

Proactis Sourcing Managed Services

Vendor Participant FAQ



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Welcome to Proactis Managed Sourcing Services. We do all we can to ensure your eSourcing experience is a pleasant one. This guide was designed to address many of the questions we receive from vendor participants. If you cannot find the answer to your question within this document please contact us at Support@ProactisManagedServices.com or (800) 475-2149.

1 Getting Started

1.1 How do I access my login and/or password?

Use the link provided in your email invitation to login and access your profile.

If you are a new user (or the profile is new), you will be asked to create a password upon login.

If you are a current user or (or the profile has been set-up previously), please enter the password you already have set-up.

If you have forgotten your password, please select 'Forgot your password' from the Login screen. You will be prompted to enter your User Name. Note, your User Name is not your email address. After you Submit the 'Forgot your password' request an email notification will be sent to you. Use the link provided in the email to login, enter your User Name, pick a new password and confirm your password.

1.1.1 Can multiple people on the sales team access an event using the same login credentials?

If your company chooses to do so multiple users may log on with the same username/password. Please note, for security purposes Proactis recommends each person create their own user profile and login information. Additionally, only ONE user may place quotes during a live sourcing event.

1.2 How can I find out how many people I'm bidding against?

Proactis is not at liberty to disclose the number of companies invited to, or participating in, an online sourcing project. You may contact the event host for this information, however they may or may not choose to share this level of detail.

1.3 What is / how do I find the name of my event?

Log on to the Proactis Managed Services Sourcing site at www.ProactisManagedServices.com. Your events are listed on the home page under one of the following tabs: Pending & In Progress, Pending Award, or Award. Additionally, the event name will be in the subject of the initial email invite sent to you (e.g. "XYZ Company Widgets Request for Quote.")



1.4 Who do I call if I have questions about the bid I've been invited to?

Proactis is your primary point of contact for the eSourcing project you've been invited to participate in. If a question arises that needs to be addressed by the event host, Proactis will facilitate communication between the host company and all event participants. Of course, you're always welcome to contact the host directly for additional information. It is helpful if you copy the primary Proactis Managed Sourcing Services contact to ensure any follow up questions are addressed prior to the pre or live bid.

1.5 How do I get a copy of the event line items?

To export a copy of line items in a sourcing project:

- Log on to the Proactis Managed Services Sourcing site at www.ProactisManagedServices.com.
- Click on the "D" (details page) link to the left of the event name
- In the upper right corner of the items list you'll see an Excel icon and "To Excel" – click on this icon to download the item list
- Open or save the document to your computer for future reference

Note – You can also download items from the "V" (view page) after the pre or live event in the same manner. The excel document from the view page will also contain a second tab with event totals.

1.6 How do I get a copy of the General Instructions?

To export a copy of the event general instructions in a sourcing project:

- Log on to the Proactis Managed Services Sourcing site at www.ProactisManagedServices.com.
- Click on the "D" (details page) link to the left of the event name
- Scroll down until you reach the General Instructions area of the event page
- In the header above the General Instructions you'll see an option to download a PDF or Word document – click one of these icons to download
- Open or save the document to your computer for future reference

1.7 I don't offer the same pack size or UOM as the bid asks for. Now what?

In order to keep quoting 'apples to apples' we recommend converting your pricing to the bid requirements when you place your actual quote. For example, if the bid asks for a price per pound quote and you offer your product in ounces, you would convert ounces to pounds then place your quote. Then enter a quote note with your actual pack size and price.

1.8 What is a Max Quote?

A max quote is determined by the event host and indicates the maximum price they will allow participants to quote during a reverse auction.



1.9 What is a Minimum Quote (forward bid)?

A minimum quote is determined by the event host and indicates the minimum price host will allow participants to quote during a forward auction.

1.10 What is a Blind Reserve?

A blind reserve is determined by the event host and indicates the target price or price point at which the host is willing to consider award of the business.

2 Training

2.1 Will I be able to practice entering quotes and notes prior to the live bid?

Yes, Proactis creates an exact replica of each event for training purposes. All vendors who are new to the system are encouraged to access this training site (see instructions below) to get comfortable with the process.

2.2 Where do I access the training site?

To access the training site log on to the Proactis Managed Services site at www.ProactisManagedServices.com. Under the Pending & In Progress tab you'll see an event listed up to three times - each designated with the event type – Pre, Live, or Training (Note: not all events have a pre-bid). Training events are open from the time invitations to participate are sent until one hour prior to pre-bid opening. If there is not a preliminary bid scheduled the training site will close one hour before the live bid.

2.3 I still have questions. Can I contact someone for assistance?

A Proactis primary point of contact is provided for every event. You can locate who your primary point of contact is by accessing the 'Additional Details' section on Details page for the event you need assistance on.

To locate your Proactis Managed Services Primary Contact:

- Log on to the Proactis Managed Services site at www.ProactisManagedServices.com
- Click on the "D" (details page) link to the left of the event name
- Scroll down until you reach the Additional Details section

Additionally, the Proactis managed services specialist team is available to answer questions and guide you through the process. If you have questions or are unclear on any aspect of an event please contact us at Support@ProactisManagedServices.com or (800) 475-2149.



3 Request for Information (RFI)

3.1 I've answered these questions before. Can I insert previous responses?

Most likely. If you've answered a particular question that's been saved in the Proactis RFI Library your response has been stored for future use. Simply click on the blue information icon to the right of each question to show previous responses. Choose the appropriate answer and edit as necessary.

3.2 How do I print the RFI questionnaire questions and my responses?

With the RFI open, click the print button in the upper-right corner of the RFI window. Once the questionnaire is submitted you can pull a Report. This option is located in the top menu bar on the Details page.

3.3 How do I save a copy of my RFI?

With the RFI open, click the save button in the upper-right corner of the RFI window.

4 File Uploads

4.1 How do I upload a document?

Please note, if an RFI questionnaire is associated to the event it must be completed first before you can upload files.

To upload a document in an eSourcing project:

- Log on to the Proactis Managed Services site at www.ProactisManagedServices.com
- Click on the "D" (details page) link to the left of the event name
- Once you've accessed the details page you'll find a menu in the upper right corner - select the Document Center tab
- Select 'Browse' and locate your file on your computer
- Click the file name
- Select Upload
- Click on Details in the top menu bar and confirm your file has been uploaded

4.2 Will other participants see my uploaded documents?

No, event participants only have access to their own uploaded documents.



4.3 How can I tell if my files were uploaded properly?

Click on 'Details' in the top menu bar to confirm your file has been uploaded – they should be listed in the Associated Files section of the page.

5 Pre-Bid & Live Bid

5.1 What is the purpose of a pre-bid?

A pre-bid is used for many reasons. The most common objectives of a pre-bid are:

1. To allow participating vendors to get comfortable with the quoting process (i.e. submitting quotes, notes, etc.)
2. To ensure everyone is quoting apples to apples. If a vendor quotes significantly higher or lower than the group, the managed services support team will place a call to review specifications, pack sizes, etc.
3. In events with many line items, a pre-bid makes the bidding process a bit easier by allowing additional time to load initial pricing.

5.2 I want to revise my quote note, do I have to wait until the live bid opens up?

Quote notes can be updated at any time during the pre or live bid period.

5.3 After I submit all my quotes during a pre-bid, is there a “final” submit button?

As you submit each quote, note, term, etc. it's recorded in the system in real time. There is no need to finalize.

5.4 Will my preliminary quotes and notes carry over to the live bid automatically?

Any pricing, notes, terms, etc. entered during the pre-bid will automatically populate in the live bid. Once you enter this information into the pre-bid screen no further action is required to carry data into the live bid.

5.5 I'm not changing my quote, why do I need to do the pre-bid?

By logging in and placing a pre-bid you have the opportunity to familiarize yourself with the quoting process and contact our managed services specialist should any issues or questions arise. Also, this helps the managed services support team ensure all participants are quoting apples to apples and



ensure a fair bid. You are not required to change your pricing during the live bid once you've entered it in the pre-bid.

5.6 Why am I not able to see the lowest bid?

There are several participant views available for eSourcing hosts to choose from. The view type is typically selected based on the category. Potential view types include:

- Low Quote: participants can only see their quote and the low quote
- Blind with Low Quote: participants can only see their quote, but the system will highlight their quote in yellow if they are the low quote
- Blind without Low Quote: participants can only see their quote
- Full View: participants in this view can see all quotes
- Ranking: This option may be included in any of the above view types. Vendors will see their rank with respect to the other participants. A ranking of '1' would indicate the best quote.

5.7 I made an error on my bid, what do I do now?

During the pre-bid you may adjust your quotes as needed. During the Live event, if you've entered an inaccurate price please call Proactis Managed Services Specialist at (800) 475-2149 immediately and if possible, while the bid is still open. We can assist in correcting any errors (including increasing a quote when necessary).

Please do not enter a note stating there is an error in your pricing.



5.8 How do I quote?

Quotes can only be placed during the indicated Pre and/or Live Event times. To place quotes in an eSourcing project:

- Log on to the Proactis Managed Services site at www.ProactisManagedServices.com
- Click on the “Q” (Quote page) link to the left of the event name
- Alternately, from any other page within the event you’ll find a menu in the upper right corner - select the Quote tab.
- On the left portion of the screen you’ll find the list of items followed by totals
- The right portion of the screen you’ll find the quote field (displayed at the item level)
- Enter a quote, select ‘submit’, and navigate to the next item with the arrow icon or by selecting the item in the event view window

If enabled rebates, tax, delivery, and ‘quote at no cost’ will be visible as well.

For large, complex events spreadsheet quoting may be enabled, giving participants the ability to download the host company’s pricing spreadsheet as an Excel template. Vendors input pricing and upload the spreadsheet rather than entering individual quotes.

5.9 What’s the difference between ‘event level’ and ‘item level’ notes?

Every bid allows vendors to create two note types; global or event level notes, and item notes. Event level notes apply to the entire program. Item notes are specific to an individual item.

5.10 I’m logged on early for the live bid. Why can’t I change my quote?

You will have the ability to enter or change a quote during the active pre or live bid time frame only. Refer to the clock at the top of your screen. It will display the time remaining until the start of the live bid.

5.11 How do I quote Funds/payment terms?

If funds and/or payment terms are quotable in your event (sometimes they are not) you’ll see a button for each (funds, terms) at the top of the page while you are in the event (Details page or Quote Page). You will have to leave the quote screen to access terms or funds. Funds/Terms can be quoted during the active pre-bid or active live bid.

5.12 I can’t see the clock / The event data is showing up incomplete.

The most common reason for this issue is full browser cache. For more information about how to clear your web browser’s cache, cookies, and history visit our help page.



5.13 How do I save a copy of my bid?

To export a copy of line items with quotes and totals after an eSourcing project:

- Log on to the Proactis Managed Services site at www.ProactisManagedServices.com
- Click on the “Q” (Quote page) after the pre or live event.
- In the upper right corner you’ll see an Excel icon and “To Excel” – click on this icon to download
- Open or save the document to your computer for future reference

6 After A Live Bid

6.1 I had all the yellow highlights, why did I not automatically win?

Most hosts of eSourcing events award based on a combination of considerations including, but not limited to quality, service levels, and price.

6.2 When do I find out if I won?

Some hosts will specify an anticipated award date, which is posted in the Additional Details section of the details page or within the General Instructions. If a date is not listed, please feel free to contact your Proactis primary contact.

