GSA Federal Acquisition Services

User Guide – eOffer/eMod

Version 1.0

Section II – Creating & Submitting An eOffer

Federal Acquisition Service
Contract Administration Division
Solicitation Services Tools

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1.0	05/15/2010	1005	Initial Document

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2 ELECTRONIC OFFER – eOFFER

Eoffer is a web-based application that allows companies to electronically prepare and submit a Mass 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
- Express Offers

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.

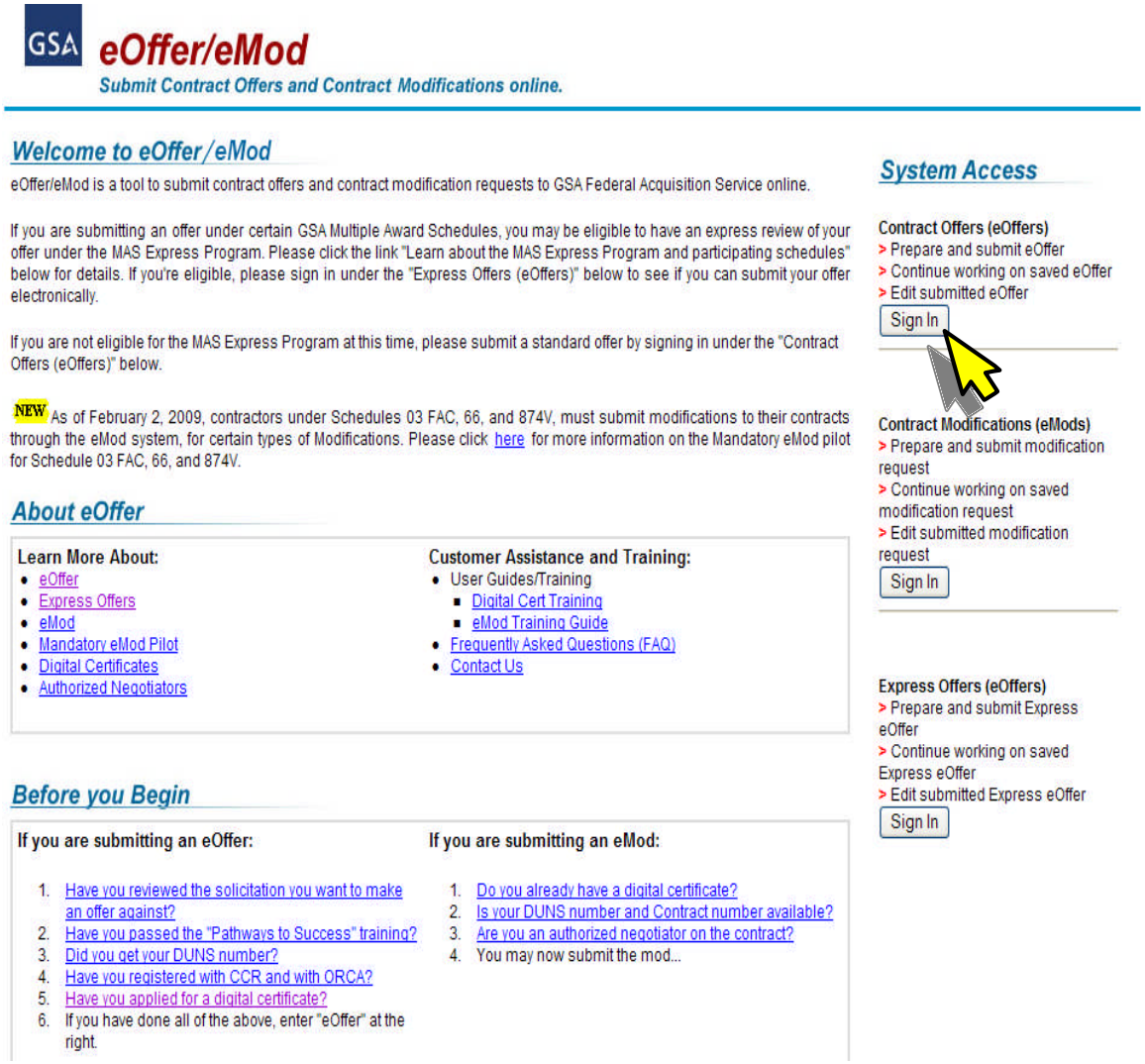
Express eOffer is the more streamlined method aimed at expediting the processing time of the electronic offer. Express eOffer is limited to a select group of Multiple Award Schedules (MAS) and SINS. For information on Express eOffers please see **Section V Express eOffer.**

2.1 Creating an eOffer

The Offer process has five basic steps that must be completed before it can be submitted. First, you should gather your company information and create the required documents for the solicitation before you start completing information in eOffer. To do this you must download and read the solicitation that you want to make an offer against and complete the required documents for the solicitation. Once this is completed you can enter the eOffer application, prepare the responses to the offer and submit your proposal. To enter the eOffer application and create an offer, follow these steps:

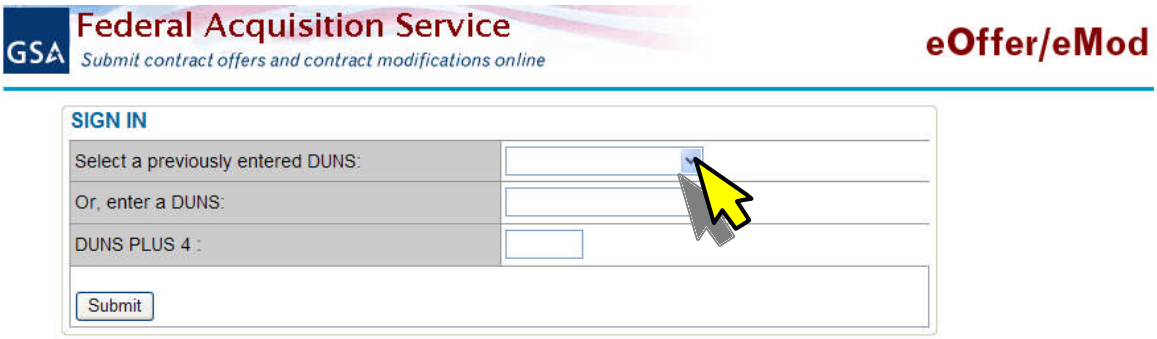
a) Go to the GSA **eOffer/eMod** homepage (www.eoffer.gsa.gov).

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** (3.1 Accessing eOffer/eMod).

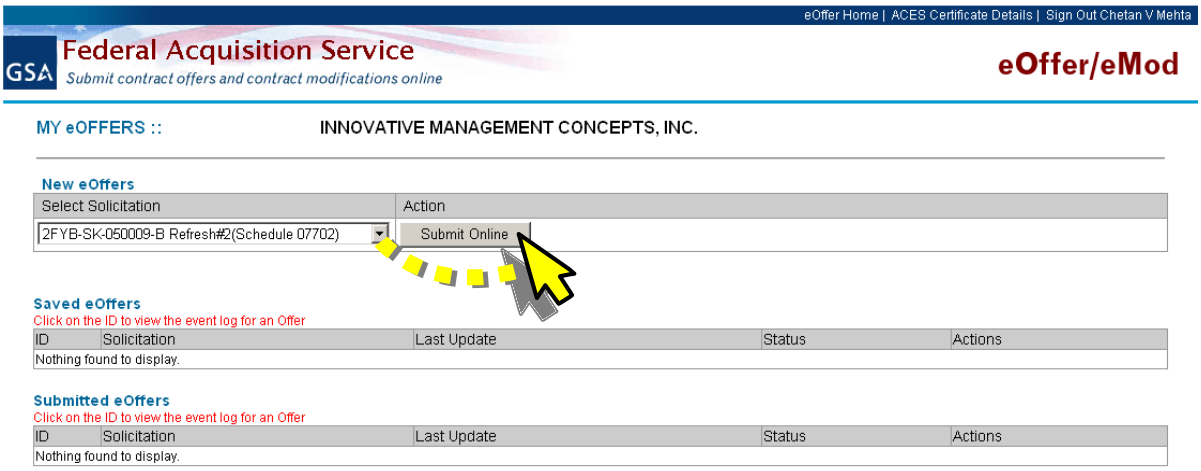
c) After successful login the sign in page will appear



d) Select your DUNS number using the drop down arrow if you have previously entered it. Or if it's a new DUNS number type it in the field below and click ***Submit***. The **MY eOFFERS** screen will be seen

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

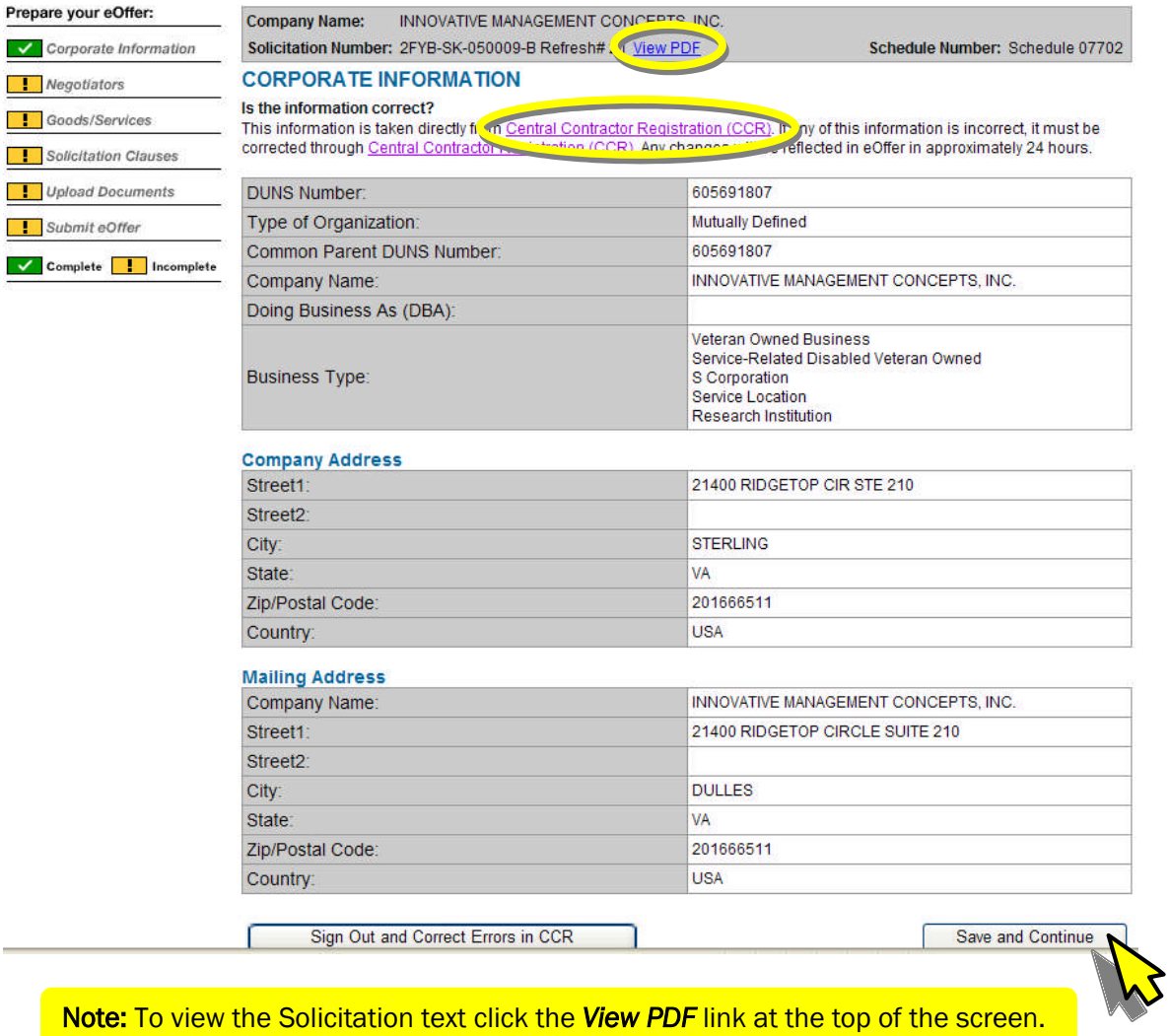
f) Click the ***Submit Online*** button.



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 take you back 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. Or 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.

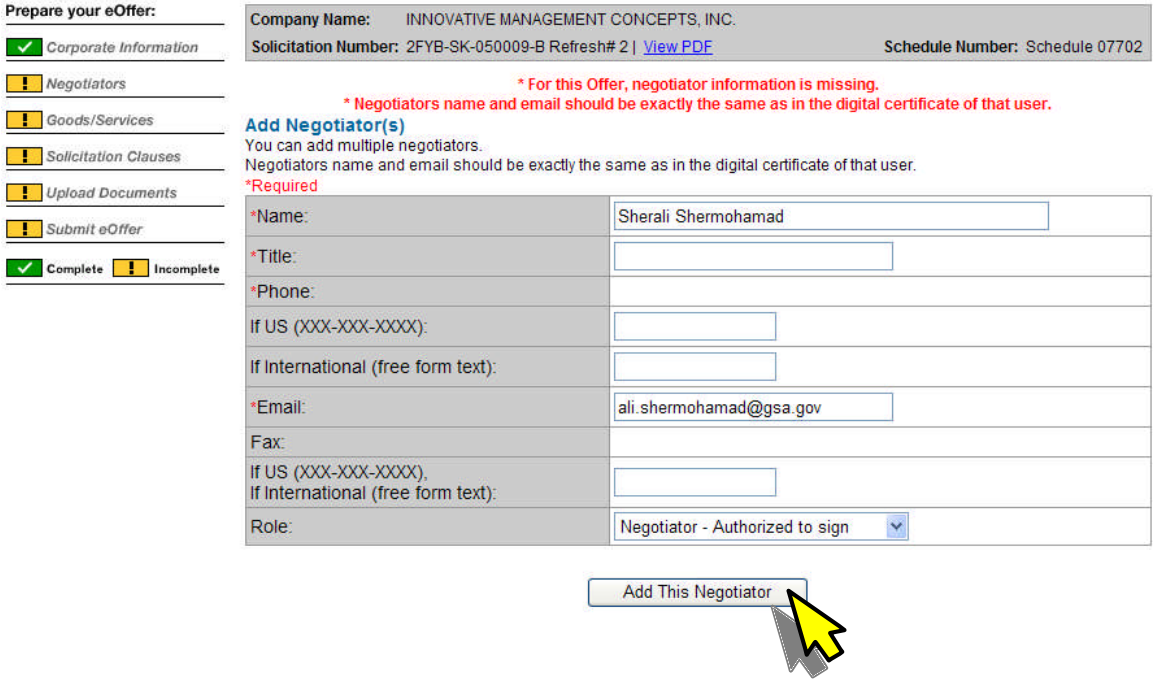
d) The Information Saved screen appears indicating that the Corporate Information section has

been completed. Click on ***Continue.*** This will take you to the "Add Negotiator(s)" screen.

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.

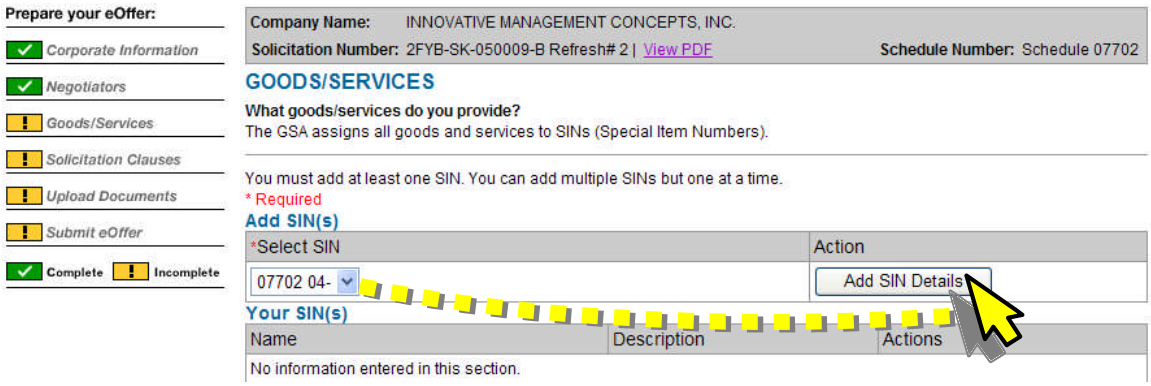
f) Once all the Negotiators have been added Click ***Save and Continue***.

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

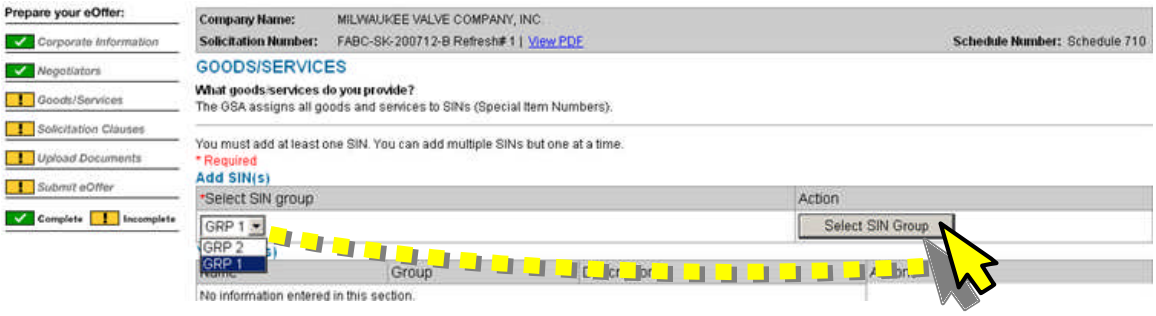
2.1.3 Goods/Services (SINs)

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 ***Select SIN from Group*** 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 Details*** page will be displayed. Fill in the mandatory fields (*):

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

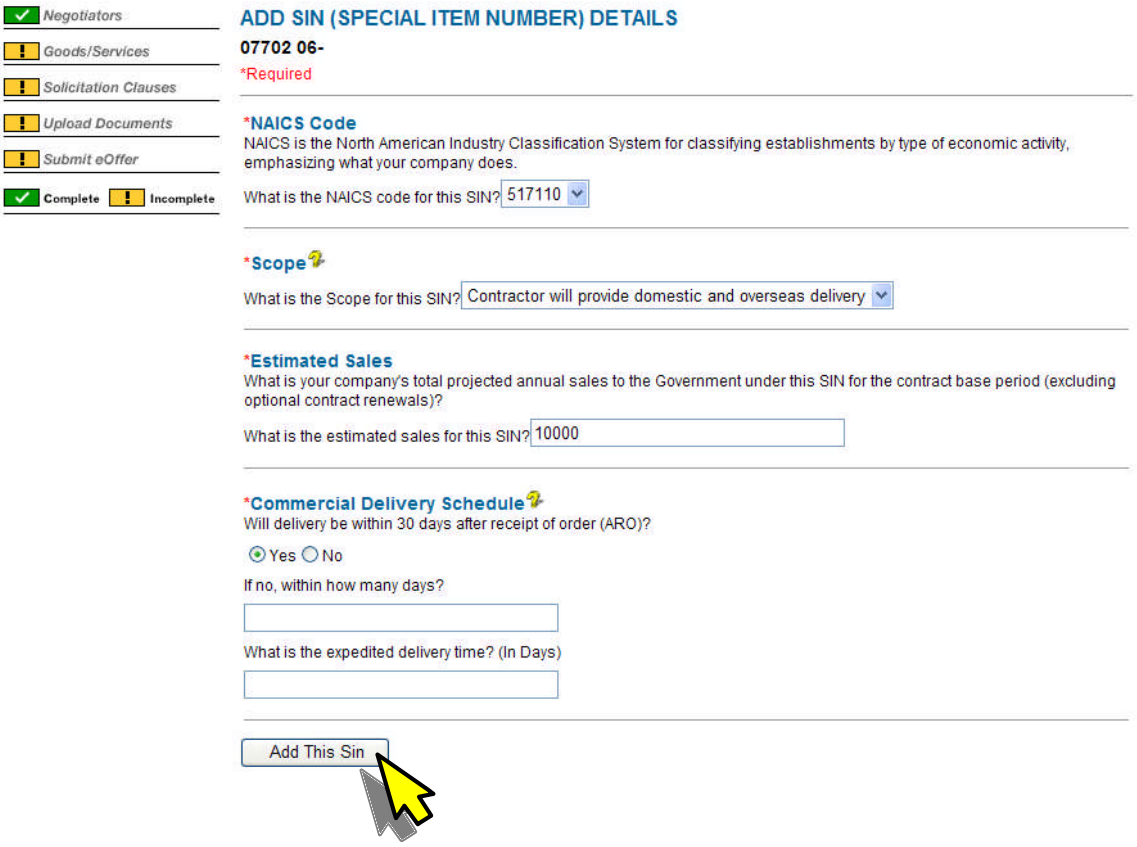
i) Click on the correct ***Scope*** from the dropdown menu indicating the SIN's scope.

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

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

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

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

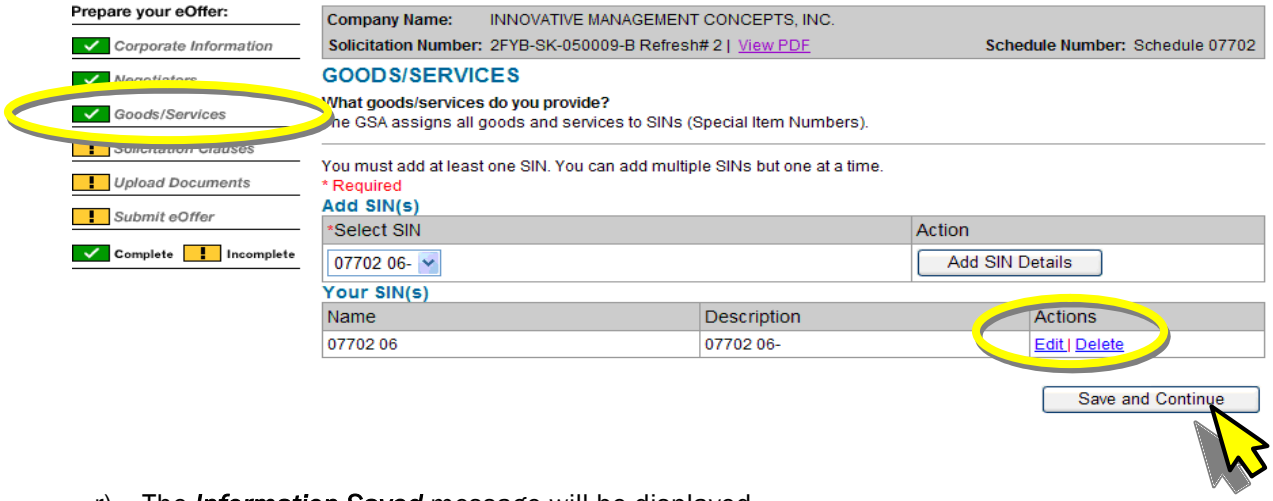


n) The completed SIN will appear on the ***Goods/Services*** page.

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

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

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



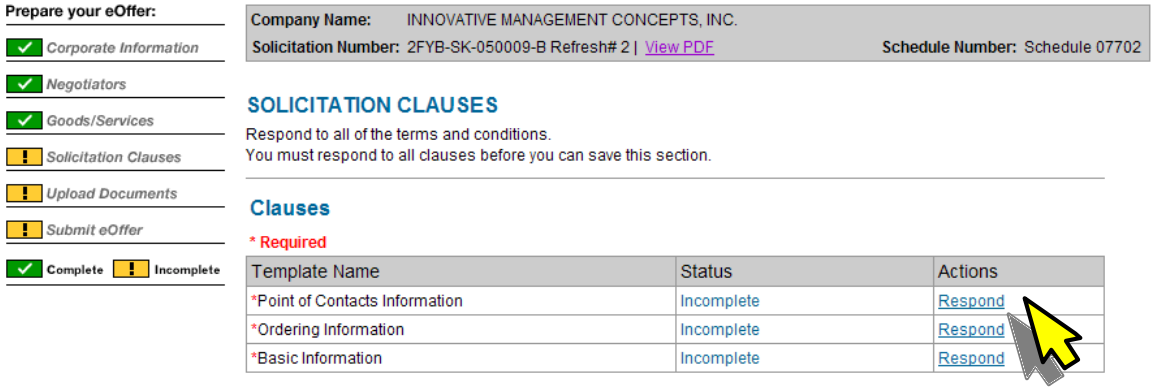
r) The ***Information Saved*** message will be displayed.

s) Click ***Continue*** to move forward.

2.1.4 Solicitation Clauses

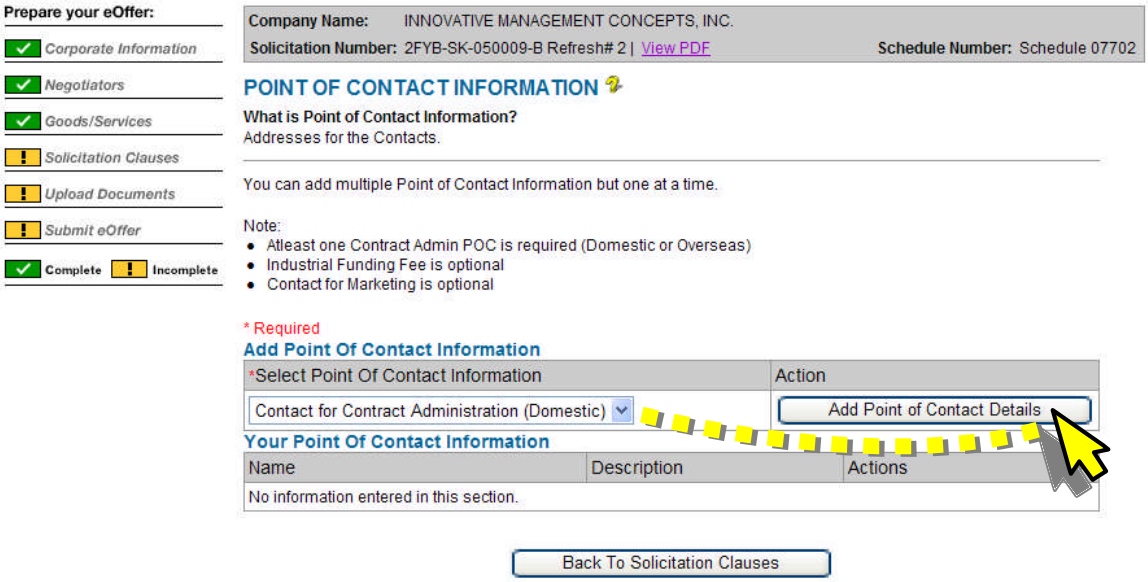
In this section, the Vendor responds to all the terms and conditions. See the ***Clauses*** listed in the ****Required*** section.

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

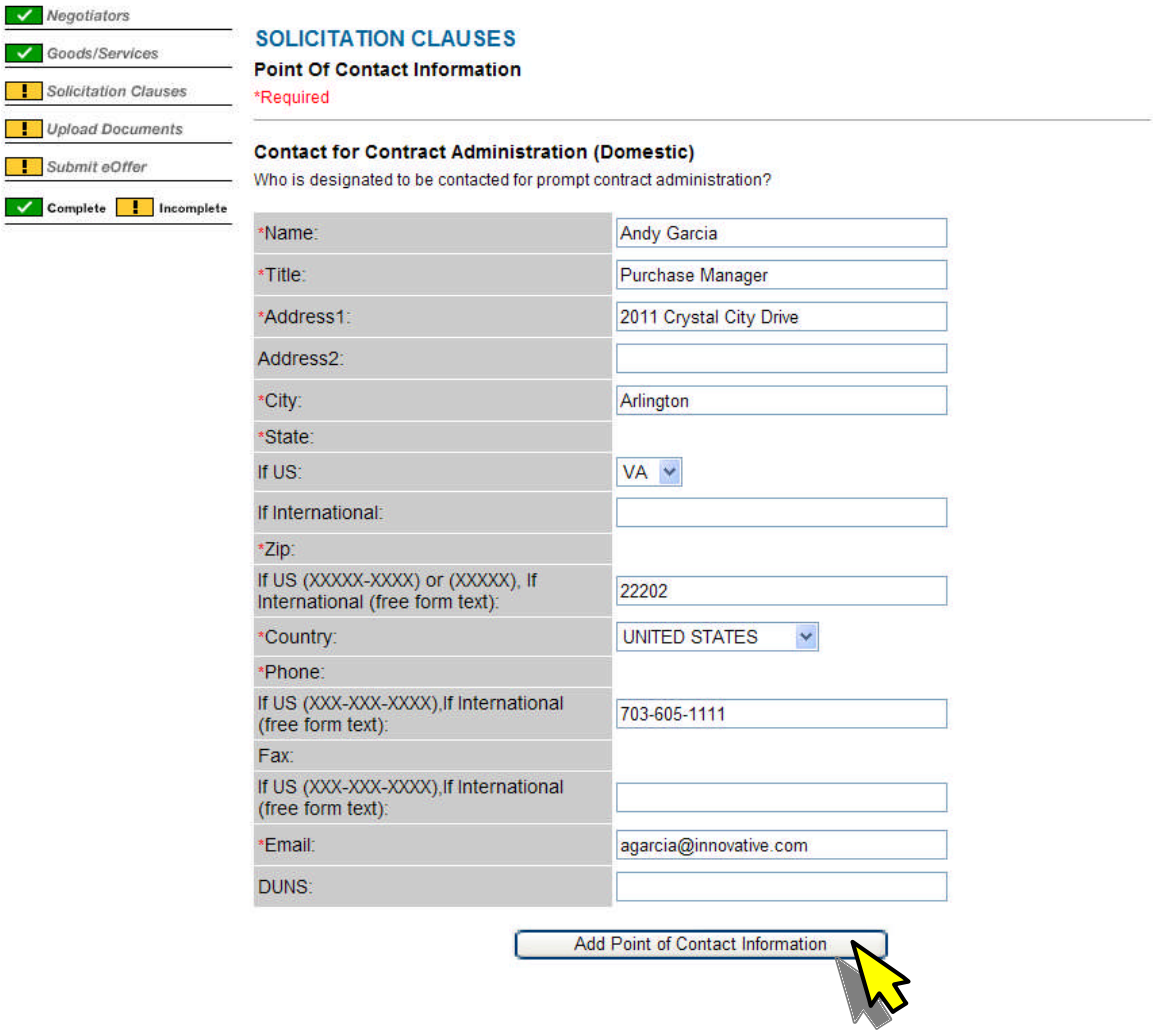


b) On the next screen you will be adding point of contact details for Contract Administration (required), Industrial Funding Fee (optional) and Marketing (optional).

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



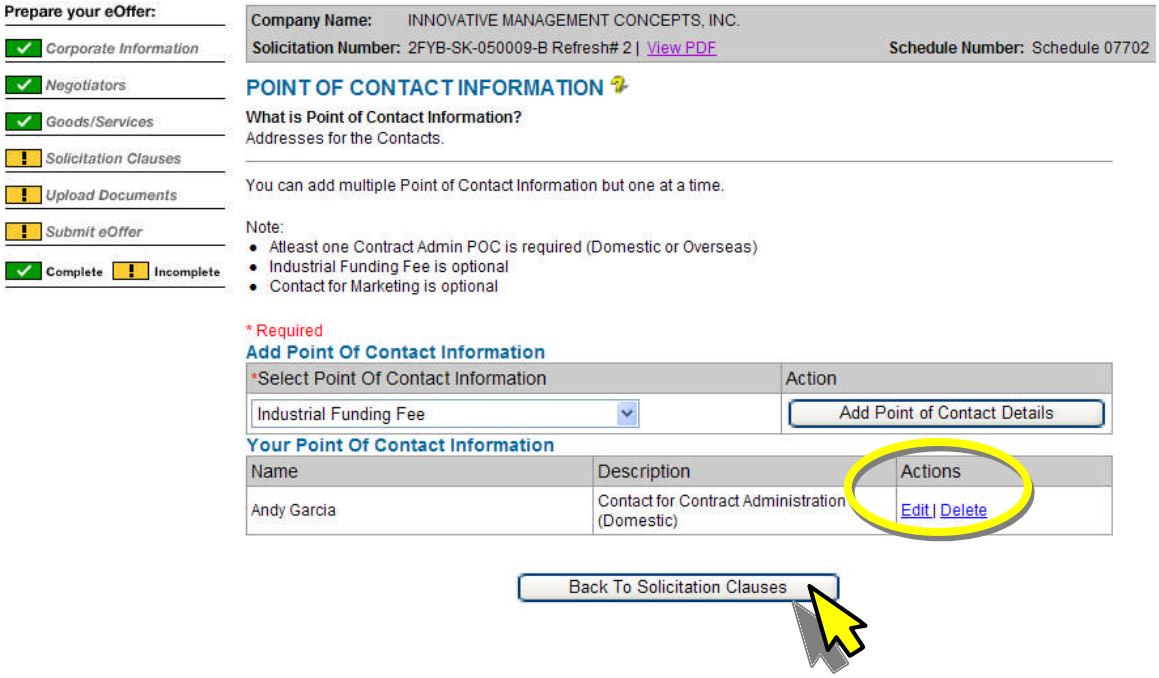
d) Fill in all mandatory fields indicated with an asterisk (*).



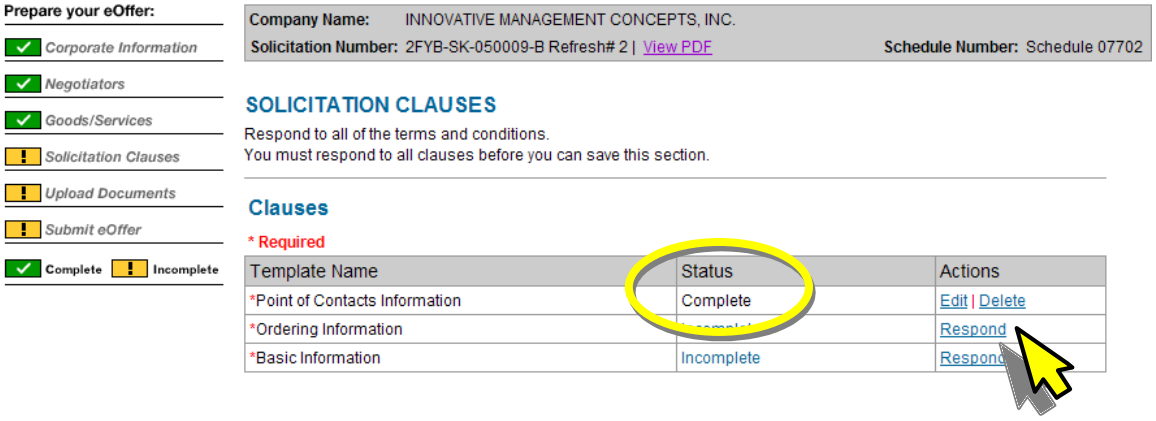
e) Click ***Add Point of Contact Details***.

f) Repeat if you need to add an additional point of contact for the same clause or a different clause.

g) The added point of contact will be listed and it can be deleted or edited.

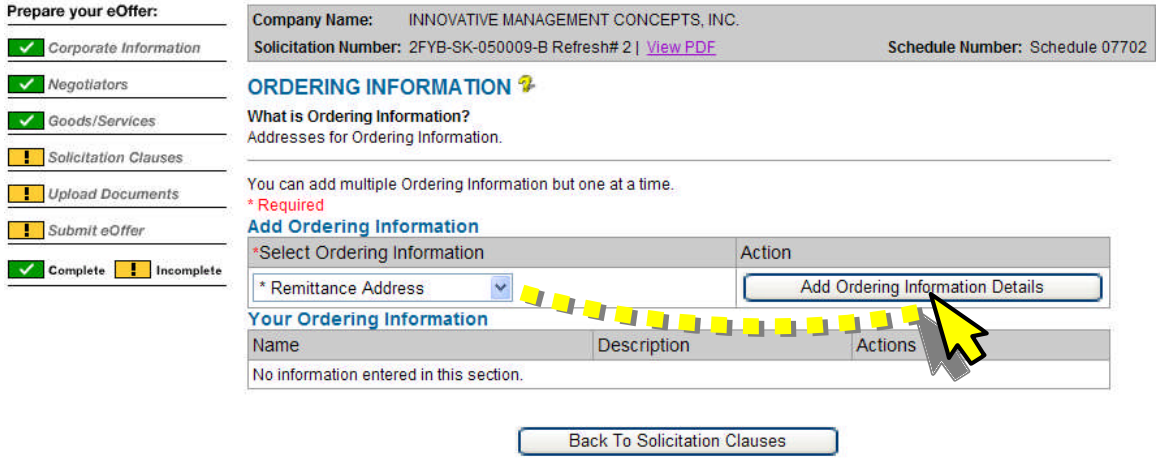


h) Click the ***Back To Solicitation Clauses*** button. You will see the Point of Contacts Information status as complete.

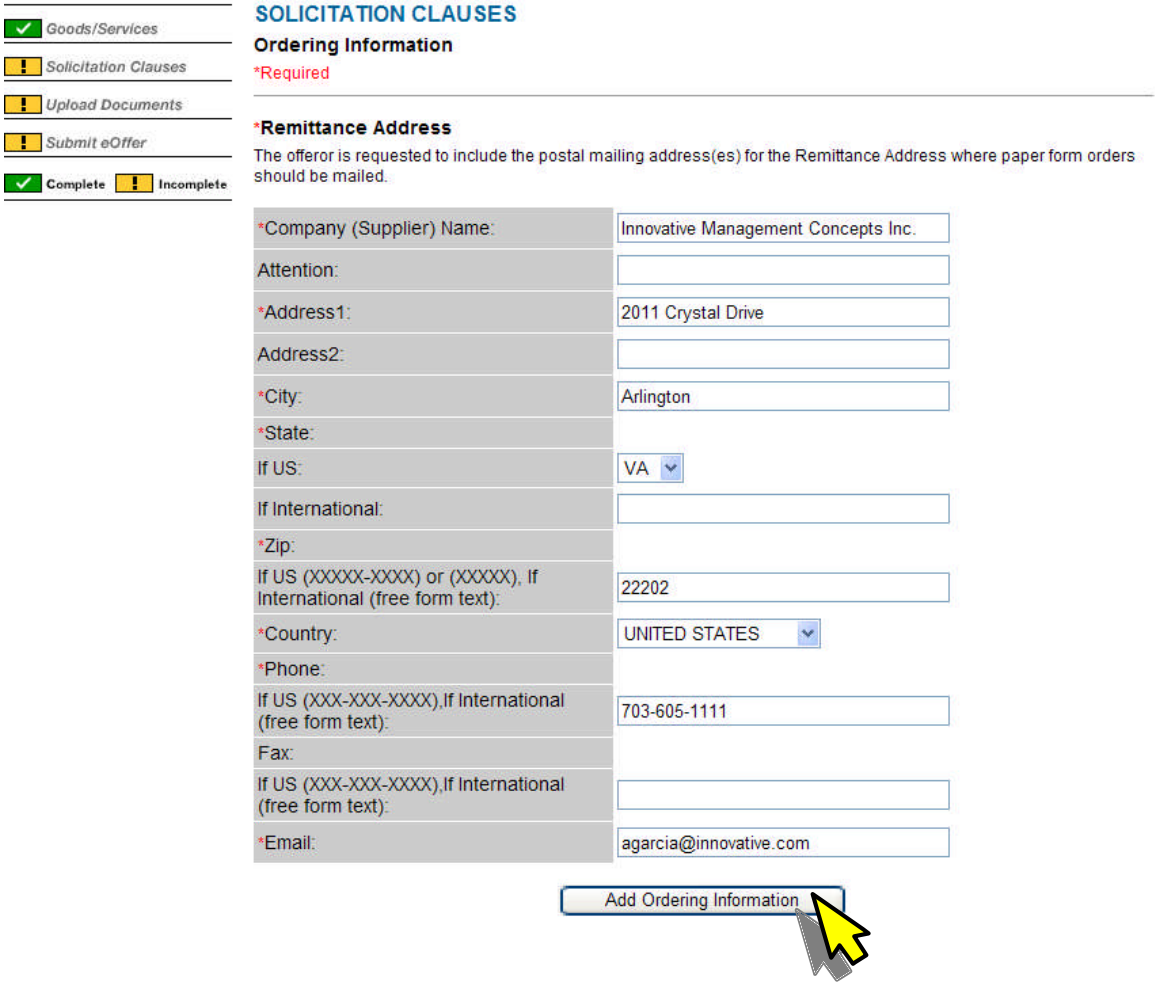


i) The next clause is ***Ordering Information***. Click on ***Respond*** in the ***Actions*** column.

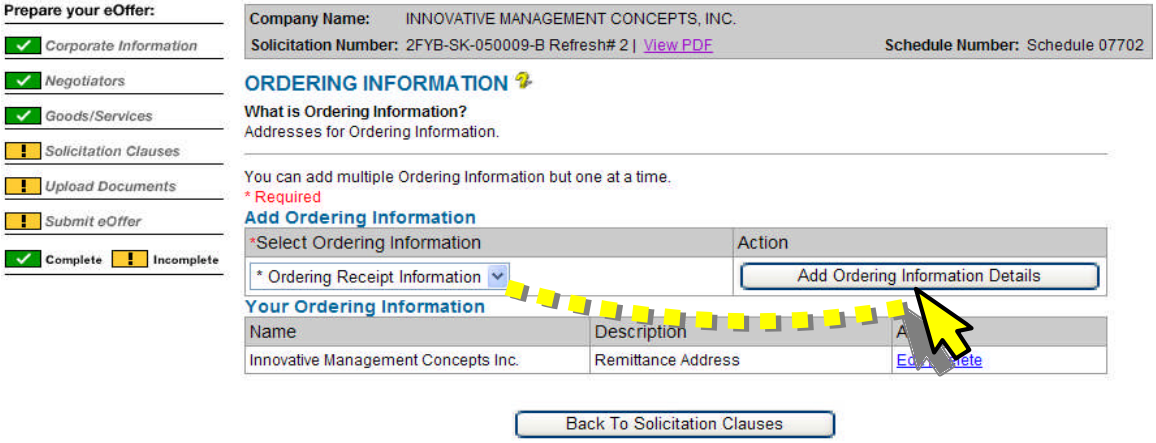
j) On the next screen select ***Remittance Address*** and click on ***Add Ordering Information Details***.



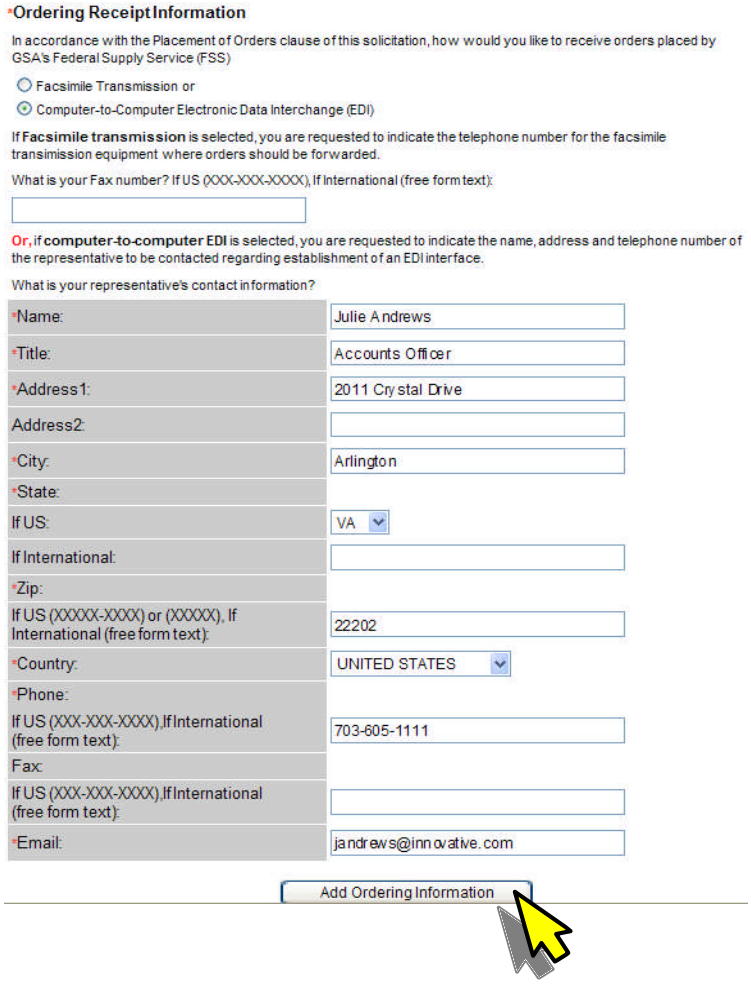
k) Fill in all mandatory fields (*) and click ***Add Ordering Information***.



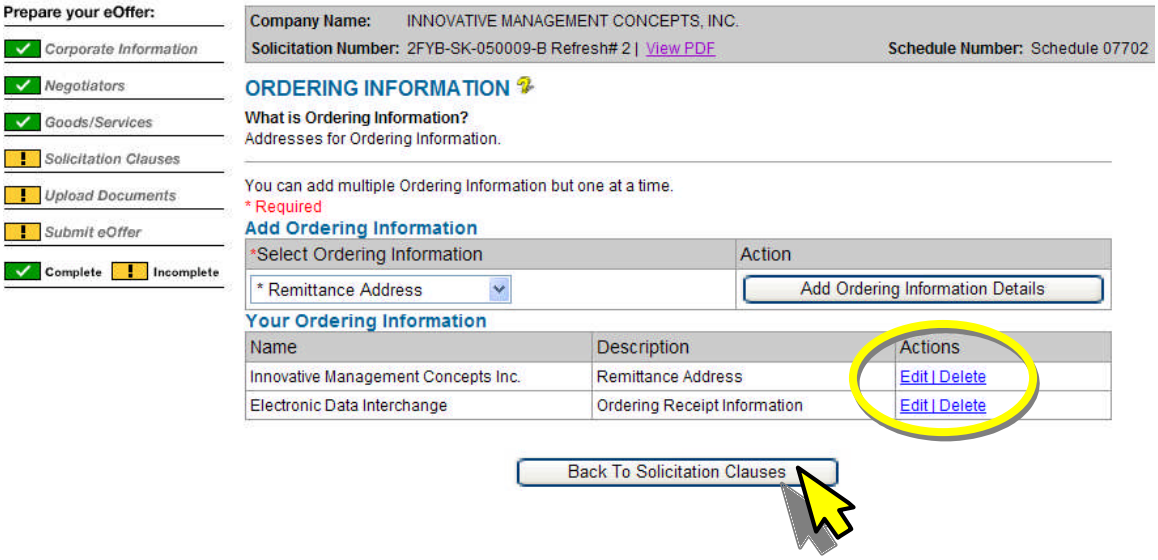
l) Next select Ordering Receipt Information (which is also required) from the Ordering Information dropdown and click ***Add Ordering Information Details.***



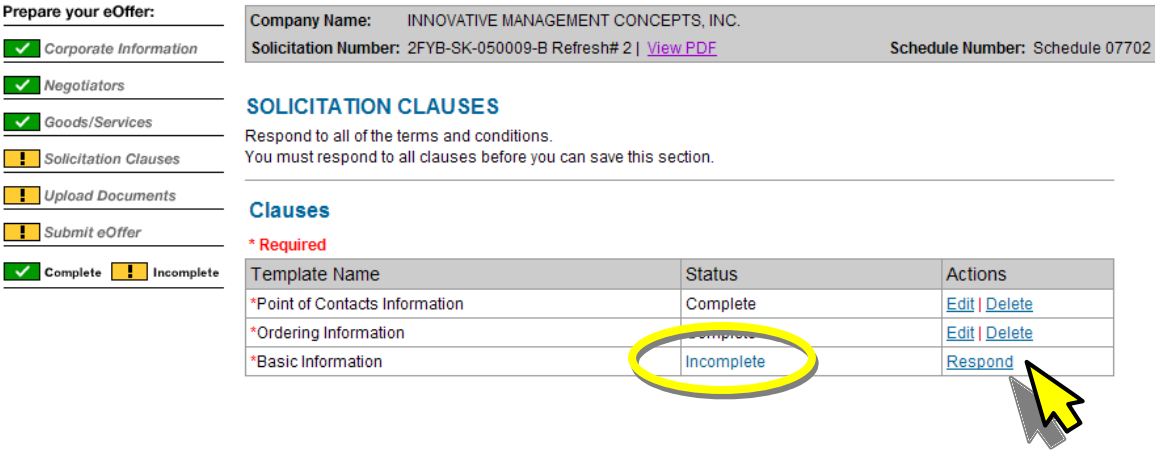
m) Select the choice for receiving orders, fill in the required (*) information and click ***Add Ordering Information***.



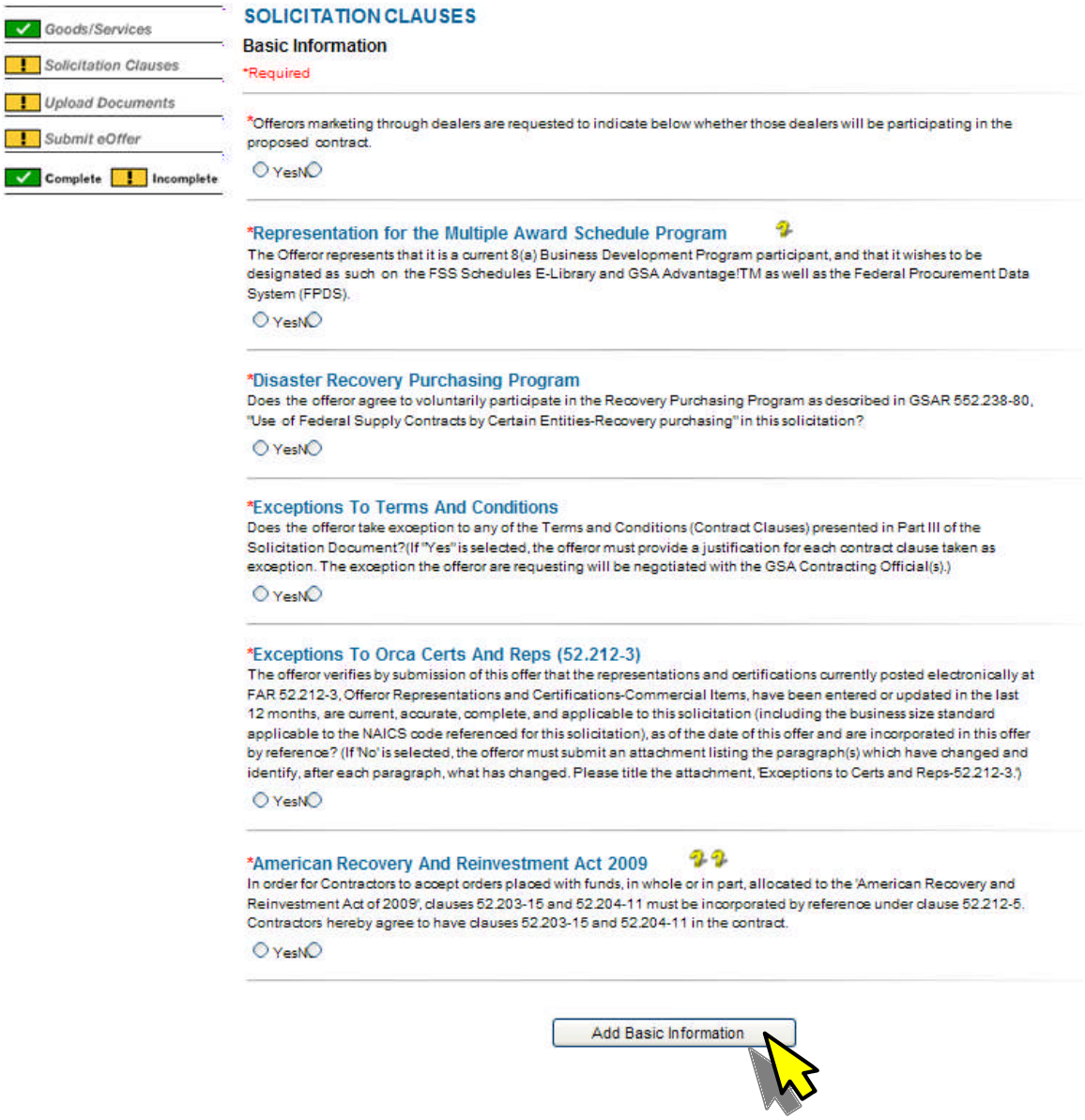
n) All the added Ordering Information will be listed with the option to Edit or Delete.



o) Click on **Back To Solicitation Clauses** and respond to the final clause relating to ***Basic Information***.



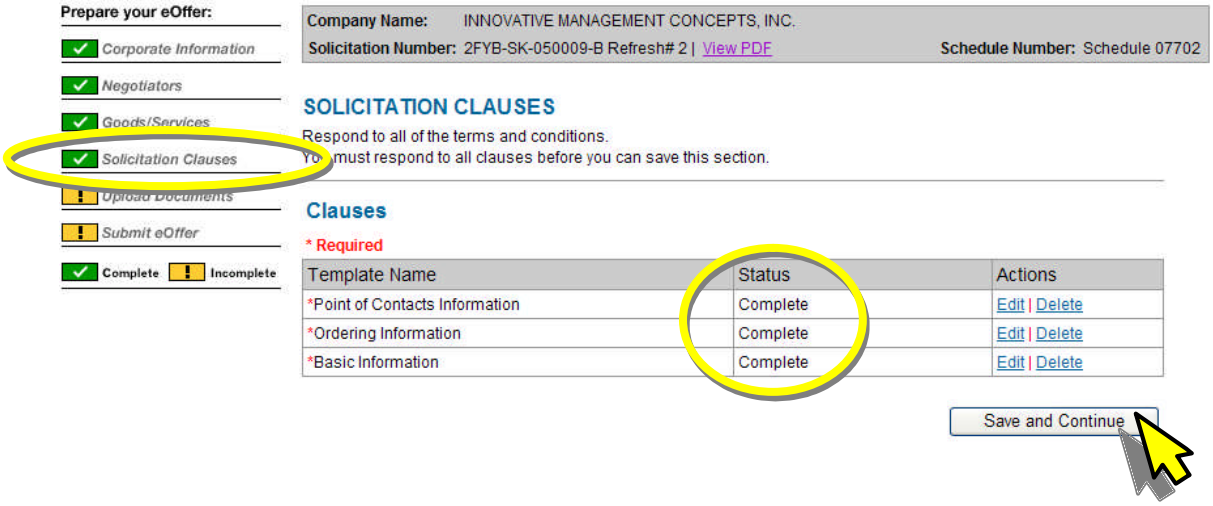
p) Choose *Yes* or *No* to the Solicitation Clause questions and statements as shown on the next screen.



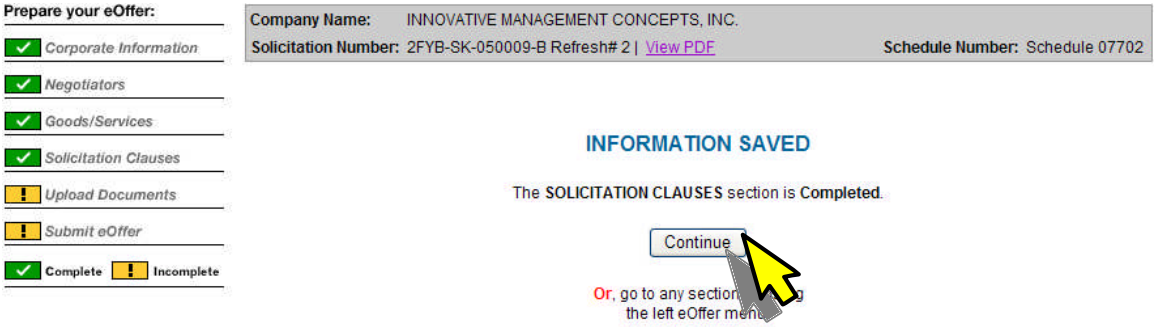
q) Click *Add Basic Information* to move forward.

r) The status for Basic Information will change to ***Complete*** thereby completing the ***Solicitation Clauses*** portion.

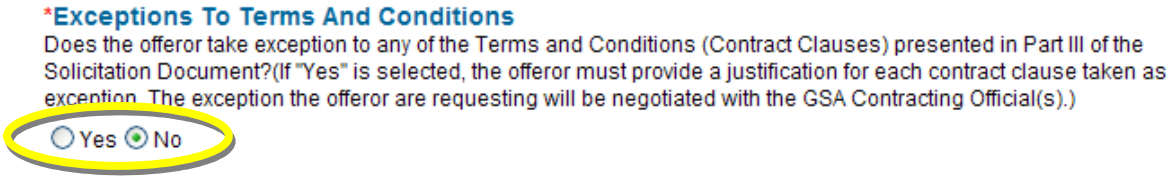
s) Click ***Save and Continue.***



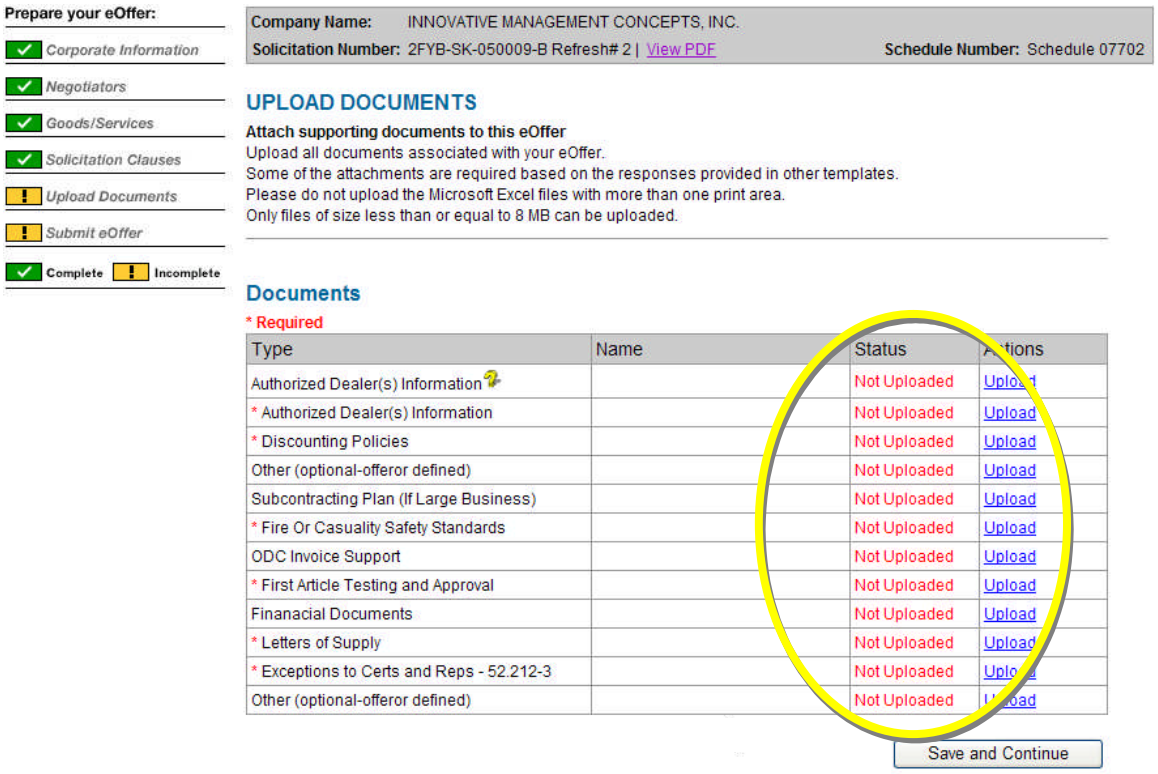
t) The Information Saved screen will be seen. Click ***Continue***.



u) The ***Upload Documents*** screen will display provided that you answered "**No**" to "**Exceptions To Terms And Conditions**" as shown below.



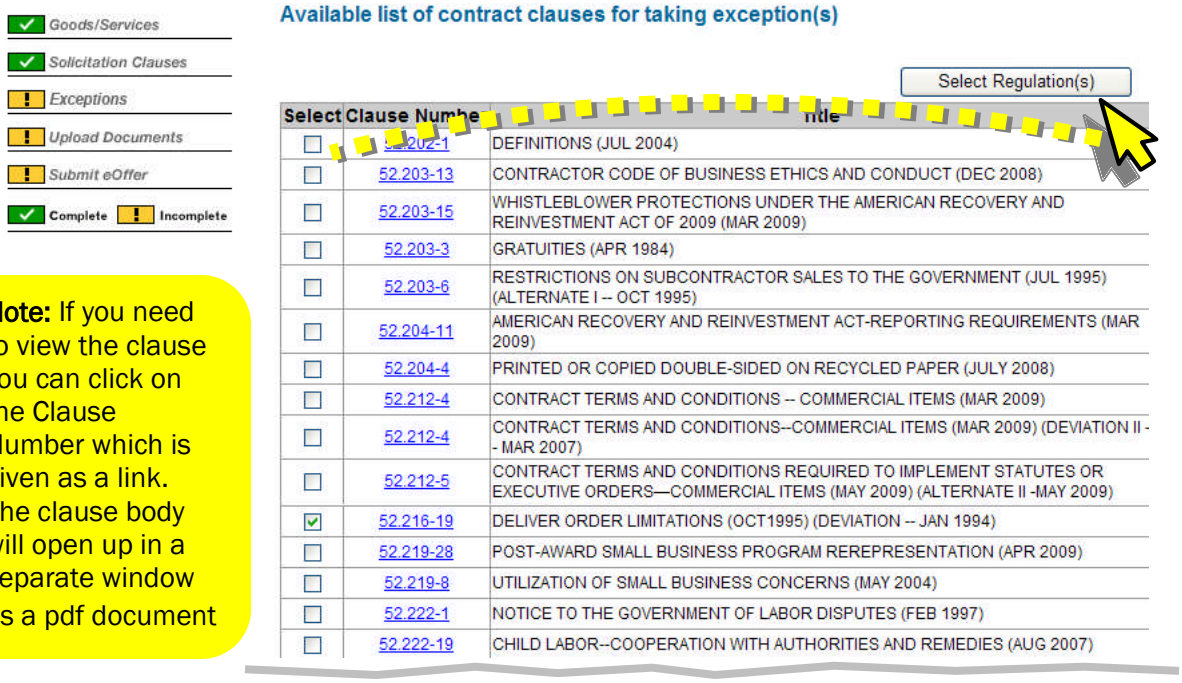
v) Skip **Section 2.1.5 Clause Exceptions** and move on to **Section 2.1.6 *Upload Documents*** if you did not take any Exceptions.



2.1.5 Clause Exceptions

If you answered "Yes" to "Exceptions To Terms And Conditions" on the Solicitation Clauses Basic Information page as shown below the following events will occur after the Solicitation Clauses section is complete.

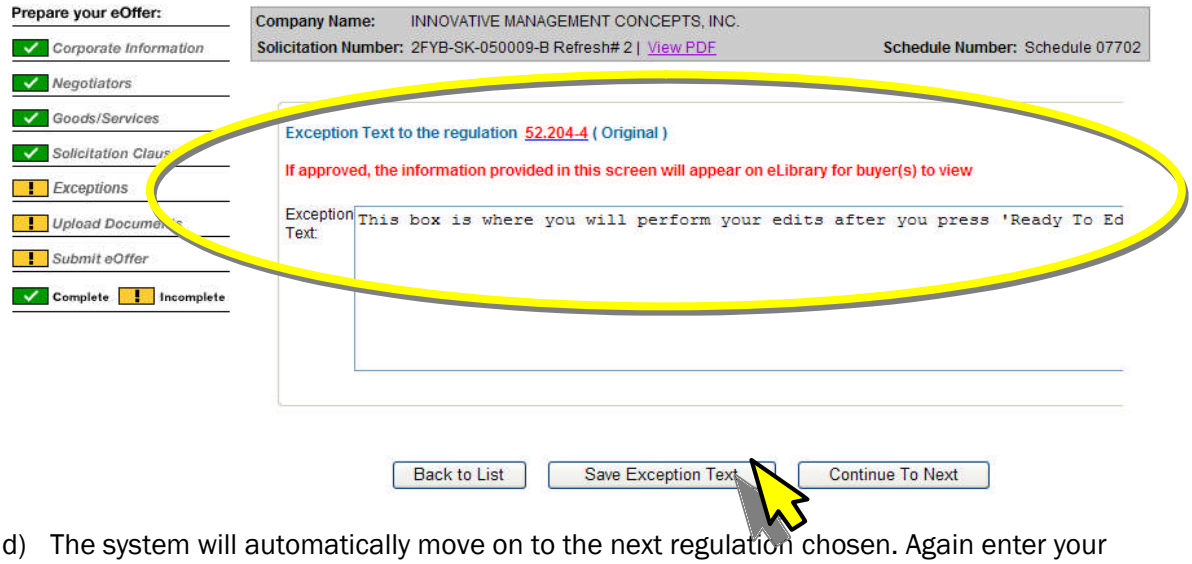
a) You will be presented with a list of contract clauses for taking exception(s). *Select* the ***Regulation(s)*** by clicking the check box. Then click the ***Select Regulations*** button.



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.

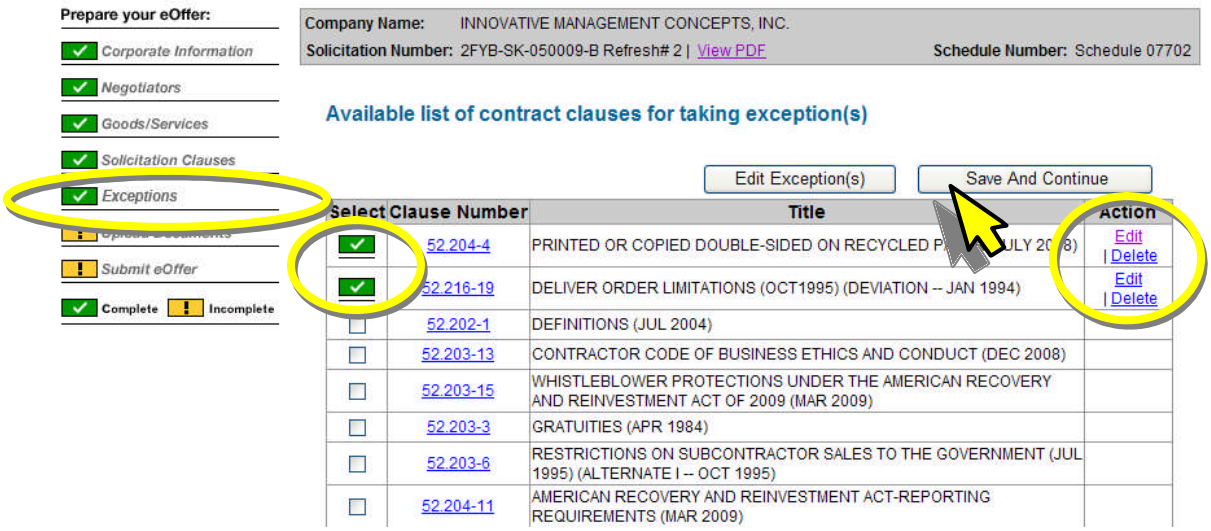
c) Type the explanation for the exception taken in the text box and click ***Save Exception Text***. Also notice that now you have an Exceptions section in your eOffer menu on the left.



d) The system will automatically move on to the next regulation chosen. Again enter your explanation in the textbox provided and click ***Save Exception Text.***

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

f) Click **Save and Continue** if you are done with all the exceptions.

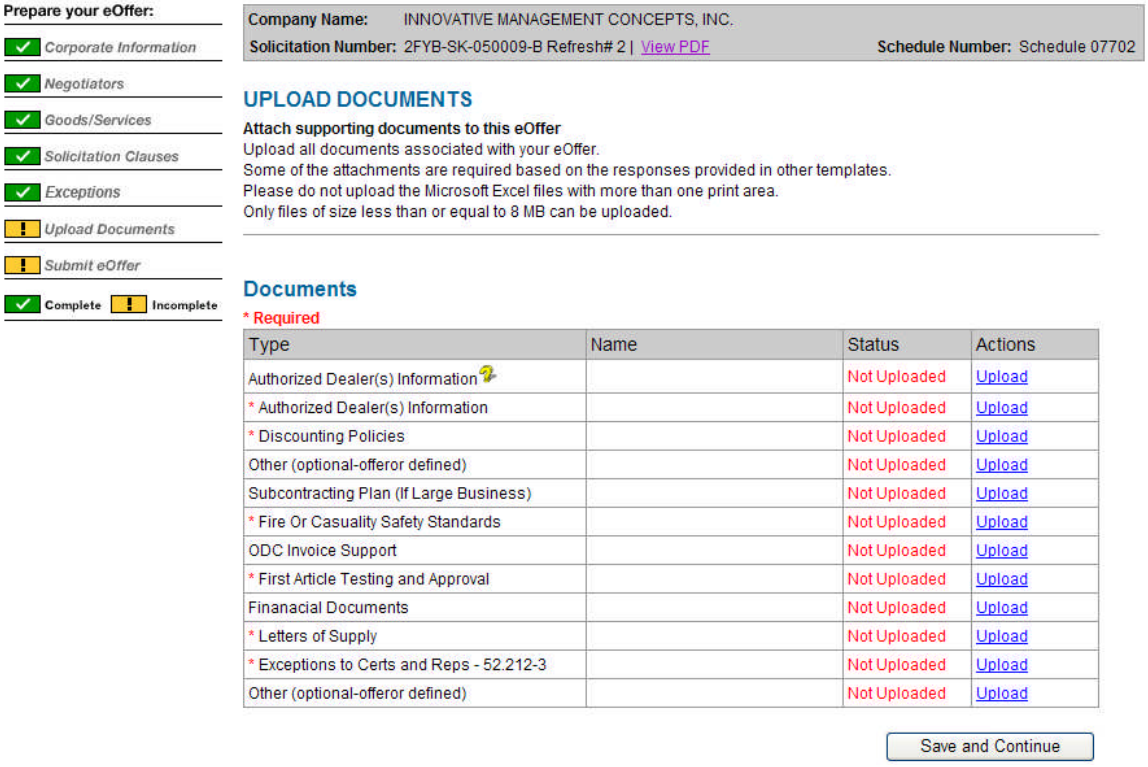


g) Click **Continue** to move on to the **Upload Documents** section.

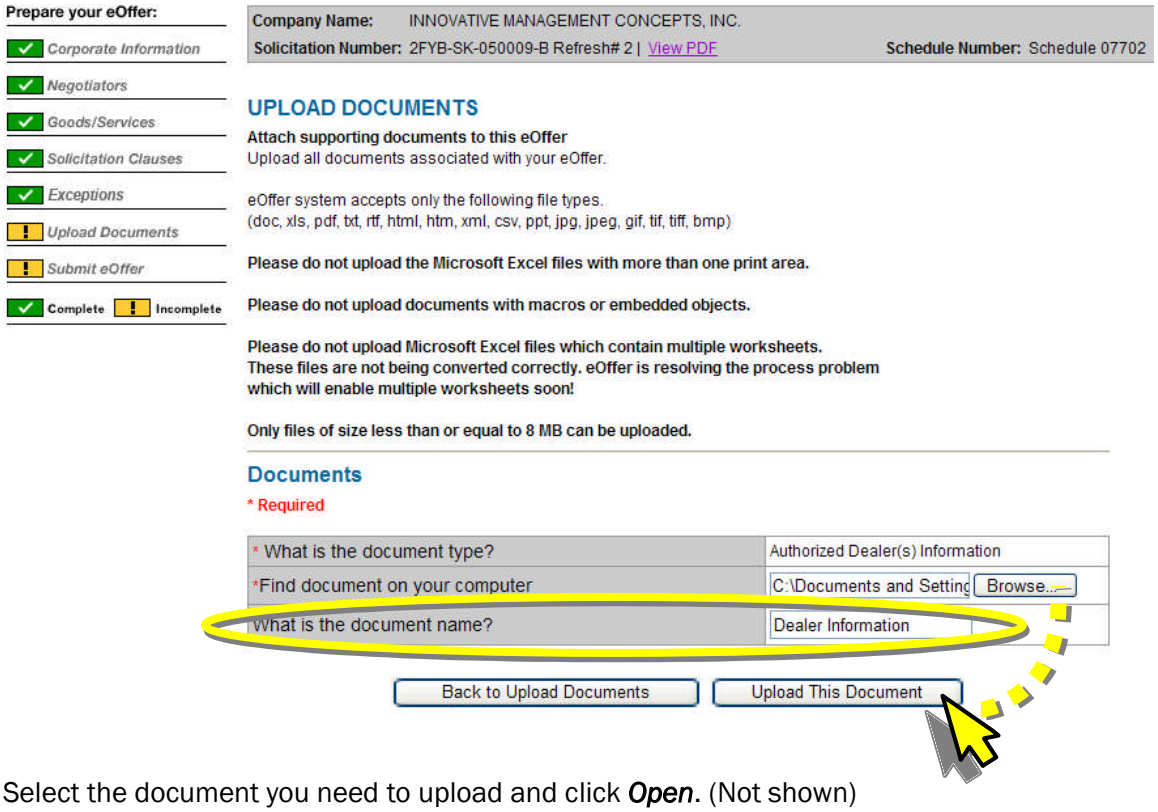
2.1.6 Upload Documents

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. Please pay attention to the requirements relating to attaching supporting documents.

a) Click the ***Upload*** button against the category for which you need to attach the document. Also note the restrictions in terms of the type of documents that can be uploaded at the top of the page.



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



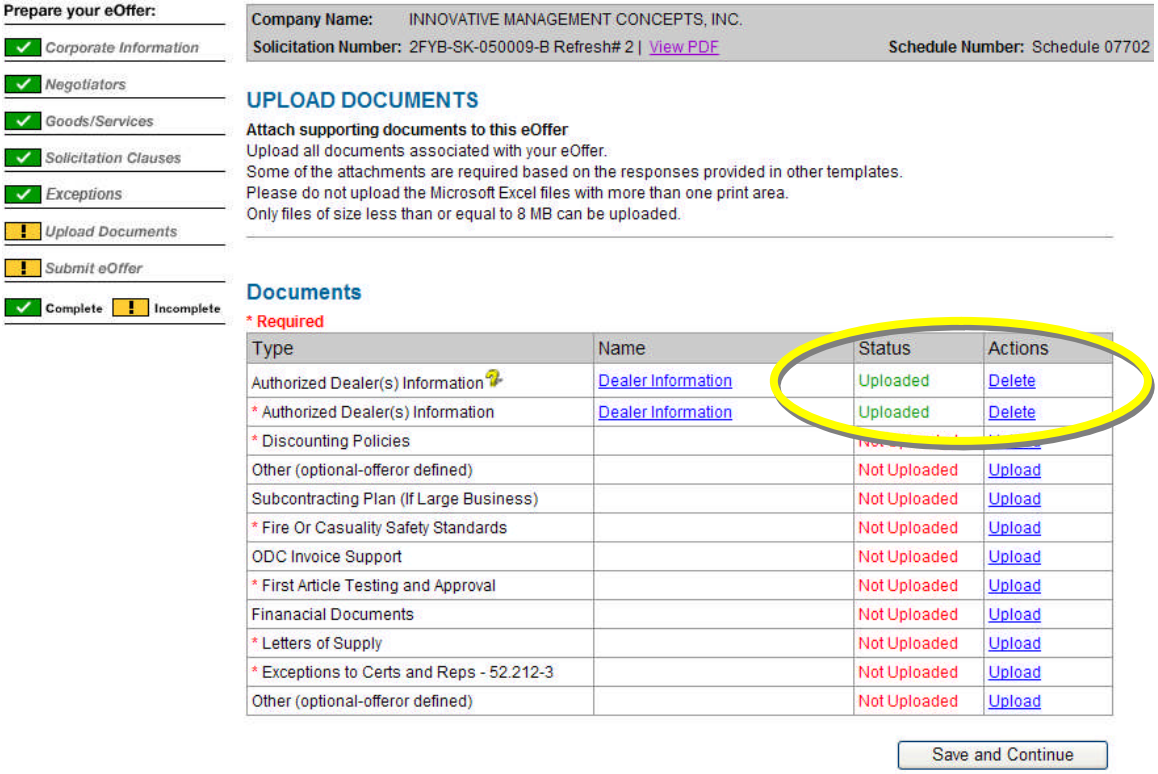
c) Select the document you need to upload and click ***Open***. (Not shown)

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.

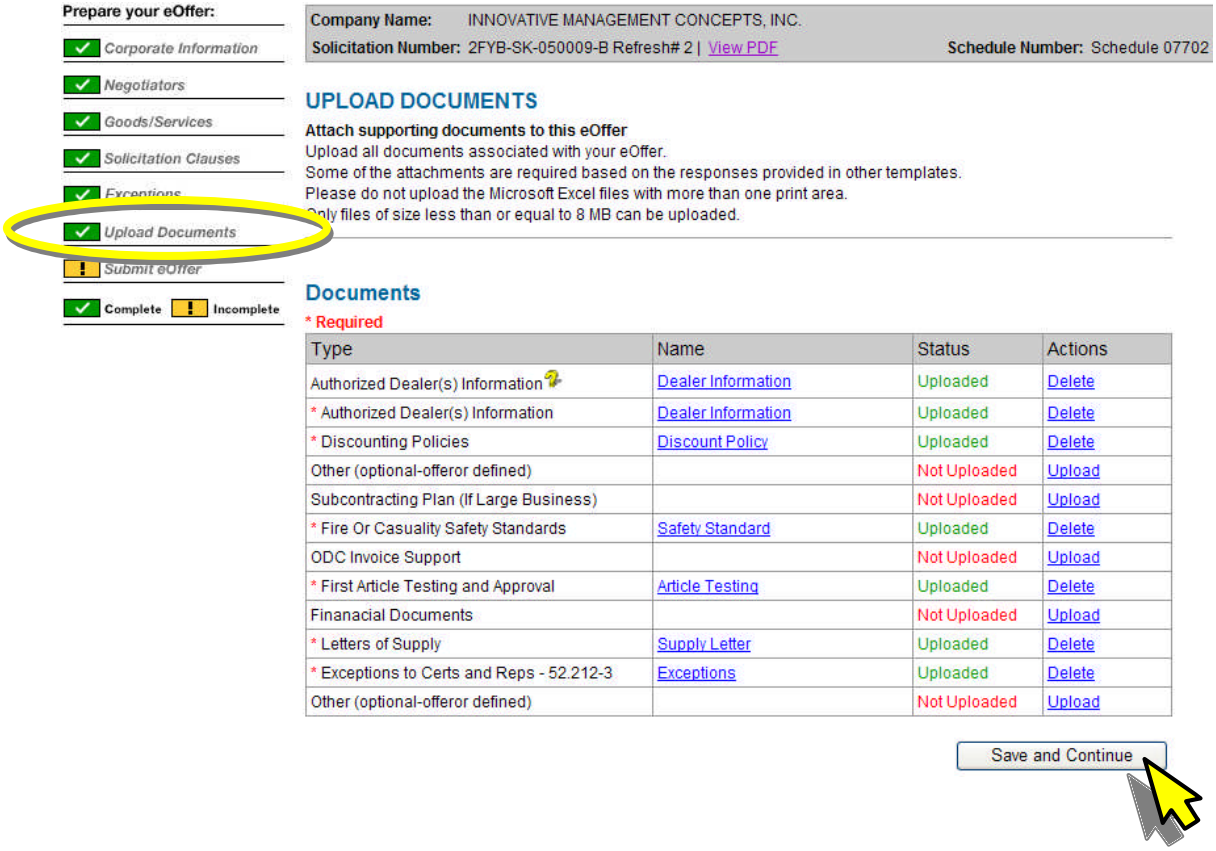
e) Click on ***Upload This Document*** to add the document.

This will take you back to the Upload Documents screen. Also 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.

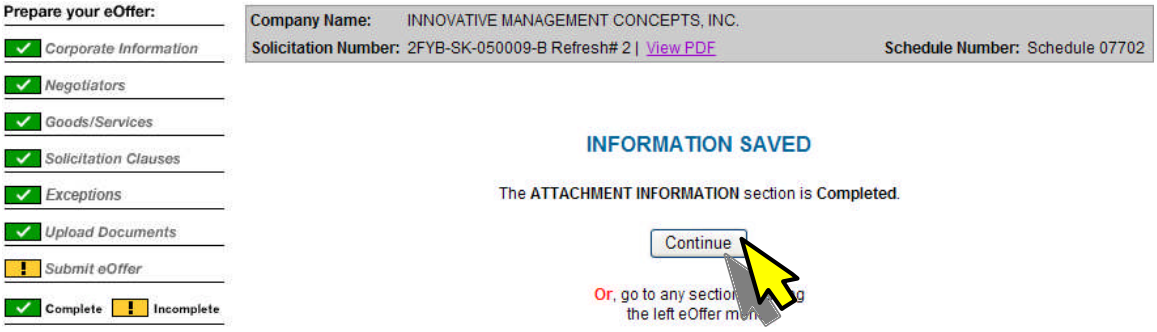


h) Repeat the process to upload all the required documents as well as any optional ones.

i) Once all the necessary attachments have been added click ***Save and Continue.***

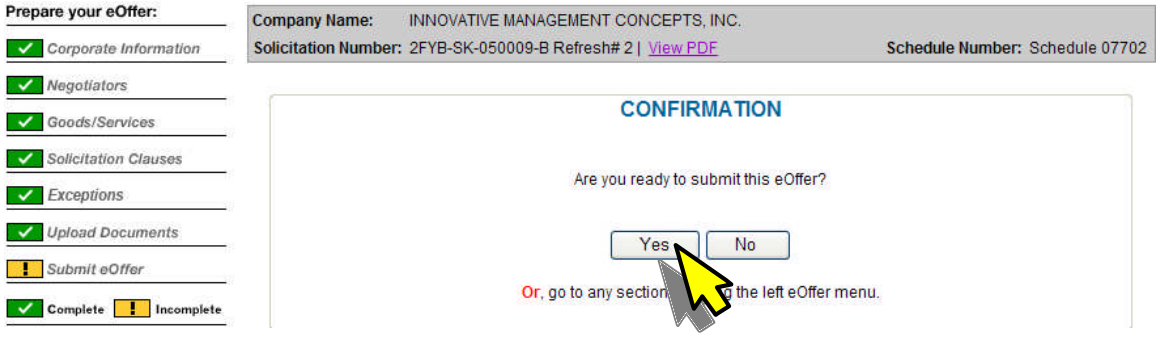


j) A confirmation screen will appear indicating that the Attachment Information section is completed. Click ***Continue*** to begin the process of submitting the eOffer.



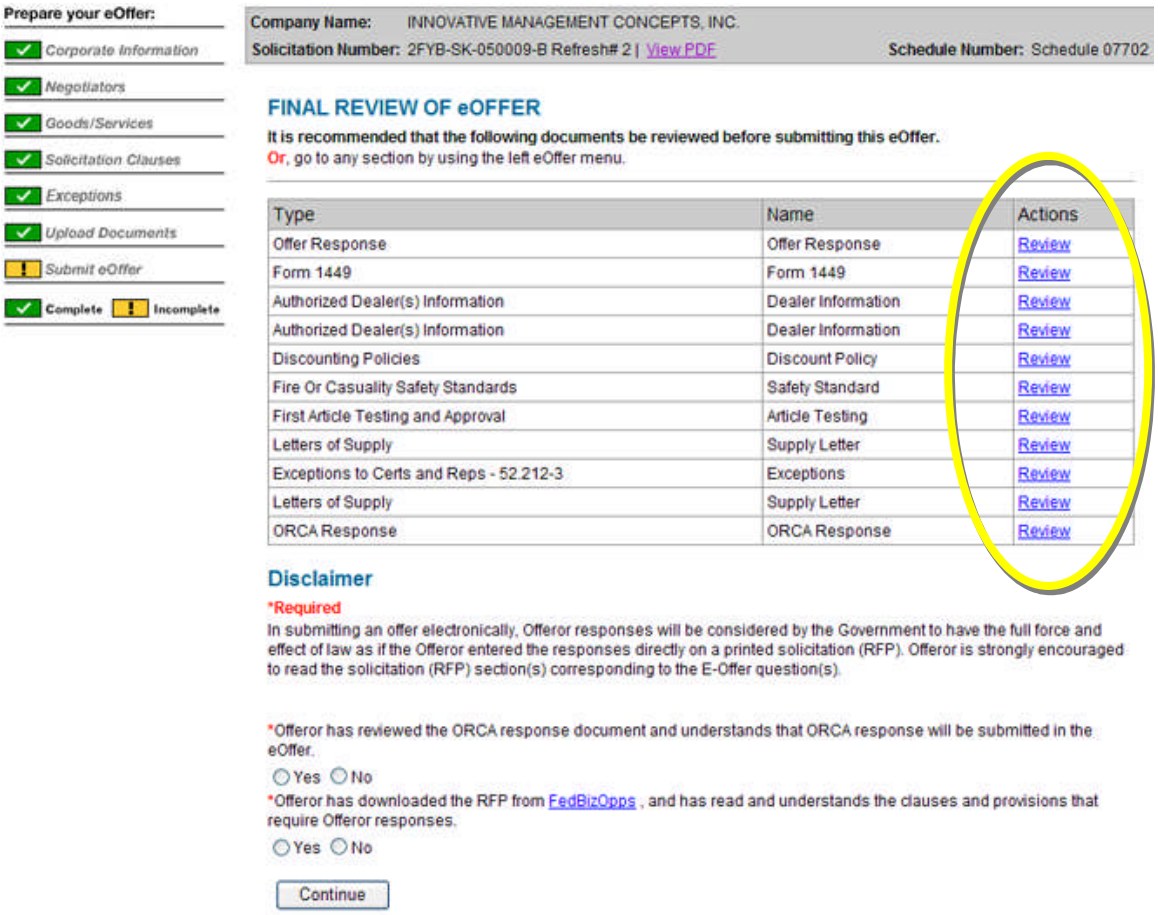
2.1.7 Submit eOffer

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

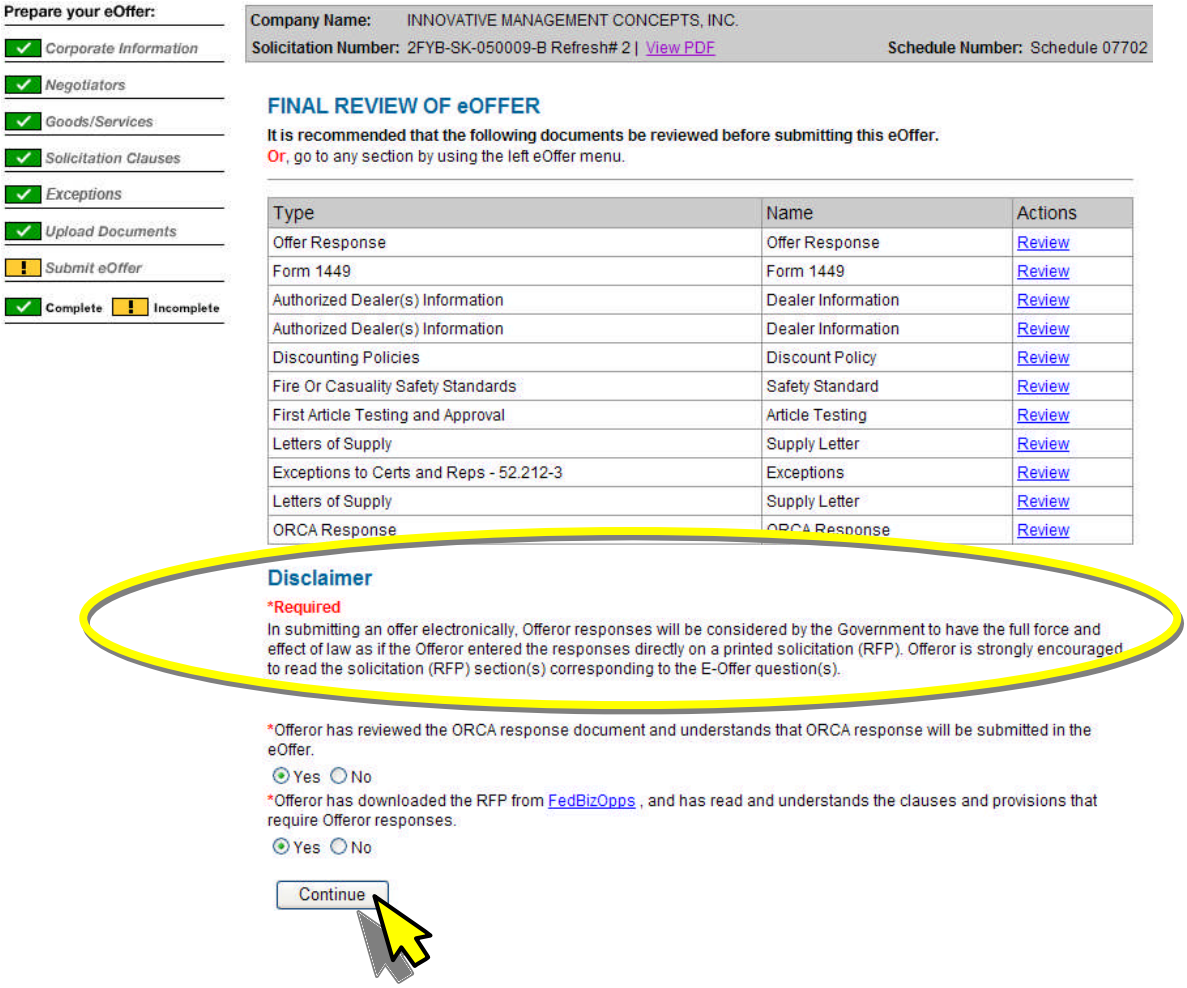


b) If you click 'Yes' the Final Review screen will be displayed.

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

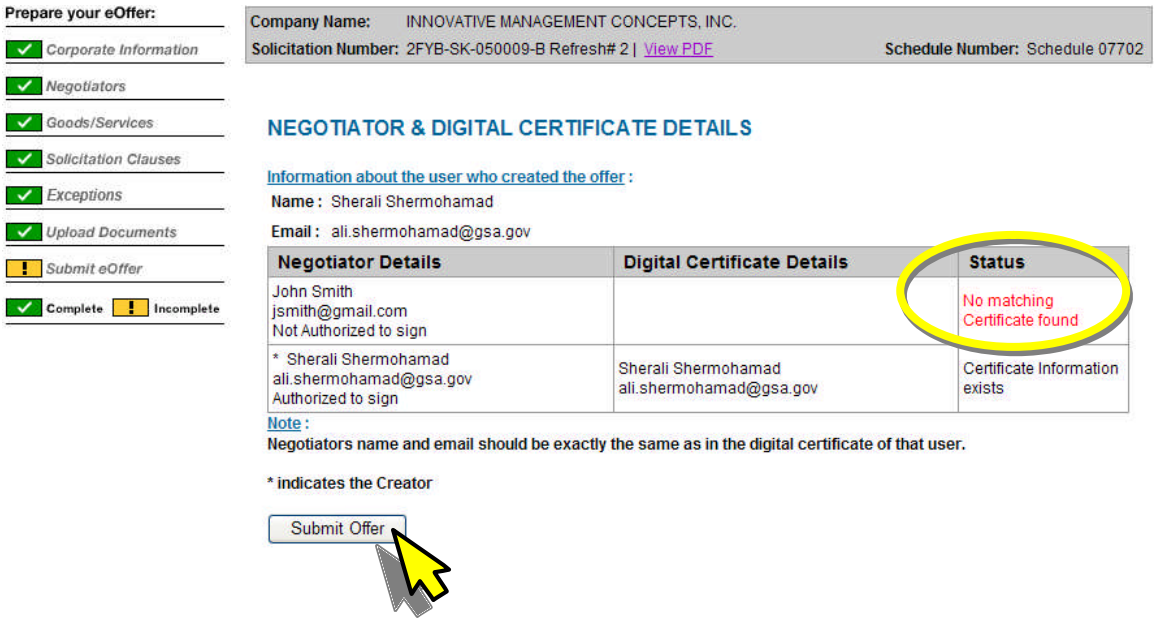


d) Read the ***Disclaimer*** carefully and select '***Yes'*** for both statements (if in agreement) and click ***Continue***.

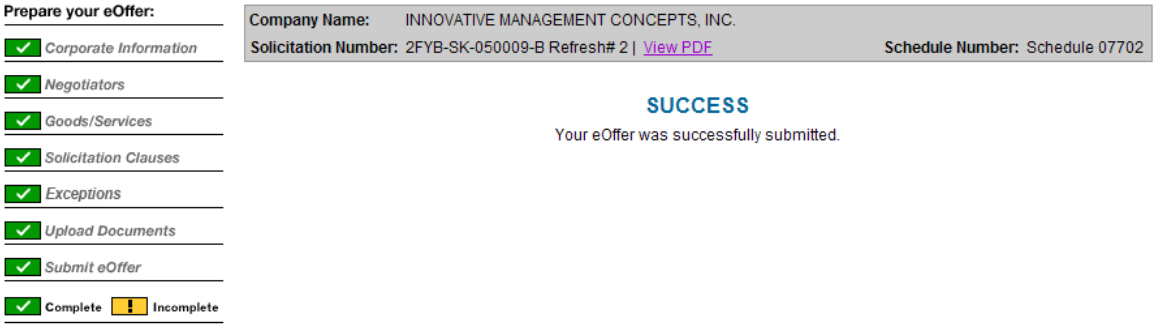


e) The system will verify the name and email ID of the Negotiators. This information is displayed on the ***Negotiator & Digital Certificate Details*** page. Ensure the information is correct.

f) If the information is not correct it will be indicated under the status. Go back to the Negotiator section and make corrections and then submit the offer.

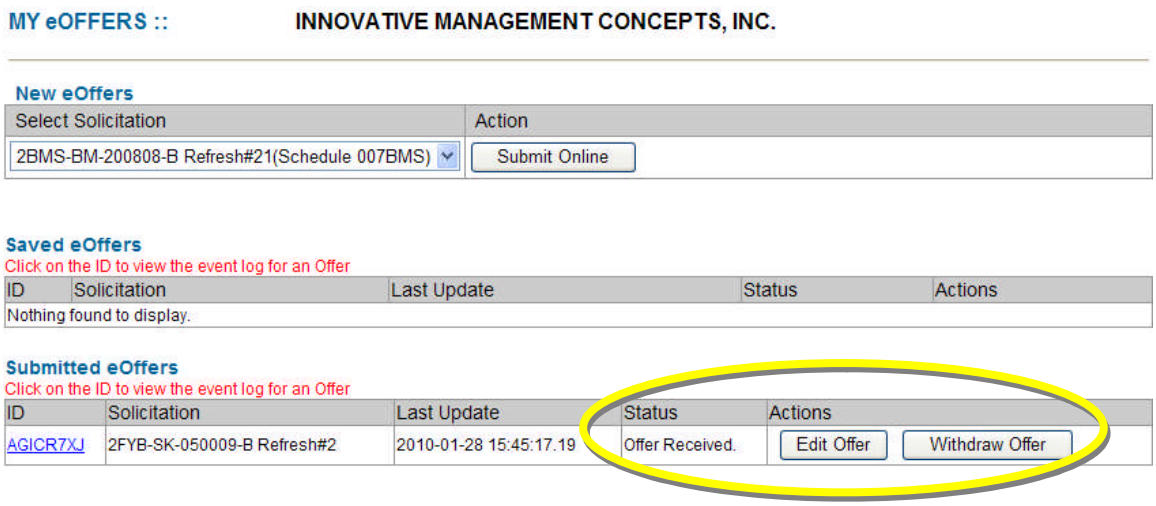


g) A success message will be displayed as shown below after the offer is submitted.

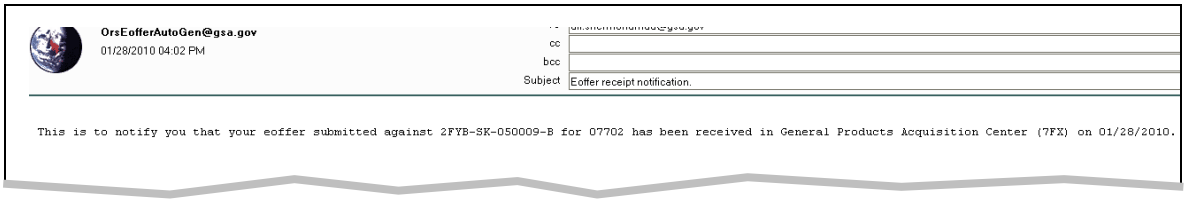


h) The status of the submitted eOffer will change to ***Offer Received*** on the My eOffers homepage.

i) At this point you still have the option to Edit the offer or Withdraw the offer.

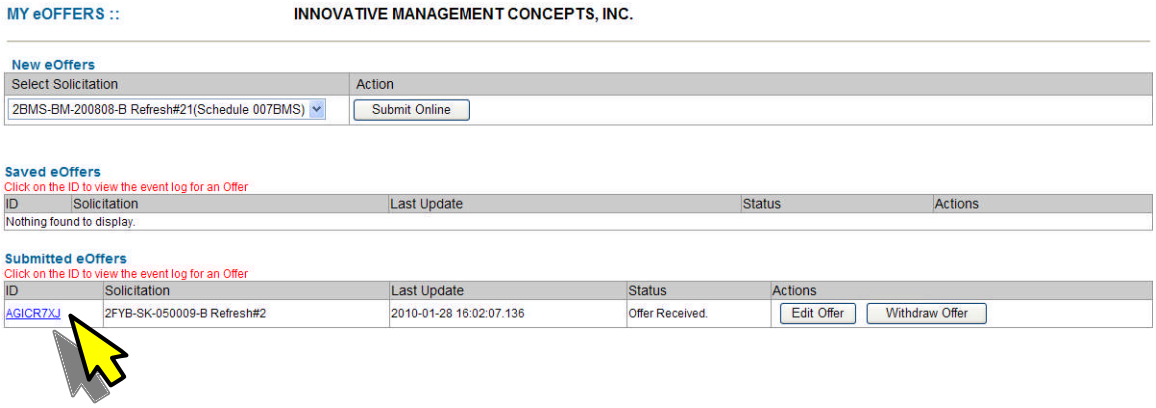


After successful submission of the eOffer the vendor will receive an automated email indicating the receipt of the eOffer. A sample email is shown below.

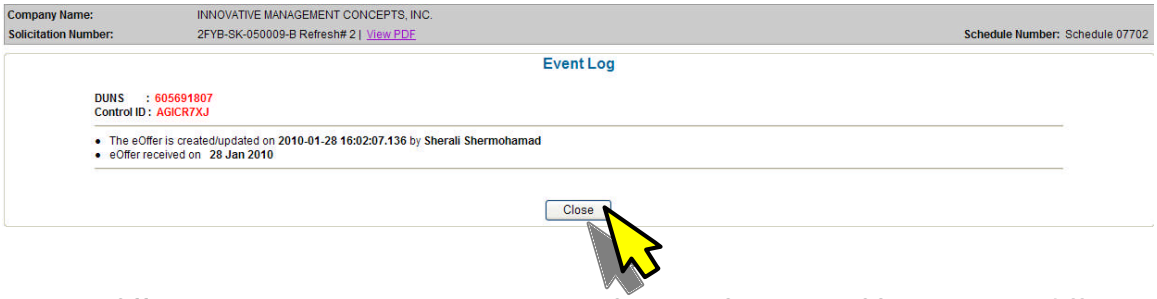


Look at the Event Log to view the history of a submitted eOffer.

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



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



Once the eOffer is received, it will be assigned to a Contract Specialist (CS) and a ***New Offer Welcome Letter*** will be generated before the CS starts processing the offer. An example of such a letter is shown below.

Subject New Offer Welcome Letter

INNOVATIVE MANAGEMENT CONCEPTS, INC.
21400 RIDGETOP CIR STE 210
STERLING, VA 20166-6511

Dear Sherali Shermohamad

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.

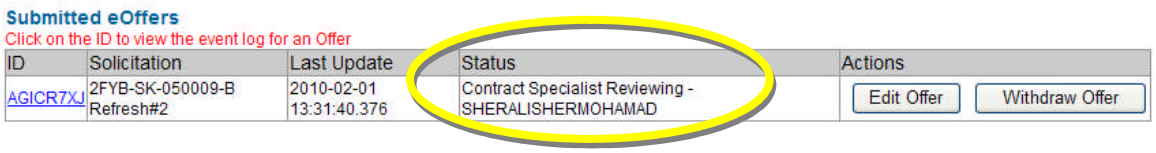
Your offer has been assigned to Contract Specialist, Ali Shermohamad. This individual will be your point of contact for any questions.

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,

Ali Shermohamad
Center Director
(P) 703-605-2143, (F) 703-789-4569, ali.shermohamad@gsa.gov

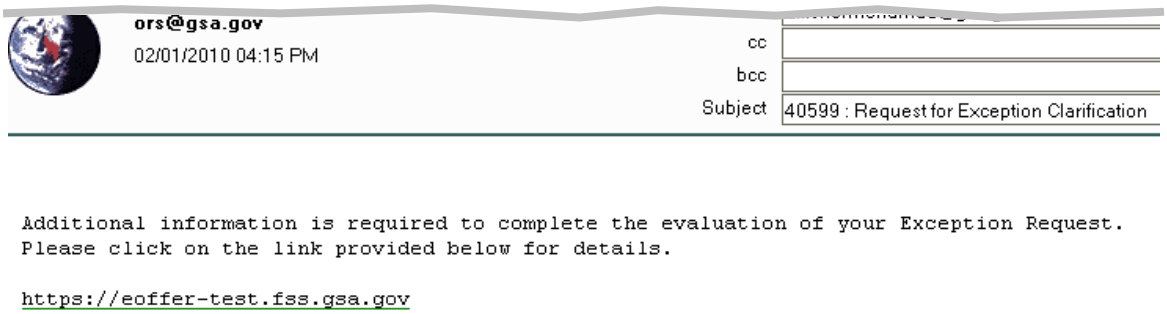
Under **Submitted eOffers** the status of the eOffer will change to "Contract Specialist Reviewing" as shown below.



Upon award of the contract, the Contract Specialist will create a contract package to be approved and signed by the Vendor. For the steps involved in that process please refer to **Section IV – Signature Process.**

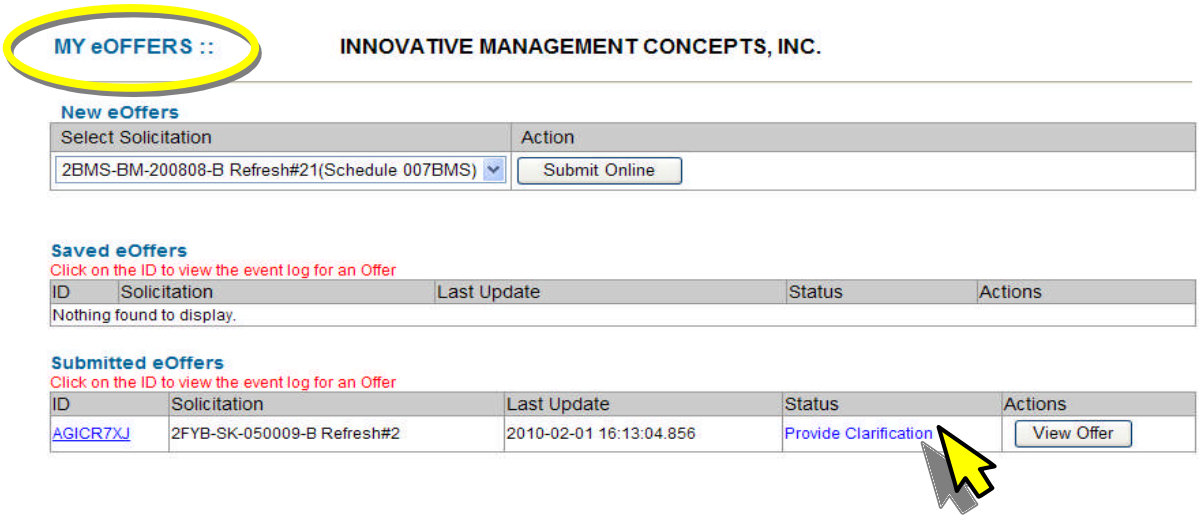
2.2 Request for Clarification to an Exception

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.



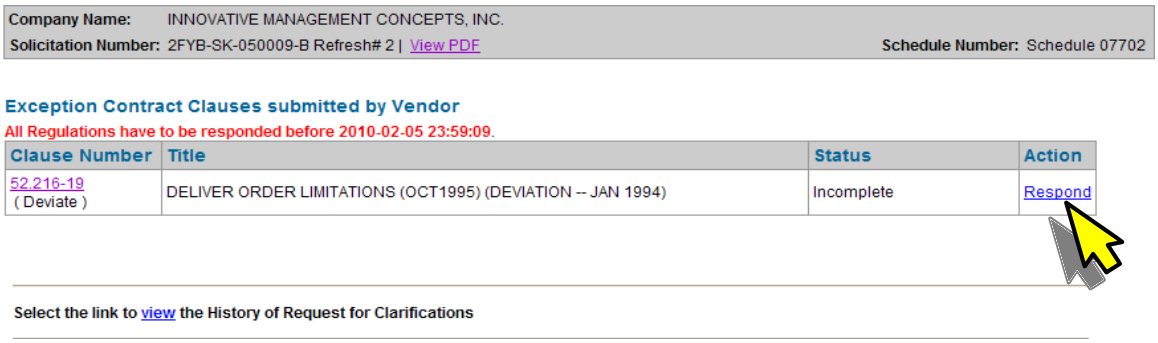
a) Go to *My eOffers*. The eOffer in need of explanation will be displayed in Submitted eOffers with the Status of *Provide Clarification.*

b) Click on the *Provide Clarification* link.



The *Exception Contract Clauses submitted by Vendor* page will be displayed.

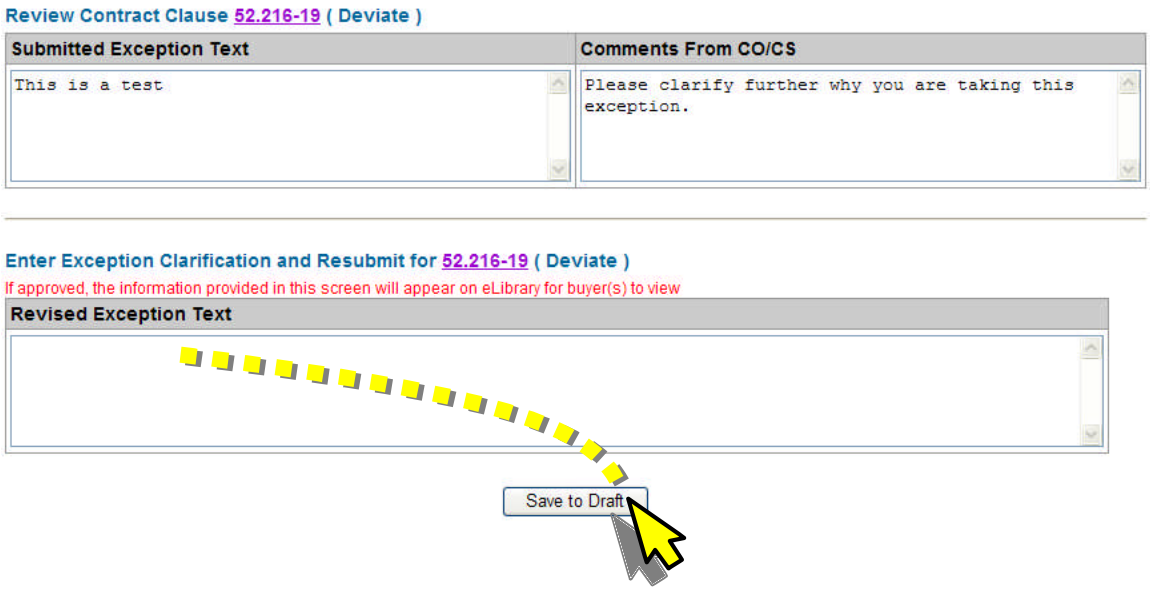
c) Click *Respond*.



The exception status page is displayed showing the history of the exception with comments from CO/CS.

d) Respond by typing in the ***Revised Exception Text*** box.

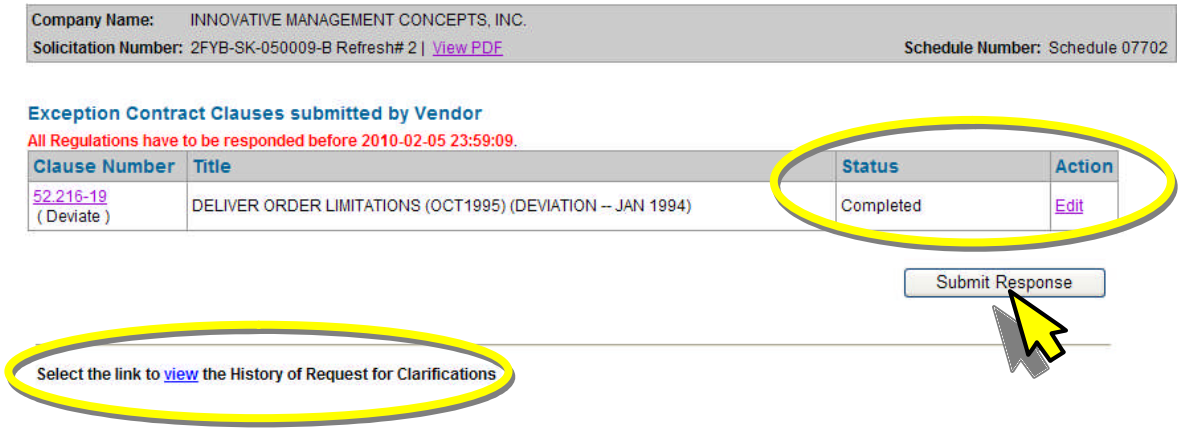
e) Click ***Save to Draft***.



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

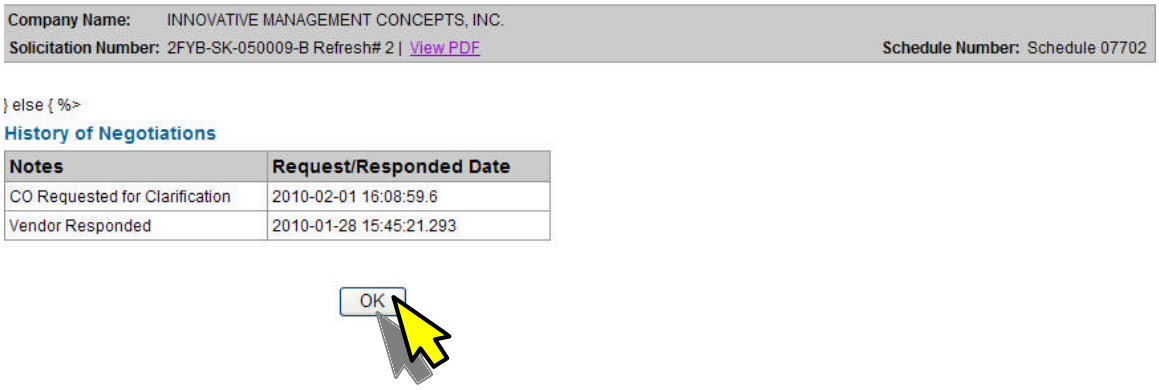
g) On the below screen you can click the ***view*** link at the bottom of the page to show the exception negotiation history.

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



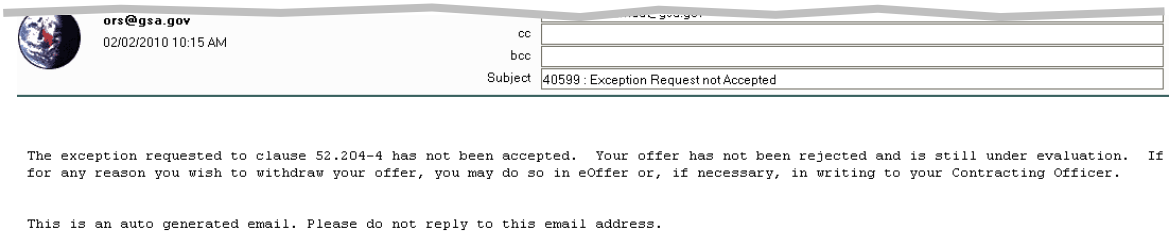
The success message will be displayed. The CO/CS will then choose to approve, ask for further clarification or reject the exception.

i) The ***History of Negotiations*** page will display. Click ***OK*** when the review is complete.

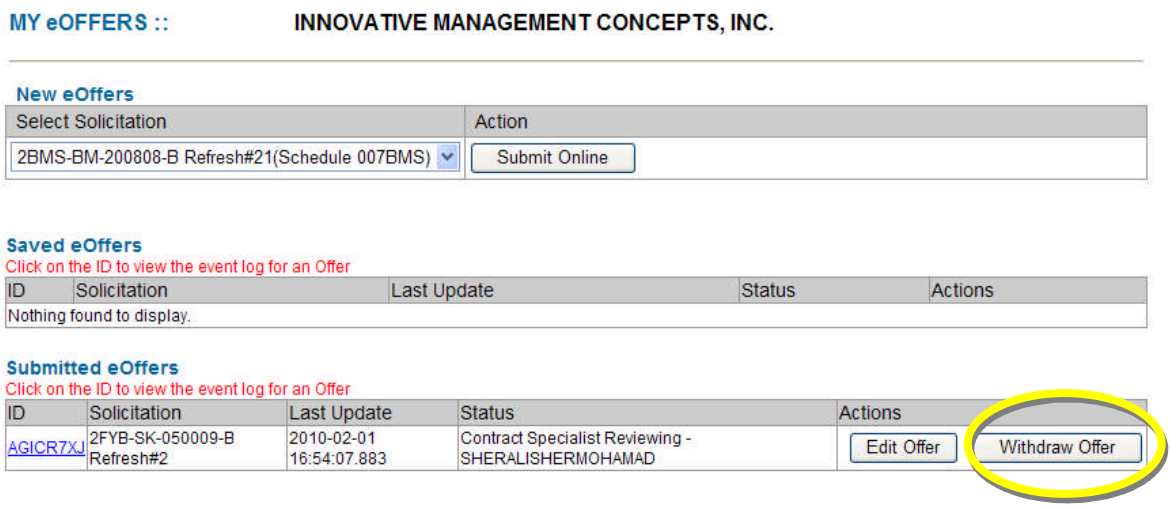


2.3 Contract Specialist Rejects an Exception

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.

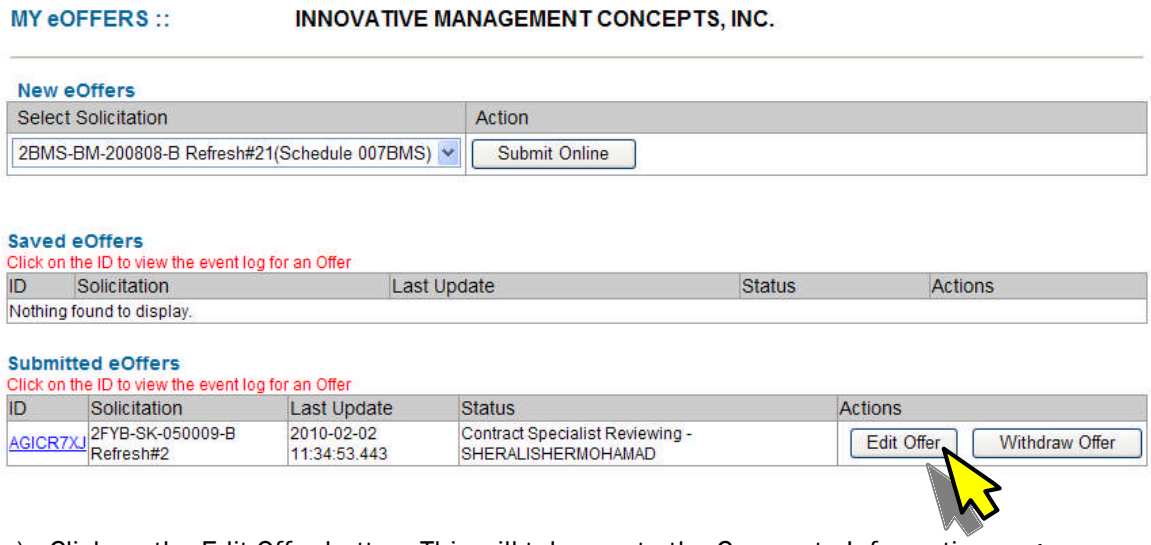


a) The offer will still be under evaluation as indicated by the status on the My eOffers page. The Vendor has an option to withdraw the offer.

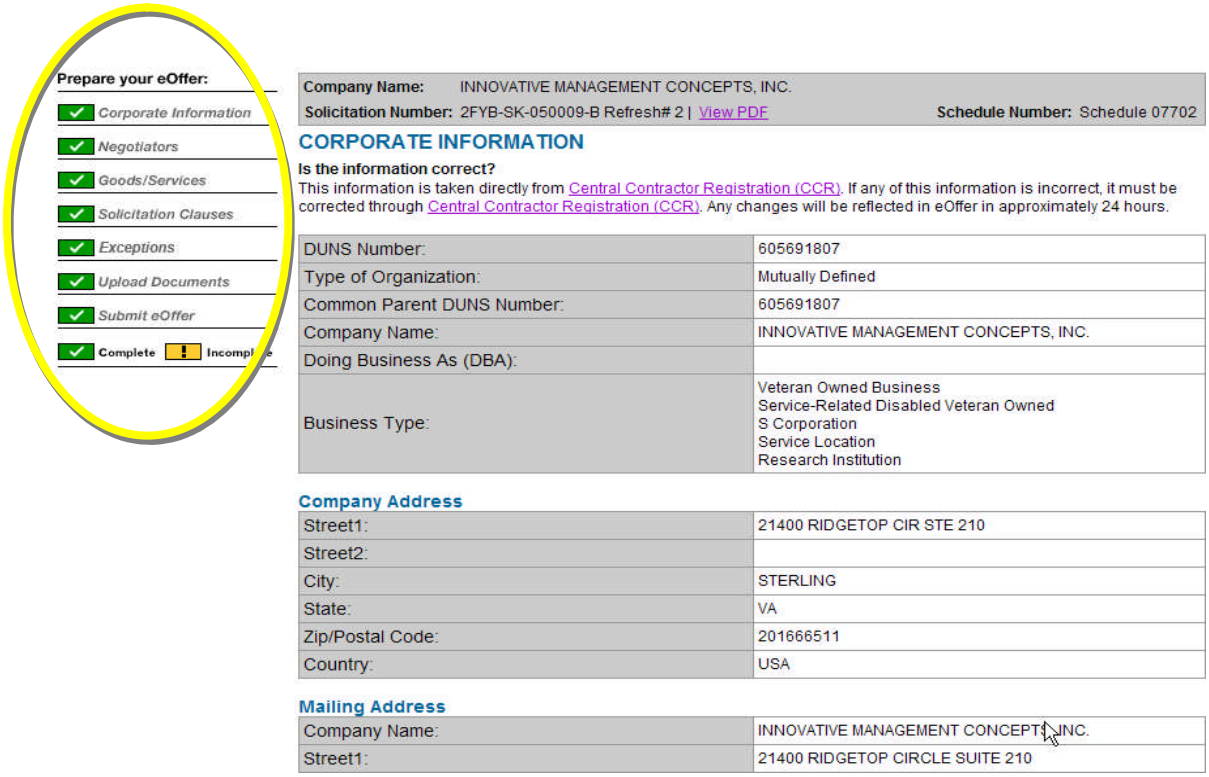


2.4 Edit an eOffer After Submission

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.



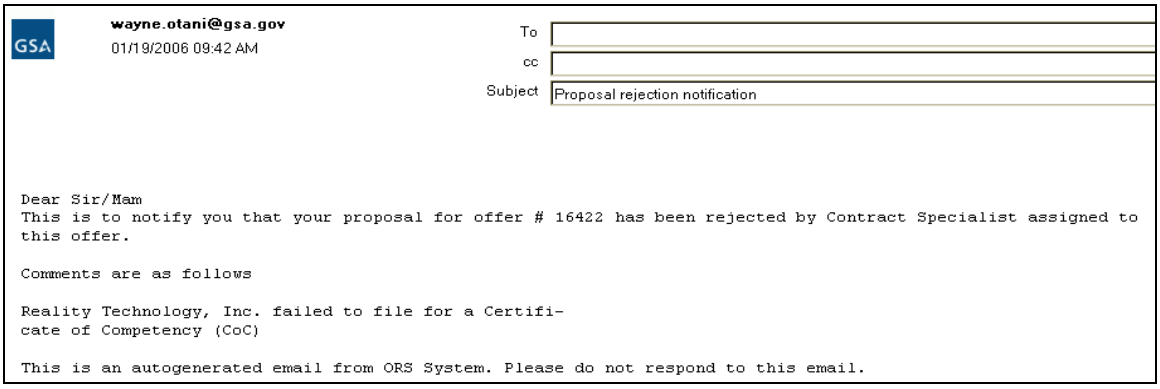
a) Click on the Edit Offer button. This will take you to the Corporate Information page.



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 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 continue participation on that particular solicitation, the eOffer will need to be recreated and resubmitted as a new offer. See the next section for instructions.

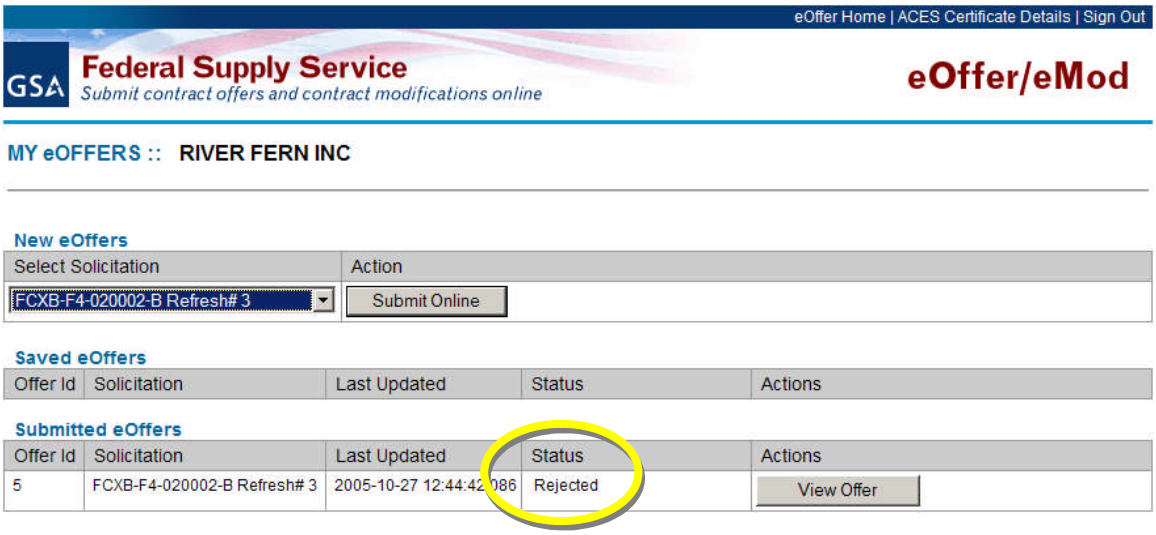
2.6 Re-Submit an eOffer After It Has Been Rejected or Withdrawn

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

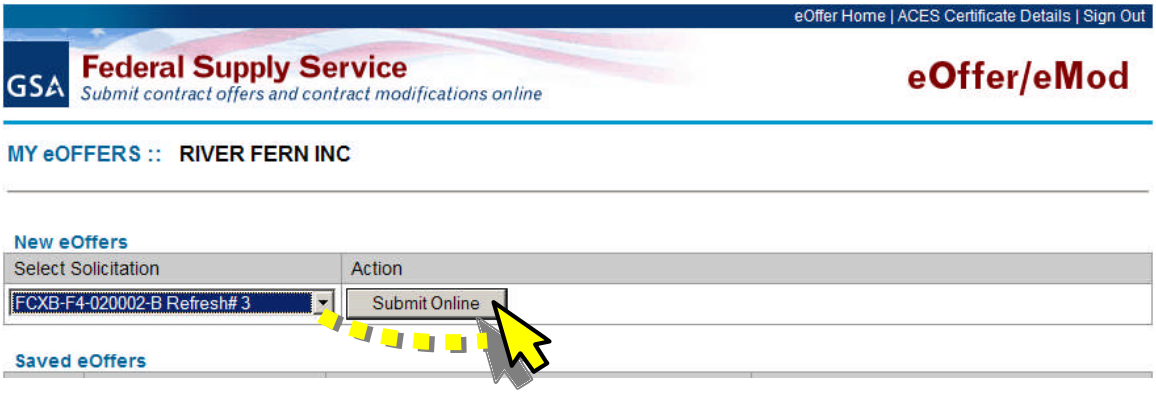
a) Once the system is accessed, the ***My eOffers*** page will be displayed.

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

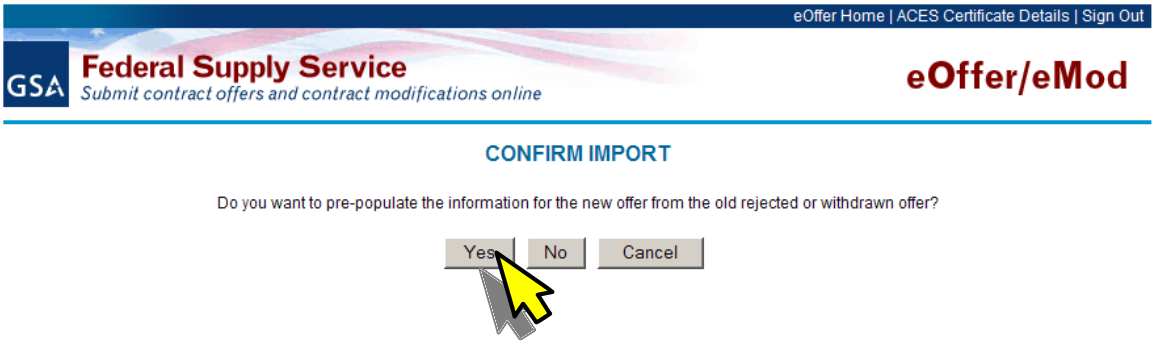
c) To view the submission, click ***View Offer***. The information listed in the rejected offer may be used to re-submit the new offer.



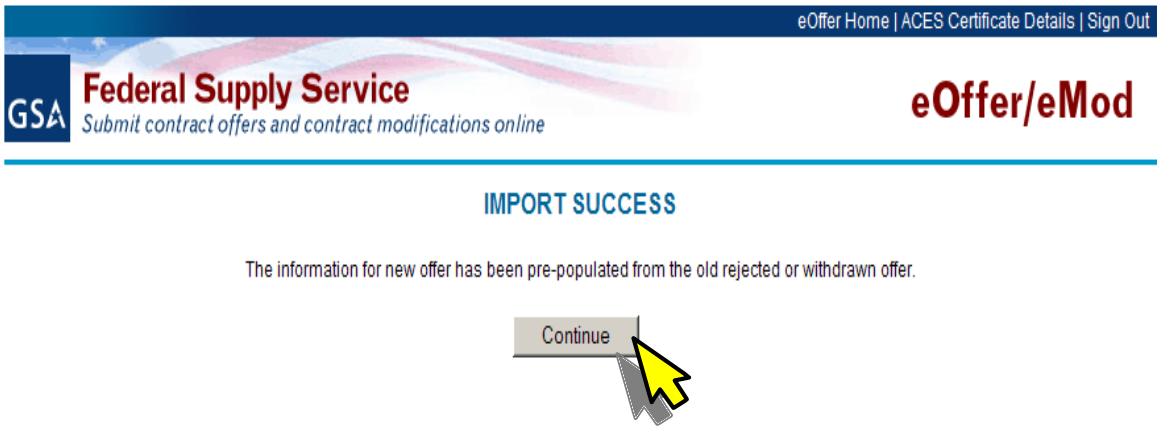
d) To re-submit the rejected offer, locate the correct solicitation number (same as the rejected solicitation number) under ***Select Solicitation*** and click ***Submit Online***.



e) Click *Yes* on the Confirm Import screen.



f) Click *Continue*.



g) All information is pulled in from the rejected offer.

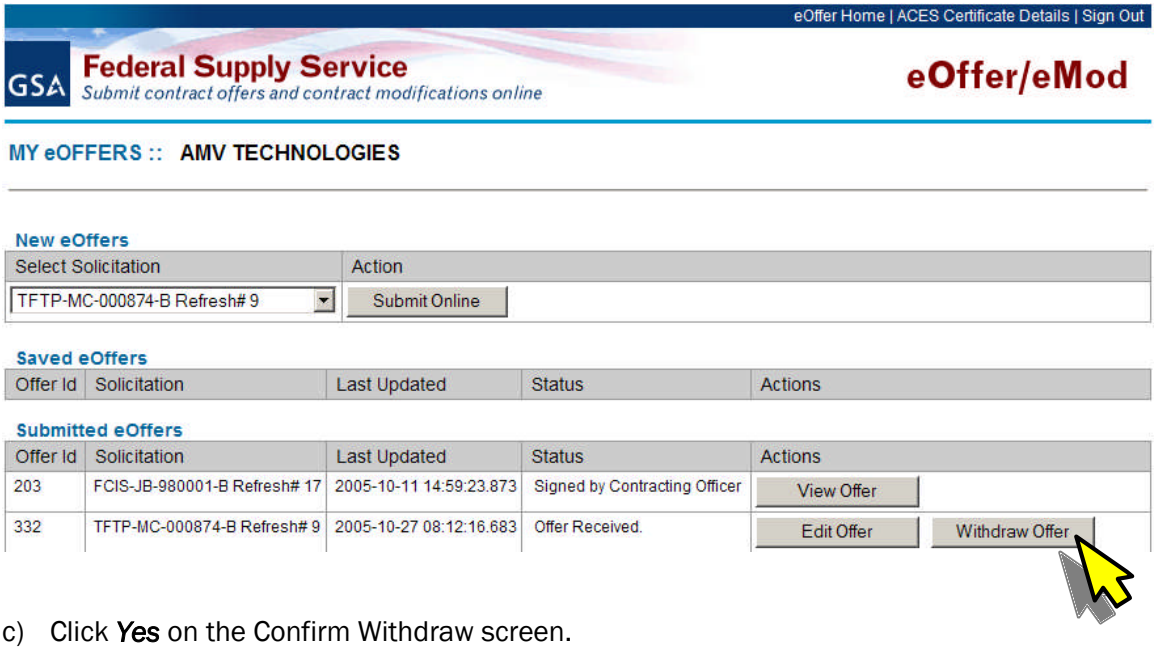
h) Ensure the information is accurate and complete all sections listed in the *Prepare Your Offer* menu and finally submit the eOffer.

2.7 Withdraw Your eOffer

An eOffer may be withdrawn anytime 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.

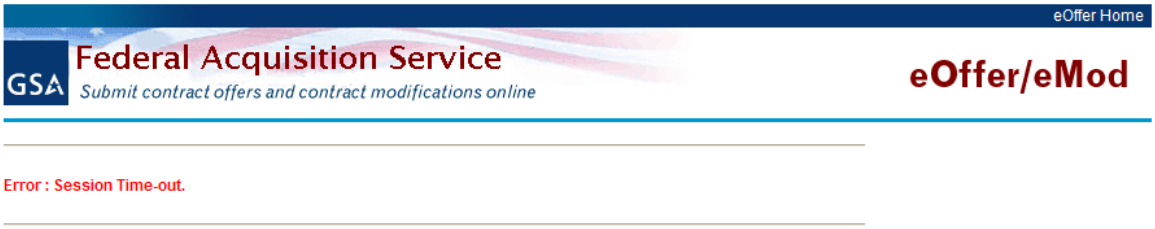


c) Click ***Yes*** on the Confirm Withdraw screen.

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

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

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.



Error : Session Time-out.