# Table of Contents

1. Introduction

2. Overview
   - 2.1 Manage Attributes
   - 2.2 Filters

3. Viewing the RFx event
   - 3.1 Guideline Acknowledgement
   - 3.2 Decline Invitation Option

4. Responding to an RFx
   - 4.1 Basic details
   - 4.2 Event Timelines
   - 4.3 Team Members
   - 4.4 Questionnaire
     - 4.4.1 Responding to a Questionnaire Offline
     - 4.4.2 Uploading the Questionnaire Response
   - 4.5 Price Sheets
     - 4.5.1 Downloading a Price Sheet
     - 4.5.2 Uploading a Price Sheet
     - 4.5.3 Selecting Preferred Currency
   - 4.6 Attachments

5. Performing Actions
   - 5.1 Viewing Upload/ Download Logs
   - 5.2 Downloading Event Summary
   - 5.3 Group Discussion

6. Submitting a Response

7. Withdrawing Response
1 Introduction

An RFx is a sourcing event that enables buyers to determine the suppliers’ capability to supply a product or a service, and the price at which they can supply it. The term RFx can refer to any of the following:

- Request for Information (RFI): An RFI is sent to new or current suppliers to confirm their ability or willingness to fulfil the organization’s requirement.
- Request for Proposal (RFP): An RFP is sent to suppliers who are found capable of fulfilling the requirement. It asks for business proposals from the suppliers and may request for additional information regarding the product or service, or the processes followed by the supplier.
- Request for Quotation (RFQ): An RFQ invites qualifying suppliers to bid for the requirement and provide price quotes.
2 Overview

On successful login, the Workspace home page is displayed.

2.1 Manage Attributes

Supplier can choose to see the attributes of supplier’s choice upfront. Manage Attributes are nothing but the columns that supplier see upfront, under all the Sourcing tabs.

To access Manage Attributes:

- Click Manage Attributes from top-right corner.

The following Manage Attributes pop-up is displayed:

- Select or de-select the check boxes as per supplier’s business requirement.
- Click Done.
2.2 Filters

Supplier can use an object as the filter for the information displayed.

To access Filters:

- Click Filters from top-right corner.

- The following Filters pop-up is displayed:

- The left pane displays the objects, and the right pane displays various types of filtering conditions based on the nature of the selected object.
- For example, in the above screen, we have selected Status, and on the right pane supplier can see different statuses.
- Select the appropriate status and click **Apply**.
- To save the filter, click this icon. To remove the filter, click icon.
3 Viewing the RFx event

Once the buyer organization has published a sourcing RFx event and invited supplier to it, an invitation mail is sent to supplier. Supplier can access the sourcing event by using the link provided in the email, as shown:

Hi Anamika Aditya,

You have been invited to participate in a sourcing event.

Here are the details:

Client Name: flydubai
Event Name: Fuel Procurement 2
Event start date/time: 1/12/2023 12:00:00 AM Arabian Standard Time
Event end date/time: 2/14/2023 11:59:00 PM Arabian Standard Time

You can use the following link to access the sourcing event: click here

Basic Instruction:
1. If you do not have a flydubai Procurement account, click here to create a new account and register yourself with flydubai.
2. After you create the password, you can log into flydubai Procurement and select the event to participate.
3. Note that the time zone of the event is Arabian Standard Time. You may be in a different time zone, and therefore, make sure you log on at the right time to avoid missing the event.

Thanks,
flydubai Procurement Team

Alternatively, supplier can access a Sourcing RFx event from My Tasks section of the Workspace.

Whenever there is a new invitation for an event from the buyer, that new event is displayed in My Tasks section.

The Event disappears from My Tasks section as soon as supplier submits the responses; event completes or decline participation.

On the RFx page, the timer section, on the upper right corner, depicts detailed information about event opening or closing, in days and time. On first access, an RFx page displayed is as shown below:
Following are the different statuses an RFx can have:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) New</td>
<td>The event is yet to be accepted.</td>
</tr>
<tr>
<td>2) Guidelines Acknowledged</td>
<td>Supplier have accepted the Guidelines.</td>
</tr>
<tr>
<td>3) Participation confirmed</td>
<td>Supplier have accepted the invitation to participate in the event.</td>
</tr>
<tr>
<td>4) Response Submitted</td>
<td>Supplier have submitted supplier’s responses for the event.</td>
</tr>
<tr>
<td>5) Event Closed</td>
<td>Response timeline has ended and if user have not submitted responses or taken any action from the menu.</td>
</tr>
</tbody>
</table>

3.1 Guideline Acknowledgement

Once the Supplier follow the link provided in the email notification or after supplier click to open the event from the Workspace home page, the RFx page is displayed. Based on the configuration selected by the buyer, initially supplier can only see Guideline with an acknowledgement section. It is only after supplier accept the Guideline, that supplier can access the rest of the RFx event.

Based on the configuration selected by the buyer, initially supplier can only see an Acceptance section. It is only once supplier accept the Guideline, that supplier can access the rest of the RFx event.

To accept the Guideline,

1) Click the **Guideline** name to read through the Guideline/NDA and then accept the Guideline. Select the **I Accept Guideline** checkbox.
6) Once supplier accept the NDA/Guideline, the status of the event changes to **Guidelines Acknowledged**.

7) Then, click the **My organization wishes to participate in this event** checkbox at the bottom and then, click the **Confirm Participation** button at the bottom right corner.

8) Click **Ok** on the subsequent success pop-up.
9) Once supplier submit the acceptance, the status of the event changes to Participation confirmed and the rest of the sections become active.

3.2 Decline Invitation Option

If supplier do not want to participate in the RFx event, supplier can decline invitation.

To decline invitation:

- Click Decline invitation.
- Click Yes on the following confirmation pop-up.
- Select an appropriate reason from the drop-down. Supplier can mention supplier’s comments in the respective comments field.
  - Click the icon to upload any attachments.
  - Click Done.
  - Click Ok on the following success pop-up.
4 Responding to an RFx

An RFx page has the following sections:

- Basic Details
- Event Timelines
- Buyer Contact information
- Team members
- Guidelines
- Questionnaire
- Price sheet
- Contract Terms
- Attachments

4.1 Basic details

The Basic Details section displays the basic information regarding the RFx event such as the event name, description, type, currency, category, business unit and region.

At the top-right corner, is the timer that indicates the time for the event to open and the closure time of response.

4.2 Event Timelines

The Event Timelines section displays the response timeline set by the buyer. The Response timeline is the time frame within which supplier can respond to the buyer. Timelines Information in 12-Hour and 24-Hour Format. User can now configure whether suppliers should see all timeline related information in the 12-hour or 24-hour format.

Configuration: By default, the timeline information is displayed in the 12-hour format.
Following screenshot displays the Event Timelines section in the 12-hour format:

<table>
<thead>
<tr>
<th>Name</th>
<th>Start Date &amp; Time</th>
<th>End Date &amp; Time</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response Timeline</td>
<td>30.11.2020 10:30 AM</td>
<td>02.12.2020 10:30 AM</td>
<td>2d 0m</td>
</tr>
</tbody>
</table>

### 4.3 Team Members

The Team Members section displays the team members that supplier has added. It enables supplier to respond to invited RFx event by collaborating with supplier’s team members.

Team members can be assigned below roles for any RFx event:

- **Primary Respondent**: The primary point of contact from Supplier Organization, ideally means the entire RFx response will be driven by this person. There can be only one Primary Respondent.
- **Collaborator**: Team member having rights equivalent to Primary Respondent. There can be multiple collaborators involved in an RFx event
- **Viewer**: Team member having only view access to event

*Note*: The above roles can be assigned or modified by the Event Author, Event Co-Author or by the Event Admin from the Buyer Organization or by existing primary Respondent or Collaborator from the Supplier Organization.

### 4.4 Questionnaire

The Questionnaire section enables supplier to answer questions added by the buyer. Supplier’s response to the questions may determine supplier score when the RFx is evaluated.

To respond to the questions, under the Questionnaire section, click the edit **edit** icon against the respective question. The following Questionnaire page is displayed:
User can respond to any questions added by the buyer, in the space provided for each respective question.

The completion indicator on the bottom left corner of the page indicates the completion status of supplier’s response in percentage.

- Click the Filters icon to apply filters on the list of questions.

Select the desired option(s) from the list and click Apply. Depending upon the type of questions configured by the buyer, the response type will vary.

4.4.1 Responding to a Questionnaire Offline

To download a questionnaire:

- From the Questionnaire section, open the desired questionnaire in edit mode.
Click the Download icon on the top-right corner of the questionnaire.

The questionnaire is downloaded in the form of MS Excel.
- Supplier can then go ahead and respond to the questions in the MS Excel itself.

### 4.4.2 Uploading the Questionnaire Response

Once supplier have responded to the Questionnaire in the MS Excel, click the Upload icon on the top-right corner.

Drag and drop or upload the MS Excel file on the subsequent pop-up and click Close.

- Supplier can view the uploaded file in the Upload/Download Log. Also, the response is updated on the UI.
Supplier need to refresh the page once, to view the response on the UI.

Note

- Click the **Logs** icon to view the list of uploaded or downloaded Questionnaires.

  ![Upload/Download Log page](image)

  The Upload/Download Log page is displayed as below:

  The log displays the file requested for, File status, File requested on, File created on, the document name and error log if any. Similarly, supplier can go ahead and respond offline to other questionnaires as well.

4.5 Price Sheets

A price sheet includes a list of items specified by the buyer. As a supplier, can provide a quotation for the required items. To view the price sheets, under the **Price Sheets** section, click the Price sheet name.
The columns and rows in the price sheet are non-editable. By default, the **Intent to Bid** field for each line item is set to Yes. This means supplier want to bid for the line item. Fill in supplier quotation/details in the Price per unit column.

In case supplier do not want to bid for the item, select No from the dropdown under the Intent to Bid column.

### 4.5.1 Downloading a Price Sheet

Supplier can download a Price sheet in the MS Excel format.

To download a Price sheet:

1) In the Price sheet section, open the required Price sheet in **Edit** mode.

2) Click the **Download** icon on the top-right corner of the Price sheet.
3) An MS Excel version of the price sheet is downloaded.

4) Supplier can then go ahead and respond to the line items in the MS Excel.

**Note**

- Supplier cannot add, edit, or delete columns in the downloaded MS Excel Price Sheet.

### 4.5.2 Uploading a Price Sheet

- Once supplier have responded to the Price Sheets in the MS Excel, click the **Upload** icon on the top-right corner of the Price Sheet to upload supplier’s response.
Supplier can view the uploaded file in the Upload/Download Log.

- Click the icon to view the list of uploaded or downloaded Price Sheets.

- The uploaded and downloaded files are displayed on the subsequent upload/download log page as shown below:

The response is also updated on the UI.

Supplier need to refresh the page once, to view the response on the UI.

Note

The log displays the file requested for, File status, File requested on, File created on, the document name and error log if any.
4.5.3 Selecting Preferred Currency

To be able to select the Preferred currency the buyer-event author needs to enable this setting before publishing the RFX to suppliers. To select the preferred currency, click drop-down arrow and select any desired currency type. Click Done.

4.6 Attachments

When a supplier adds an attachment, the Attachment Classification is blank, with the option to specify the required classification, as shown below:
5 Performing Actions

In this section, supplier will learn about the different actions that supplier can perform to an existing RFx.

5.1 Viewing Upload/ Download Logs

Supplier can view logs of all the uploaded/downloaded files. All the files that supplier upload/download from the Questionnaires or Price sheet section, for the RFx event are displayed, thus saving supplier’s time to navigate to various section to fetch the file.

View the log:

1) Click the icon and then click Upload and Download Log icon on the upper-right corner of the RFx event page.

2) The following Download Log page is displayed:

5.2 Downloading Event Summary

The Download Summary option under the Actions menu helps supplier download a consolidated zip file containing the summary of the event, guidelines, price sheets, and questionnaires.
To download the event summary:

1) Click the **Actions** icon on the top-right corner of the event page and then click **Download Summary** from the options.

The event then gets downloaded in the zip file that contains the guidelines, price sheets, questionnaires, and the event summary.

### 5.3 Group Discussion

Using the group discussion forum, supplier can view and take part in various discussion topics that are created by the buyer, as well as create supplier's own topics.

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**Note**

*Any topics that supplier create are visible only to the buyer.*

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The group discussion forum becomes active only after the event is published and supplier have confirmed participation. To open the discussion forum, click the **Discussion Forum** icon, displayed next to the event timer.

Supplier can view and respond to the discussions that the buyer may have initiated in the discussion forum. Supplier can start a discussion once the event is published.

To initiate a discussion: in the RFx event:

1) On the top-right corner, click Discussion Form.

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**Note**

*Only those team members who are invited to participate in the RFx event can view the icon.*

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2) The group discussion topic is displayed. By default, the first topic, which is created by the application, has the same name as the RFx event.
3) Select the required participants and click Save.

4) To create a topic, click the Create Topic/Discussion icon.

5) Enter the topic name and click Save.

6) Similarly, to create a discussion, click the Create Topic/Discussion icon.
7) Type the discussion name and select the topic to associate with the discussion.

8) Select the team members and suppliers who can access the topic.

Note: To create an internal discussion, do not select the suppliers.

9) Click Save.

10) Click the Add Attachment icon to attach documents, if any.

11) To post supplier’s messages or replies in the discussion, in the right pane of the page, click the discussion title.
When a supplier replies to a buyer’s message, only the buyer and his or her team members can view the reply. Other suppliers cannot view it. In an internal discussion, all the team members can view a posted message.

In a group discussion, supplier can also take the following actions.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="edit" alt="Edit" /></td>
<td>Edit the name of the discussion.</td>
</tr>
<tr>
<td><img src="refresh" alt="Refresh" /></td>
<td>Refresh the page.</td>
</tr>
<tr>
<td><img src="download" alt="Download" /></td>
<td>Download the group discussion.</td>
</tr>
</tbody>
</table>
6 Submitting a Response

After viewing all the required details on the RFx and responding to the questionnaires and price sheets, as applicable, supplier can submit supplier’s responses to the buyer.

Click the **Submit response** button on the bottom right corner of the RFx page to submit supplier’s response.

- Click **Yes** on the confirmation pop-up.
- Once the response is submitted, the status of event changes to Response Submitted.
7 Withdrawing Response

Supplier can withdraw submitted responses in a sourcing event, for revision or correction. The revised responses can then be resubmitted until the Response timeline is active.

To withdraw responses:

1) Click the Withdraw Responses button at the bottom-right corner of the desired RFx event.
2) Click Yes on the subsequent pop-up.
3) Mention the reason or comments of withdrawing supplier’s response in the field provided.

4) Click Post.

5) Supplier can also upload an attachment by clicking the Attachment icon.

6) Once supplier have withdrawn supplier’s responses, supplier can modify it as required and resubmit it again as explained in Responding to an RFx.
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