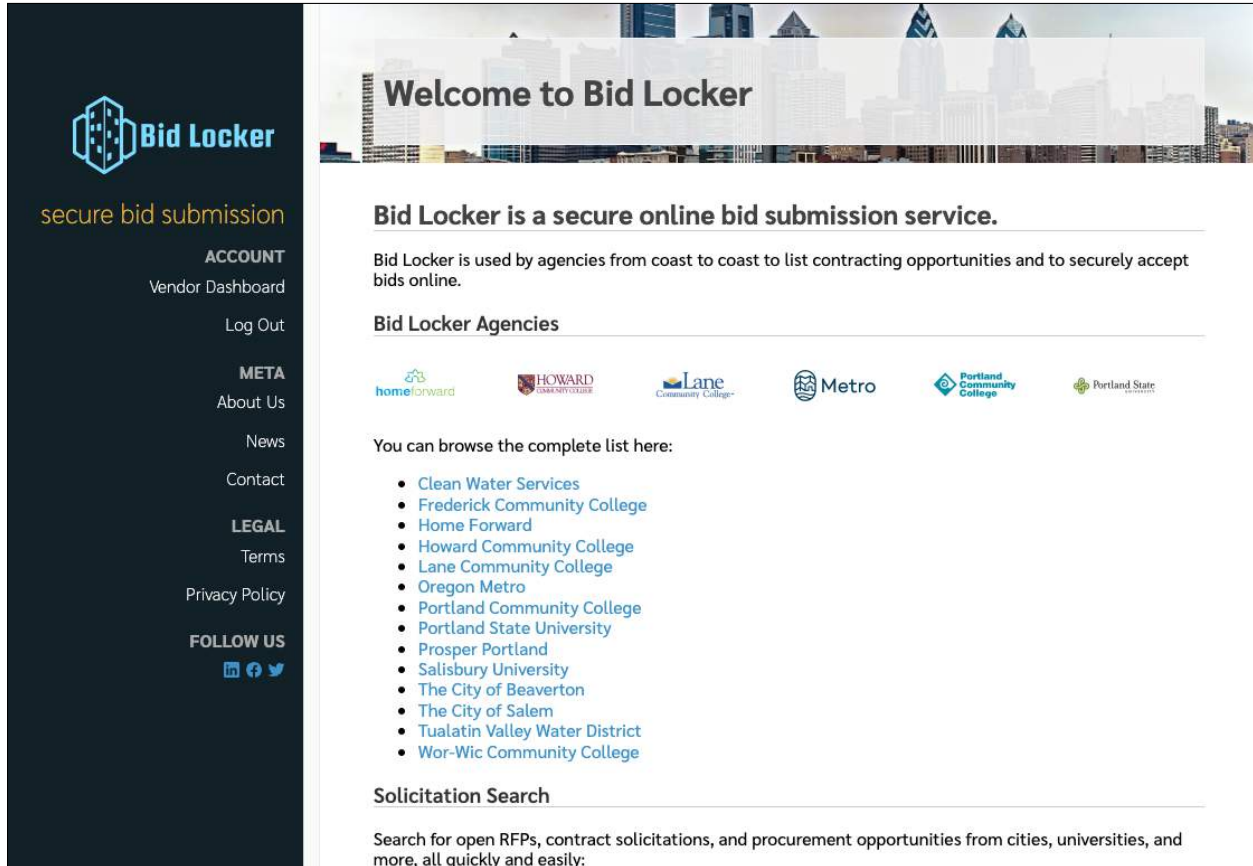


Figure 1: The Bid Locker Home Page

On the Bid Locker home page, look in the left-hand nav column for the "Sign Up" link, highlighted below.

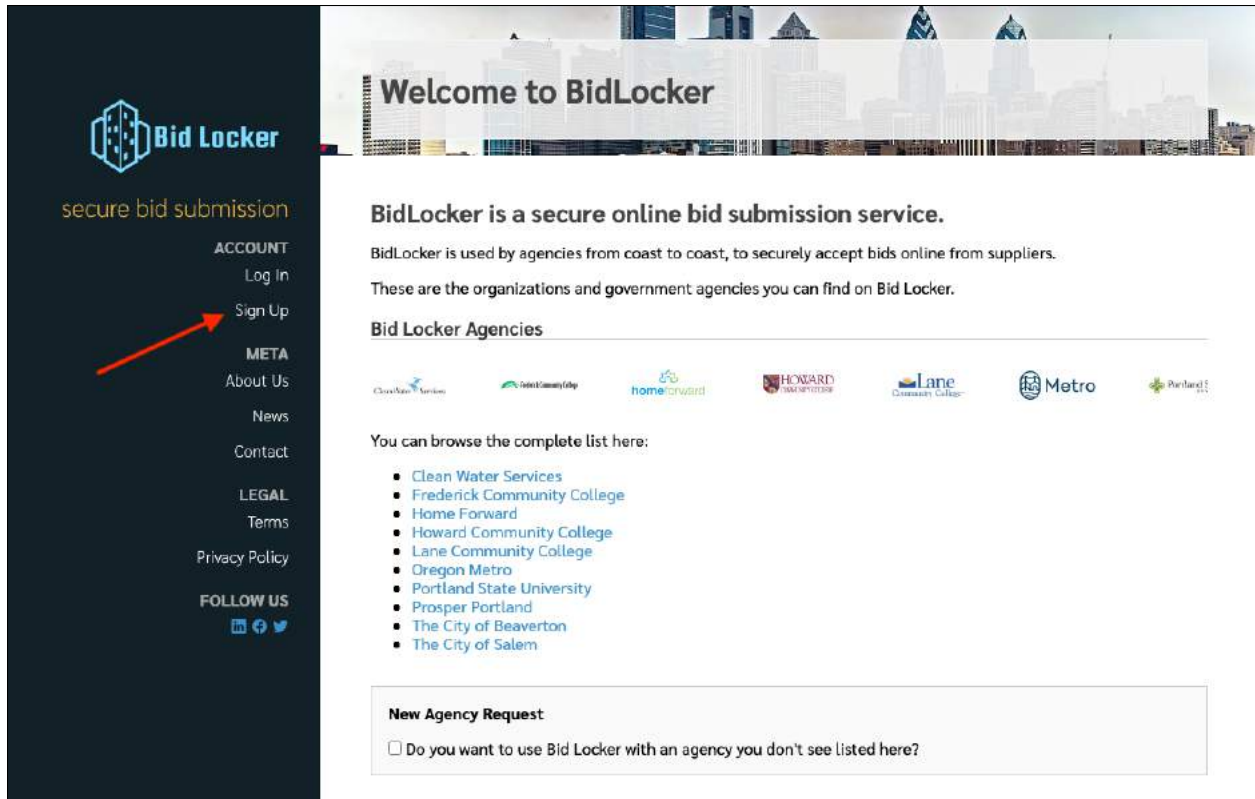


Figure 2: Signing up

Click the “Sign Up” link and you’ll be taken to the secure Bid Locker login. Here, use your email address and select a strong password. Your password must be at least 8 characters long, and have a number and a special character.

This is what the login screen looks like:

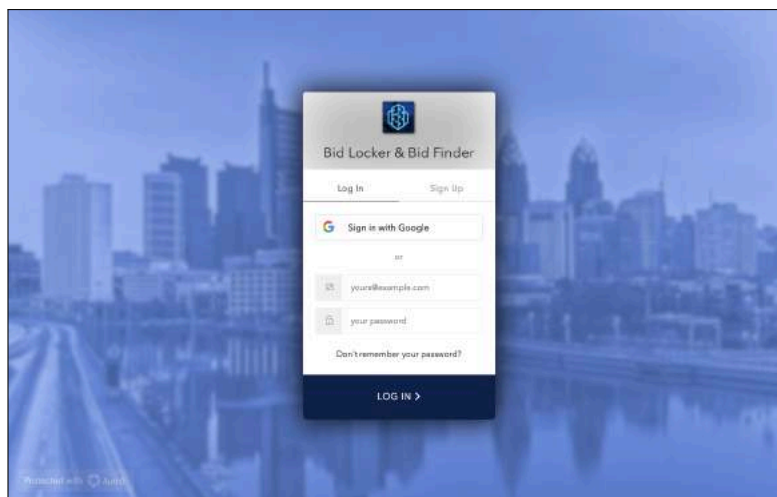


Figure 3: Signing up

You can also use your Google account to securely create your login. Click the “Sign in with Google” button to use

your Google login instead of using an email address and password.

After signing up, you'll be taken to the Bid Locker profile setup process. There are five steps:

- Basic business profile information
- Physical and mailing address
- Additional business information and commodity codes (optional)
- Logo (optional)
- Certifications (optional)

After completing the sign-up process, you're automatically logged into Bid Locker.

## 2.2 Logging In

If you've just set up a new business profile, you're already logged in, and you can skip this section.

To log in, first load up Bid Locker in your browser: <https://bidlocker.us>

Then, click the "Log In" link in the left-hand column, as shown here:

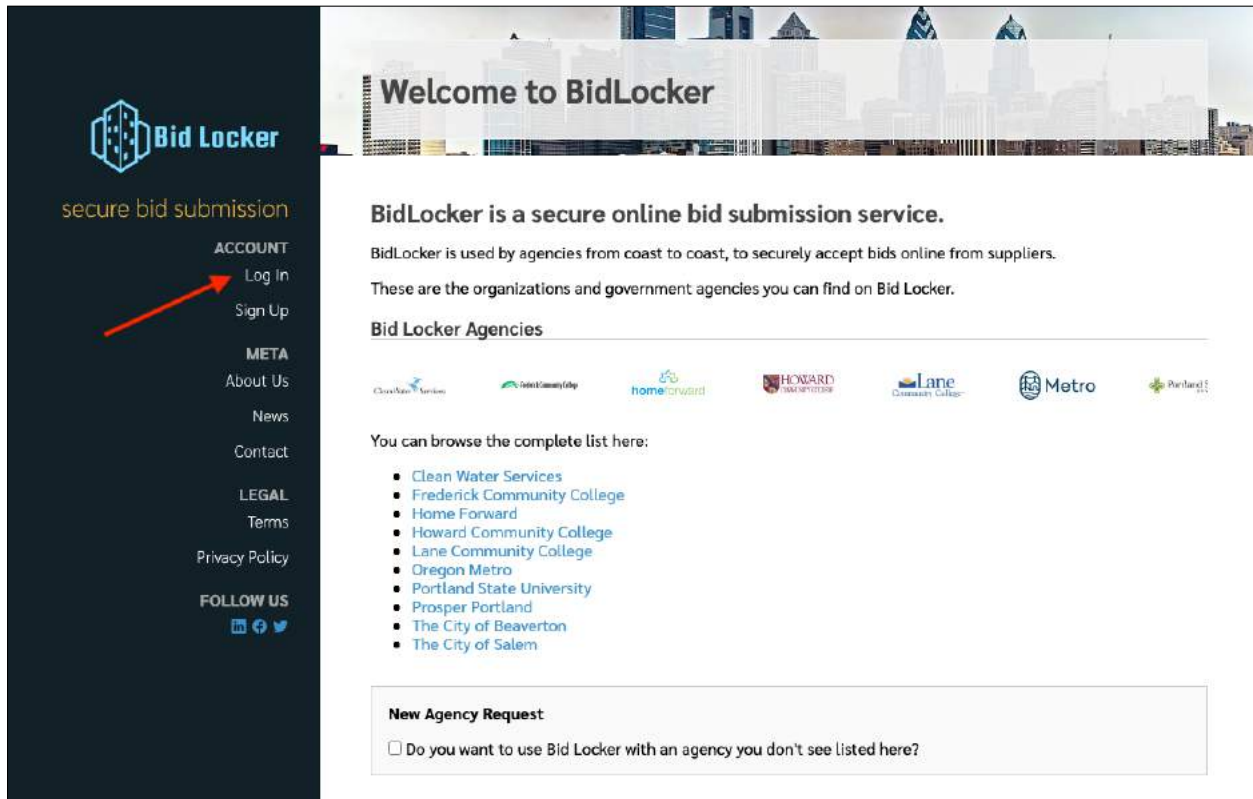


Figure 4: Logging in

You'll be taken to the secure Bid Locker login. Use the email address and password — or your Google account — you used when you first set up your profile. If you've used the correct email address and password, you'll be logged in and taken to your vendor dashboard.

### 2.2.1 Resetting Your Password

If you've forgotten your password, click the "Don't remember your password?" link on the login screen, as shown here:

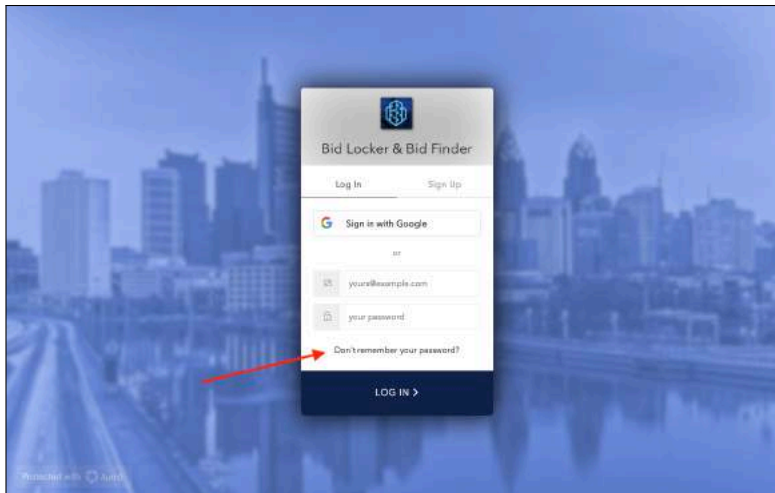


Figure 5: Resetting your password

Enter the email address you used when signing up, and a password reset link will be emailed to you.



### 3 Your Vendor Dashboard

After you log in, you'll be taken to your vendor dashboard. At the top you'll see your vendor dashboard navigation menu, where you can access your profile, see the agencies you've registered with, and update your login information.

Next you'll see saved searches, your agency watchlist, your project watchlist, and so on.

Last, you'll see your bid history, including completed and in-process bids.

**Bid Locker**  
secure bid submission

**ACCOUNT**  
Vendor Dashboard  
Site Config  
Log Out

**META**  
About Us  
News  
Contact

**LEGAL**  
Terms  
Privacy Policy

**FOLLOW US**  
[Social Media Icons]

---

**DASHBOARD HOME:** [Equity Hub](#) [New Search](#) [My Profile](#) [My Registered Agencies](#) [My Account](#) [Help](#) [Log out](#)

## Welcome, John Smith!

Welcome to your vendor dashboard, where you'll find projects you're watching or have expressed interest on, your saved solicitation searches, and highlights from your favored agencies.

#### Agency Watchlist

Agency	Created	
<a href="#">Equity Hub</a>	4/2020	<a href="#">remove</a>

Your agency watchlist has agencies you've starred to express interest. You can keep an eye on agencies you've done business with in the past or would like to monitor for future opportunities.

#### Project Watchlist

Solicitation	Agency	Created	
<a href="#">RFP #1910 Chemeketa Cooperative Regional Library Svcs. (CCRLS) Leased Lit Fiber</a>	<a href="#">Chemeketa Community College</a>	11/2019	<a href="#">remove</a>
<a href="#">I-405 Perimeter Fencing (East)</a>	<a href="#">Portland State University</a>	4/2020	<a href="#">remove</a>

Your project watchlist has solicitations you've starred to express interest. When these solicitations are updated or have addenda added, that will show up here. If you'd like to be included on the bidders' list for any of these solicitations, you must express interest. *These are just projects you're watching, not those you've expressed interest in bidding on.*

#### Your Submitted Bids

Solicitation	Closing	Status	Created	
<a href="#">Null solicitation</a>	no date given	submitted	4/2020	<a href="#">review</a>

This is a list of your submitted bids. You can revise or withdraw any bids before the virtual bid window has closed. After that, you can only review them.

Questions? Feedback? Email us: [help@bidlocker.us](mailto:help@bidlocker.us) | Call us: 267-225-1407  
Bid Locker is a secure online bid submission service, offered by Equity Hub.

Figure 6: The vendor dashboard



## 4 Bid Locker's Agencies and Organizations

Every agency and organization on Bid Locker has their own landing page. Each agency's landing page shows you contact information, usually has a brief description of the agency, and often has links to agency pages where you can find additional information.

You can find agency landing pages either from your vendor dashboard or by browsing the complete agency list on the Bid Locker home page — see the next section for more information.

### 4.1 Browsing the Agency List

You can always browse the complete list of agencies on the Bid Locker home page at: <https://bidlocker.us>

Click the agency name, or their logo, to go to any agency's landing page.

#### 4.1.1 The Agency Landing Page

Once you've found your agency landing page, you can see its list of solicitations under the heading **Our Active Solicitations**, as seen below:

The screenshot shows the Bid Locker Agency Landing Page for Oregon Metro. On the left is a dark sidebar with the Bid Locker logo and navigation links: ACCOUNT (Vendor Dashboard, Log Out), META (About Us, News, Contact), LEGAL (Terms, Privacy Policy), and FOLLOW US (with social media icons). The main content area has a light blue header with the Oregon Metro logo and title. Below the logo is contact information for Bids and Proposals: 600 NE Grand, Portland, OR 97232, phone 503-797-1613, email bidsandproposals@ore..., and website https://www.oregonme... A blue button with a star icon says "saved to watchlist". To the right is a text block describing Oregon Metro as the regional government for the Portland area, serving 1.5 million people. Below this is a section titled "Doing Business with Metro" with a link to contracting opportunities. At the bottom is a section titled "Our Active Solicitations" with a list of 10 open bid and contracting opportunities.

**Bids and Proposals**  
600 NE Grand  
Portland, OR 97232  
503-797-1613  
@ bidsandproposals@ore...  
https://www.oregonme...

**Oregon Metro**  
Metro is the regional government for the Oregon portion of the Portland metropolitan area. It is the only directly elected regional government and metropolitan planning organization in the United States. Metro works with communities, businesses and residents in the Portland metropolitan area to chart a wise course for the future while protecting the things we love about this place.

Metro serves more than 1.5 million people in Clackamas, Multnomah and Washington counties. The agency's boundary encompasses Portland, Oregon and 23 other cities – from the Columbia River in the north to the bend of the Willamette River near Wilsonville, and from the foothills of the Coast Range near Forest Grove to the banks of the Sandy River at Troutdale.

**Doing Business with Metro**  
To learn more about how to do business with Metro, visit our contracting opportunities page here:  
<https://www.oregonmetro.gov/how-metro-works/contract-opportunities/doing-business-metro>

**Our Active Solicitations**  
These are our open bid and contracting opportunities:

- ITB 3952 On-Call Masonry Services and On-Call Masonry Waterproofing Services
- ITB 4026 Metro South Transfer Station Scale Replacement
- Notice of Intent to Award an Interstate Cooperative Contract
- RFP 4006 Large Repair and Maintenance at Transfer Stations
- RFP 4012 Garbage & Recycling System Facilities Plan
- RFP 4024 - Janitorial Services
- RFP 4030 Lone Fir Cultural and Archaeological Services
- RFP 4032 Research, Engagement and Analysis for Large Household Item/Bulky Waste Collection
- RFP 4034 OCC Signage and Display Fabrication
- Small Business Open House (Virtual)

Figure 7: Bid Locker Agency Landing Page

You can also save any agency to your agency watchlist by clicking the "save to watchlist" button.

**Please note:** you must be logged in to save an agency to your watchlist.

## 4.2 Sharing Your Profile With an Agency

When you've created a vendor profile for your business, your profile is kept private until you register with agencies and opt into sharing it with them. In other words, we don't automatically share your profile with every agency on Bid Locker — we leave it up to you who you want to register with, so that you decide who you're sharing your vendor profile with.

Registering with an agency and sharing your profile with them is simple, and there are several places where you can do this, including the agency's landing page and the bid and proposal details pages.

For example, when you're logged in, you can register your vendor profile with an agency on their landing page. At the bottom of the agency's landing page, you'll see a section with a button you can click to share your profile:



Figure 8: Registering with an agency

In most cases, clicking that button is all it takes to register with the agency and share your vendor profile with them.

### 4.2.1 Additional Questions

An agency may have created additional questions that you must answer as part of their vendor registration process, and if they have, you'll be prompted to answer those when you register with them. These may be questions about the service areas you cover, or they may include forms that you must fill out or documents to sign.

If an agency has asked additional questions, you'll see their questions on an "Additional Questions" screen that looks something like this:

**Setting up Your Vendor Profile: Additional Questions**

Name Address About Logo Certifications **Additional Questions** Finished

Tualatin Valley Water District has requested the following additional information for your vendor profile.

**Confidentiality Agreement**

In order to access any files for Tualatin Valley Water District, vendors must agree to and complete the [Confidentiality Agreement](#), and upload the signed Agreement to their profile. Plan centers or other redistribution sources are not allowed to access Tualatin Valley Water District files.

Prime Contractors/Consultants must complete the first two pages. Any subcontractors/subconsultants need to complete the second two pages.

Select file... \* required

File	File Size
There are no uploaded files.	

*Please note:* this is a required field for you to submit bids and proposal responses to this agency.

*Please note:* this is a required field before you can access the solicitation documents for any bid opportunity or RFP from this agency.

**Electronic Signature**

Please enter your full name here. This will be considered your electronic signature affirming that you have uploaded a completed Confidentiality Agreement to your profile.

\* required

*Please note:* this is a required field for you to submit bids and proposal responses to this agency.

*Please note:* this is a required field before you can access the solicitation documents for any bid opportunity or RFP from this agency.

Figure 9: Additional questions for an agency’s vendor registration

If an agency asks you any additional questions, your answers will be visible on your vendor profile only to that agency — no other agencies will see how you’ve answered any such questions.

## 5 Bid Opportunities and RFPs, or, the Virtual Bid Window

On Bid Locker, every contracting opportunity (i.e. a bid opportunity or an RFP) has its own details page, containing a wide variety of information about that contracting opportunity.

On every agency landing page, there is a section labeled “Our Active Solicitations” which has a list of the agency’s open bid and proposal opportunities. Each item in the list is a link, which you can click to see the details page for that contracting opportunity, whether a bid opportunity or RFP.

### 5.1 The Bid Opportunity and RFP Details Pages

The details page for the bid opportunity or RFP that you’re interested in will contain a variety of information, including:

- The title of the contracting opportunity,
- The due date,
- Additional contact information,
- Bid/proposal documents,
- And numerous other details.

Below is a screenshot of what the solicitation details page will look like:

The screenshot shows the Bid Locker website interface. On the left is a dark sidebar with the Bid Locker logo and navigation links: 'secure bid submission', 'ACCOUNT' (Log In, Sign Up), 'META' (About Us, News, Contact), 'LEGAL' (Terms, Privacy Policy), and 'FOLLOW US' (social media icons). The main content area features a header with the project title: 'ITB-Rock Creek IPS Medium Voltage VFD No. 3 Replacement Project Equipment Pre-Purchase'. Below the header is a table of project details:

<b>Project #:</b>	7085
<b>Category:</b>	Invitation to Bid
<b>Department:</b>	WRRD Engineering Division
<b>Issued by:</b>	<a href="#">Clean Water Services</a> <a href="#">Visit Website</a>
<b>Publish Date:</b>	Jan 22, 2021 2:00PM
<b>Bids Due Date:</b>	Feb 2, 2021 2:00PM
<b>Status:</b>	open
<b>Posted:</b>	Jan 22, 2021

Below the table are three buttons: 'save to watchlist', 'express interest', and 'submit bid'. A 'Description' section follows, containing the text: 'See the Invitation to Bid documents for the Rock Creek IPS Medium Voltage VFD No. 3 Replacement Project Equipment Pre-Purchase Project No. 7085 at "http://cleanwaterservices.org/183".' A 'Contact' section is partially visible at the bottom.

Figure 10: Solicitation Details Page

The bid opportunity and proposal details page is also your starting point for submitting a bid, so if you’re ready to jump right in, you can click the “submit bid” button and then follow the instructions in the Submitting a Bid or Proposal section of this user guide.

## 5.2 Adding a Solicitation to Your Watchlist

You have a private watchlist for solicitations, and you can add any solicitation to your watchlist at any time. This keeps solicitations you're interested in handy, as they all appear on your dashboard under the "Project Watchlist" section.

To add a solicitation to your watchlist, click the "save to watchlist" button on the solicitation details page, e.g.:



Figure 11: The Watchlist Button

You can remove a solicitation from your watchlist at any time by clicking the button again. You can also remove it by clicking the "remove" link on the dashboard.

Note that agencies cannot see when you've added a solicitation to your watchlist. The watchlist is only for your convenience.

## 5.3 The Interested Parties List

**Please note:** not all agencies use the interested parties list on Bid Locker. These directions only apply to agencies that use Bid Locker's interested parties list. If your agency uses a different website to advertise its bid and proposal opportunities, and only uses Bid Locker for bid submission, you may need to consult with them to use the interested parties list on their advertisement website.

To add your business to the interested parties list, look for the button labeled "Express Interest" on the solicitation details page. Click this button, and it should toggle on. That's it! You've added yourself to the interested parties list.



Figure 12: The Express Interest Button

You can also remove yourself from the interested parties list by clicking the button again.

### 5.3.1 Seeing the Interested Parties and Planholders Lists

If your agency has made the interested parties or planholders lists visible, you can see these lists on the details page.

**Please note:** you may need to be logged in to see it, if the agency has required vendors to log in to see these lists.

### 5.4 Downloading Solicitation Documents

If the bid opportunity or RFP you're viewing has bid documents attached to it, those will be listed under the section titled **Attachments**.

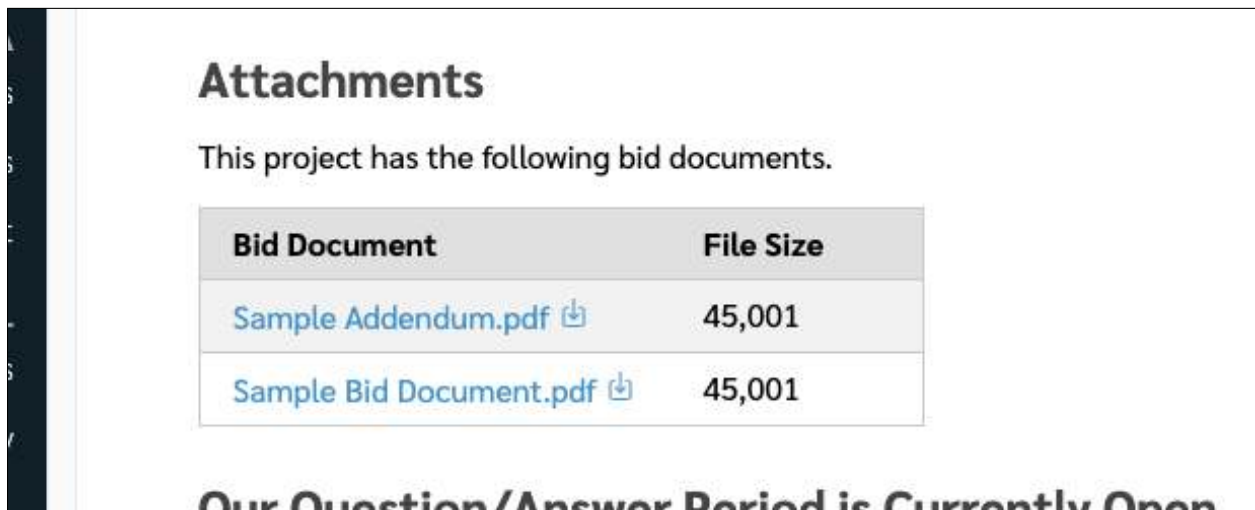


Figure 13: Downloading Solicitation Attachments

Click the document title to view it in your browser, or if you prefer, click the download icon to download the document directly to your computer.

If the agency has set restrictions on who can download their attached documents, you'll see a list of requirements underneath the document table. It will tell you what you need to do to gain access to the solicitation documents, e.g. being registered with the agency or expressing interest, e.g.:

### Attachments

This project has the following solicitation documents.

Bid Document	File Size
ITB 3952 - On-Call Masonry and Masonry Waterproofing.pdf	406,296

You will need to:

- ✓ Be logged into Bid Locker
- ✓ Be registered with Oregon Metro
- ✗ Express interest using the "Express Interest" button above

Figure 14: Attachment Requirements

In the above example, you must be logged in, have registered with the agency (in this case, Oregon Metro), and you must express interest using the "Express Interest" button.

#### 5.4.1 Notices of Intent to Award

**Please note:** not all agencies post their notices of intent to award on Bid Locker. These directions only apply to agencies that use Bid Locker to post their notices of intent to award. If your agency uses another solicitation website together with Bid Locker, you may need to consult with them to find their notices of intent to award.

When an agency has completed their bid tabulation or proposal evaluation, they may post their notice of intent to award to Bid Locker. You can see these in the solicitation documents section, along with the rest of the solicitation documents. These will be marked as "Bid Tabulation" or "Intent to Award" in the list of documents. You can download them as you would any other document.

#### 5.5 Participating in Q&A

**Please note:** not all agencies allow you to ask questions about the solicitation on Bid Locker. These directions only apply to agencies that use Bid Locker's QA function. If your agency uses another solicitation website together with Bid Locker, you may need to consult with them to ask questions via their other website.

When an agency lists their solicitation, they may also set up a QA period, during which you can ask questions about your solicitation. If the QA period is currently open, then you'll be able to submit your questions via the details page, e.g.:



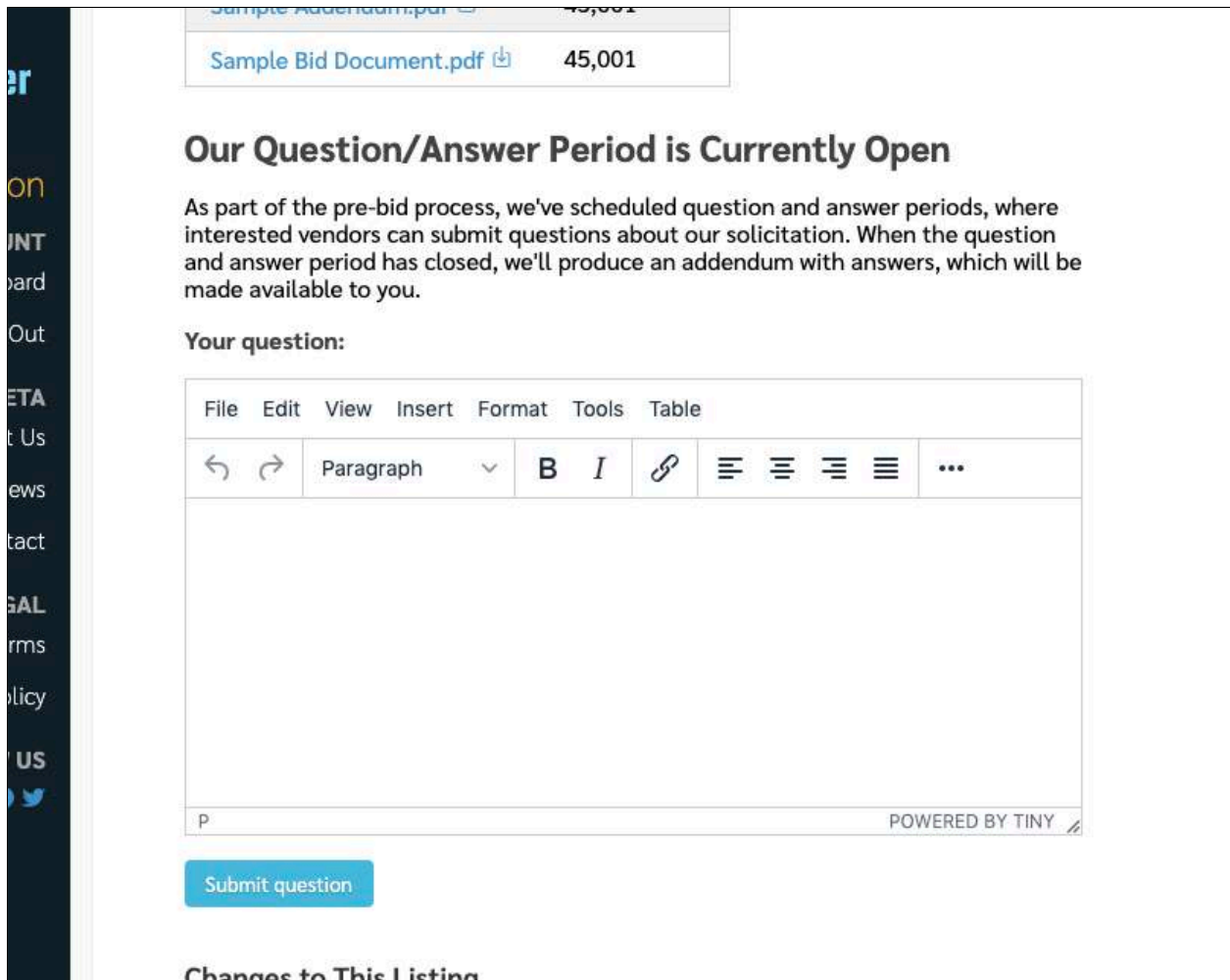


Figure 15: Asking questions during the Q&A period

Enter your question in the text area and click the "Submit Question" button. The agency will now see your question and will be able to answer it when the QA period has closed. Generally, agencies will post their answers to all submitted questions as a new addendum attached to the original solicitation.

## 6 Submitting a Bid or Proposal

When you're ready to submit your bid or proposal with Bid Locker, you can follow these instructions to upload and submit your bid or proposal documents.

**Before you start this, make sure you've read the solicitation requirements carefully and have everything ready. If you need to make changes to your submission later on, you can always do so, up until the bid window has closed.**

When you're ready, here's how to submit your response.

### 6.1 Starting Your Bid Submission

On the details page, look for the "submit bid" button, as shown below:

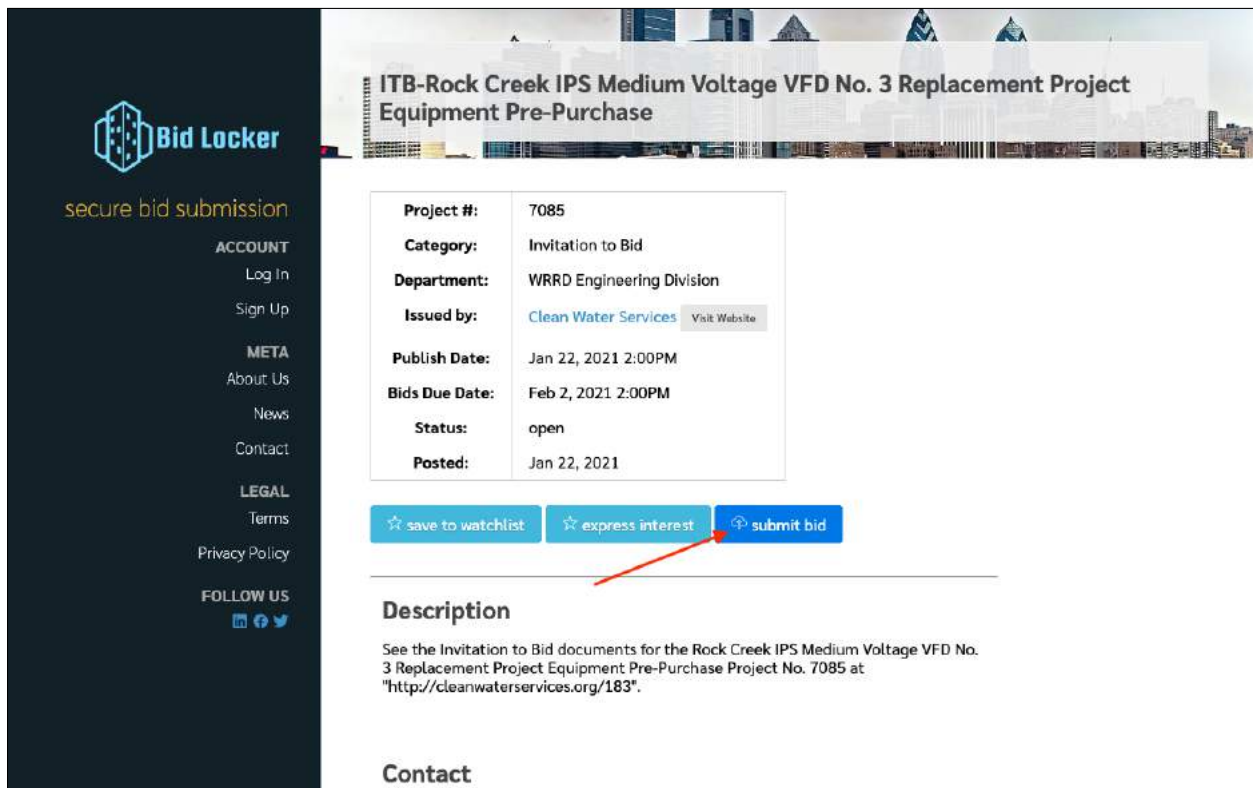


Figure 16: The "submit bid" button

Click the "submit bid" button to begin, and you'll be taken to first step of the bid submission process.

**Please note:** if you've already submitted a bid for this solicitation, then you'll see that the button now reads "review bid" — this button takes you to your bid review page where you can make revisions.

#### 6.1.1 The Pre-Submission Review Page

After clicking "submit bid" you'll be taken to a review page that lists the solicitation title, closing date, and other information, to help make sure you're submitting your response to the right location. After reviewing the information on this step, click the "Begin Bid Submission" button as shown below:

**Bid Locker**  
secure bid submission

ACCOUNT  
Vendor Dashboard  
Log Out

META  
About Us  
News  
Contact

LEGAL  
Terms  
Privacy Policy

FOLLOW US  
in f t

## Animal Crossing - Pond Required

<b>Project #:</b>	AC-01
<b>Issued by:</b>	Equity Hub
<b>Bids Due Date:</b>	Apr 1, 2021 5:00PM
<b>Status:</b>	open
<b>Posted:</b>	Apr 20, 2020

### Begin Bid Submission

If you're ready to submit a bid or a proposal on this solicitation, you can do so here. Make sure you've read the solicitation and ALL of the attached documents, including any addenda that have been added.

*Please note:* Bid revisions are allowed.

[Begin Bid Submission](#) [Return to Solicitation](#)

### For Questions or Additional Information, Contact:

Name: Test Account  
Email: [test@rfps.info](mailto:test@rfps.info)

Questions? Feedback? Email us: [help@bidlocker.us](mailto:help@bidlocker.us) | Call us: 267-225-1407  
*Bid Locker is a secure online bid submission service, offered by Equity Hub.*

Figure 17: Beginning a response

Also note that if the solicitation has just closed while you were reviewing the information, you won't be able to proceed past this screen.

## 6.2 Step 1: Uploading Your Bid Documents

Now, you can upload your bid or proposal documents. You can upload as many documents as you need here — there's no limit on the number of documents per submission.

Click the "Select files..." button to select the files on your computer that you wish to upload, e.g.:

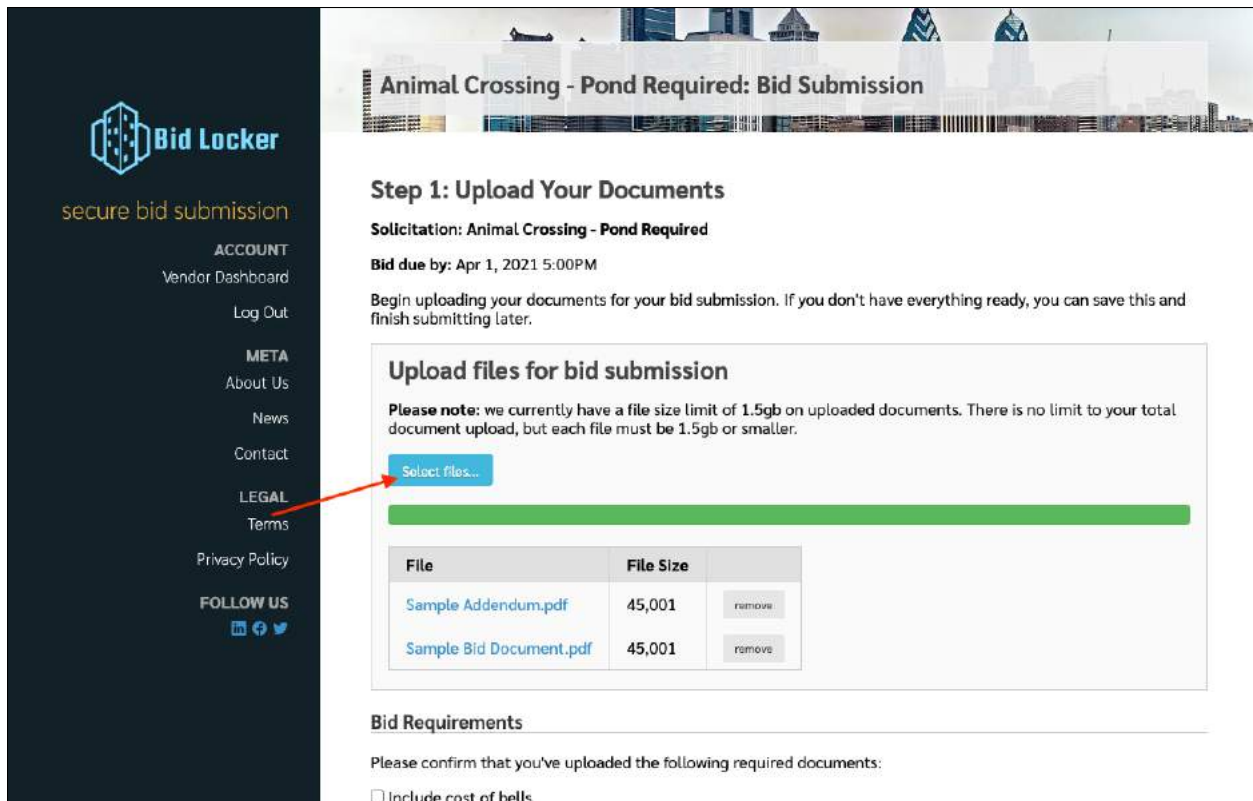


Figure 18: Uploading Bid Documents

You can upload one file at a time, or many, whichever your preference. As each file uploads, the progress bar will begin to fill out. When it's completely filled, your file upload has finished, and you're ready for the next step.

### 6.2.1 Line-Item Bidding

If the bid opportunity you're responding to has a line-item quote component, you'll be able to complete your line item responses here. In addition to the file upload section of this page, you'll see a section labeled "Line Items" that will contain a grid of line items for you to fill out:

## Step 1: Enter your Line-Item Quotes



**Solicitation: South Parking Lot Paving**

**Bid due by:** no close date

### Line Items

Enter your line-item quotes for this bid submission. If you don't have everything ready, you can save this and finish submitting later. You must fill in at least a unit cost for required line items. Shipping cost and ship date are always optional.

When entering unit and shipping costs, you don't need include a currency indicator (such as a \$ or £ sign.)

Item	Unit of Measure	Quantity	Unit Cost	Shipping Cost	Ship Date	Required?
Piping 8" PVC	Ft	6000.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	✓
Concrete	Cu Yds	400.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	✓
Aggregate (Separated)	Cu Yds	200.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	✓
Piping 2" (Steel)	Ft	1500.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Environmental Eval			<input type="text"/>	<input type="text"/>	<input type="text"/>	✓

### Upload additional files for bid submission

**Please note:** we currently have a file size limit of 1.5gb on uploaded documents. There is no limit to your total document upload, but each file must be 1.5gb or smaller.

Select files...

Figure 19: Line-item Bidding

You must complete any line items marked as "required" — anything not marked as required is optional, but please consult the original bid documents to determine how you should complete those line items.

#### 6.2.2 Bid Requirements

Some solicitations will have a list of requirements you must confirm before you finish your submission. These requirements are shown as a checklist on the submission upload page, e.g.:

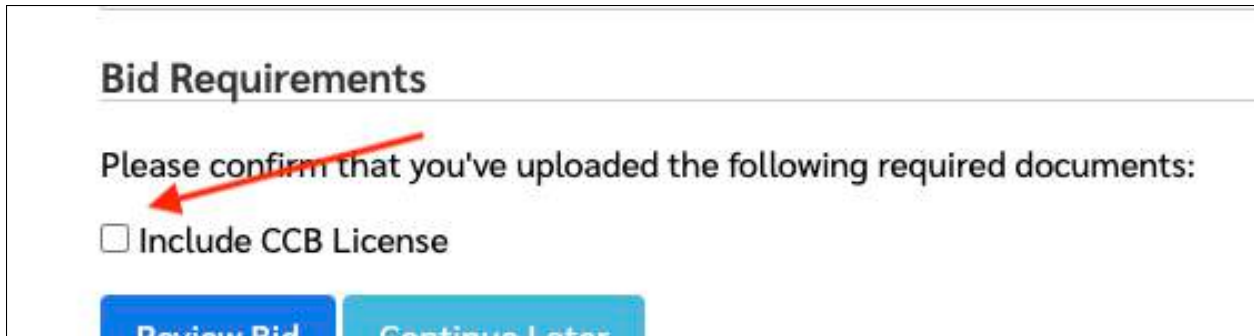


Figure 20: Bid Requirements

Click each checkbox to affirm that you've satisfied the given requirement – but only do so if you've actually completed the requirement.

If you haven't met the requirement, you can save your submission in progress and return later. **Even if you save your submission in progress, you must still complete it before the closing date.**

### 6.2.3 Bid Document Types

For some solicitations, the agency may set up document types for each of the documents you upload as your response — they might do this to have you separate out the different parts of your proposal into different sections, e.g. to upload your fee schedule separately from your technical proposal, or to upload a signature page as its own separate document.

If the agency has set up document types for this solicitation, then you will see a dropdown menu next to each document as you upload it:

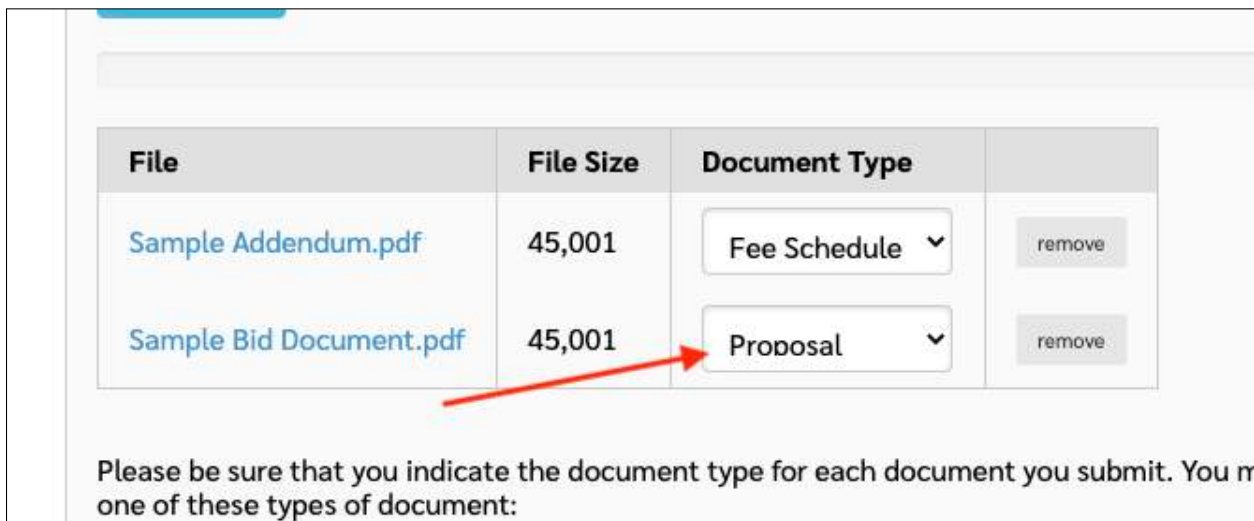


Figure 21: Bid Document Types

Select the document type for each document you upload, making sure you upload at least one document of each required document type.

#### 6.2.4 Saving Your Submission in Progress

If you have only some of your documents ready, or you'd like to complete your submission later on, you can save your work in progress and return to it from your vendor dashboard at any time. All of your file uploads will be saved, and any bid requirements you've checked will also be saved.

To save your submission in progress and continue later, click the "Continue Later" button:



Figure 22: Saving a Submission in Progress

This will save your submission in progress and return you to your vendor dashboard.

#### 6.3 Step 2: Reviewing and Confirming Your Submission

After you've uploaded all of your submission documents, and completed any additional steps (such as line-item bidding, bid requirements, or document types), you're ready to submit your response.

If you're on *Step 1*, click the "Review Bid" button to continue to the review and confirmation page:



Figure 23: Reviewing a Bid Before Submitting

On this page, you'll see all of your uploaded documents and submitted information, presented as a review step so that you can make sure everything for your bid response or proposal is as you intend it.

When you're ready to confirm your submission, first check the box labeled "Please check here to confirm your bid submission":



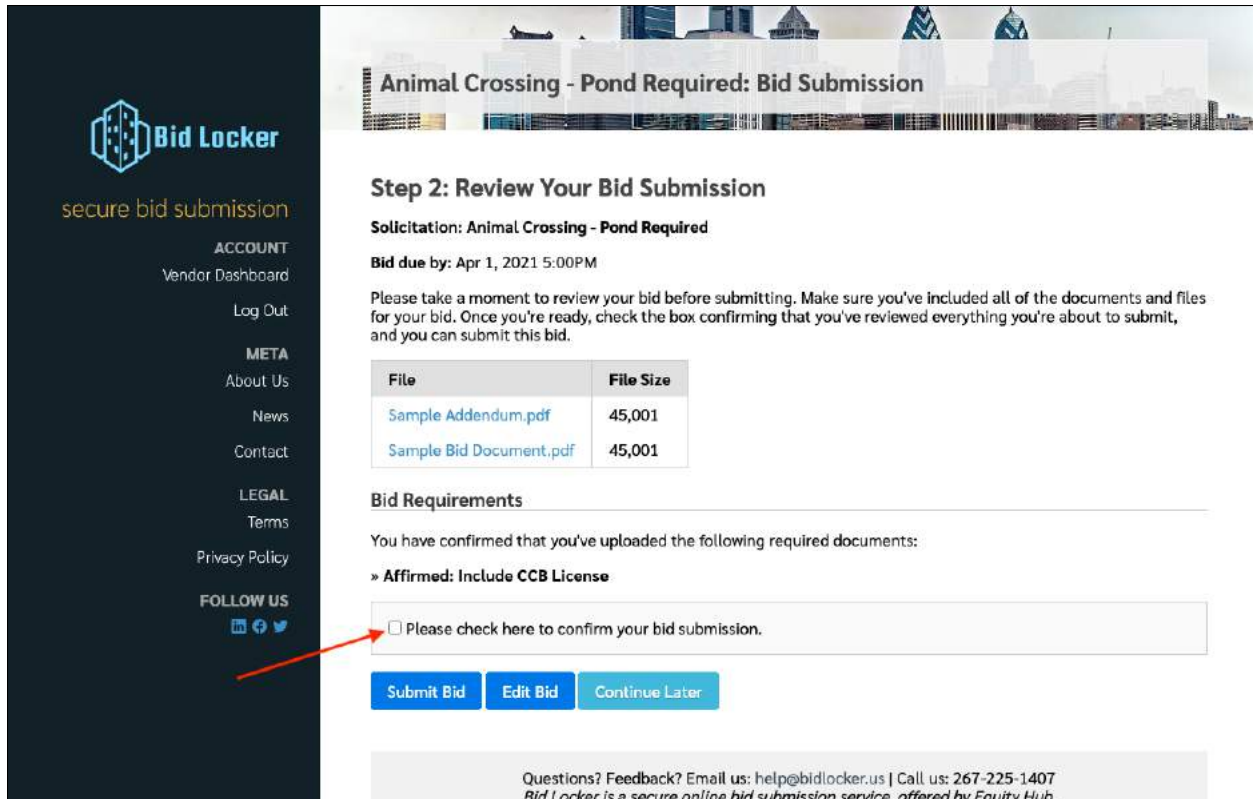


Figure 24: Confirming your response

Then click the “Submit Bid” button — that’s it!

If you need to revise your submission, you can do so by clicking the “Edit Bid” button. If you need to return to your submission to finish it later, click the button labeled “Continue Later”:

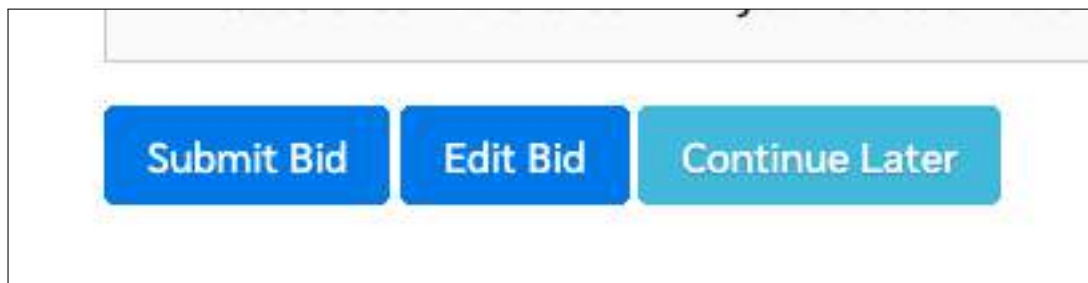


Figure 25: Submitting, editing, continuing later

After you’ve hit the “Submit Bid” button, you’ll see your confirmation screen and will receive an email confirmation within a few minutes.

### 6.3.1 Downloading a Submission Receipt

On the confirmation page, you can download a PDF receipt of your submission by clicking the “Download Submission Receipt” button:

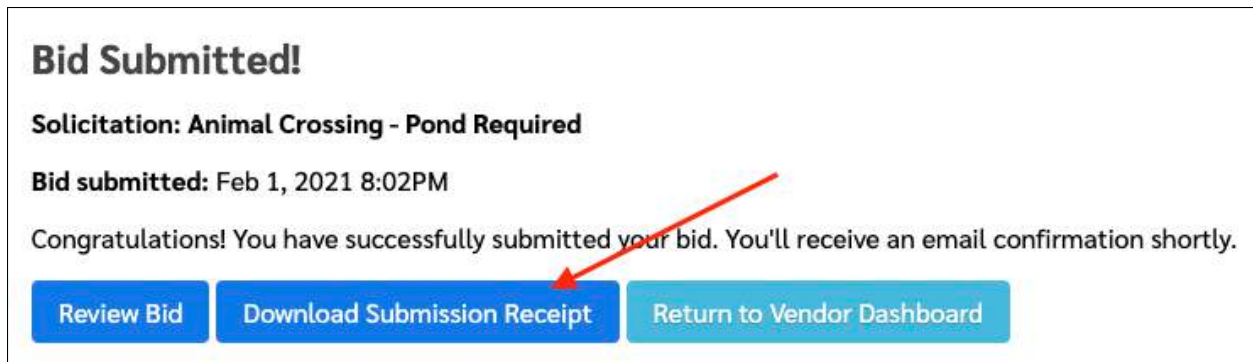


Figure 26: Downloading a submission receipt

You can download this immediately upon submitting your response, but you can also download it at any later time on the Bid Review page, which you can get to from your vendor dashboard.

### 6.3.2 Additional Documentation and Multi-Stage Bids

For some solicitations, your agency may request or require some additional supplemental documentation, separate from the bid submission itself. This could be, for example, a first-tier subcontractor disclosure form. If your solicitation requires some kind of supplemental documentation, it will be described in the solicitation documents, so be sure check if there are any such requirements.

If this solicitation requires some additional documentation, you will also see a notice on your document upload page, e.g.:

er

on

JNT  
board

Out

ETA  
it Us  
ews  
tact

GAL  
rms  
olicy

/ US

## Review Your Bid Submission

**Solicitation:** [Animal Crossing - Pond Required](#)

**Bid due by:** Apr 1, 2021 5:00PM

**Submission status:** submitted

**Submitted:** Feb 1, 2021 8:02PM

Bid documents uploaded for your bid submission:

File	File Size
<a href="#">Sample Addendum.pdf</a>	45,001
<a href="#">Sample Bid Document.pdf</a>	45,001

[Revise Bid](#)
[Withdraw Bid](#)
[Download Submission Receipt](#)
[Return to Dashboard](#)

---

### Additional Documentation Required

This solicitation has an additional documentation requirement.

**Additional documentation requested:** First-Tier Subcontractor Disclosure

**Additional documentation due by:** Apr 1, 2021 7:00PM

Additional documentation uploaded for your bid submission:

File	File Size
There are no uploaded files.	

[Submit Additional Documentation](#)

Figure 27: The Supplemental Documentation Notice

**Please note:** You won't be able to upload any additional documentation until you've completed your bid submission.

**6.3.2.1 Uploading Documents for Additional Bid Stages** After you've completed your bid submission, you'll see a section on your submission confirmation page where you can upload your additional documentation, as shown below:

**South Parking Lot Paving**

## Second-Stage Bid Submission ?

This solicitation has an additional step after you complete your initial bid submission:

**First-Tier Subcontractor Disclosure**

**Due by:** Feb 1, 2022 2:00pm

**Upload files for bid submission**

**Please note:** we currently have a file size limit of 1.5gb on uploaded documents. There is no limit to your total document upload, but each file must be 1.5gb or smaller.

Select files...

File	File Size
There are no uploaded files.	

When you've uploaded all of the documents you need for this step of the bid process, use the "Complete additional documentation" button to return to your bid review page.

Complete additional documentation
Return to Bid Review
Return to Vendor Dashboard

Figure 28: Uploading the Supplemental Documentation

To upload your additional documentation or final-stage bid documents, click the "Begin Additional Document Request" button. This takes you to the page where you can upload whatever final-stage documents the agency has requested.

Once you're on the additional documentation upload page, click the "Select files..." button and select the files to upload from your computer. When you're done, click the "Complete Additional Documentation" button to finish up and return to your bid review page.

#### 6.4 Reviewing Your Completed Submissions

At any time, you can review your bid submissions from your vendor dashboard. Click the "review" link next to any submission you wish to review:

**Your Submitted Bids**

Solicitation	Closing	Status	Created	
<a href="#">Animal Crossing - Pond Required</a>	4/1/21 17:00	submitted	2/2021	<a href="#">review</a>

Figure 29: Revising Your Solicitation from the Vendor Dashboard

This will take you to your bid review page.

#### 6.4.1 The Bid Review Page

On the bid review page, you'll see your entire submission, including submitted documents, line-items, and so on. You can revise your bid by clicking the "Revise Bid" button, withdraw it by clicking the "Withdraw Bid" button, or download a submission receipt:

**Review Your Bid Submission**

**Solicitation:** [Animal Crossing - Pond Required](#)

**Bid due by:** Apr 1, 2021 5:00PM

**Submission status:** submitted

**Submitted:** Feb 1, 2021 8:02PM

Bid documents uploaded for your bid submission:

File	File Size
<a href="#">Sample Addendum.pdf</a>	45,001
<a href="#">Sample Bid Document.pdf</a>	45,001

[Revise Bid](#)
[Withdraw Bid](#)
[Download Submission Receipt](#)
[Return to Dashboard](#)

Figure 30: Reviewing your solicitation from the vendor dashboard

#### 6.4.2 Revising Your Bid Submission

If you need to revise your bid or proposal after submitting it, you can do so here, as long as the due date has not yet passed. Start by clicking the "Revise Bid" button:

**Review Your Bid Submission**

**Solicitation:** [Animal Crossing - Pond Required](#)

**Bid due by:** Apr 1, 2021 5:00PM

**Submission status:** submitted

**Submitted:** Feb 1, 2021 8:02PM

Bid documents uploaded for your bid submission:

File	File Size
<a href="#">Sample Addendum.pdf</a>	45,001
<a href="#">Sample Bid Document.pdf</a>	45,001

[Revise Bid](#) [Withdraw Bid](#) [Download Submission Receipt](#) [Return to Dashboard](#)

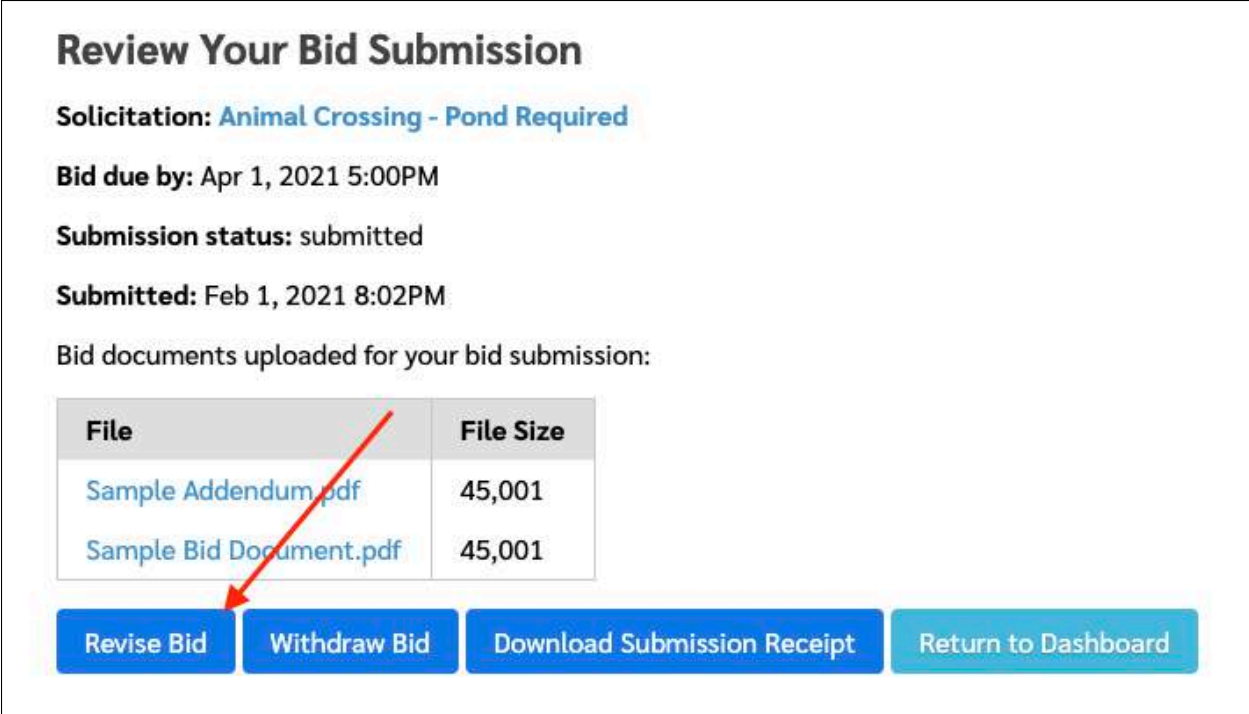


Figure 31: Revising Your Solicitation Submission

This takes you back to the document upload page, described in the Step 1: Uploading Your Bid Documents section. You can now remove bid documents, upload new ones, and make any other changes as needed. Submit your revision by continuing through the review screen, as before, and by confirming and submitting your response again.

**6.4.3 Withdrawing Your Bid Submission**

If you need to withdraw your submission (e.g. if you're no longer interested in participating in the solicitation), you can do so at any time before the due date, using the "Withdraw Bid" button on the bid review page:

## Review Your Bid Submission

**Solicitation:** [Animal Crossing - Pond Required](#)

**Bid due by:** Apr 1, 2021 5:00PM

**Submission status:** submitted

**Submitted:** Feb 1, 2021 8:02PM

Bid documents uploaded for your bid submission:

File	File Size
<a href="#">Sample Addendum.pdf</a>	45,001
<a href="#">Sample Bid Document.pdf</a>	45,001

[Revise Bid](#)
[Withdraw Bid](#)
[Download Submission Receipt](#)
[Return to Dashboard](#)

Figure 32: Withdrawing your submission

After clicking this button, you'll be asked to confirm that you really do want to withdraw your solicitation. Once you confirm that you want to withdraw your solicitation, it will be withdrawn immediately.

If you want to resubmit, you can do so by starting the bid submission process over again.

**6.4.3.1 Notes for Agencies that Disallow Revision** *Please note: this section only applies to a handful of agencies with a specific procurement process requirement — that vendors cannot “amend” or “revise” their submissions, but must withdraw and resubmit if they wish to make changes.*

If you have submitted a bid or proposal to an agency that disallows revision, don't worry! You can still make changes to your submission, but you must follow a slightly different process to do so.

If your agency has disabled the “Revise Bid” button, then you must first withdraw your bid. After withdrawing your submission, you will be able to edit and resubmit your bid or proposal, so long as the due date has not yet passed.



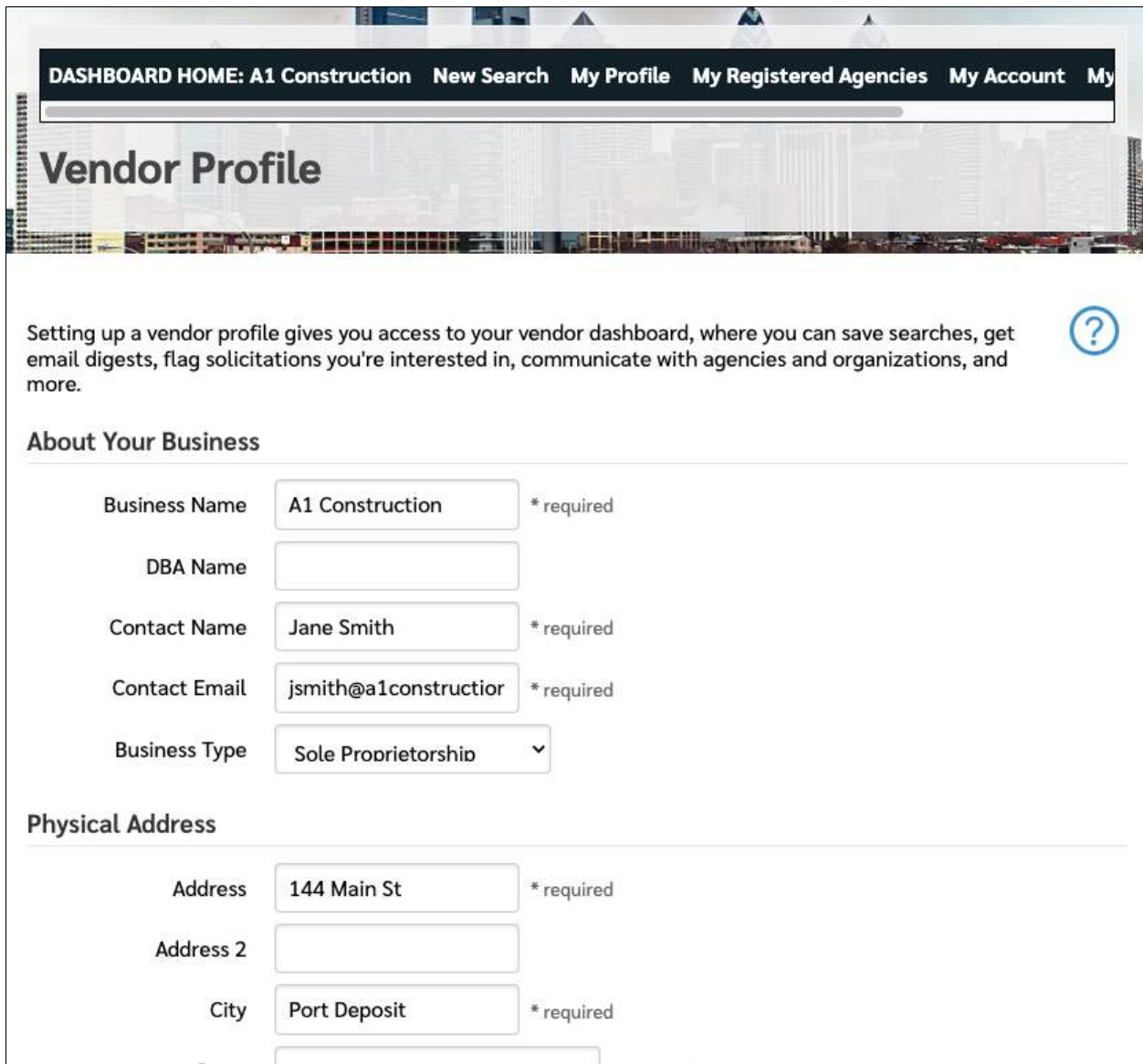
## 7 Additional Options

You may, from time to time, want to update your vendor profile, change your password, or review your account history. You can do all of these tasks from your vendor dashboard, using the links in the top nav.

### 7.1 Your Vendor Profile

Your vendor profile is the primary information about your business that agencies see when you register with them. This is the information you entered when you first set up your profile. You can update it at any time using the “My Profile” link in the top nav on your vendor dashboard.

You’ll see your vendor profile information in a single page, and can make any changes you need:



The screenshot shows a web application interface for updating a vendor profile. At the top, a navigation bar contains the following links: DASHBOARD HOME: A1 Construction, New Search, My Profile, My Registered Agencies, My Account, and My. Below the navigation bar is a header section with a cityscape background and the title "Vendor Profile".

Below the header, there is a paragraph of text: "Setting up a vendor profile gives you access to your vendor dashboard, where you can save searches, get email digests, flag solicitations you're interested in, communicate with agencies and organizations, and more." To the right of this text is a blue circular help icon with a question mark.

The form is divided into two main sections:

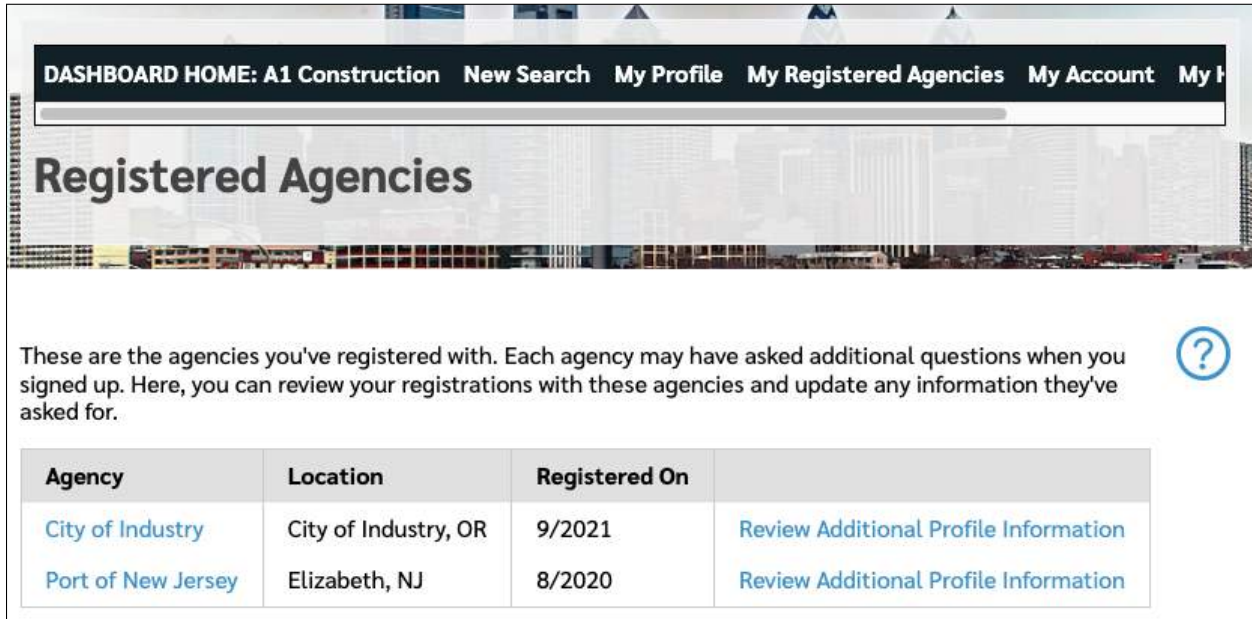
- About Your Business:**
  - Business Name: A1 Construction \* required
  - DBA Name: (empty field)
  - Contact Name: Jane Smith \* required
  - Contact Email: jsmith@a1constructor \* required
  - Business Type: Sole Proprietorship (dropdown menu)
- Physical Address:**
  - Address: 144 Main St \* required
  - Address 2: (empty field)
  - City: Port Deposit \* required
  - State: (empty dropdown menu)

Figure 33: Updating your vendor profile

Be sure to click the "Update My Profile" button when you're done. Your profile will be updated immediately.

## 7.2 Your Registered Agencies

If you've registered with agencies, you can see a list of them using the "My Registered Agencies" link in the top nav:



Agency	Location	Registered On	
<a href="#">City of Industry</a>	City of Industry, OR	9/2021	<a href="#">Review Additional Profile Information</a>
<a href="#">Port of New Jersey</a>	Elizabeth, NJ	8/2020	<a href="#">Review Additional Profile Information</a>

Figure 34: Updating your registered agency information


Click the "Review Additional Profile Information" to review and update any agency-specific vendor questions each agency may have asked.

## 7.3 Your Account Login

If you need to change your account login email address or password, you can do so via the "My Account" link in the top nav:

[DASHBOARD HOME: A1 Construction](#) [New Search](#) [My Profile](#) [My Registered Agencies](#) [My Account](#) [My](#)

## Vendor Account

This is where you can change your login information, such as the email address or password you use to log in.  If you're using a social login, such as Google, then you won't be able to change your password here.

### Your Account Information

Your Name  \* required

Your Email Address  \* required

### Change Your Password

If you'd like to change your password, please enter a new one here. You must use at least one lower-case letter, one upper-case letter, and one number.

Leave this blank to leave your password unchanged.

Password

Confirm

Figure 35: Updating your account login

Here, you can update your display name (shown only on your vendor dashboard, not shown to anyone else) and the login email address you use. If you want to change your password, you can enter in a new password and confirmation. Otherwise, you can leave the password and confirmation blank to leave your password unchanged.

### 7.3.1 Your Account, Using a Social Login

If your account was set up using a social login (e.g. a Google account login), then you can't change your account login or password, and your account login page will look something like this:

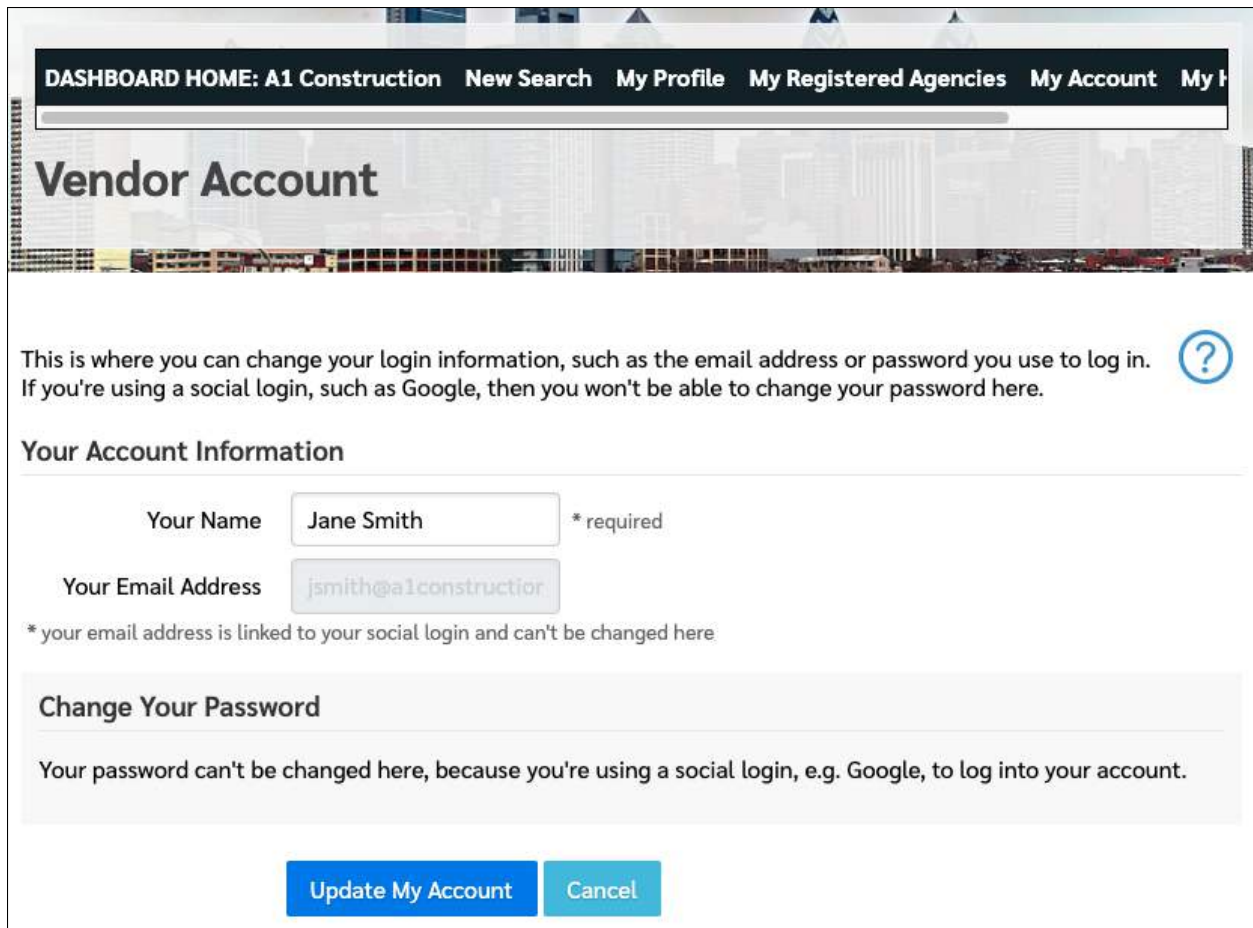


Figure 36: An account that uses a social login

If you need to convert your account from a social login to a standard login and password, please contact us for help. We can usually accommodate these requests within a day or two, but may need to reach out for additional information before doing so.

#### 7.4 Your Account History


At any time, you can access your account history using the "My History" link in the top nav. On the account history page, you'll see a detailed log of everything you've done on Bid Locker, including updating your profile, submitting bids and proposals, and more.

Your account history will look something like this:

DASHBOARD HOME: [Equity Hub](#) [New Search](#) [My Profile](#) [My Registered Agencies](#) [My Account](#) [My Histor](#)

## Bid Locker History

### Activity Log

This is your Bid Locker historical activity report, showing the last 100 entries. 

Activity	For Agency	Timestamp	IP Address
Expressed interest On Call Program - Contractors	Portland State University	3/13/22 12:26:09 AM	1.2.3.4
Removed listing from watchlist On Call Program - Contractors	Portland State University	3/13/22 12:25:55 AM	1.2.3.4
Added listing to watchlist On Call Program - Contractors	Portland State University	3/13/22 12:25:53 AM	1.2.3.4
Vendor updated their profile		2/20/22 1:52:14 AM	1.2.3.4
Removed listing from watchlist ITB 4018 Smull Property Demolition	Oregon Metro	2/20/22 1:28:31 AM	1.2.3.4
Added listing to watchlist ITB 4018 Smull Property Demolition	Oregon Metro	2/20/22 1:25:38 AM	1.2.3.4

Figure 37: Your account history

This account history viewer will show you the last hundred history entries for your Bid Locker account.

## 8 For Additional Help

If you have questions or need help setting up your vendor profile or submitting bids, we're always happy to help. You can reach us at:

**Phone:** 267-225-1407

**Email:** [help@equityhub.us](mailto:help@equityhub.us)