The purpose of this BC Bid Application Ministry Buyer Quick Reference Guide is to act as a high-level guide. For detailed instructions and more information, go to the Ministry Buyer Guide.

To...	Follow these steps...	Tips and Links...

Create Sourcing Project	1. **Set up Project** based on the chosen solicitation process:
	  • Select the appropriate Sourcing Project Type.
	  • If posting on behalf of another organization **Issued for** is the Ministry/Branch requesting the procurement.
	  • Main Commodity/Other Commodities: search for and select the Commodity
	2. Click **Set up Team**:
	  • The person who creates the Project has by default the Official Contact and Responsible roles.
	  • Add any additional users based on their assigned roles.
	3. Click **Set up Documents** to upload documents related to the opportunity.
	  • The documents are in draft status and will need to be changed to Approved status before being added to the opportunity in Prepare RFx.
	Optional: Select **Add Suppliers** and search/select suppliers to be invited, if any.
		How to create a Sourcing Project
		
		Set up Team
		
		Set up Documents
		
		Add Suppliers Overview

Prepare RFx	1. In the **Setup** tab **Select Opportunity Type,** fill in Summary Details and assign **Issue** and **Closing** dates. 2. Click **Validate & Save**. After saving, enter the estimated amount and category. 3. In the **Additional RFx Info** tab, select the submission delivery method(s) and delivery location. 4. In the **Documents** tab, upload opportunity related documents (either new or from Set up Documents). Ensure all documents for supplier view are uploaded and marked as approved. 5. In the **Suppliers** tab, review supplier(s) if invited to the opportunity. 6. In the **Approvals** tab, fill out details.	Additional RFx Info How to add documents to an Opportunity Approvals
Issue RFx	1. Click **View as Supplier** for a final review of the RFx. 2. Click **Ready to Issue** and Legal Approved if Yes was selected in Approvals tab, remedy any missing information. 3. Click **All approvals complete**. 4. Click **Issue Opportunity**. 5. Edit the template email and remove all blue text from the Subject and Body. 6. Click **Send and Close**. 7. Click **OK** twice (Step 1 and Step 2). Your RFx is open.	Issue an Opportunity
If need to Change the Closing Date	1. In the **Prepare RFx Setup** tab, change the **Closing Date**. 2. Issue an **Addendum** in the **Discussion Forum** to document the change.	
Issue Addendum	1. In the **Discussion Forum**, select **Compose Message**. 2. Send the message for **All invited suppliers.**	Issuing an Addendum

	3. In the **Subject field** enter the Opportunity ID, Description and Addendum number. 4. In the body of the message, enter the content of the addendum. 5. *Optional*. Add an attachment.	Addenda provide answers to questions or additional information 📹 How to use Discussion Forum
Issue an Amendment	1. On any **Prepare RFx** screen of an Open opportunity, select the **Other Actions** drop-down list, then select **Create new Amendment** 2. Select the information to be copied to the new version, typically Copy from Selected RFx. 3. On the **Prepare RFx Setup** screen, enter the **Amendment Reason** and select Issue and Closing dates. 4. Make any required changes and issue the opportunity.	📹 Issuing an Amendment Amendments will require suppliers to submit new challenges
Review Submissions	Once the Opportunity closes: 1. Add offline submissions, if any. 2. Click **Unseal submissions** on the **Prepare RFx** Setup tab. 3. Select **View RFx Activity** and review submissions for each supplier (download and distribute documents for evaluation).	📹 Uploading Submissions All offline submissions must be entered before unsealing 📹 Unsealing and downloading Submissions
Award an Opportunity	1. Click the **Analyze & Award** tab. 2. For unselected Suppliers, click the **Do not Award** icon. 3. Select the **Trophy icon** for the supplier who will be awarded the opportunity.	📹 Awarding a Contract
Notify & Share	1. Send **Successful** & **Unsuccessful notifications**; edit the email templates as required. 2. Create **Contract Award Summary**.	📹 Sending Award Results Notification to Suppliers 📹 Creating a Contract Award Summary
Create a new Lot	1. On any **Prepare RFx** screen of a closed opportunity, select **Create new Lot**. 2. Select the information to be copied to the new lot. 3. Make any required changes and issue the opportunity.	📹 How to create a new lot New lots can be created to issue an opportunity with new specifications
Update RFx and Project Status	Once a project is complete: 1. In **Prepare RFx Setup** tab, update the status as needed. 2. In the **Set up Project** tab, update the status as needed.	📹 Completing an Opportunity 📹 Closeout a Sourcing Project Suppliers need to know the final status of a Project even if it isn't awarded