GSA Federal Acquisition Services

User Guide – eOffer/eMod

Version 1.2

II – Creating & Submitting An eOffer

Federal Acquisition Service
Contract Administration Division
Solicitation Services Tools

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REVISION HISTORY

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TABLE OF CONTENTS

2 ELECTRONIC OFFER – eOFFER

2.1 Creating an eOffer 5
2.1.1 Corporate Information 7
2.1.2 Negotiators 8
2.1.3 Goods/Services (SINs) 10
2.1.4 Standard Responses 13
2.1.5 Solicitation Clauses 14
2.1.6 Clause Exceptions 22
2.1.7 Upload Documents 28
2.1.8 Submit eOffer 32
2.2 Request for Clarification to an Exception 37
2.3 Contract Officer/Specialist Rejects an Exception 39
2.4 Edit an eOffer After Submission 40
2.5 Rejection of an eOffer by the Contract Officer/Specialist 41
2.6 Re-Submit an eOffer After It Has Been Rejected or Withdrawn 41
2.7 Withdraw Your eOffer 43

2 ELECTRONIC OFFER – eOFFER

Eoffer is a web-based application that allows companies to electronically prepare and submit a Multiple Award Schedule (MAS) contract proposal to Federal Acquisition Service. It creates an interactive, secure electronic environment that simplifies the contracting process from submission of proposal to awards. eOffer enables a seamless transmission of data from the vendor community to the FAS contracting offices. Two types of offers can be submitted on the eOffer/eMod system:

- Contract Offers (eOffers)
- Express Offers (eOffers)

The Contract Offer or eOffer is the traditional method of submitting an offer electronically and is available for use on most GSA Multiple Award Schedules (MAS). The following topics in this section are about creating and submitting the regular eOffer.

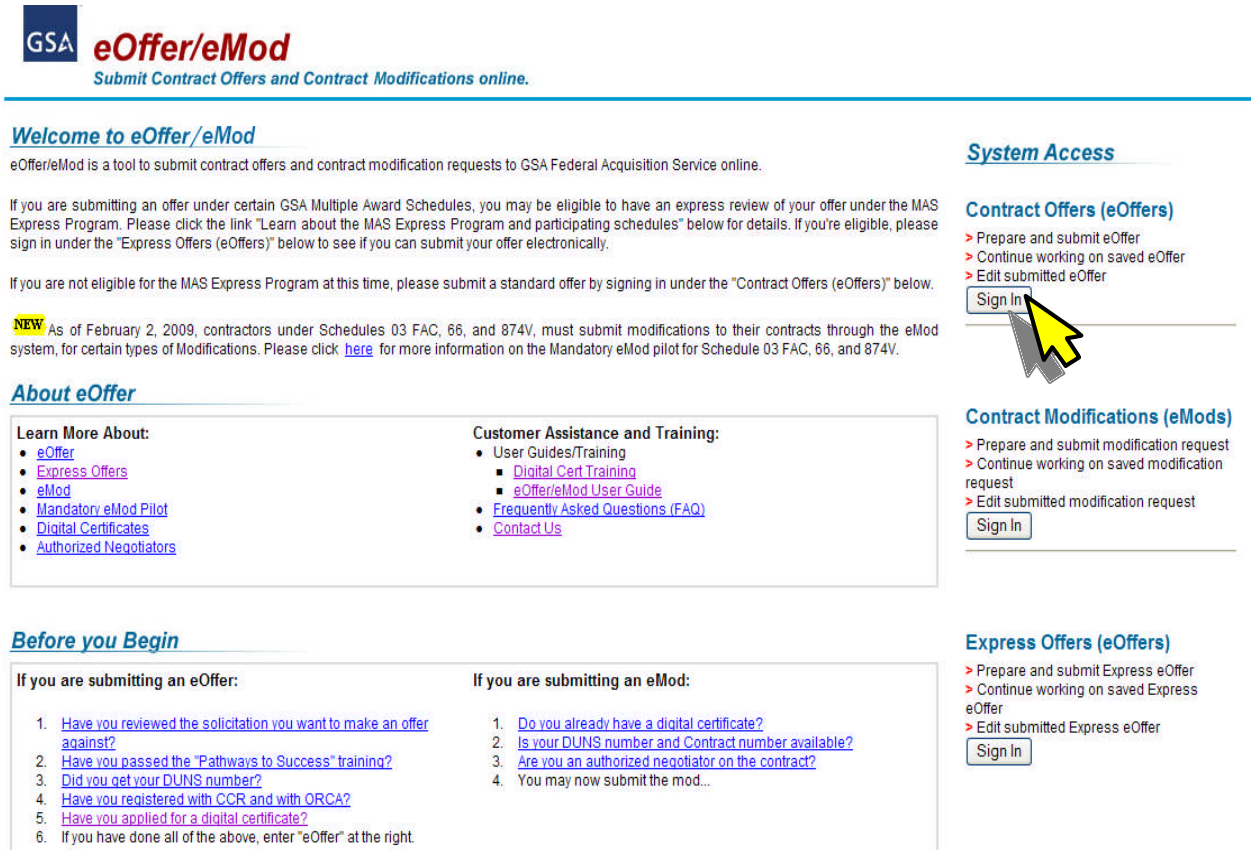
Express eOffer is the method aimed at expediting the processing time of the electronic offer. Express eOffer is limited to a select group of Multiple Award Schedules (MAS) and SINS. For information on Express eOffers please see **V – Creating & Submitting an Express eOffer.**

2.1 Creating an eOffer

The Offer process has several basic steps that must be completed before it can be submitted. First, gather your company information and create the required documents for the solicitation before starting to complete the information in eOffer. To do this, you must download and read the solicitation that you are making an offer against and complete the required documents for the solicitation. Once this is completed enter the eOffer application (which requires a digital certificate for authentication), prepare the responses to the offer and submit your proposal. To sign into the eOffer application and create an offer, follow these steps:

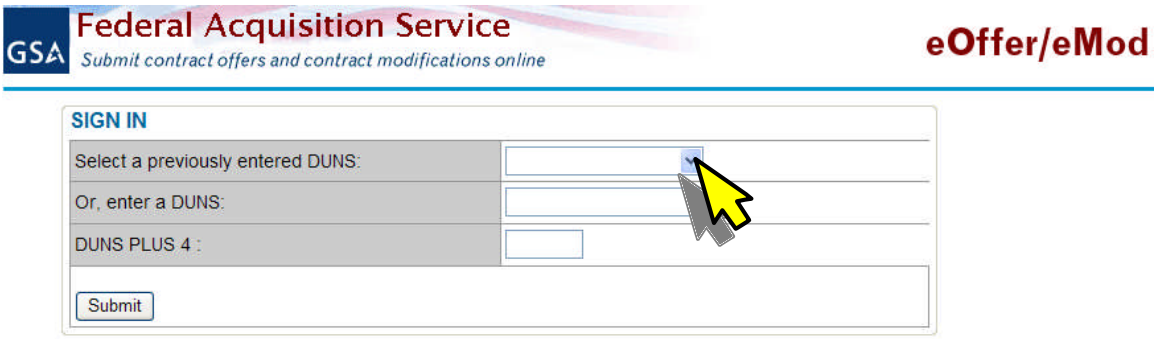
a) Go to the GSA **eOffer/eMod** homepage (www.eoffer.gsa.gov).

b) Click the ***Sign In*** button under ***Contract Offers (eOffers***).



The system will verify access via digital certificate authentication. For detailed login information see section **I - Getting Started - 1.6 Accessing eOffer/eMod**.

c) After successful login the **SIGN IN** page will appear

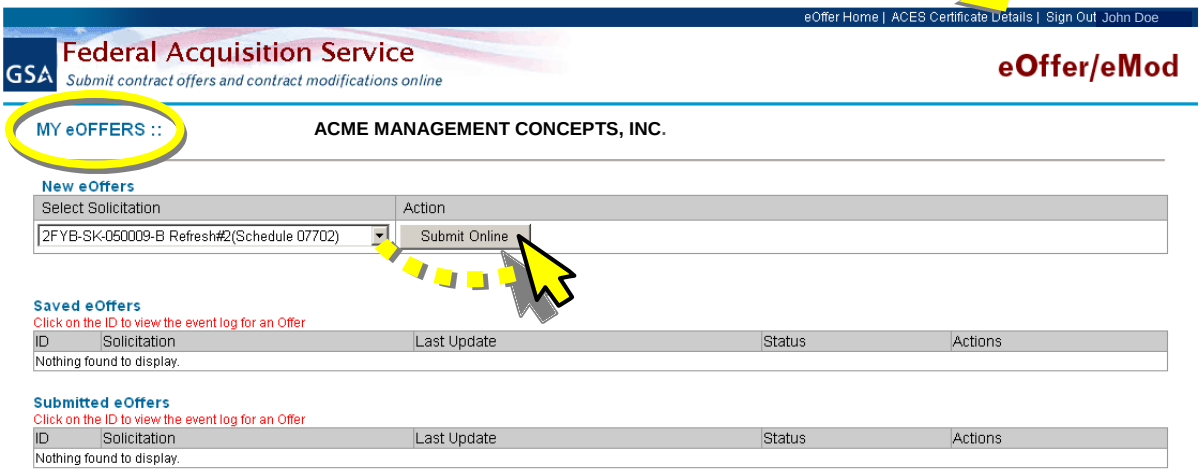


d) Select your DUNS number using the drop down arrow if you have previously entered it. If it is a new DUNS number, type it in the field below and click ***Submit***. The **MY eOFFERS** screen will become visible.

e) In the **New eOffers** section, select the solicitation number against which the offer will be submitted from the drop down menu under ***Select Solicitation***.

f) Click the ***Submit Online*** button.

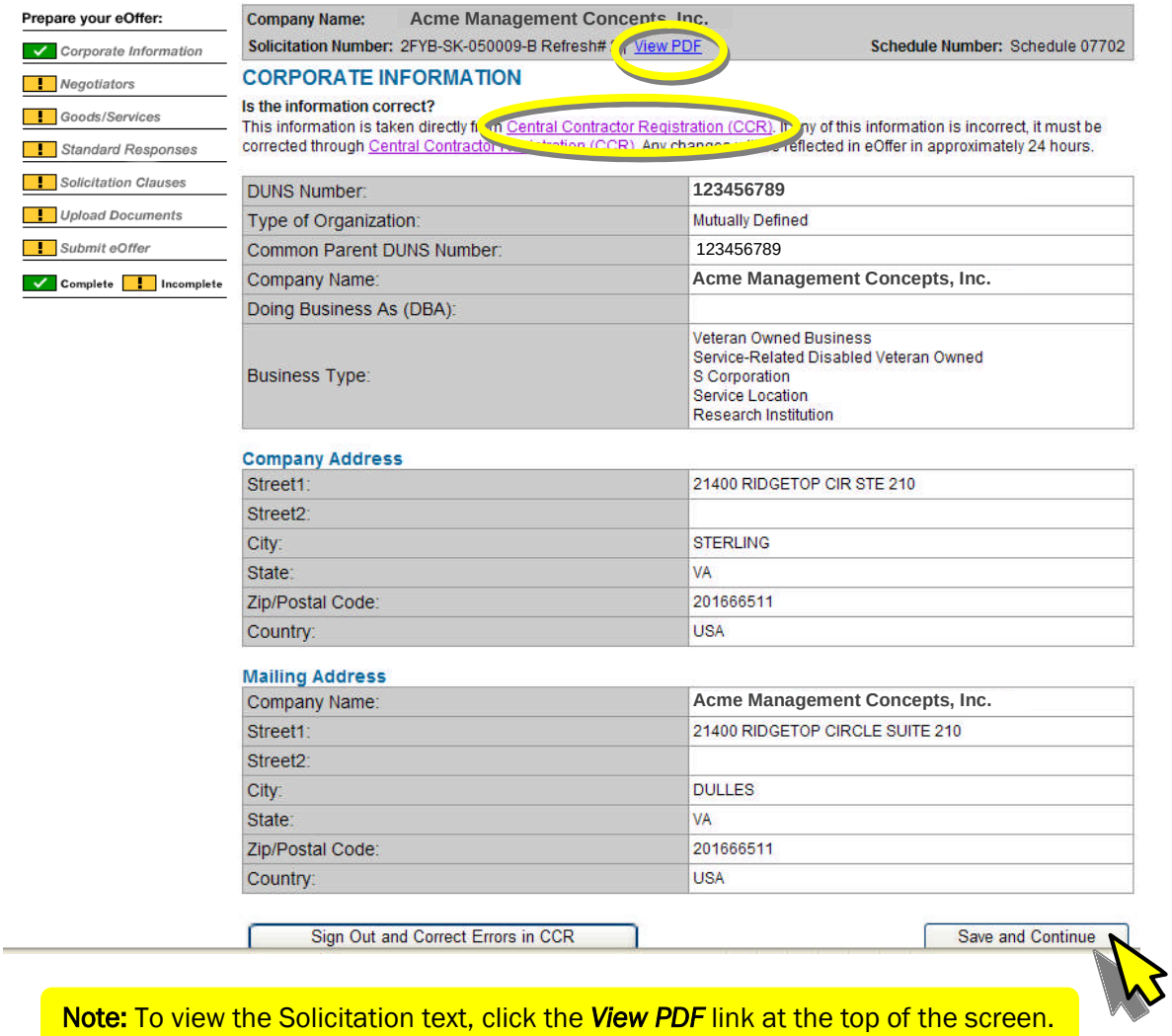
Note: Quick links for your convenience.



The ***Corporate Information*** page is the first to display.

2.1.1 Corporate Information

a) The **Corporate Information** page will be displayed with details pulled directly from the Central Contractor Registration (CCR) database. Verify that all information is correct.

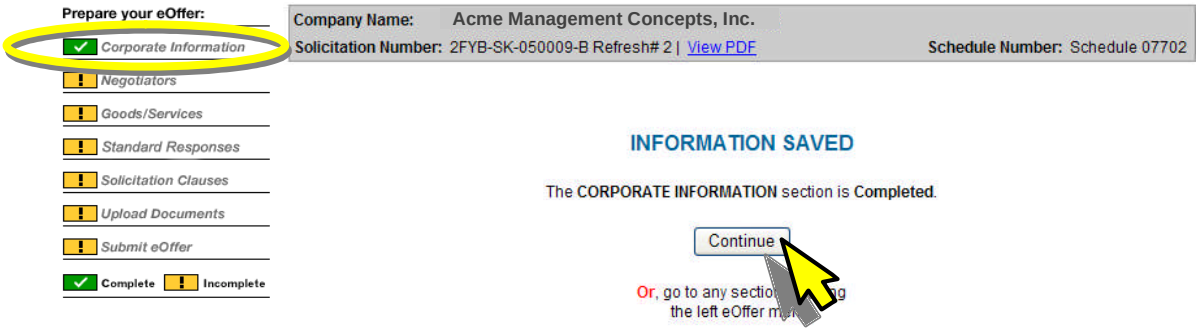


Note: To view the Solicitation text, click the ***View PDF*** link at the top of the screen.

b) If any information is not correct, click the button ***Sign Out and Correct Errors in CCR***. This will return to the eOffer/eMod homepage. To access the CCR go to the link *"Have you registered with CCR and with ORCA?"* under the "Before You Begin" section. You may also click the CCR link given at the top of the Corporate Information page. After the corrections are made in CCR, the eOffer/eMod system will update in approximately 24 hours. You may continue to work on the eOffer while the updates occur.

c) If the information is correct, click ***Save and Continue*** to move forward.

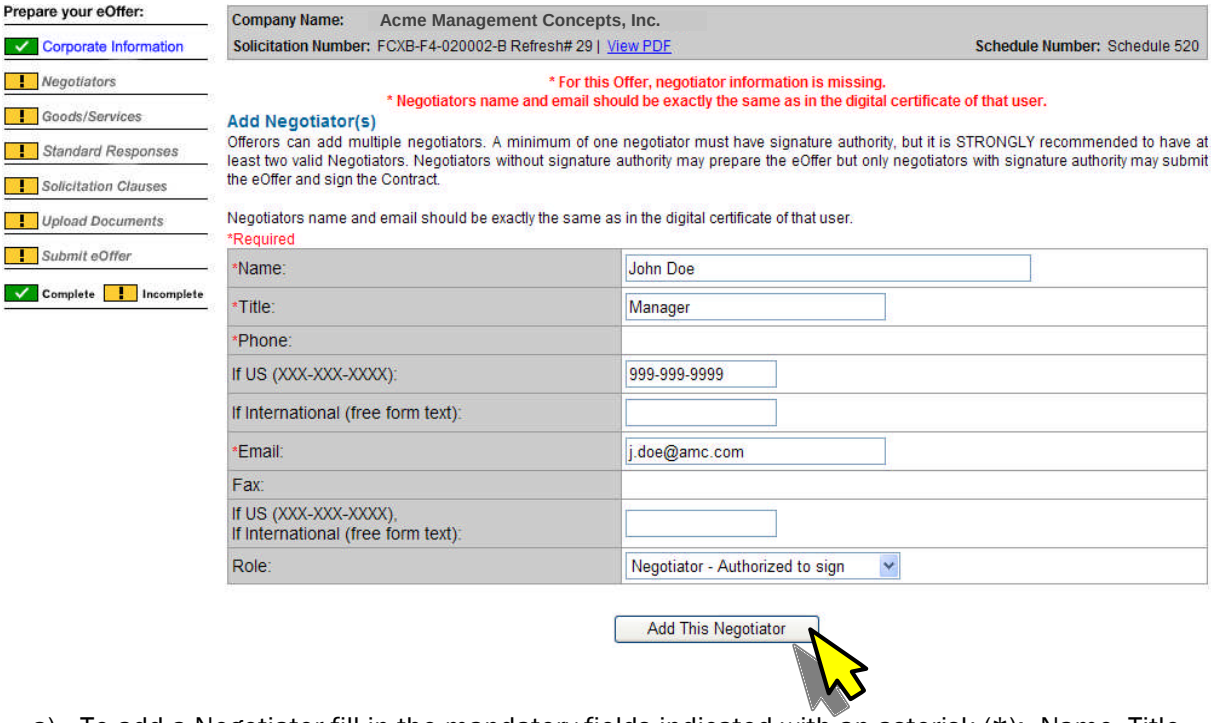
d) The Information Saved screen appears indicating that the Corporate Information section has been completed (note green checkmark in left menu). Click on ***Continue.*** This will take you to the "**Add Negotiator(s)**" screen (shown on next page).



Note: Do not use the "Back" button on the computer screen toolbar since it may lead to loss of data. Use the buttons at the bottom of each screen or click on sections under the **Prepare your eOffer** menu on the left to maneuver through the process.

2.1.2 Negotiators

All users that need to access the system to work on a particular eOffer will need to be added as Negotiators. Multiple Negotiators may be added one at a time if necessary. The Negotiator's name and email address must be entered exactly as they appear on their digital certificate. For more information on how to verify this information please refer to section **I– Getting Started (Appendix A)**



a) To add a Negotiator fill in the mandatory fields indicated with an asterisk (*): Name, Title, Phone and Email. Select a Role you want to assign to this Negotiator and Click ***Add This Negotiator***.

b) A Negotiator can be assigned one of two roles i.e. "Authorized to sign" or "Not Authorized to sign". In an eOffer there should be at least one Negotiator who is authorized to sign.

c) Once a Negotiator is added it will be listed under "**Your Negotiators**". If you need to add another Negotiator, click ***Add New Negotiator*** and repeat steps (a) and (b).

d) Repeat the process to add the desired number of Negotiators.

e) A Negotiator can also be deleted or their information can be edited. Use the Edit and Delete links provided under the Actions column if needed.

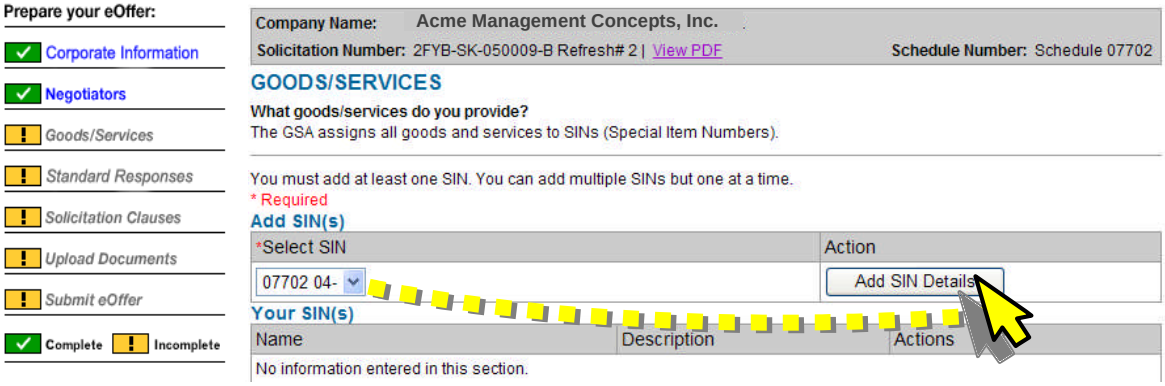
f) Once all the Negotiators have been added Click ***Save and Continue***.

g) The **Information Saved** screen will be displayed indicating that the Negotiator section is complete. Click ***Continue*** to move on to the next section.

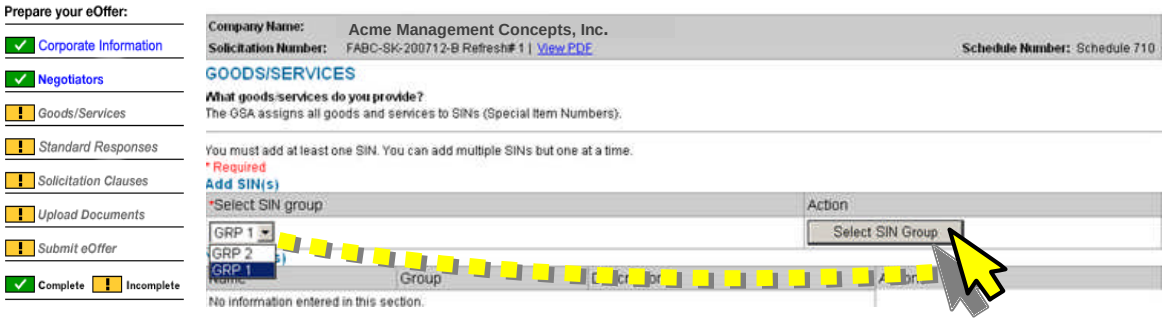
2.1.3 Goods/Services (SINs)

After adding the Negotiators the **Goods/Services** page will be displayed. The next step is to choose the Special Item Number(s) (SINs) to be contained in the offer. The SIN is the identifier for the type of goods or services being offered. Each offer may contain multiple SINs.

a) Choose the SIN from the dropdown under the **Select SIN** field and click ***Add SIN Details.***



b) For grouped SINS choose the group from the dropdown and click ***Select SIN Group.***



c) Choose the SIN from the dropdown and click ***Add SIN Details.***

Note: To look up information on a particular SIN, go to the GSA elibrary link: http://www.gsaelibrary.gsa.gov/ElibMain/home.do

The **ADD SIN (SPECIAL ITEM NUMBER) DETAILS** page will display. Fill in the mandatory fields (*):

d) Click on the correct **NAICS Code** from the dropdown menu.

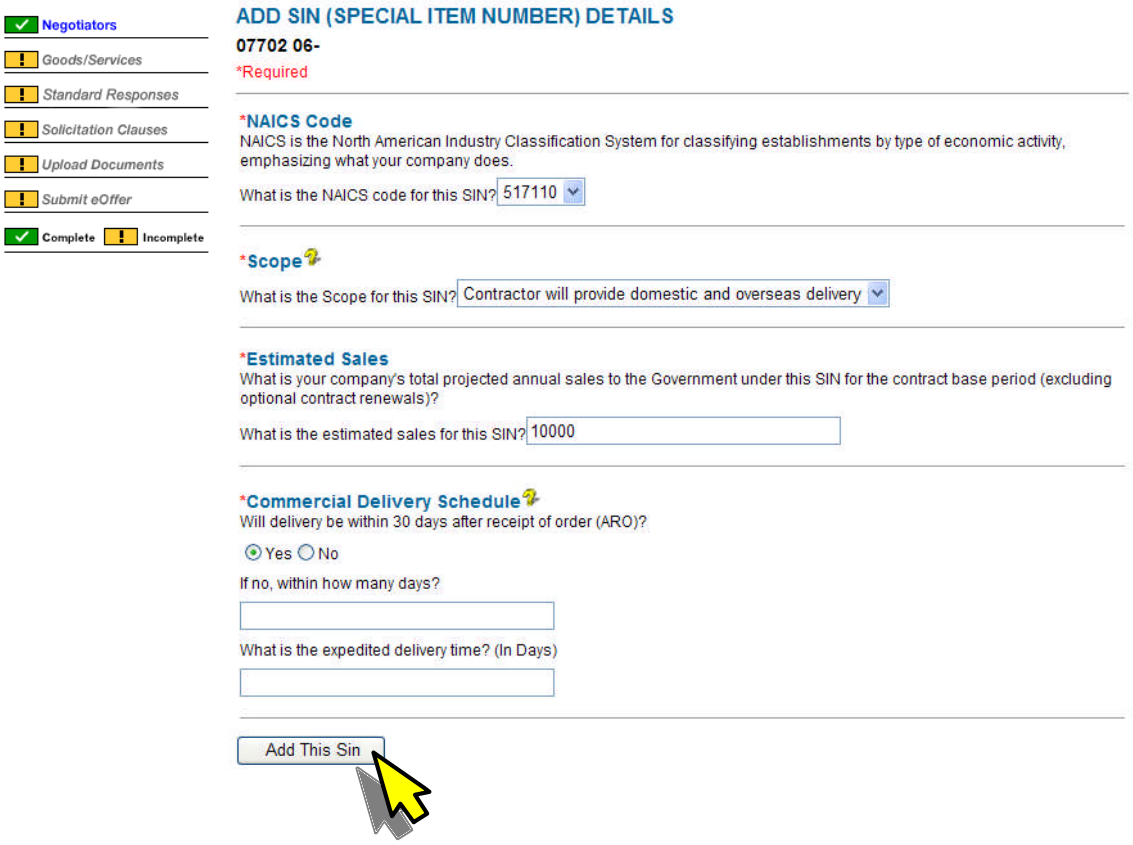
e) Click on the correct **Scope** from the dropdown menu indicating the SIN's scope.

f) Fill in the **Estimated Sales** field with the projected annual sales to the government for that particular SIN chosen.

g) Check Yes or No in the **Commercial Delivery Schedule** field, specifying the estimated delivery time.

h) Check ***Yes*** or ***No*** in the **Cooperative Purchasing** field.

i) To save the information click ***Add This Sin.***

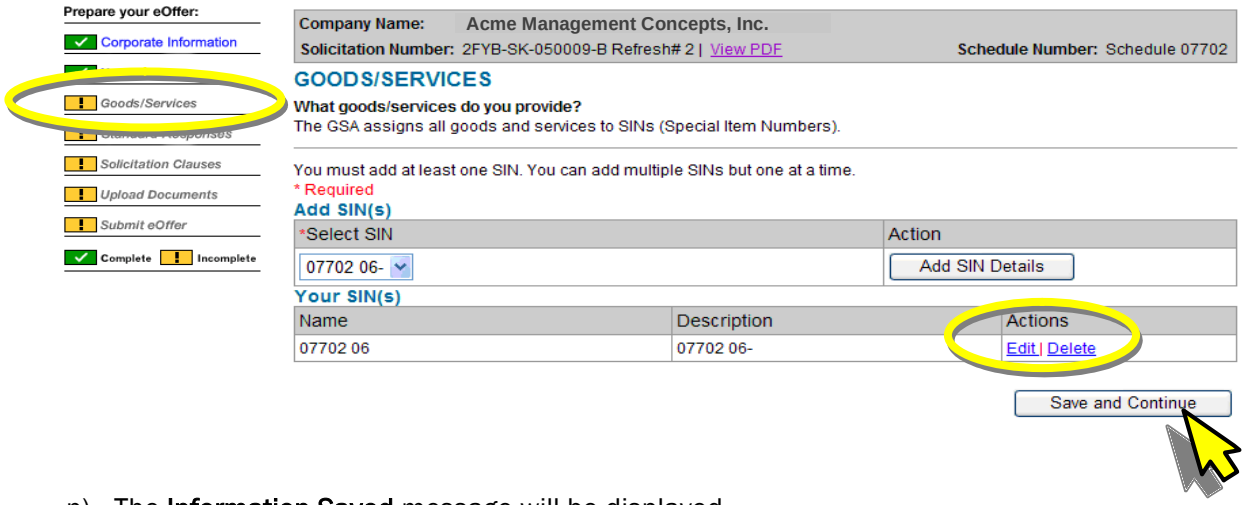


j) The completed SIN will appear on the **Goods/Services** page.

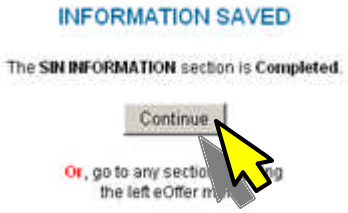
k) To add another SIN repeat the process as described in earlier steps

l) To make changes, click ***Edit.*** To remove a SIN click ***Delete.***

m) Click ***Save and Continue*** when finished***.***



n) The **Information Saved** message will be displayed.



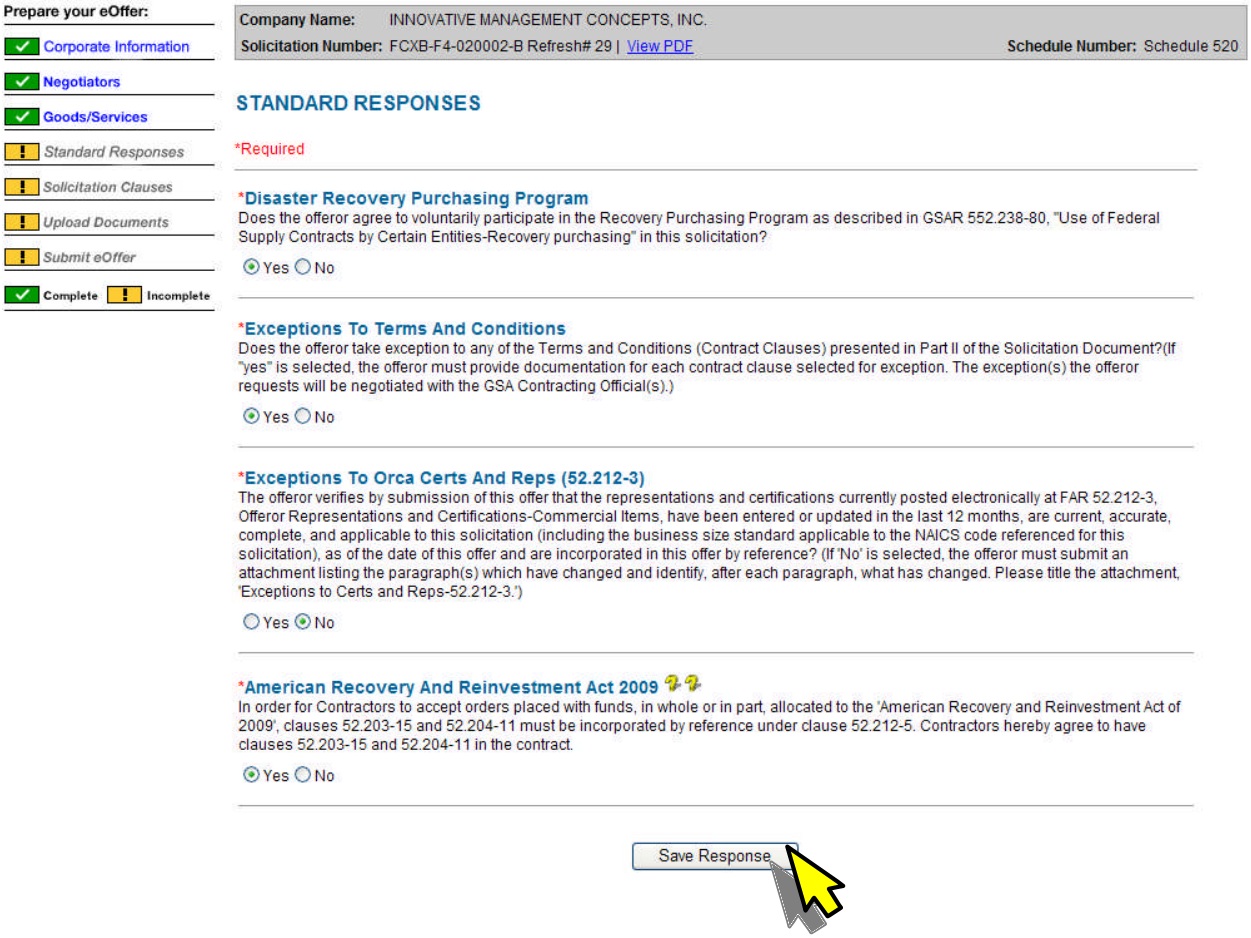
o) Click ***Continue*** to move forward to the **Standard Responses.**

2.1.4 Standard Responses

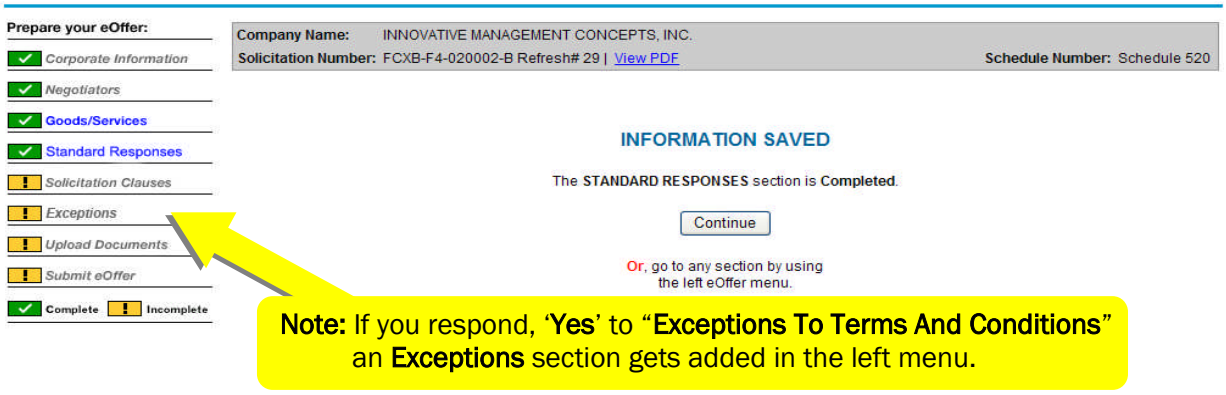
In this section, review the following questions. Responses to all four are required.

a) Respond to the listed questions.

b) Click *Save Response.*



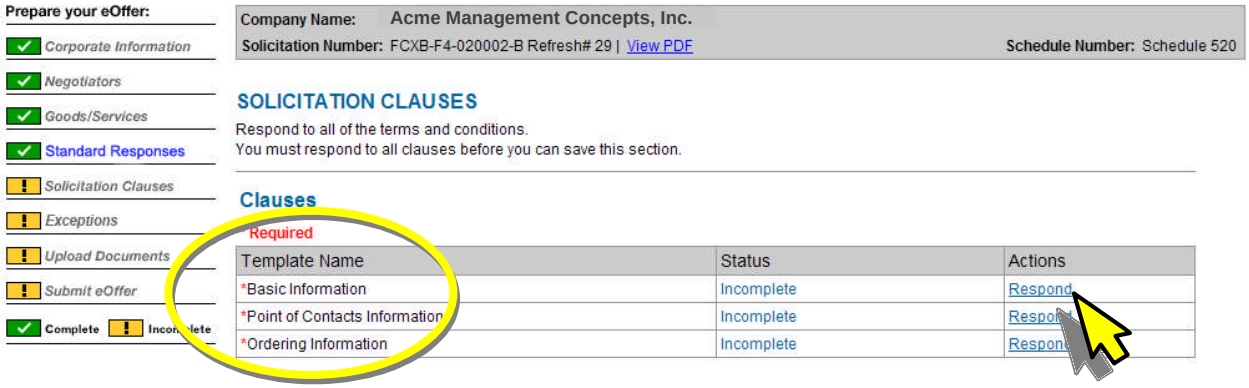
c) The **Information Saved** message is displayed. Click ***Continue*** and move onto the **Solicitation Clauses**.



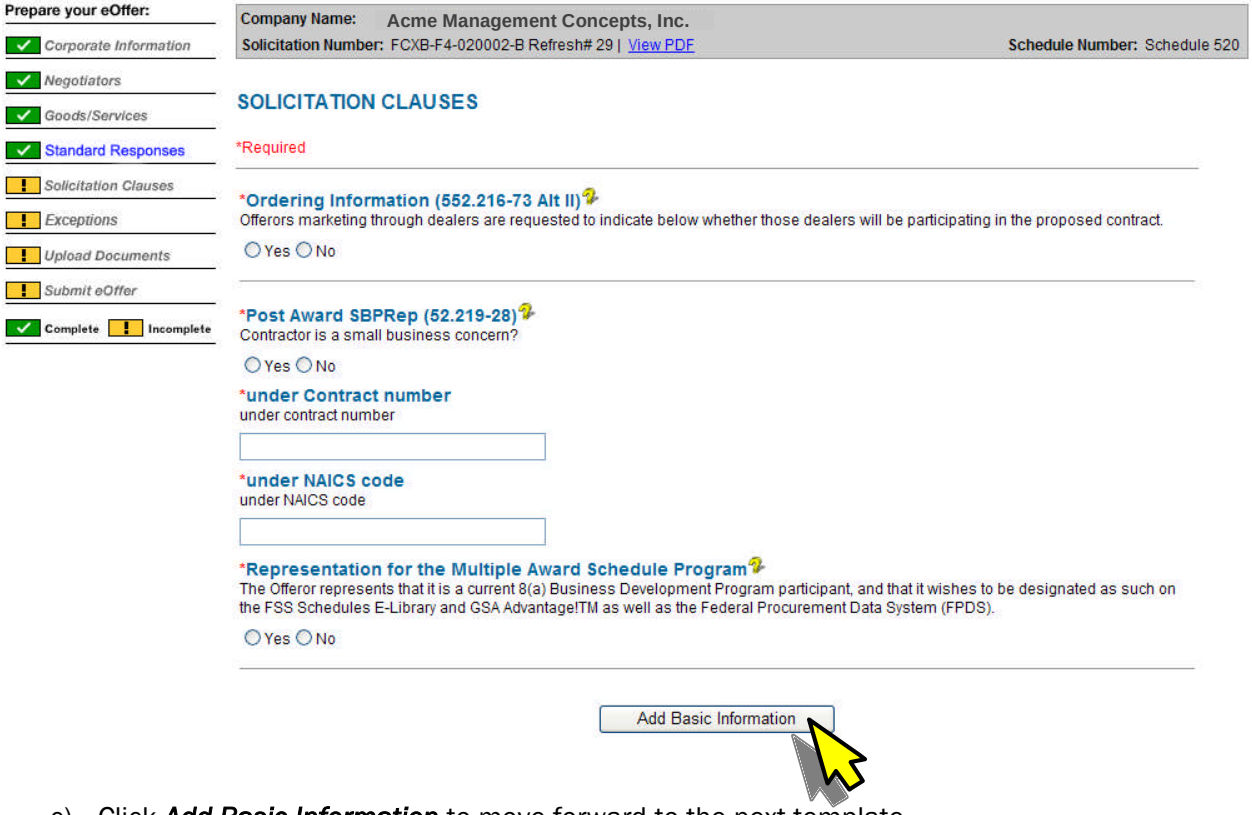
2.1.5 Solicitation Clauses

In this section, responses to solicitation clauses have to be completed. These **Clauses** are listed in the three (3) templates that are required.

a) Start with "Basic Information" template. Click on Respond link under the "**Actions**" column.

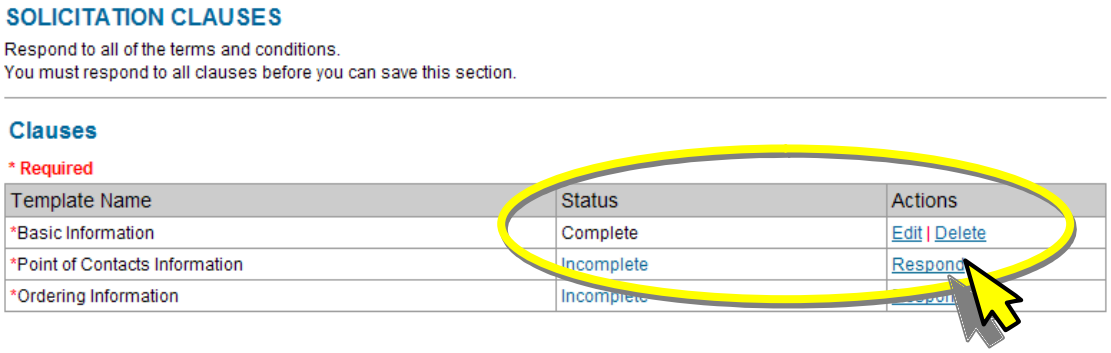


b) Click "*Yes*" or "*No*" to the Solicitation Clause questions and fill-in requested information.



c) Click ***Add Basic Information*** to move forward to the next template.

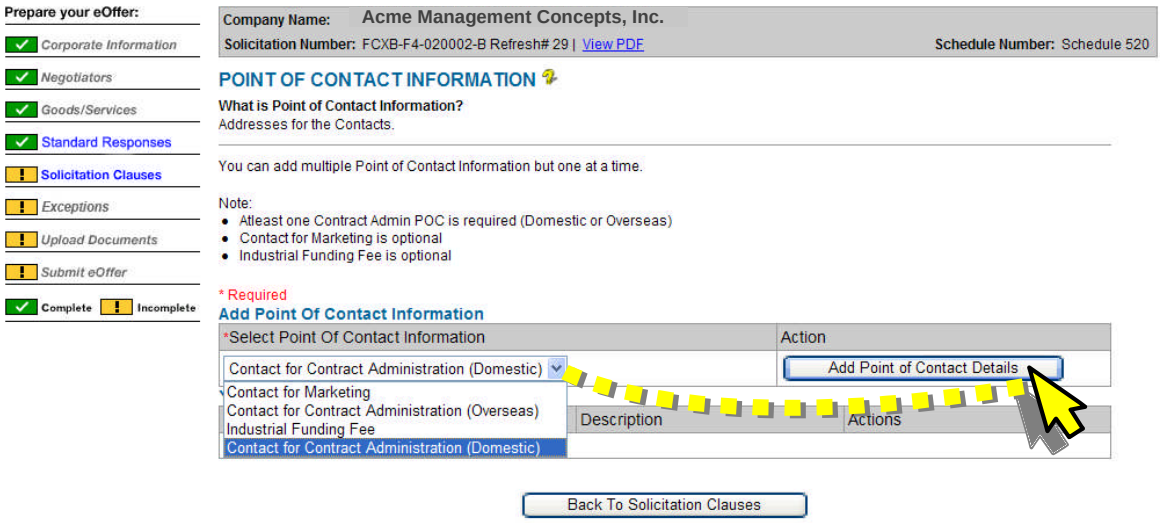
d) The status for "Basic Information" will change to "Complete" under the "**Status**" column. The option to ***Edit*** or ***Delete*** is now available under the "**Actions**" column.



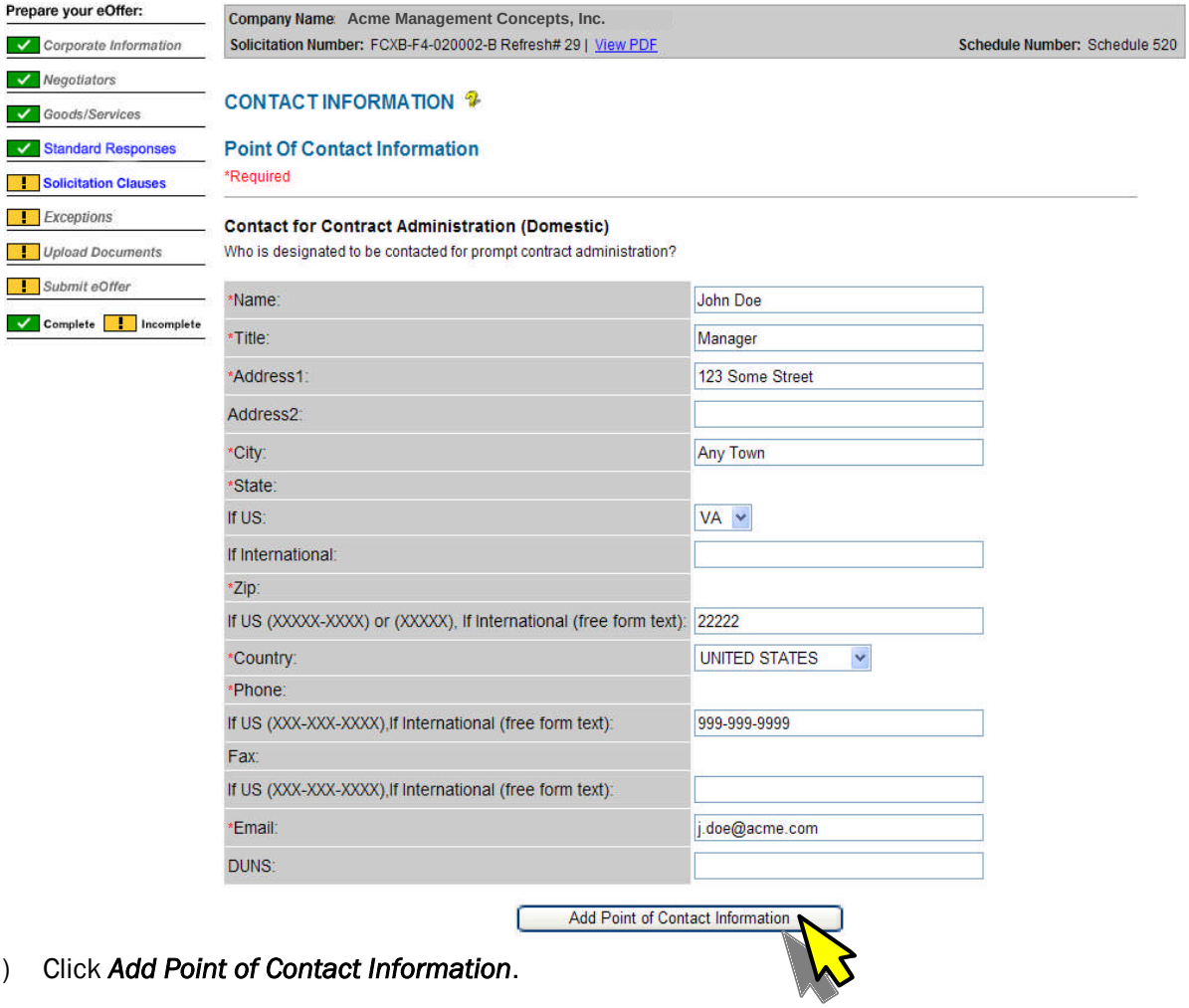
e) In the "**Actions**" column, click on the ***Respond*** link, corresponding to the **Point of Contacts Information**.

f) On the next screen you will add point of contact details for Contract Administration (required), Industrial Funding Fee (optional) and Marketing (optional).

g) Under ***Select Point of Contact Information** choose from the dropdown and click ***Add Point of Contact Details***.



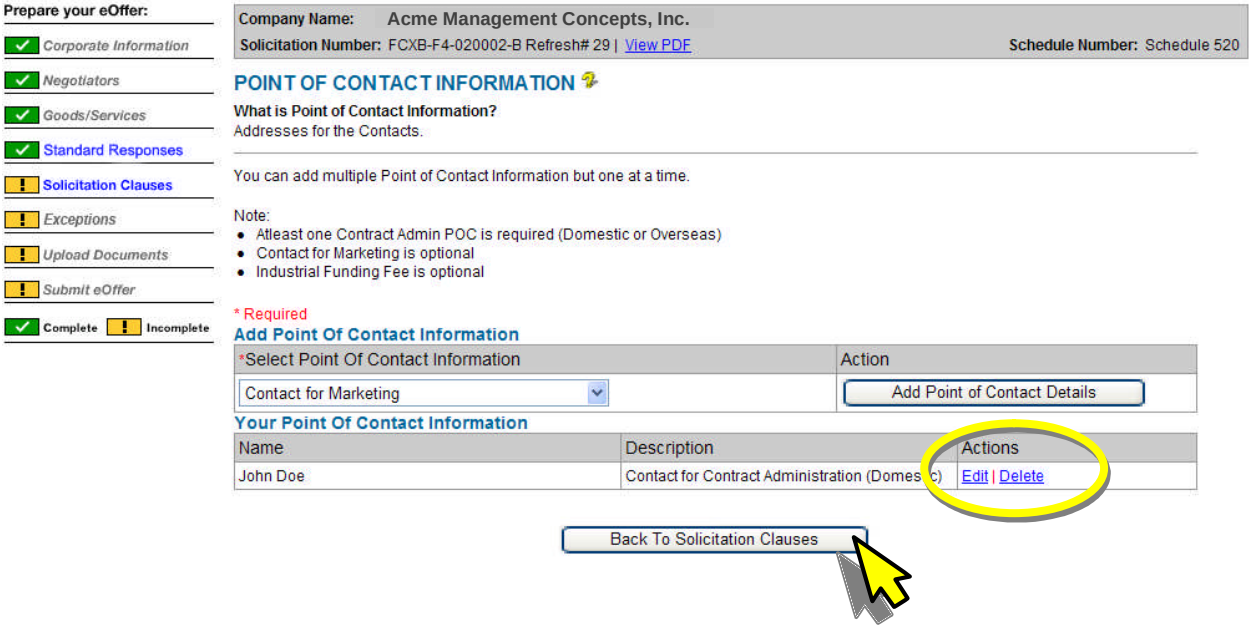
h) Fill in all mandatory fields indicated with an asterisk (*).



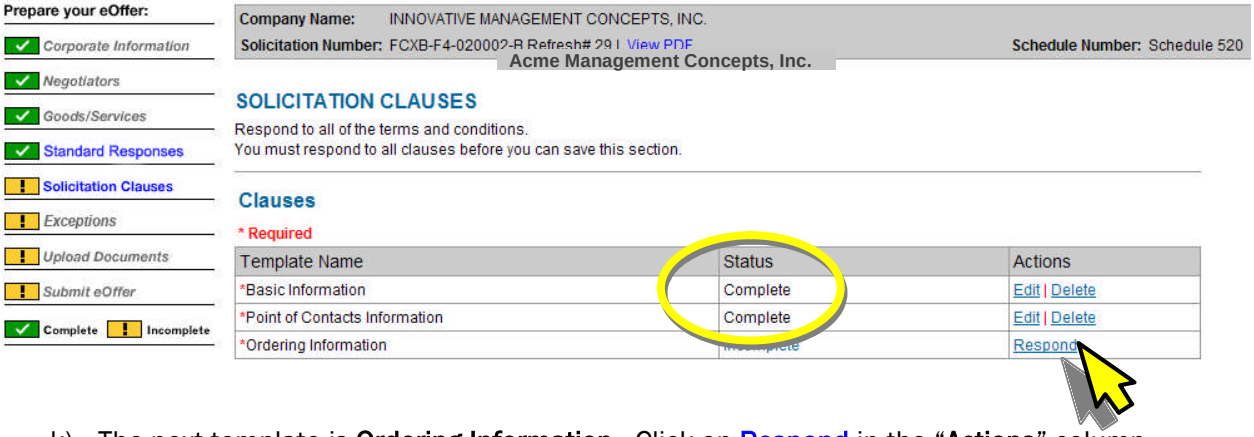
i) Click *Add Point of Contact Information*.

Note: Multiple points of contact can be added by repeating the steps.

The point of contact will be listed and can be Edited or Deleted from the "**Actions**" column.

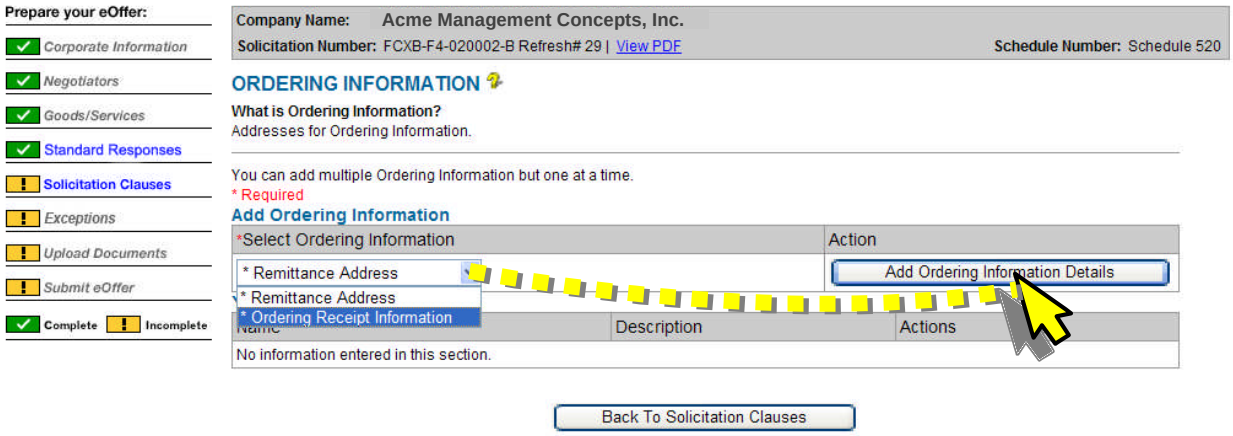


j) Click the ***Back To Solicitation Clauses*** button. You will see the Point of Contacts Information status as complete.

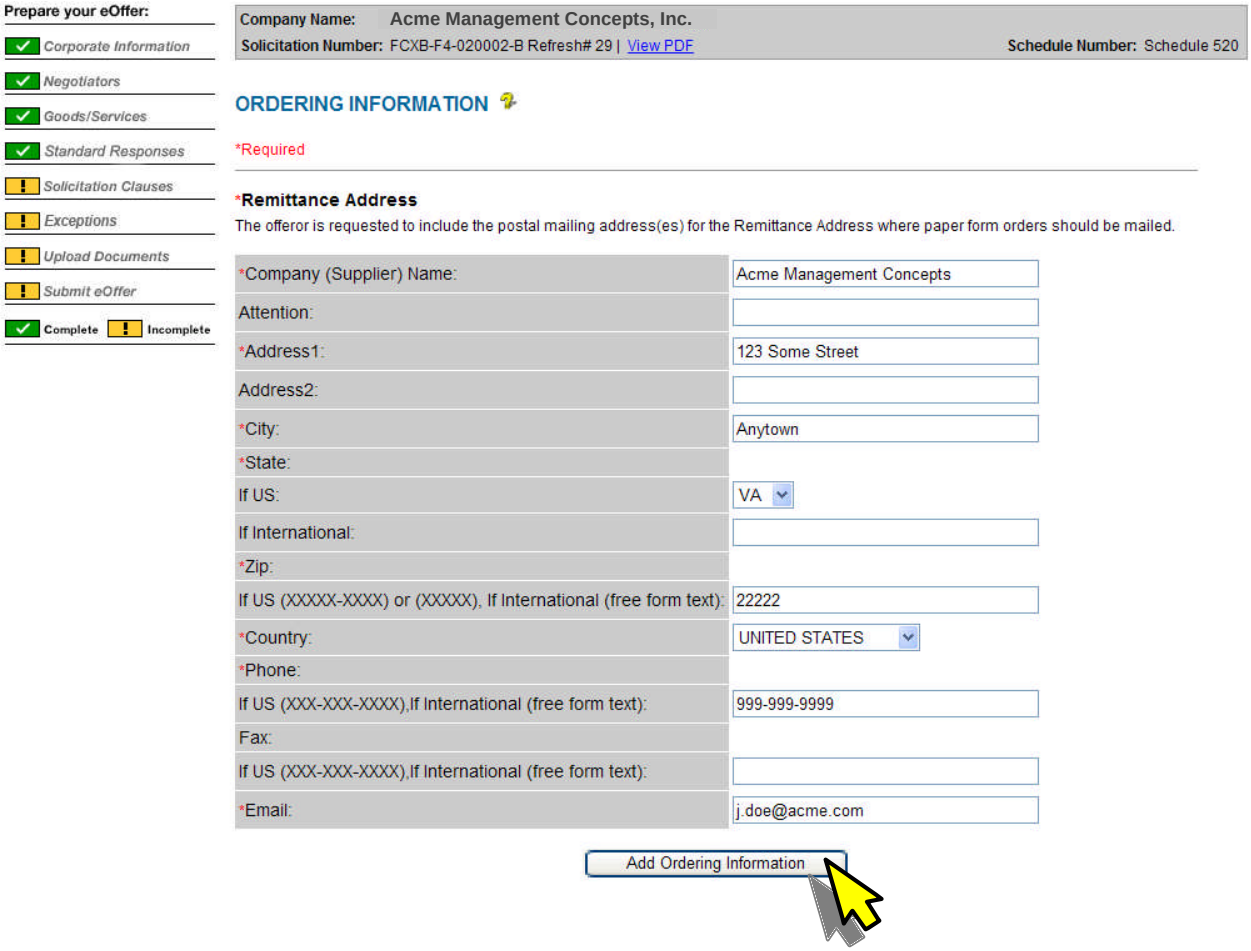


k) The next template is **Ordering Information**. Click on Respond in the "**Actions**" column.

l) Select **Remittance Address** or **Ordering Receipt Information** from the dropdown (both are required) and click on ***Add Ordering Information Details***.

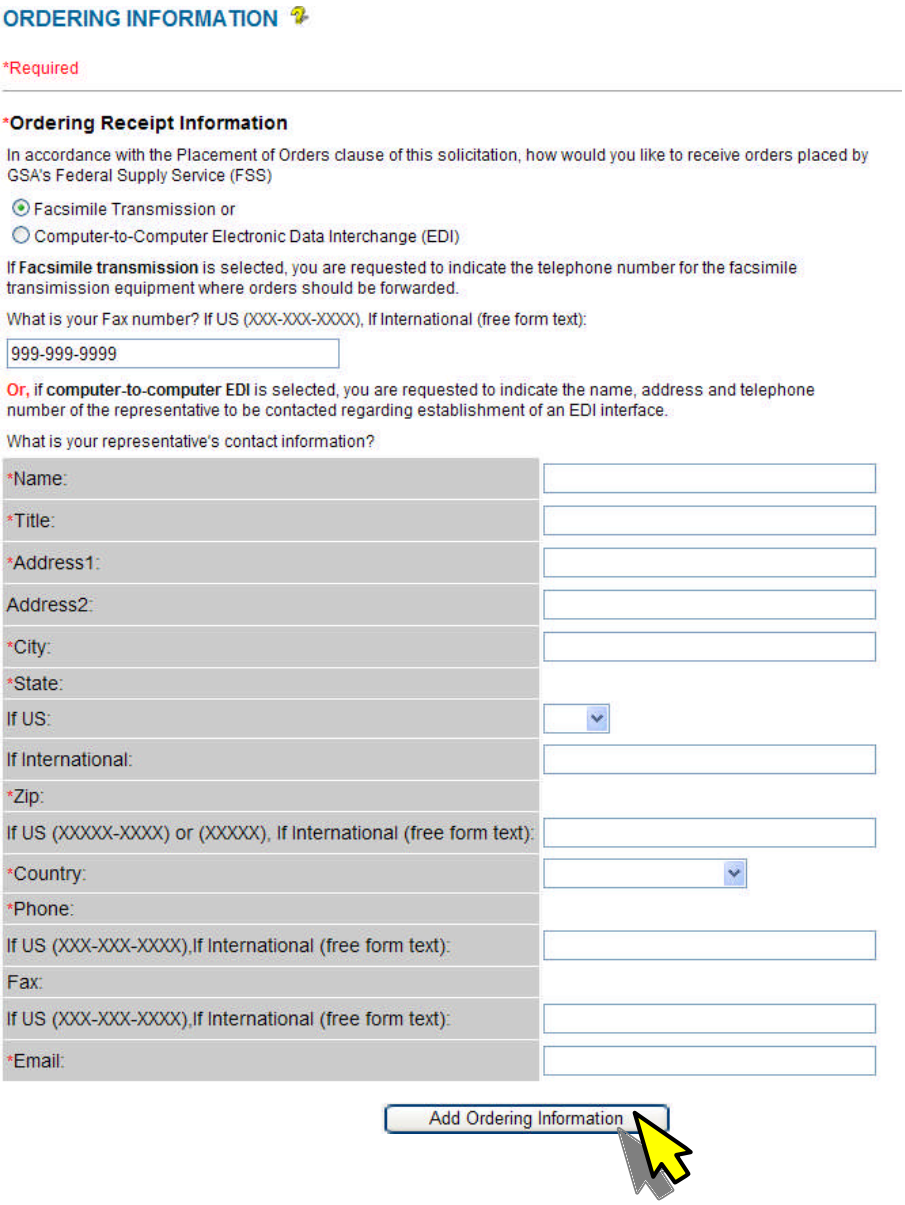


m) Fill in all mandatory fields (*) and click ***Add Ordering Information***.



n) Repeat steps (2.1.5 (l) and (m)) for the **Ordering Receipt Information.**

o) Select the choice for receiving orders, fill in the required (*) information and click *Add Ordering Information*.



ORDERING INFORMATION

*Required

***Ordering Receipt Information**

In accordance with the Placement of Orders clause of this solicitation, how would you like to receive orders placed by GSA's Federal Supply Service (FSS)

- (•) Facsimile Transmission or
- ( ) Computer-to-Computer Electronic Data Interchange (EDI)

If **Facsimile transmission** is selected, you are requested to indicate the telephone number for the facsimile transimission equipment where orders should be forwarded.

What is your Fax number? If US (XXX-XXX-XXXX), If International (free form text):

999-999-9999

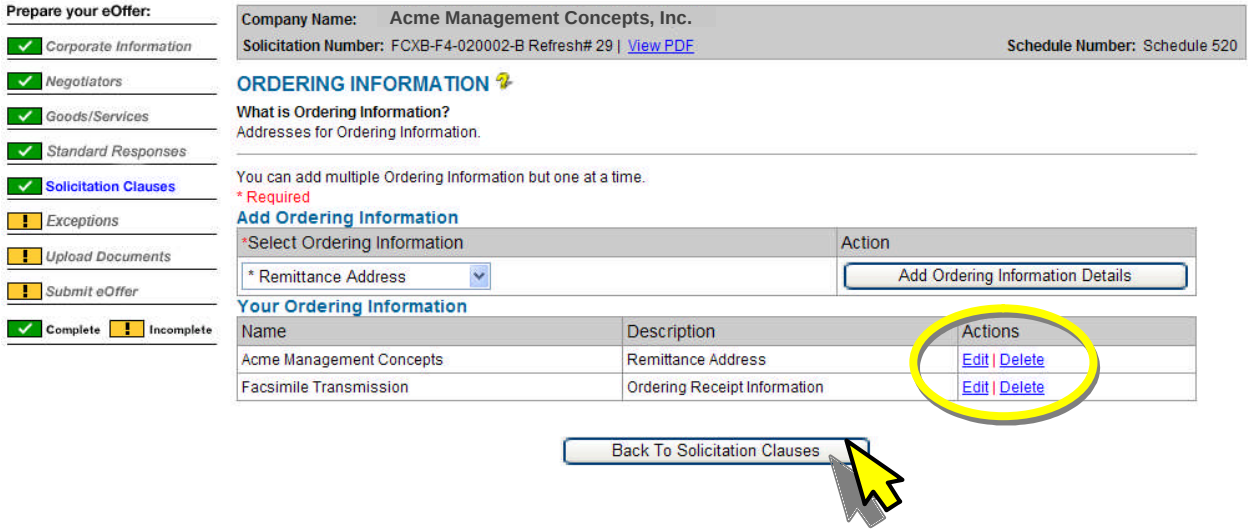
Or, if **computer-to-computer EDI** is selected, you are requested to indicate the name, address and telephone number of the representative to be contacted regarding establishment of an EDI interface.

What is your representative's contact information?

*Name:	
*Title:	
*Address1:	
Address2:	
*City:	
*State:	
If US:	
If International:	
*Zip:	
If US (XXXXX-XXXX) or (XXXXX), If International (free form text):	
*Country:	
*Phone:	
If US (XXX-XXX-XXXX),If International (free form text):	
Fax:	
If US (XXX-XXX-XXXX),If International (free form text):	
*Email:	

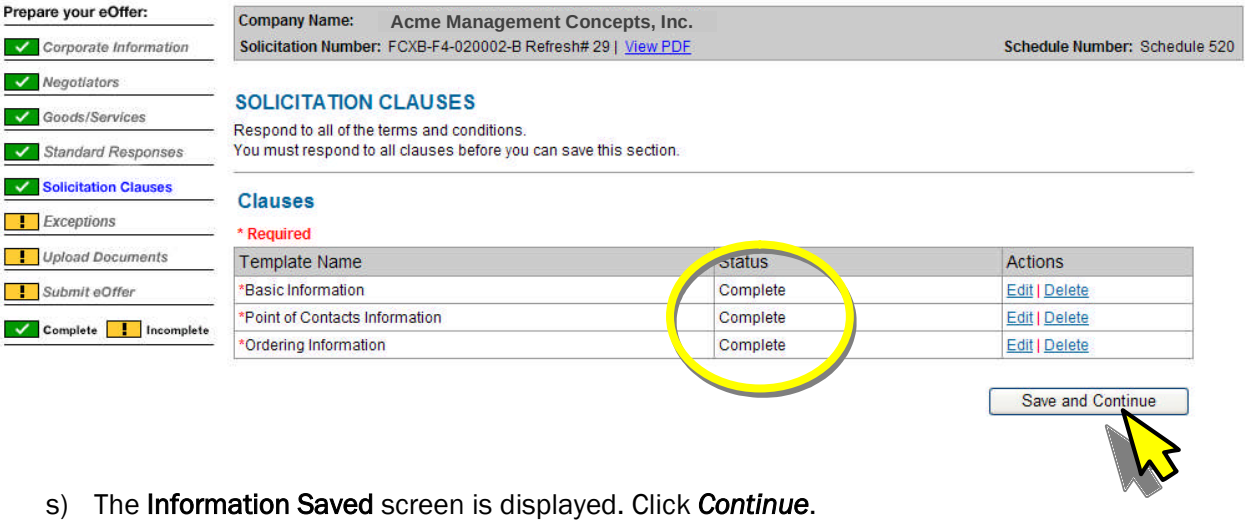
Add Ordering Information

p) All the added Ordering Information will be listed with the option to **Edit** or **Delete**.

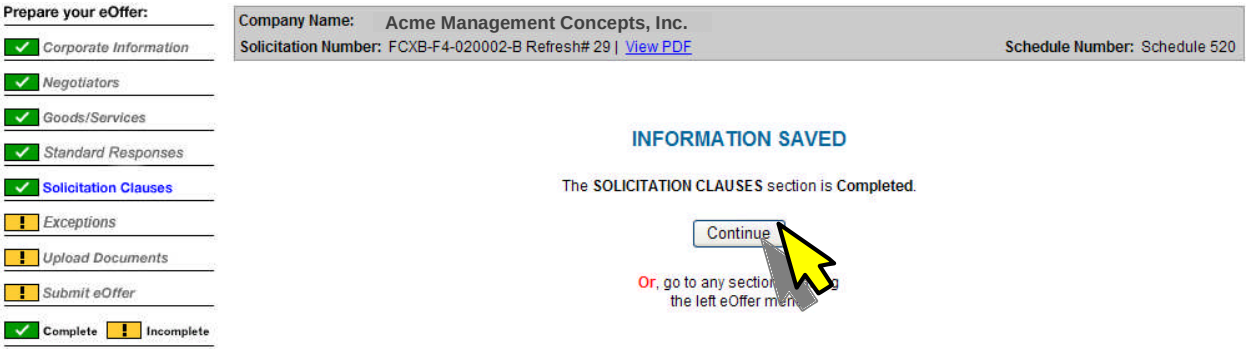


q) Click on ***Back To Solicitation Clauses***. The status for the Ordering Information will change to **Complete** thereby completing the **Solicitation Clauses** section.

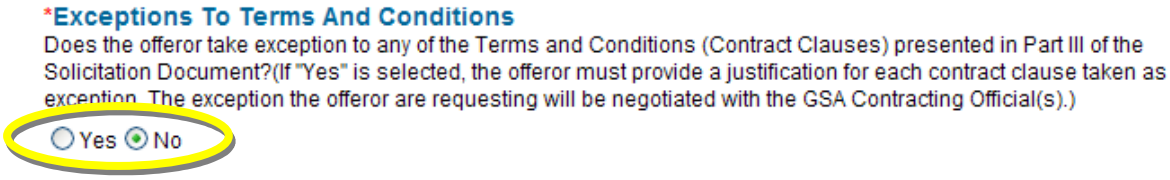
r) Click ***Save and Continue.***



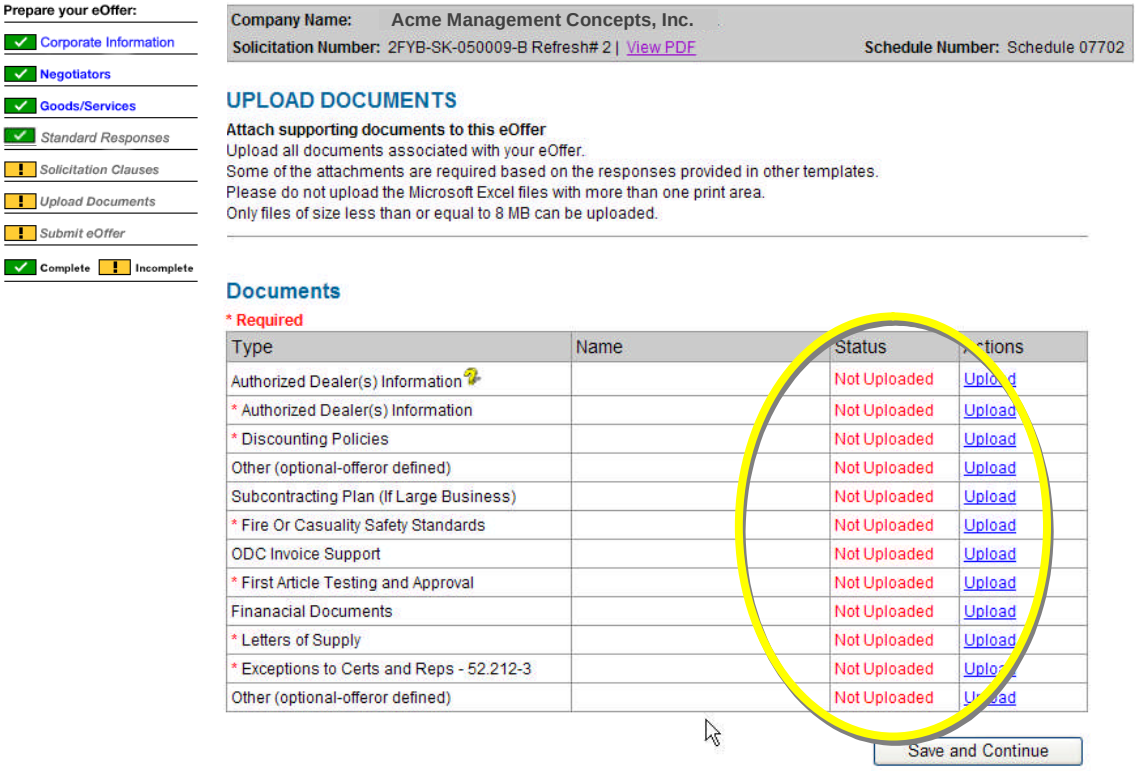
s) The **Information Saved** screen is displayed. Click ***Continue***.



t) The **Upload Documents** screen will display, provided that you answered "**No**" to "**Exceptions To Terms And Conditions**" in the Basic template as shown below.



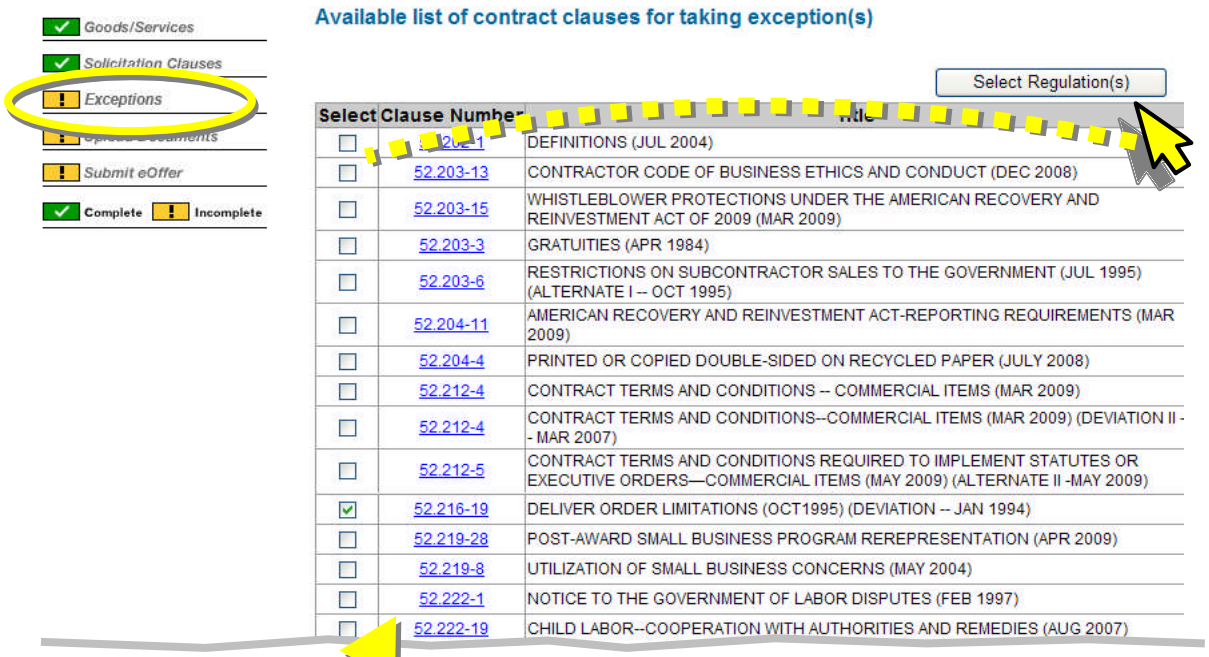
u) Skip section **2.1.6 Clause Exceptions** and move on to section **2.1.7 Upload Documents** if you did not take any Exceptions.



2.1.6 Clause Exceptions

If you answered "Yes" to "Exceptions To Terms And Conditions" on the Solicitation **Clauses Basic Information** page as shown below, the **Exceptions** section will need to be completed after the **Solicitation Clauses** section is complete.

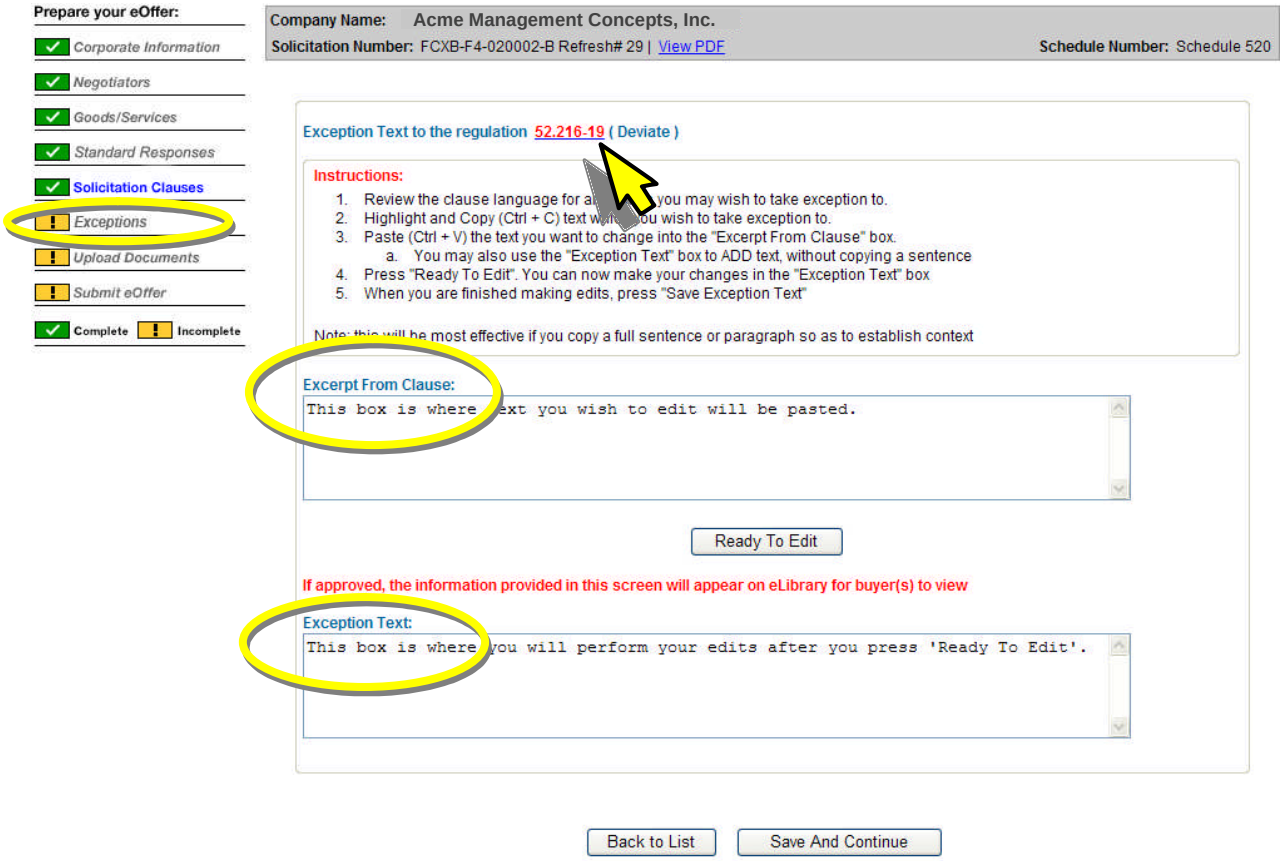
a) You will be presented with a list of contract clauses for taking exception(s). *Select* the **Regulation(s)** by clicking the check box. Then click the ***Select Regulations*** button.



Note: If you need to view the clause you can click on the Clause Number which is given as a link. The clause body will open up in a separate window as a pdf document

b) On the next screen you will see an "**Exceptions Text**" box as well as the "**Excerpt From Clause**" box.

c) Notice that now you have an **Exceptions** section in your eOffer menu on the left. Review the Instructions. To view the clause click on the Clause link.



d) The clause body will open up as a pdf file. Highlight and copy (Ctrl+C) the text for which the exception is being taken(as demonstrated below).

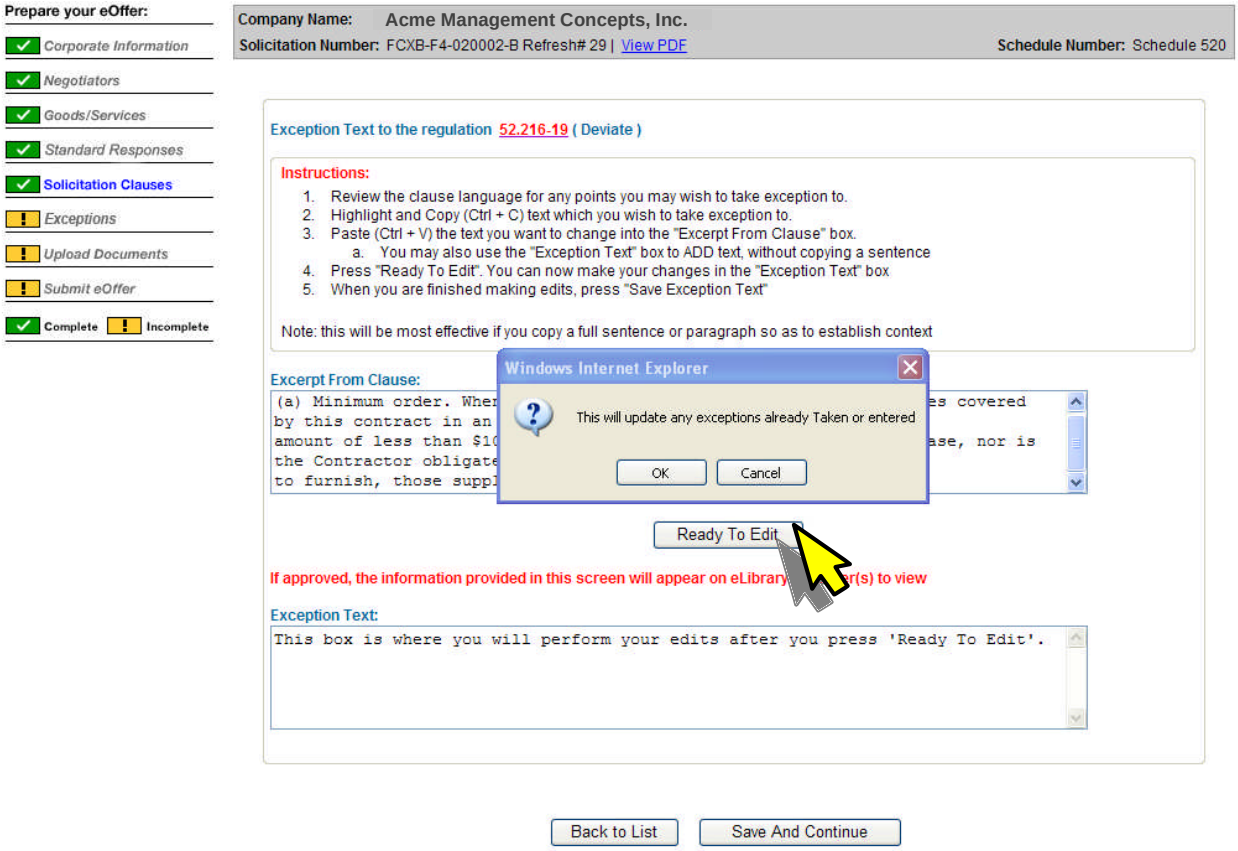
52.216-19 DELIVERY ORDER LIMITATIONS
(DEVIATION—JAN 1994) FSS A/L FC-94-2

(a) Minimum order. When the Government requires supplies or services covered by this contract in an amount of less than $100, the Government is not obligated to purchase, nor is the Contractor obligated to furnish, those supplies or services under the contract.

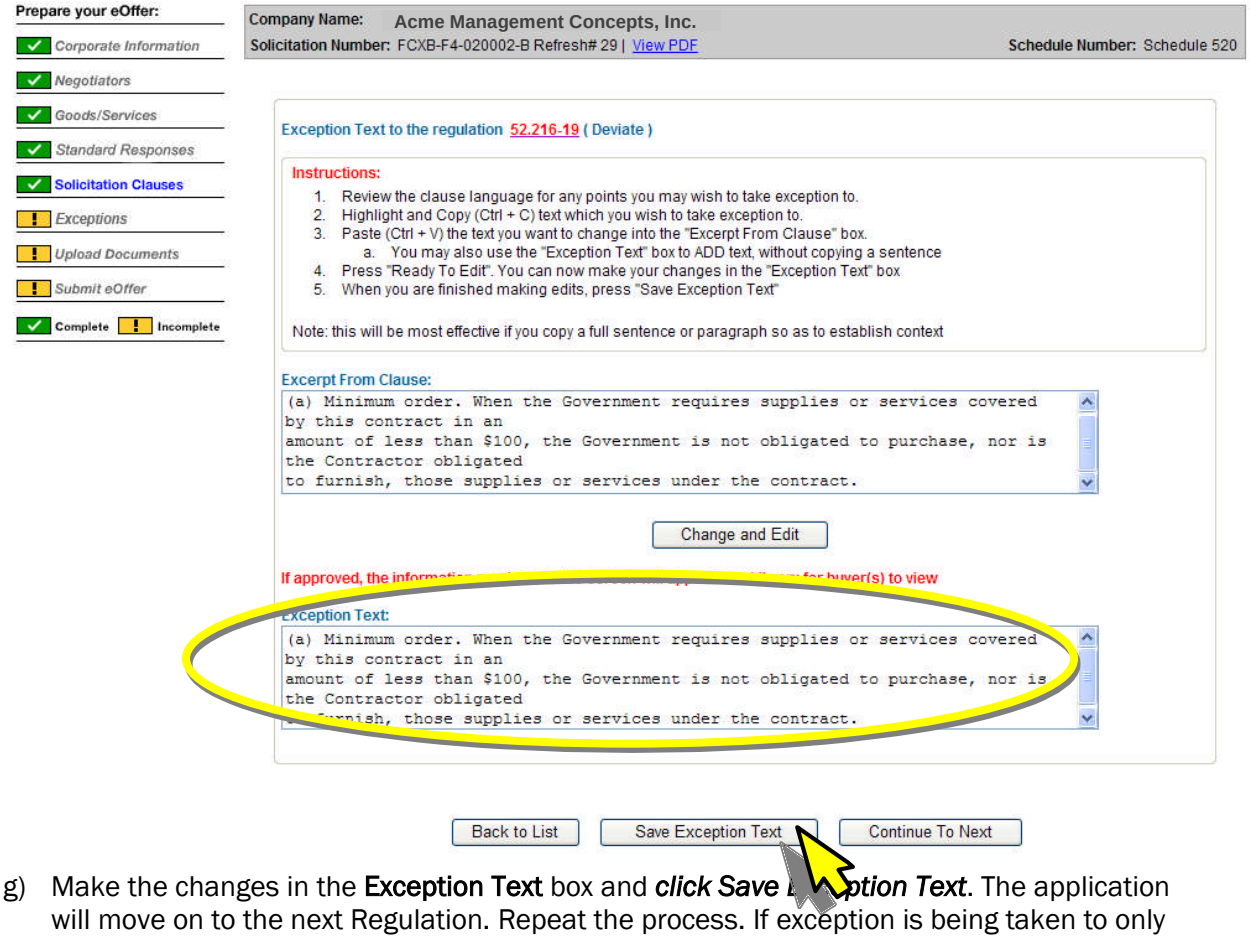
(b) Maximum order. The total dollar value (exclusive of discounts for prompt payment) of any order placed under this contract shall not exceed $*****100,0000****.

(c) The Contractor shall not accept or fulfill any order that exceeds the maximum order limitations set forth herein. Violation may result in termination of the contract pursuant to the default clause.

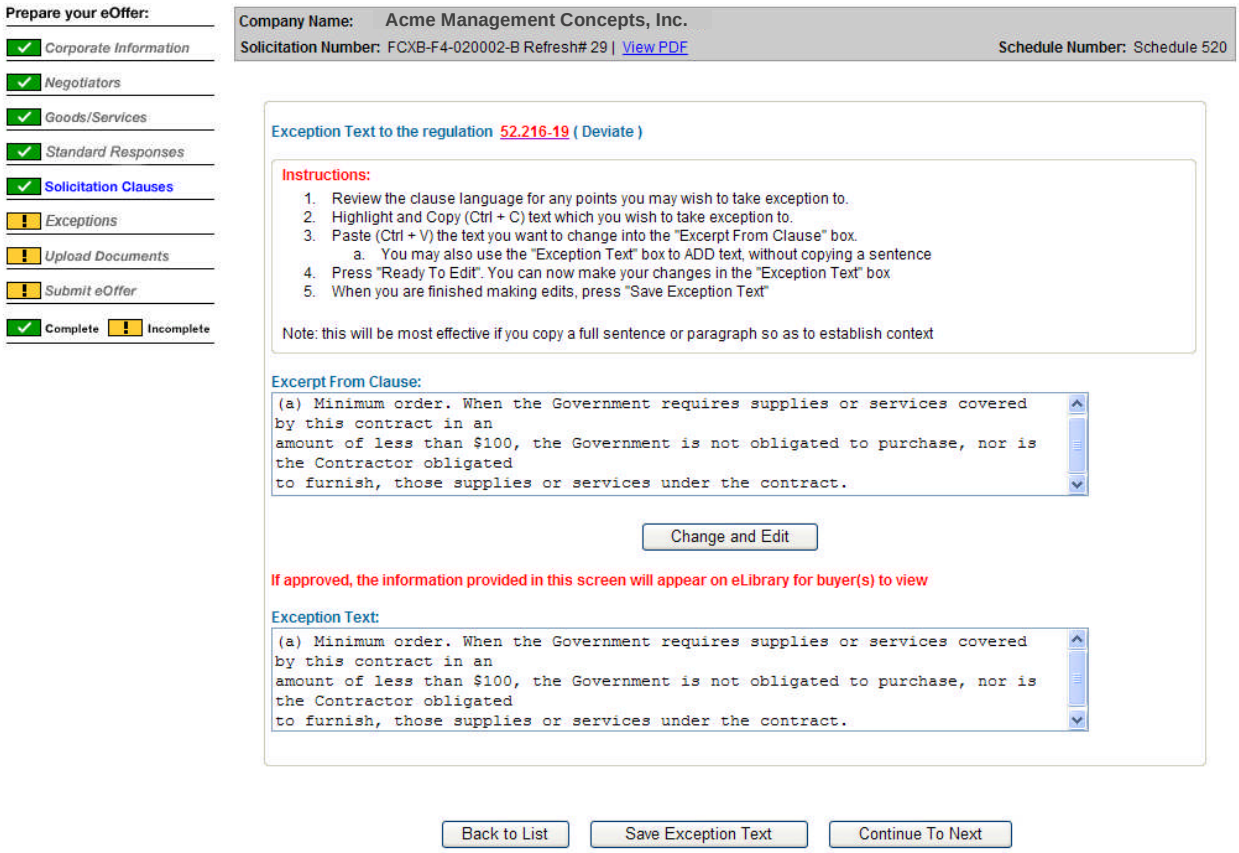
e) Click in the ***Excerpt From Clause*** box and do ***Ctrl+V.*** The text will get copied.



f) Click the ***Ready To Edit*** button. A pop up will display. Click ***OK*** and the text will be replicated in the **Exception Text** box.

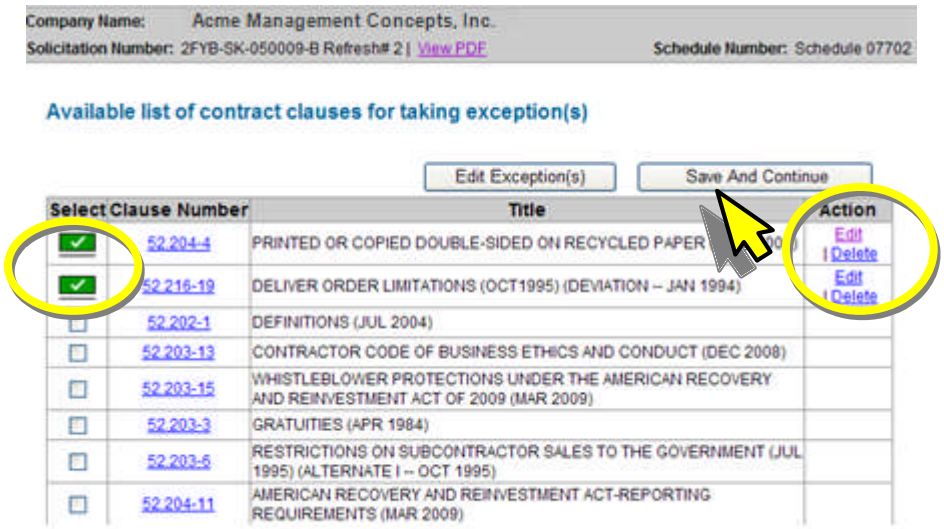


g) Make the changes in the **Exception Text** box and ***click Save Exception Text***. The application will move on to the next Regulation. Repeat the process. If exception is being taken to only one Regulation the Save And Continue button will be seen instead of the Save Exception Text.

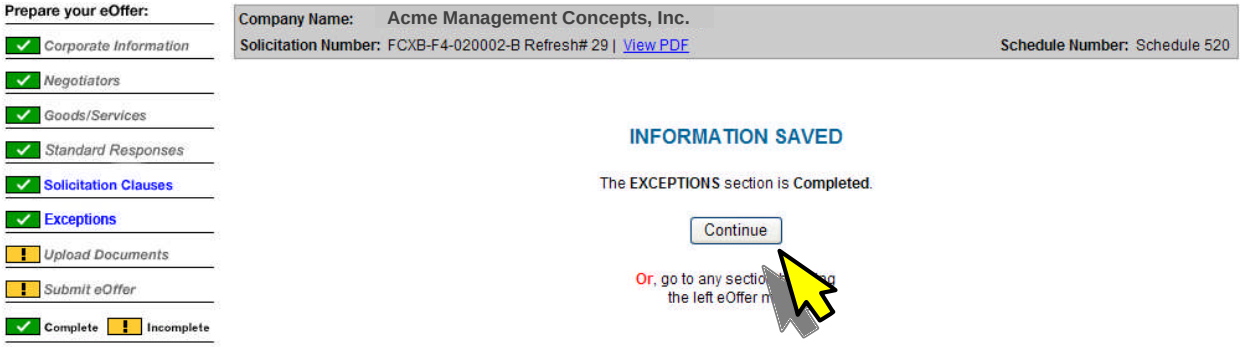


h) If you click the ***Back to List*** button the list of contract clauses will be displayed (shown in 2.1.6 a). You will notice that your Exception clauses will be at the top of the list now with the option to Edit or Delete.

i) Click ***Save and Continue,*** when done with all the exceptions.



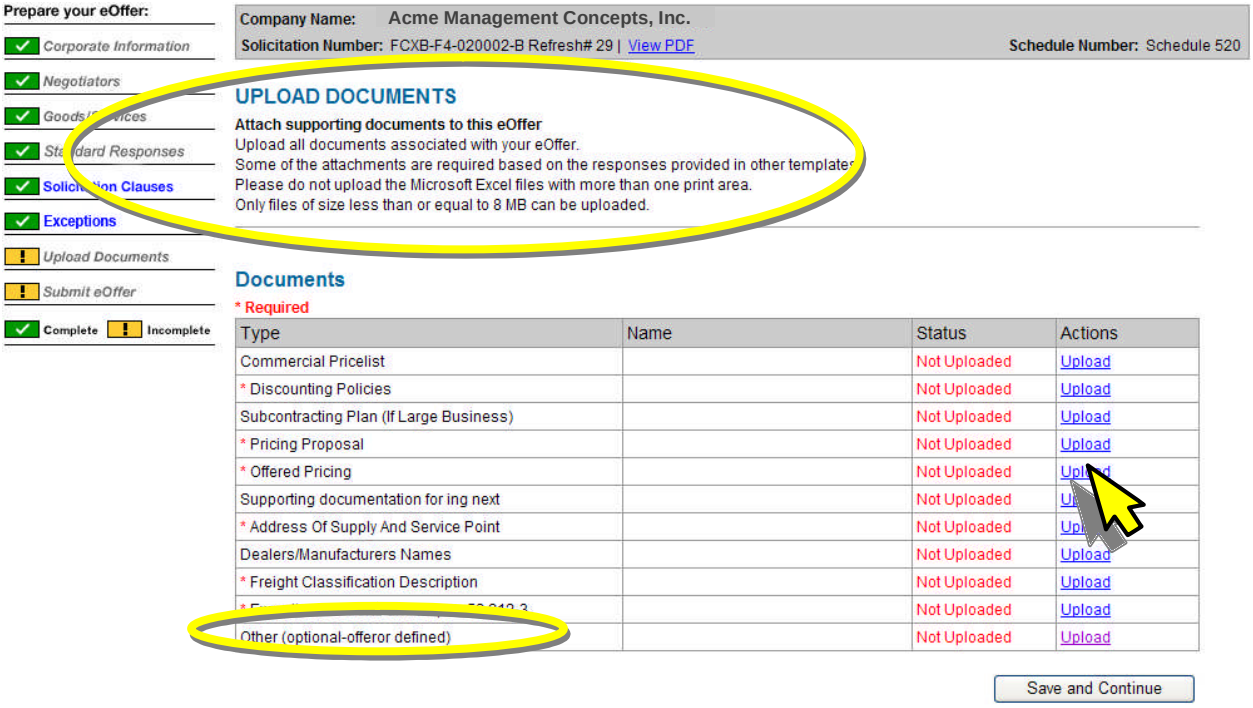
j) Click *Continue* to move on to the **Upload Documents** section.



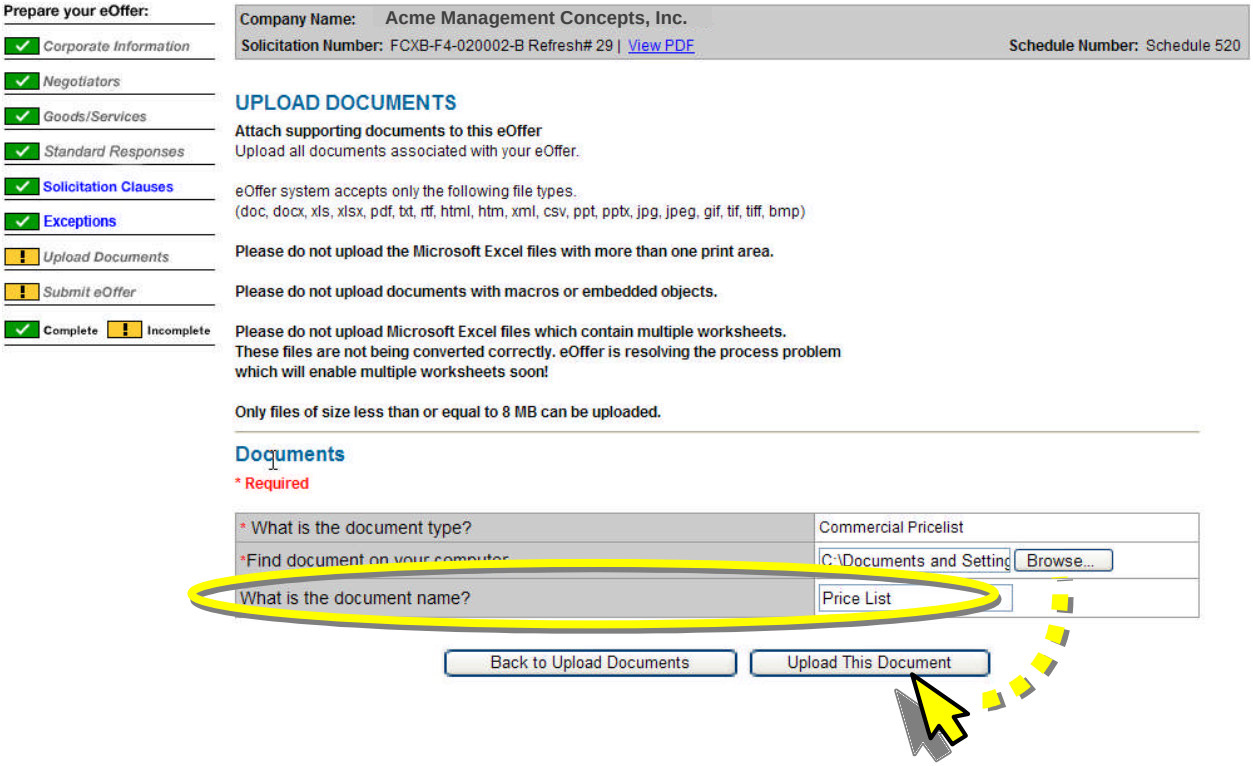
2.1.7 Upload Documents

The Upload Documents screen enables the addition of supporting documentation to the eOffer. This is the final step prior to submitting the eOffer. The mandatory documents required for all eOffers are indicated with an asterisk (*). This list will change depending on the solicitation requirements. If an additional document needs to be uploaded, please use **Other (optional-offeror defined)** category. Note the instructions for Uploading Documents.

a) Click the ***Upload*** link against the category for which you need to attach the document.



b) Click ***Browse*** to locate documents to be attached.



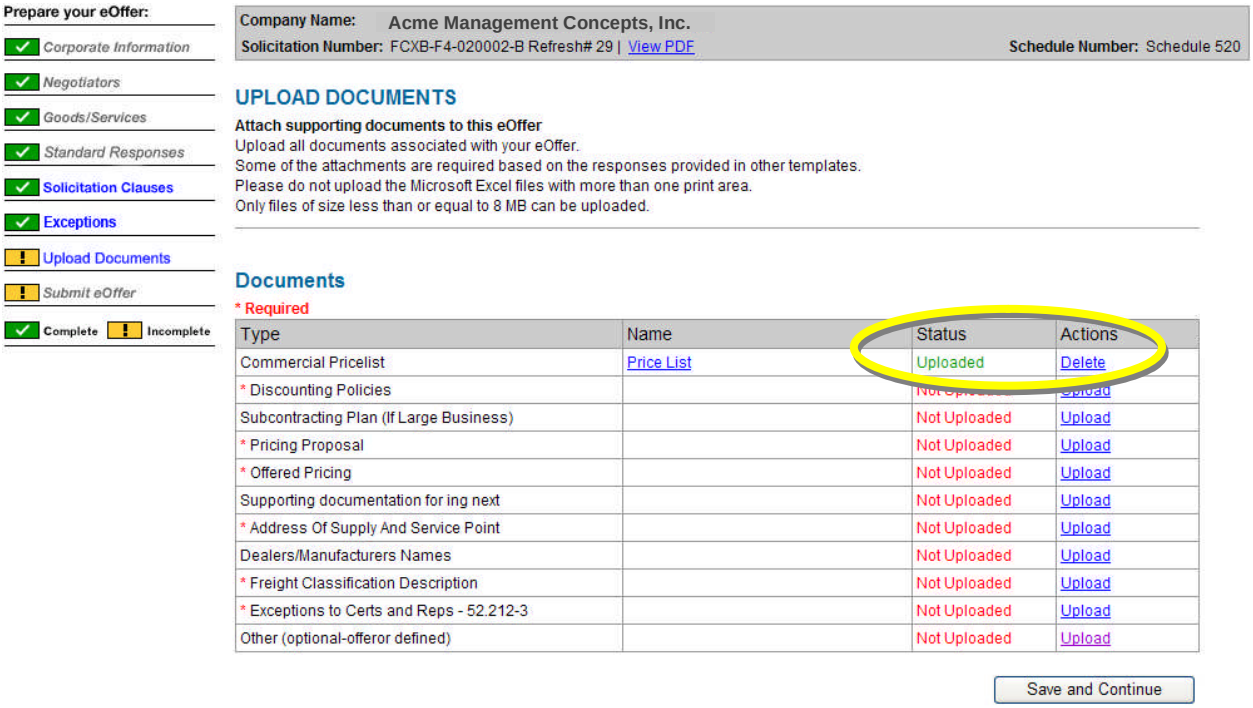
c) Select the document you need to upload and click ***Open***. (Not shown here)

d) Enter the name of the document in the "**What is the document name?**" field.

Note: Give it a relevant name, does not have to be the file name.

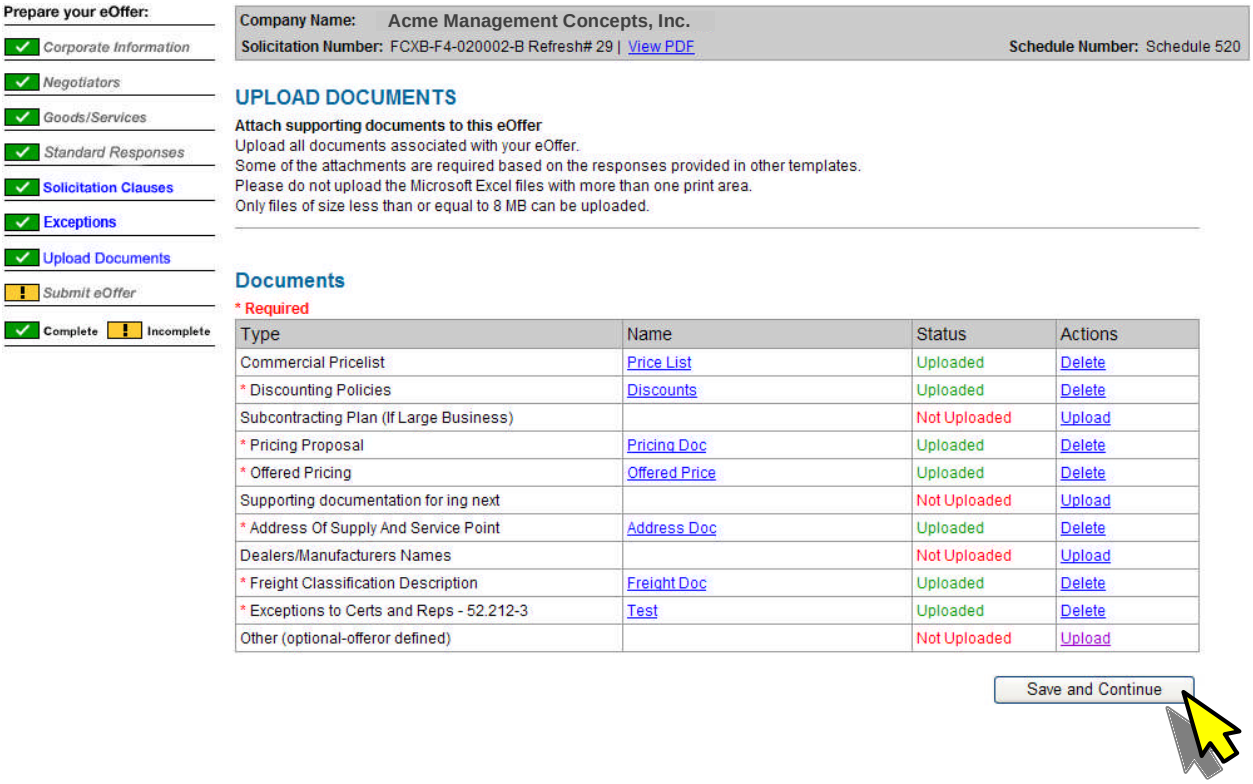
e) Click on ***Upload This Document*** to add the document. This will take you back to the **Upload Documents** screen.

f) You will notice that the "**Status**" of the document will change to **Uploaded** and in the "**Actions**" column there will be an option to Delete the uploaded document.

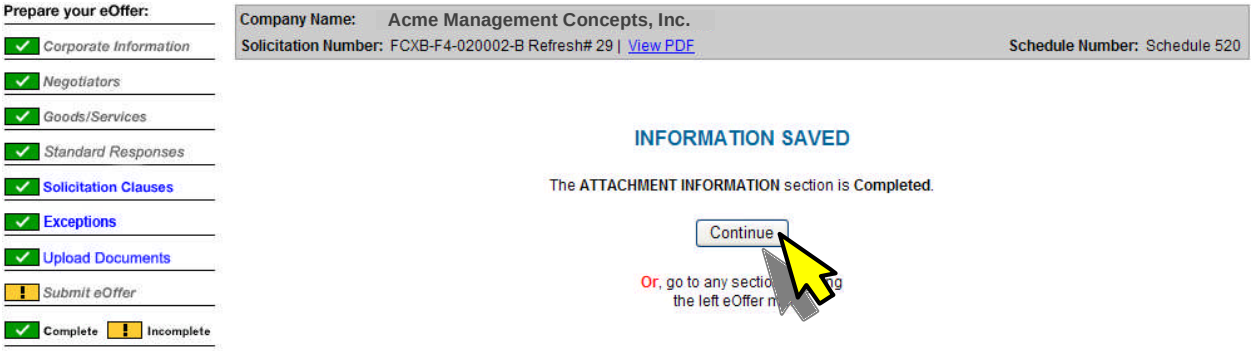


k) Repeat the process to upload all the required documents as well as any optional ones.

l) Once all the required documents have been added click ***Save and Continue.***

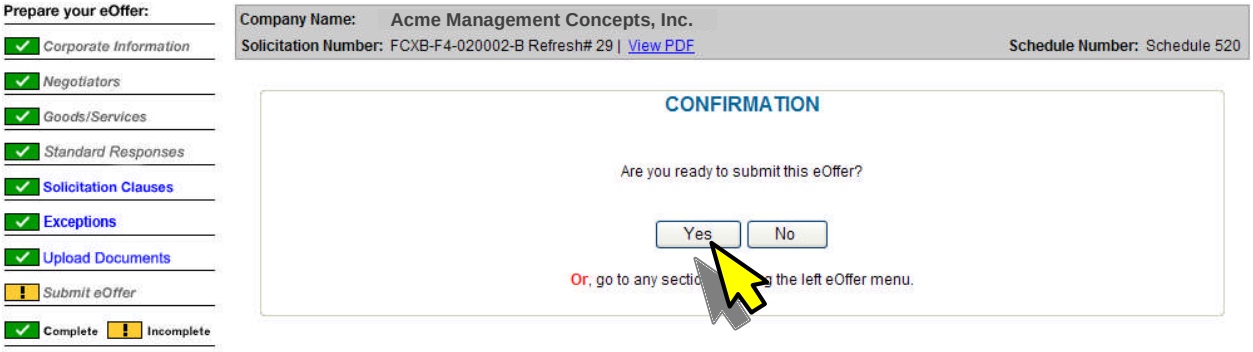


m) A confirmation screen will appear indicating that the **Attachment Information** section is completed. Click ***Continue*** to begin the process of submitting the eOffer.



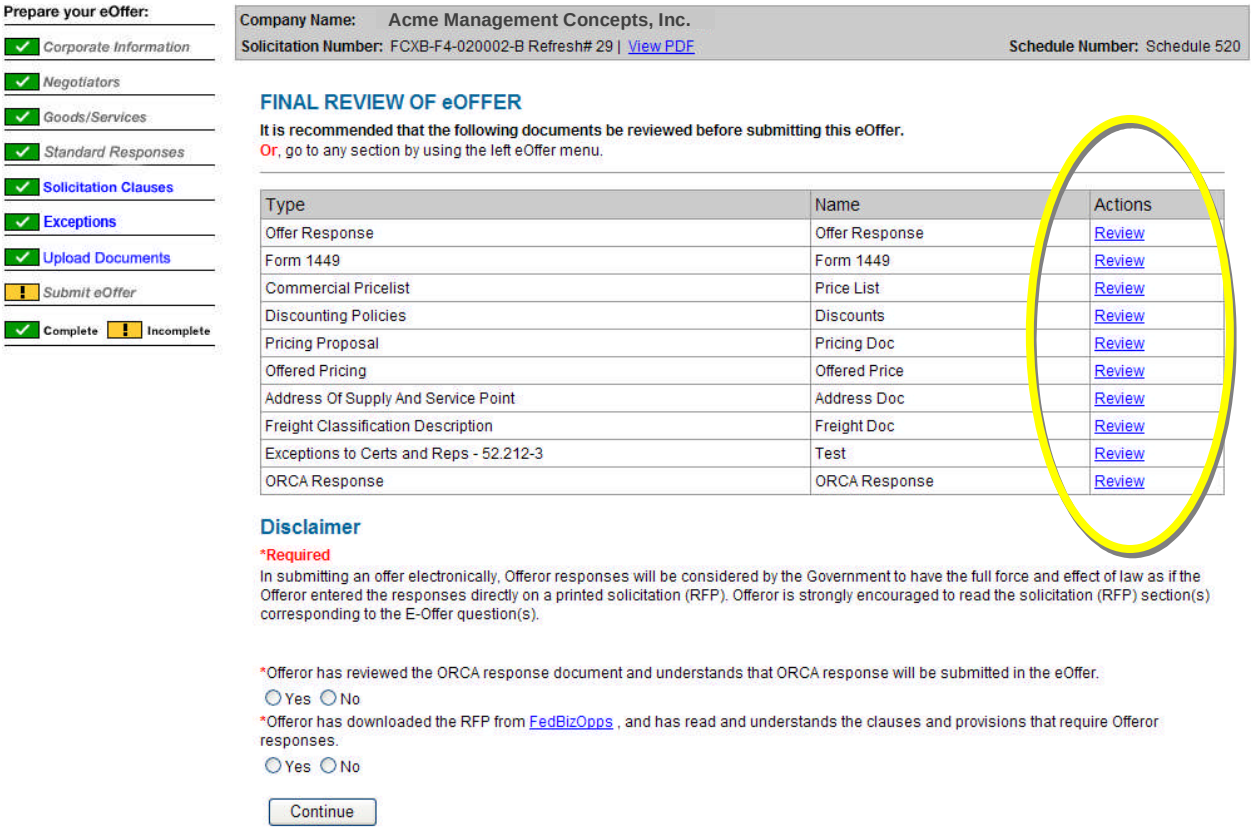
2.1.8 Submit eOffer

a) A confirmation message will be displayed asking if you are ready to submit the eOffer. Click ***Yes*** if you are ready to submit.

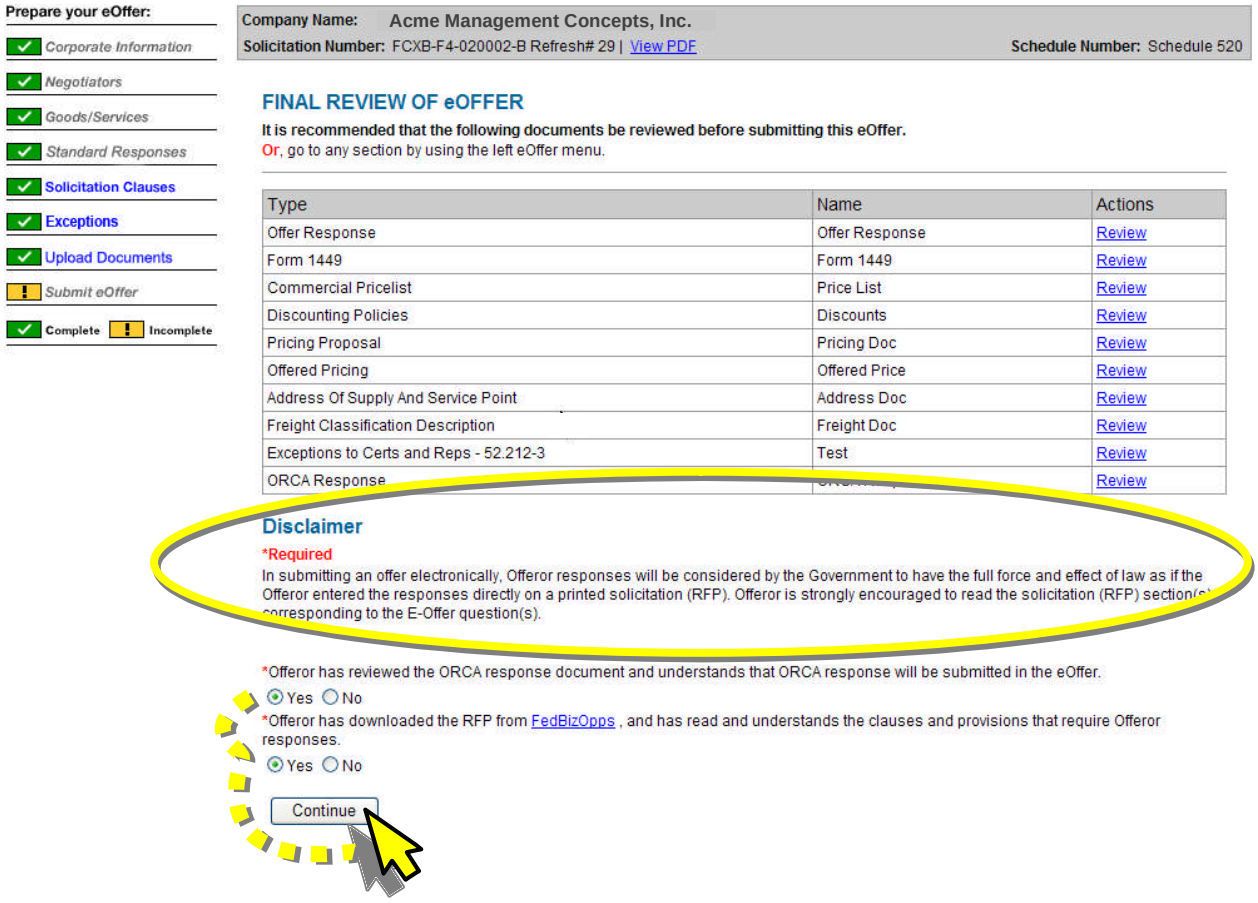


b) If you click "***Yes***" the Final Review screen will be displayed.

c) Review the documents attached earlier in the eOffer process by clicking on the Review link. Ensure accuracy of all documents.

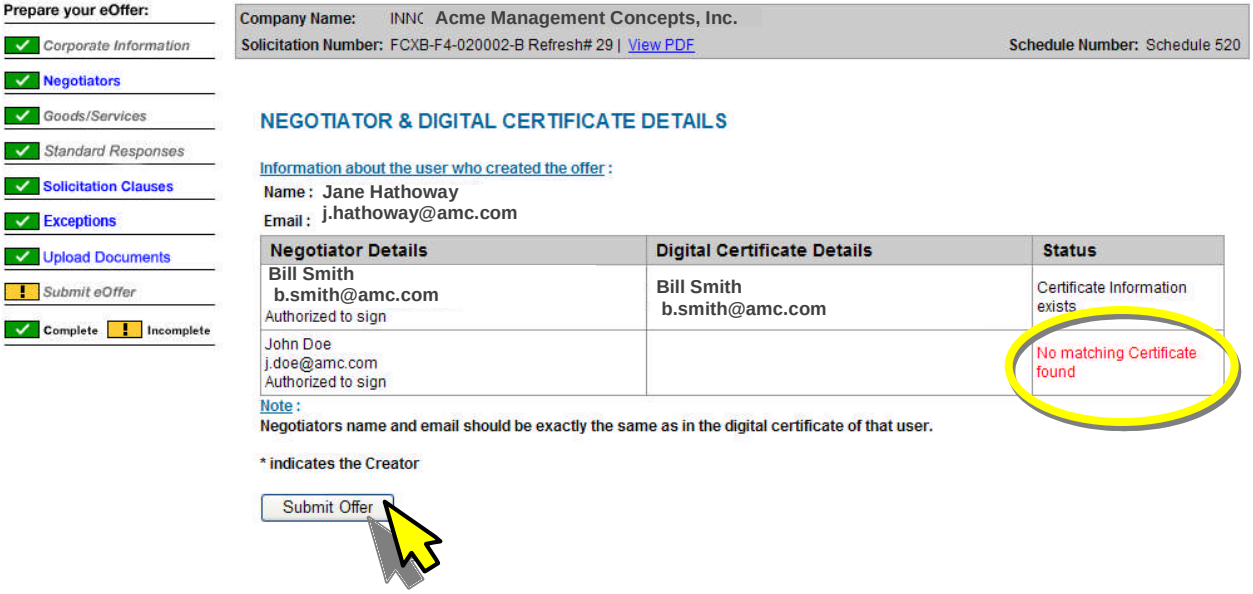


d) Read the **Disclaimer** carefully and select "*Yes*" for both statements (if in agreement) and click ***Continue.***

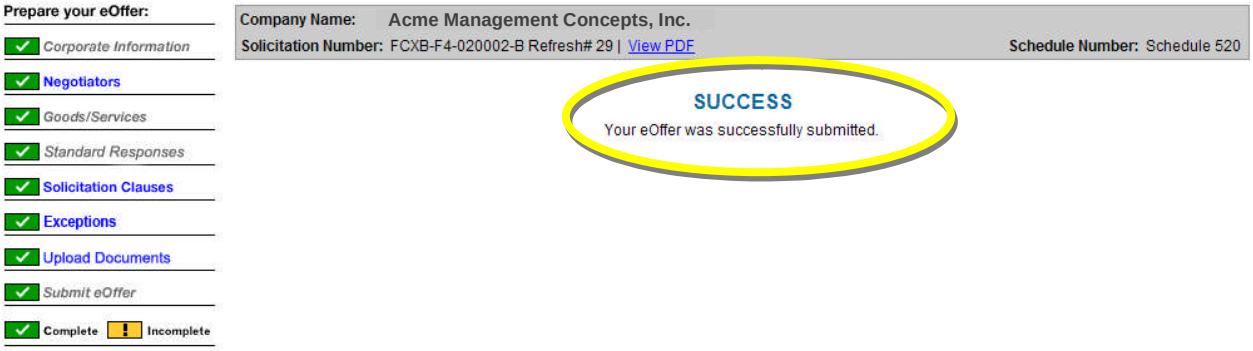


e) The system will verify the name and email ID of the Negotiators. This information is displayed on the **Negotiator & Digital Certificate Details** page. Ensure the information is correct.

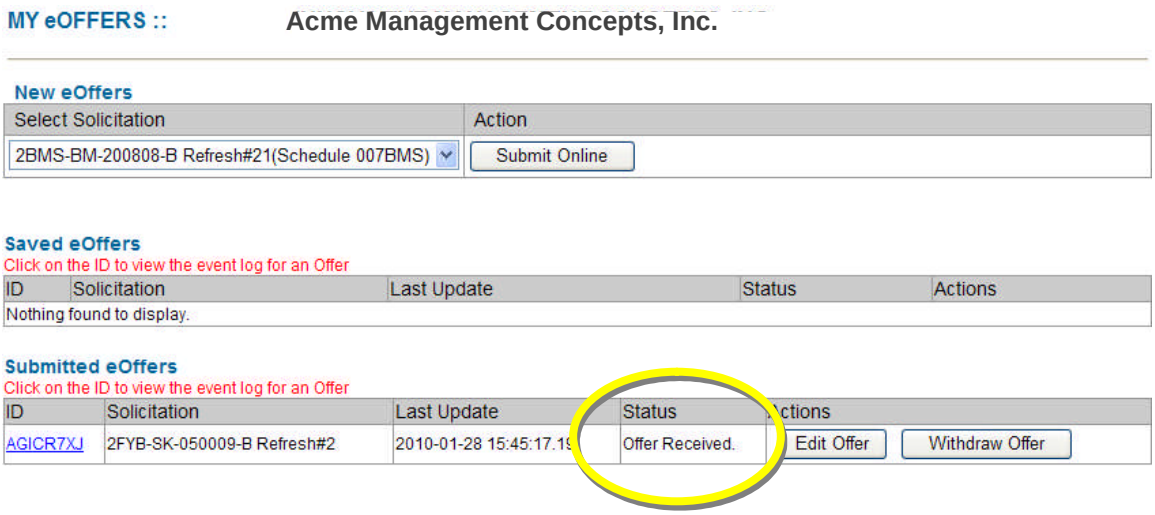
f) If the information is not correct, it will be indicated under the "**Status**". Go back to the **Negotiators** section and make corrections and click ***Submit Offer***.



g) A success message will be displayed as shown below after the eOffer is submitted.



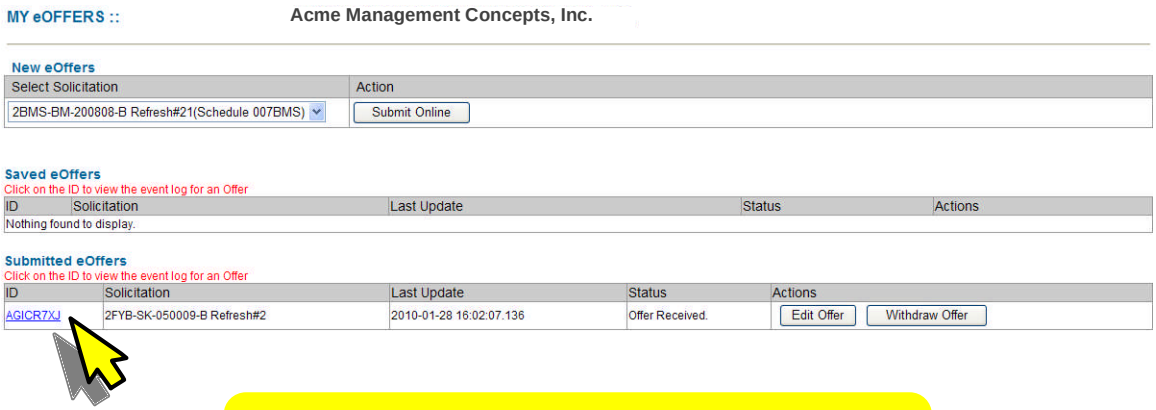
h) The status eOffer will change to "Offer Received" on the **My eOffers** homepage under **Submitted eOffer** (shown on next page).



g) After successful submission of the eOffer the vendor will receive an automated email indicating the receipt of the eOffer. A sample email is shown below.

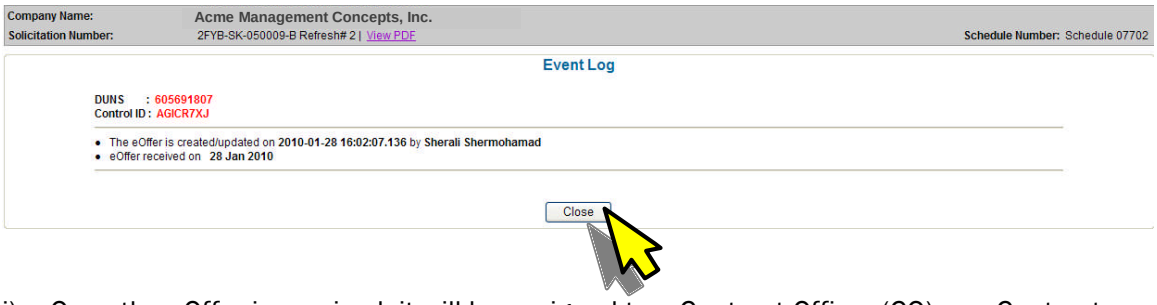
Look at the Event Log to view the history of a submitted eOffer.

i) On the **My eOffers** homepage, click on the number located in the "**ID**" column under **Submitted eOffers**.

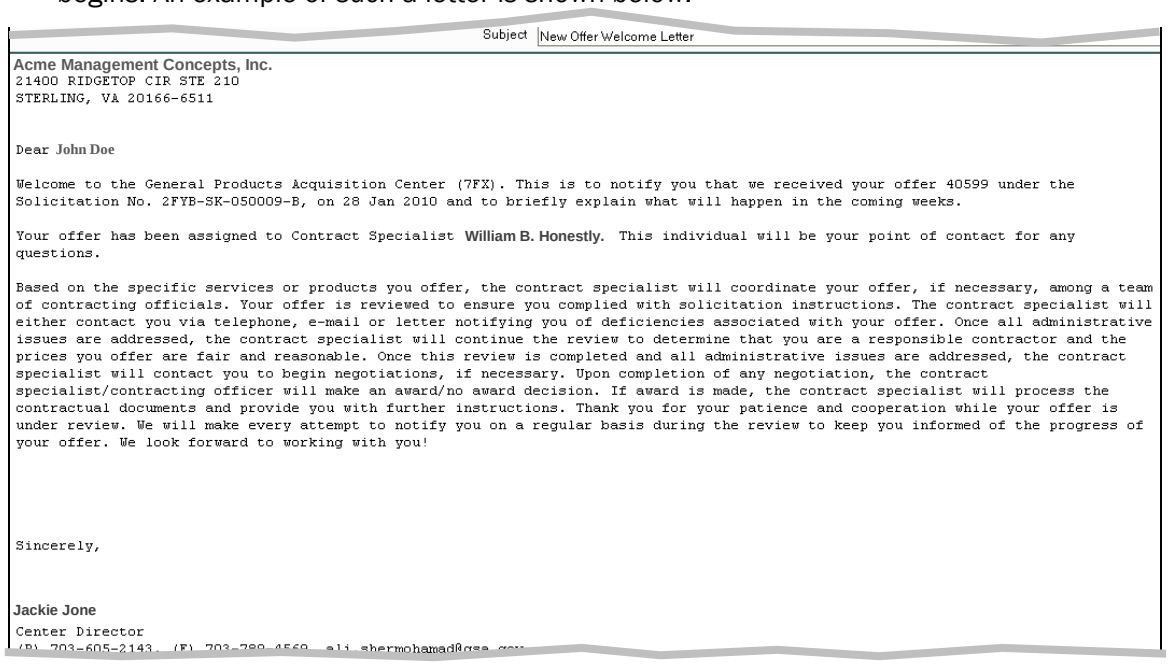


Note: After the submission of an eOffer, it is still possible to Edit or Withdraw the eOffer.

h) The **Event Log** will be displayed. Click ***Close*** when done.



i) Once the eOffer is received, it will be assigned to a Contract Officer (CO) or a Contract Specialist (CS) and a **New Offer Welcome Letter** will be generated once the processing begins. An example of such a letter is shown below.



Subject New Offer Welcome Letter

Acme Management Concepts, Inc.
21400 RIDGETOP CIR STE 210
STERLING, VA 20166-6511

Dear John Doe

Welcome to the General Products Acquisition Center (7FX). This is to notify you that we received your offer 40599 under the Solicitation No. 2FYB-SK-050009-B, on 28 Jan 2010 and to briefly explain what will happen in the coming weeks.

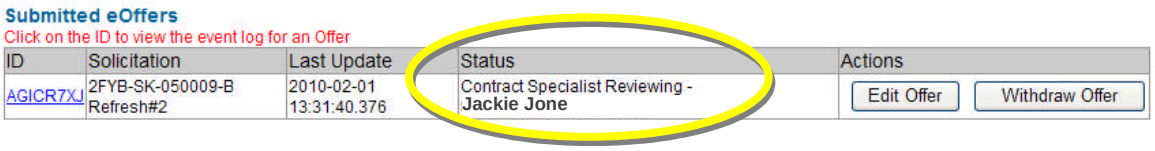
Your offer has been assigned to Contract Specialist **William B. Honestly.** This individual will be your point of contact for any questions.

Based on the specific services or products you offer, the contract specialist will coordinate your offer, if necessary, among a team of contracting officials. Your offer is reviewed to ensure you complied with solicitation instructions. The contract specialist will either contact you via telephone, e-mail or letter notifying you of deficiencies associated with your offer. Once all administrative issues are addressed, the contract specialist will continue the review to determine that you are a responsible contractor and the prices you offer are fair and reasonable. Once this review is completed and all administrative issues are addressed, the contract specialist will contact you to begin negotiations, if necessary. Upon completion of any negotiation, the contract specialist/contracting officer will make an award/no award decision. If award is made, the contract specialist will process the contractual documents and provide you with further instructions. Thank you for your patience and cooperation while your offer is under review. We will make every attempt to notify you on a regular basis during the review to keep you informed of the progress of your offer. We look forward to working with you!

Sincerely,

Jackie Jone
Center Director

j) Under **Submitted eOffers** the status of the eOffer will change to "Contract Specialist Reviewing" as shown below.



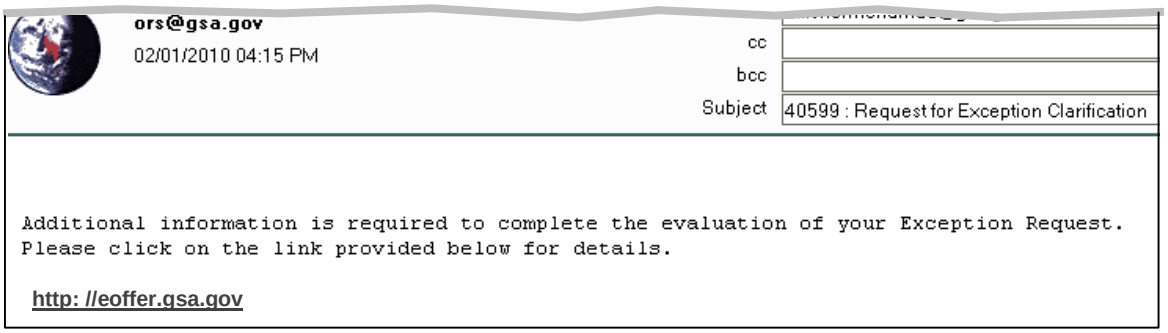
Submitted eOffers
Click on the ID to view the event log for an Offer

ID	Solicitation	Last Update	Status	Actions
AGICR7XJ	2FYB-SK-050009-B Refresh#2	2010-02-01 13:31:40.376	Contract Specialist Reviewing - **Jackie Jone**	Edit Offer / Withdraw Offer

k) Upon award of the contract, the Contract Specialist will create a contract package to be approved and signed by the Vendor. For detailed steps, please refer to section **IV – Signature Process.**

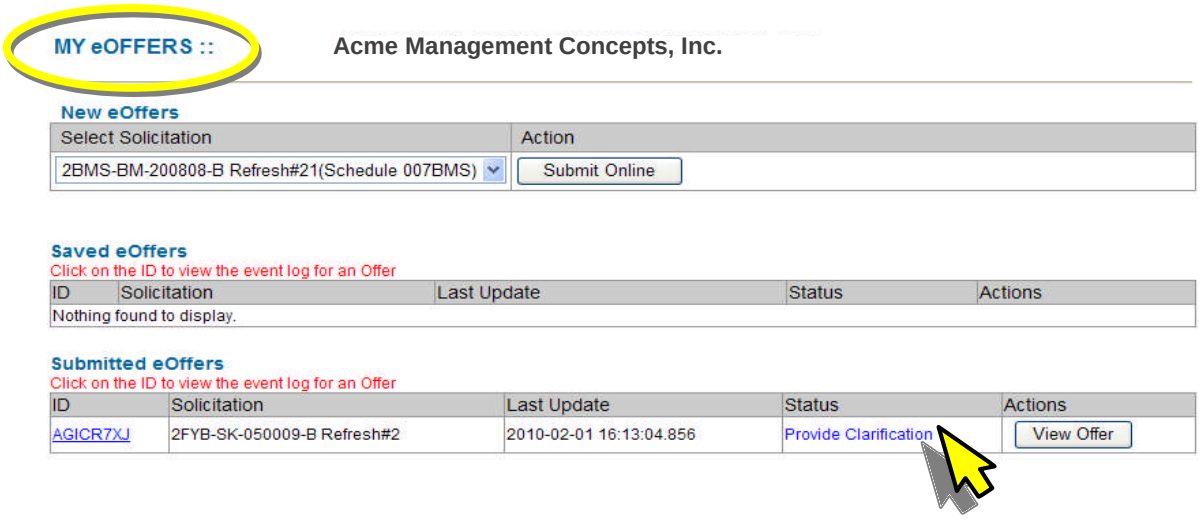
2.2 Request for Clarification to an Exception

After the eOffer has been submitted, the CO/CS may have questions regarding a clause exception. In this case, a request for clarification email will be sent to the Vendor.



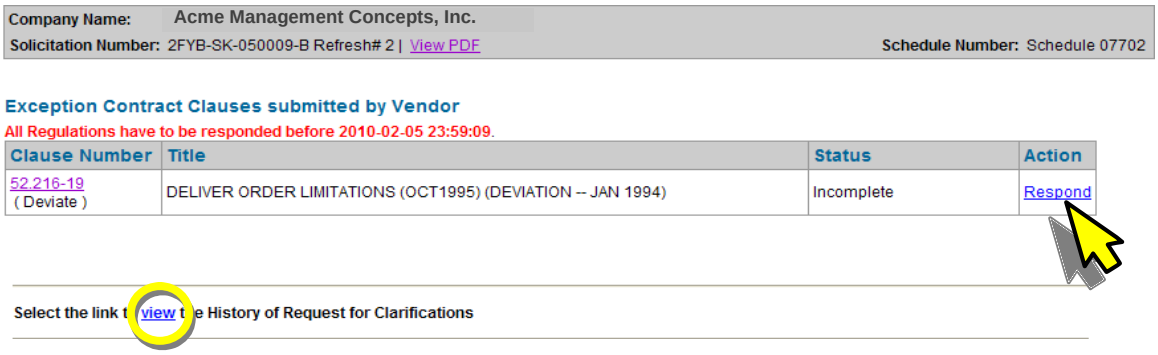
a) Go to ***My eOffers***. The eOffer in need of explanation will be displayed under **Submitted eOffers** with the Status of ***Provide Clarification***.

b) Click on the Provide Clarification link.



The **Exception Contract Clauses submitted by Vendor** page will be displayed. (Note: the history of Request for Clarifications can be viewed by clicking the view link).

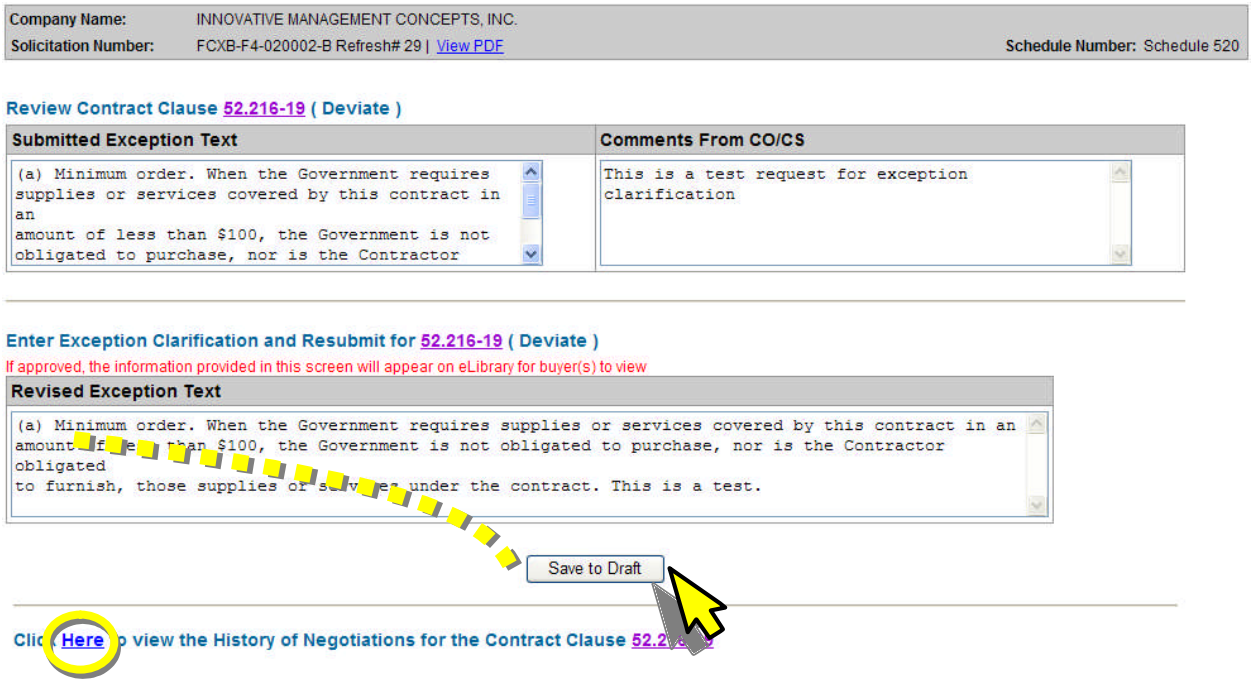
c) Click Respond.



The exception status page is displayed showing the Submitted Exception Text with comments from CO/CS.

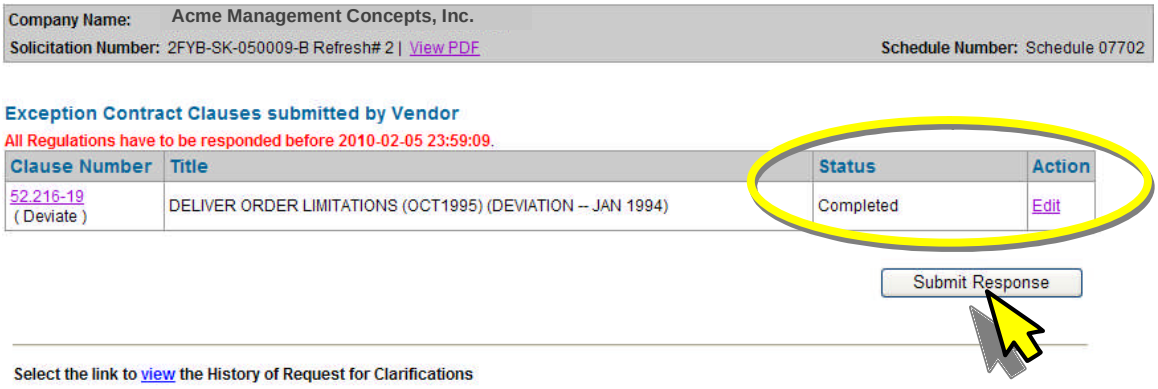
d) The "**Revised Exception Text**" is pre-populated box. Enter the Exception Clarification. (Note: The history of the negotiations can be viewed by clicking the link at the bottom of the screen).

e) Click ***Save to Draft***.

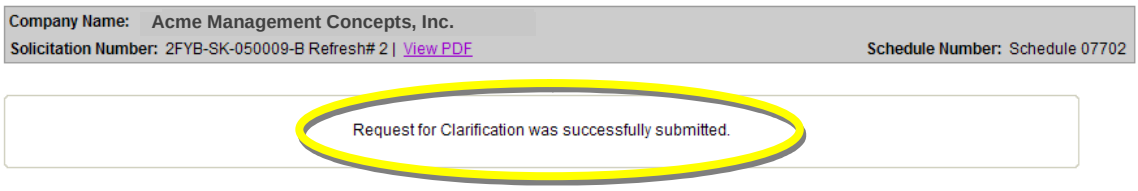


f) The "**Status**" of the exception will change to Completed. At this point you also have the option to edit your response.

g) If you are satisfied with your answer Click ***Submit Response.***

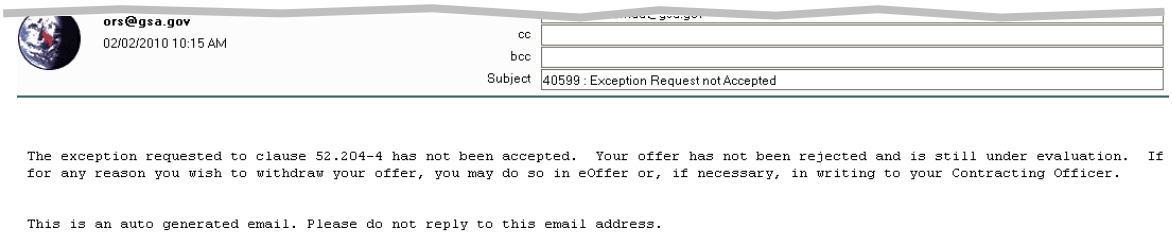


h) The success message will be displayed. The CO/CS will then choose to approve, ask for further clarification or reject the exception.

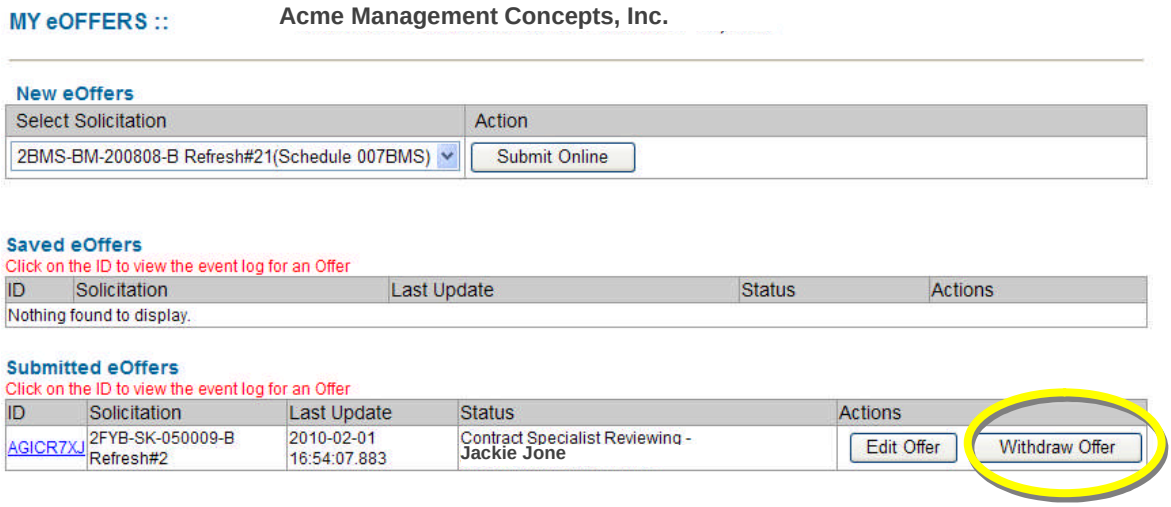


2.3 Contract Officer/Specialist Rejects an Exception

The CO/CS may reject an exception. In that case the Vendor will receive an email notification as shown below, but cannot respond to the rejection through the eOffer/eMod system.

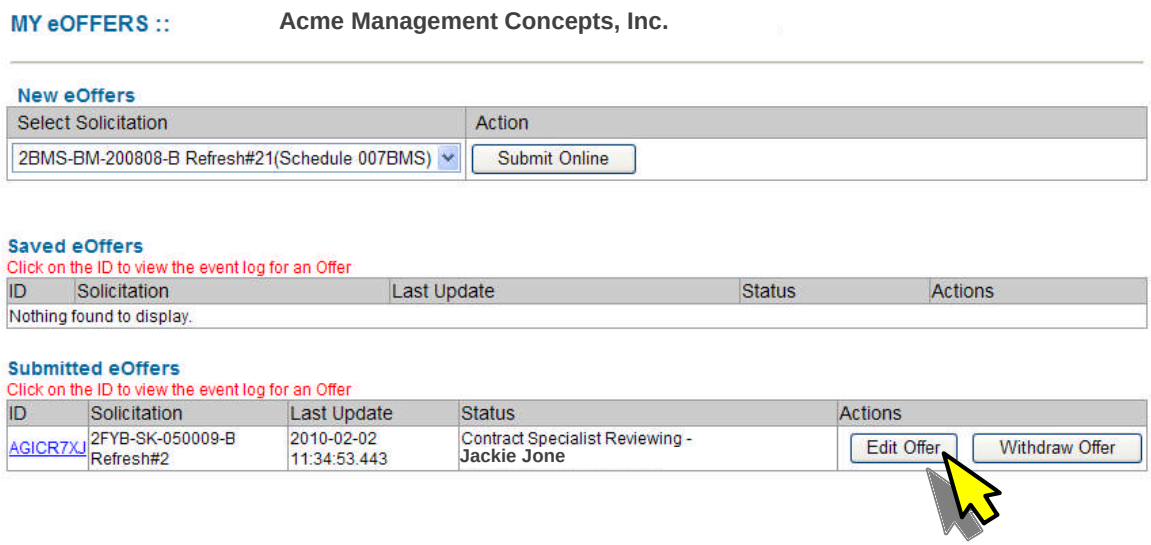


a) The offer will still be under evaluation as indicated by the status on the **My eOffers** page. The Vendor has an option to withdraw the offer.

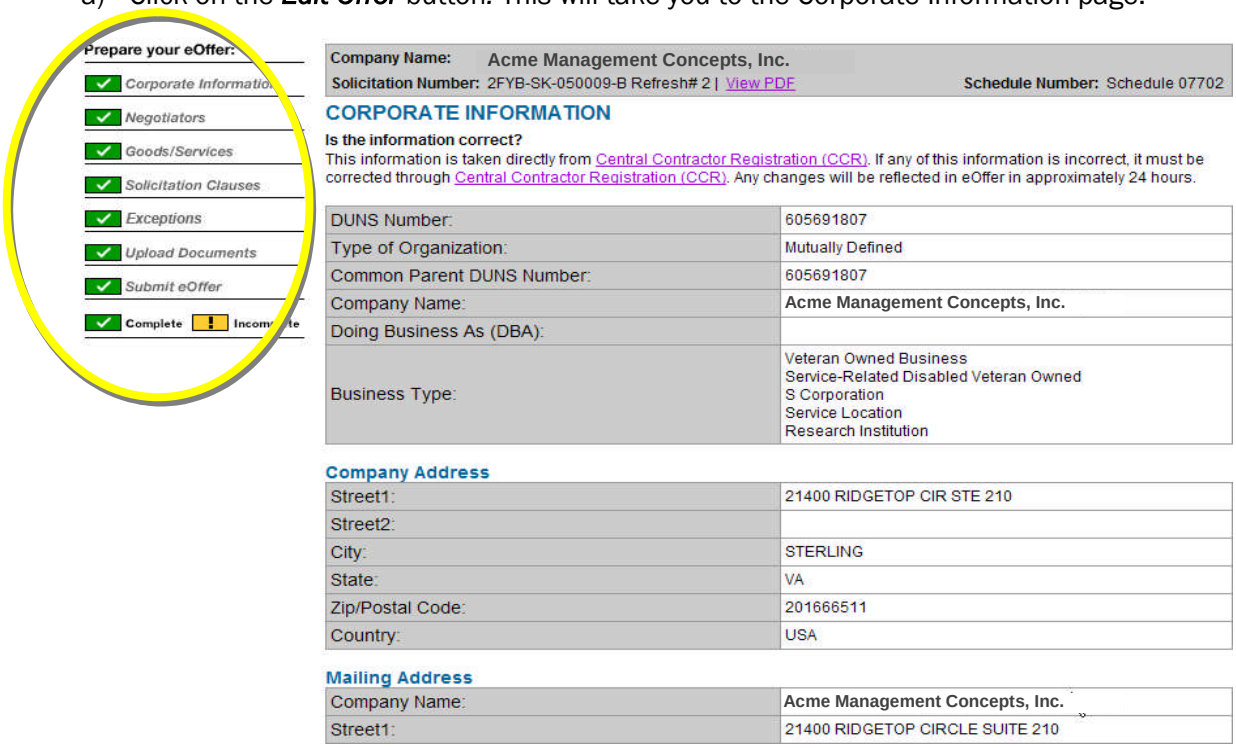


2.4 Edit an eOffer After Submission

If a submitted eOffer requires some changes a Vendor has the ability to do so via the **Edit Offer** functionality. This can be done while the eOffer is under review by the Contract Specialist.



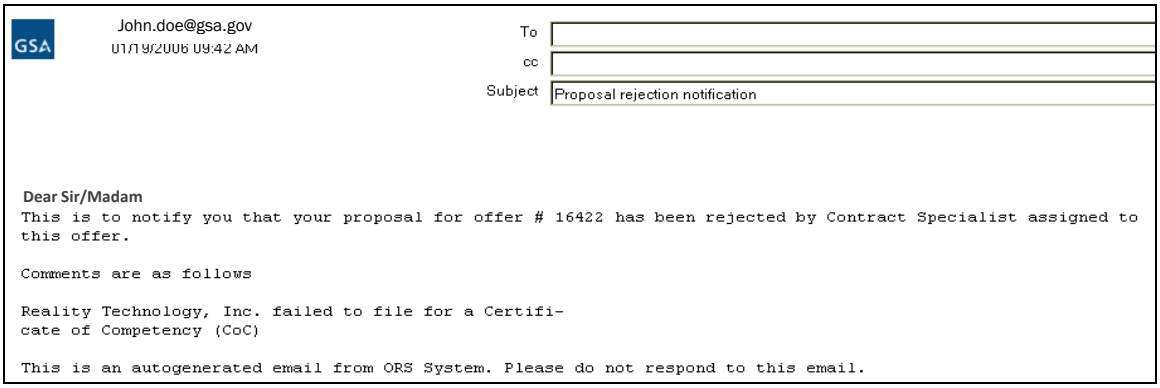
a) Click on the ***Edit Offer*** button. This will take you to the Corporate Information page.



b) Using the menu on the left under **Prepare your eOffer** you may go to any section of the offer and make changes. Once done the offer will have to be re-submitted by clicking on ***Submit eOffer*** in the menu. You should see a submission success message.

2.5 Rejection of an eOffer by the Contract Officer/Specialist

a) If the Contract Specialist rejects the eOffer an email stating the offer has been rejected will be generated as shown below.



b) If the Vendor wishes to resubmit the offer for that particular solicitation, the eOffer will need to be recreated as a new offer. See the next section for instructions.

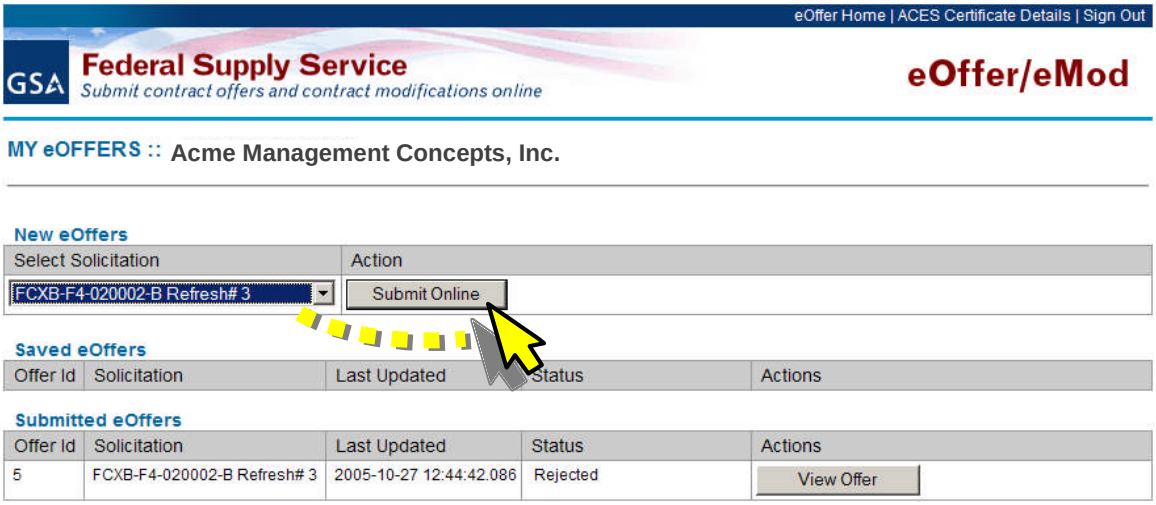
2.6 Re-Submit an eOffer After It Has Been Rejected or Withdrawn

a) To resubmit an eOffer that was rejected by the Contract Specialist, ***Sign In*** to **Contract Offers (eOffers).**

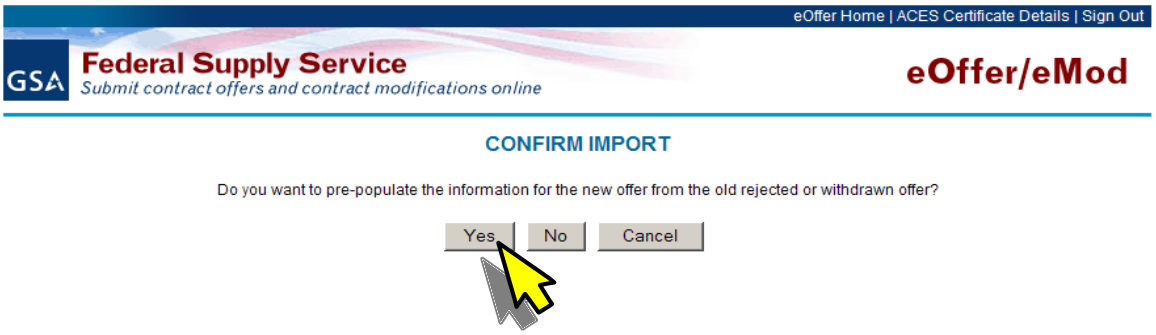
b) Once the system is accessed, the **My eOffers** page will be displayed.

c) The rejected offer can be located under **Submitted eOffers** with the status of "Rejected".

d) To re-submit the rejected offer, locate the correct solicitation number (same as the rejected solicitation number) under **Select Solicitation** and click ***Submit Online***.



e) The System offers an option to import the data from the "Rejected" eOffer. Click ***Yes*** on the Confirm Import screen if data is to be pre-populated.



f) Click ***Continue***.

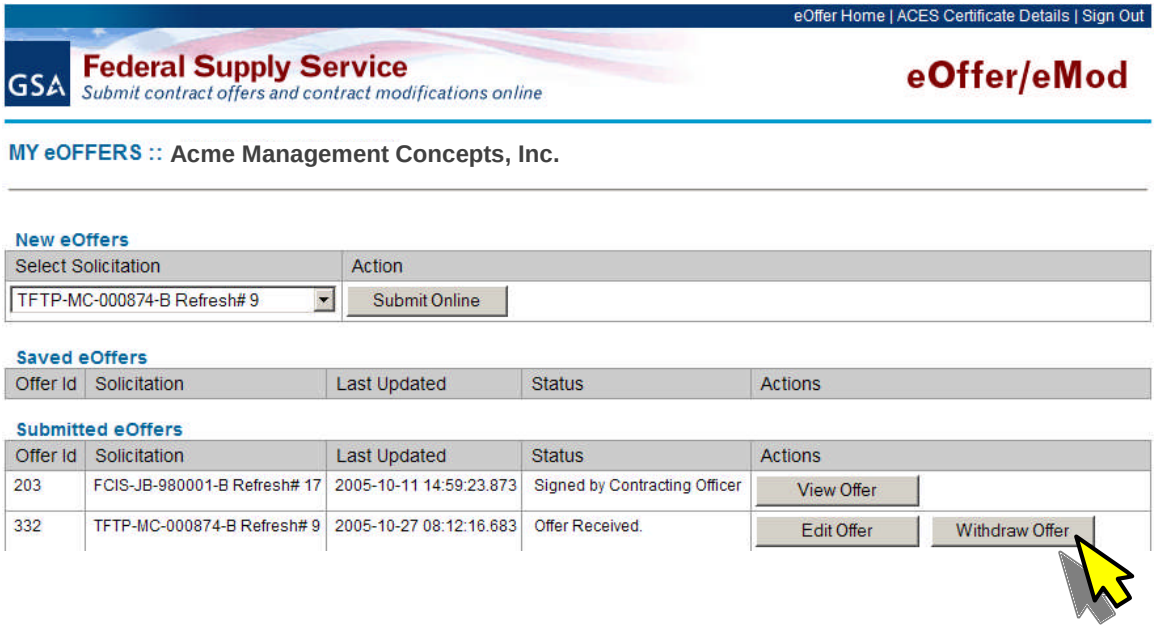
g) Ensure the information is accurate and complete all sections listed in the **Prepare Your Offer** menu and finally submit the eOffer.

2.7 Withdraw Your eOffer

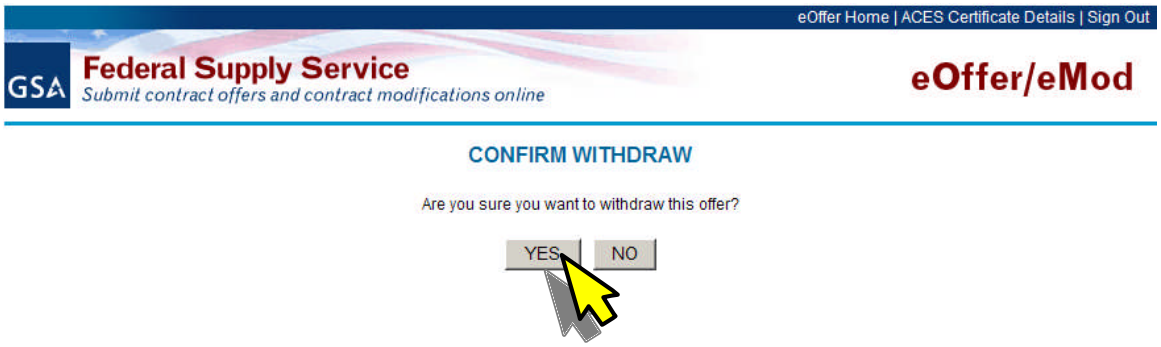
An eOffer may be withdrawn any time prior to the CO signing the contract package.

a) To withdraw an offer go to the **My eOffers** page.

b) Find the offer to withdraw under **Submitted eOffers** and click ***Withdraw Offer*** in the Actions column.



c) Click *Yes* on the **Confirm Withdraw** screen.



d) The status of the eOffer will change to Withdrawn.

e) The CO/CS will receive an email notifying the offer was withdrawn.

Error : Session Time-out.

NOTE: If you are inactive in the system for more than 30 minutes the eOffer session will time out and the following message will be seen. Click on ***eOffer Home*** and log back in to resume your session.