

## Requesting Proposal Revisions

Once the Opening Date/Time has been reached for a formal Bid and the response period has closed, vendors can no longer submit new Quotes or edit the Quotes that they have already submitted in response to the Bid. However, once a Bid has been opened, you can request clarifications, revisions and Best and Final Offers (BAFOs) via the proposal revision feature on the Revisions tab of the Bid Tabulation (Bid Tab) for that Bid.

### Selecting Quotes for Revision

Requesting a proposal revision is done by choosing particular Quotes and utilizing a system email to notify the vendors that created them that a revision is requested. A copy is then made of each Quote, and the copies are assigned the same number as the original with "-RX" appended to the end, where "X" is the number of revisions that have been requested for that Quote. This new copy of the Quote is made editable to the vendor until you close the revision process.

To request a revision, first you'll need to decide which vendors you'd like to request a revision from and to determine if you would like to send multiple vendors the same revision request email, or if you will need to personalize the request email for individual vendors.


To send the same request to multiple vendors, pick a **Due Date** for each revision by clicking the calendar icon, then select the check box in the **Request Revision** column for each vendor to receive the request email and click the **Send Notification to Selected Vendors** button on the bottom of the screen. To send a revision request to one vendor, pick the **Due Date** for that vendor's revision, then click the **Create Notification** button in the **Notification Actions** column next to the vendor you'd like to request a revision from.

Note that the date selected in the **Due Date** column does not effect when you are able to cutoff the revision process and view a vendor's submitted revision. At any point you can close the revision process and either start again or continue with the evaluation and award process.


**Bid Tabulation for Bid #ADSP010-00000035**

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Revision: Revision 1

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
<input type="checkbox"/>	Periscope Holdings, Inc.			<input type="text"/>	 <a href="#">Create Notification</a>

[Send Notification to Selected Vendors](#)

April 

**April 2010**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

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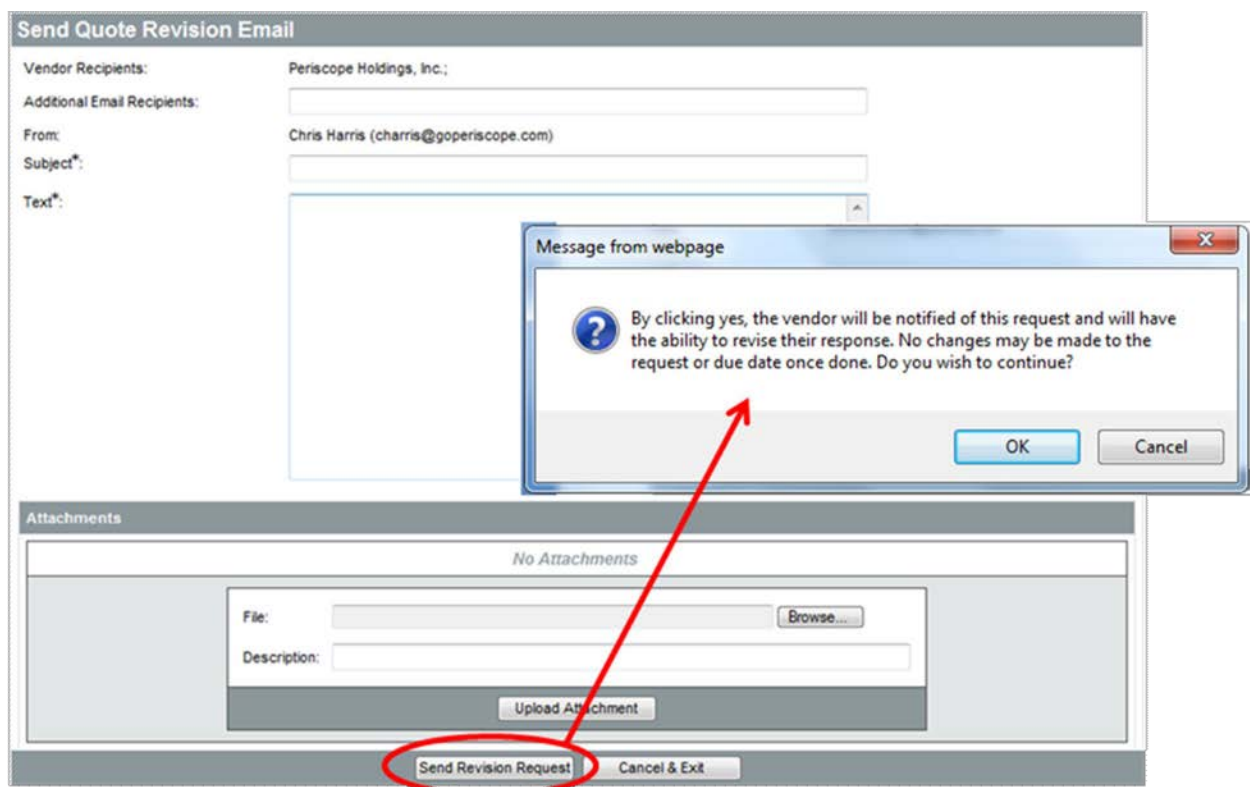
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Note that while the revision process remains open, you will be prohibited from recommending award and the vendor can submit and withdraw their Quote as needed. They are also able to acknowledge any amendments that were applied to the Bid prior to the Bid Opening Date/Time.

### Sending the Revision Request Email

Next, the **Send Quote Revision Email** screen will display enabling you to develop the email message that will be sent requesting the proposal revision(s), including adding **Additional Email Recipients**, a **Subject**, **Text** (body), and **Attachments**. Once complete, click the **Send Revision Request** button along the bottom of the screen. A pop-up message will display confirming your intent to make vendors' Quotes editable and to send the email.

Note that the **Text** field does not support standard formatting, so it is recommended that you limit the text in this field and include any instructions in attached documents. Also note that this email will not appear in your email's Sent folder, so if you need a copy for your records, include your own email in the **Additional Email Recipients** field.



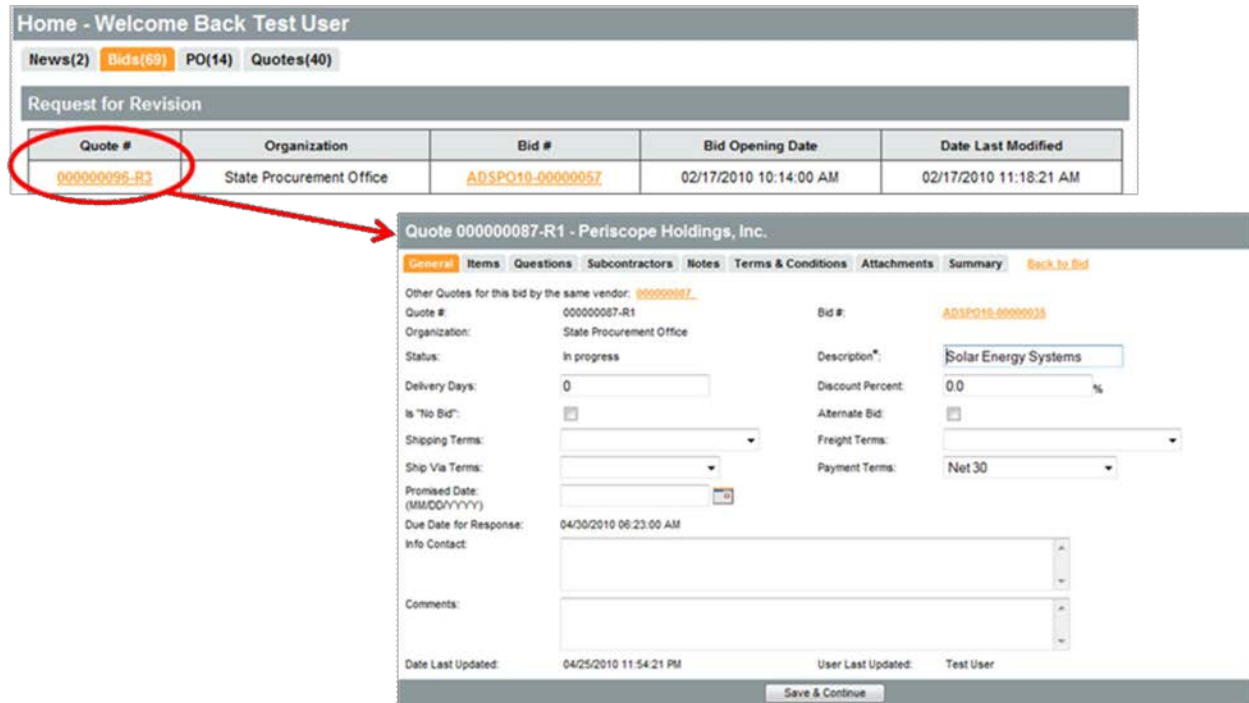
The screenshot shows the 'Send Quote Revision Email' web form. The form includes fields for 'Vendor Recipients' (filled with 'Periscope Holdings, Inc.'), 'Additional Email Recipients' (empty), 'From' (filled with 'Chris Harris (charris@goperiscope.com)'), 'Subject\*' (empty), and 'Text\*' (empty). Below these is an 'Attachments' section with a 'No Attachments' message and a file upload area containing 'File:', 'Description:', a 'Browse...' button, and an 'Upload Attachment' button. At the bottom of the form are two buttons: 'Send Revision Request' (circled in red) and 'Cancel & Exit'. A 'Message from webpage' dialog box is overlaid on the form, containing a question mark icon and the text: 'By clicking yes, the vendor will be notified of this request and will have the ability to revise their response. No changes may be made to the request or due date once done. Do you wish to continue?'. The dialog has 'OK' and 'Cancel' buttons. A red arrow points from the 'Send Revision Request' button to the dialog box.

### Vendor Revision Response

Vendors will be able to access their editable Quote from the **Request for Revision** section on the Bids tab of their Homepage. The editable Quotes that display in this section are sorted from newest to oldest. Upon selecting the link in the **Quote #** field, all fields will be open for editing, allowing the vendor to change all aspects of their Quote, including their item price quotes, question answers, Terms & Conditions response and

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exceptions, and attachments. After completing the editing process, the vendor can submit their revision by clicking **Submit Quote** from the Summary tab. Revisions can be submitted and withdrawn as desired by the vendor until you choose to close this revision round.



**Home - Welcome Back Test User**

News(2) Bids(68) PO(14) Quotes(40)

**Request for Revision**

Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
000000095-R3	State Procurement Office	ADSP010-00000057	02/17/2010 10:14:00 AM	02/17/2010 11:18:21 AM

**Quote 000000087-R1 - Periscope Holdings, Inc.**

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Other Quotes for this bid by the same vendor: 000000087

Quote #: 000000087-R1 Bid #: ADSP010-00000035

Organization: State Procurement Office

Status: In progress Description\*: Solar Energy Systems

Delivery Days: 0 Discount Percent: 0.0 %

Is "No Bid": ☐ Alternate Bid: ☐

Shipping Terms:  Freight Terms:

Ship Via Terms:  Payment Terms: Net 30

Promised Date: (MM/DD/YYYY)

Due Date for Response: 04/30/2010 06:23:00 AM

Info Contact:

Comments:

Date Last Updated: 04/25/2010 11:54:21 PM User Last Updated: Test User

[Save & Continue](#)

Note that if a revision round has been closed, and the vendor never submitted a response, the copy of their Quote that was created to allow editing will continue to appear on their Homepage under the **Request for Revisions** section. However, upon selecting the Quote, a pop-up message will display alerting the vendor that the revision process for that Quote was ended. At that point, the Quote will disappear from their Homepage.

### Closing Revision Process

Once you are ready to review the revised Quotes, return to the Revision tab on the Bid Tab of your Bid and click the **Close Revision Process** button on the bottom of the screen. If a revision was submitted by a vendor, that revised Quote will replace their original on the Bid Tab. You are now able to continue with evaluation and award, or you can conduct another revision round by selecting the next round in the **Revision** dropdown and then starting the request process again.

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**Bid Tabulation for Bid #ADSP010-00000035**

Quotes **Revisions** Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Revision: Revision 1 ▾

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
	Periscope Holdings, Inc.	<a href="#">View</a>	04/28/2010 06:23:41 AM	04/30/2010 06:23:00 AM	Email sent to charris@periscopeholdings.com at 04/28/2010 06:23:49 AM

**Close Revision Process**

**Bid Tabulation for Bid #ADSP010-00000035**

Quotes **Revisions** Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Revision: Revision 2 ▾

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
<input type="checkbox"/>	Periscope Holdings, Inc.				<a href="#">Create Notification</a>

**Send Notification to Selected Vendors**