Supplier Guide: Responding to an RFx
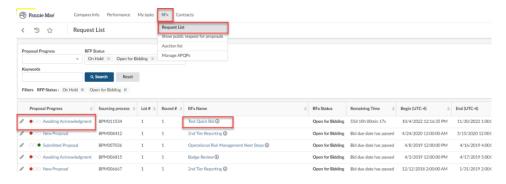
Steps to Respond to an RFx:

Recommended browsers that are compatible with ProcureOne are as follows:

- **Microsoft Edge, Google Chrome, & Mozilla Firefox**

1. Access the ProcureOne login page by clicking the link provided in an RFx invitation or by going to the website; **https://procureone.fanniemae.com**

2. ProcureOne may also be accessed through the FannieMae.com website. On Fanniemae.com, select **Suppliers** from the bottom menu of the website. From there, find the link to contracting opportunities.

3. Login by entering your **Login** and **Password.** The Login is the email used during registration.

   a. If you have forgotten your password, click the *Lost your password?* button
   b. If you have not registered on ProcureOne, do so now by selecting **New Supplier? Register Now**
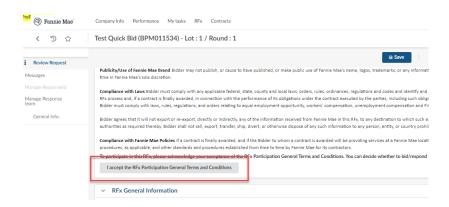

Supplier Portal Home Page:

4. If your company has been invited to participate in an RFX, the RFx will appear in the **Request List** on the Homepage after your login to ProcureOne. Open the RFx by clicking on the **Hotlink** or the **pencil icon**.

Review Request:

5. The screen opens with the **Acknowledgement** page on the **Review Request** tab. Click **I accept the RFx Participation General Terms and Conditions**. This must be completed before any additional information/steps will be made available.
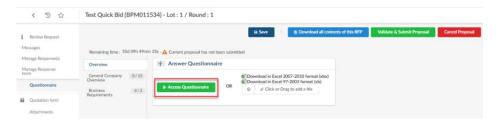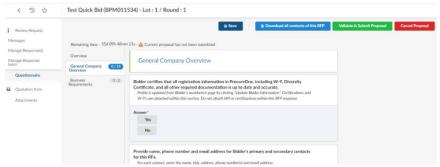
6. You will be in a new screen, here you will need to select either **WILL BID or NO BID.** If you select **WILL BID**, click **Confirm**, the RFx documents are visible. If necessary, you will be able to decline to respond at a later point after you have reviewed all of the contents.

7. You can start the questionnaire by clicking **Questionnaire** on the left-hand side of the screen. the **Overview** and **Answer Questionnaire** section will display. Within the **Answer Questionnaire** section, click **Access Questionnaire**
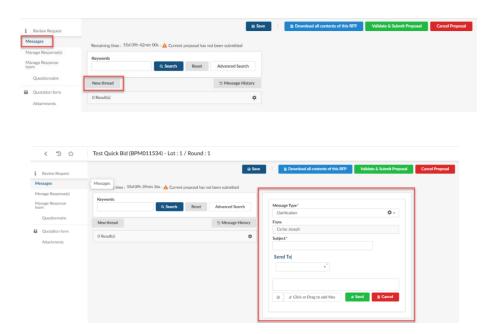

8. You will now see various sections of the **Questionnaire and any Attachments** corresponding to this event. Answer the questions.
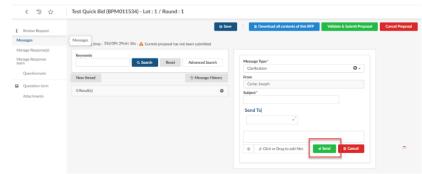

Messages: (Sending a message to Fannie Mae sourcing personnel or other contacts within your company)

9. Click the **Messages** tab, click the ***New thread*** button. A draft message window will appear on the right-hand side. The suppliers can only send messages to the Sourcing Personnel and other contacts within their company attached to the RFx
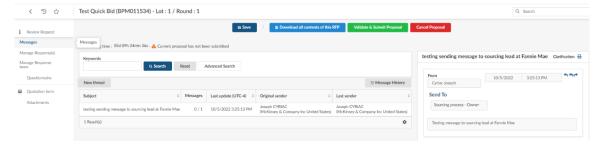
10. Drafting the Message

   a. **Message Type** field defaults to **Clarification** – leave it at that
   b. **From** field: will display your name
   c. **Subject** field: enter a subject
   d. **Send To** field: Select the person to whom you will be sending the message to
   e. Enter your message in this section
   f. **Click or Drag to add files**: add all supporting documentation
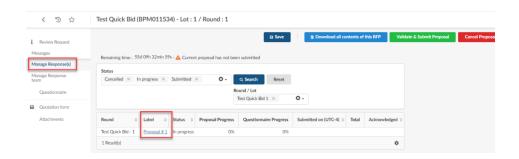   g. Click **Send** when ready to send

11. Message Thread- The message thread for that clarification has begun and a read-only view of the message will appear
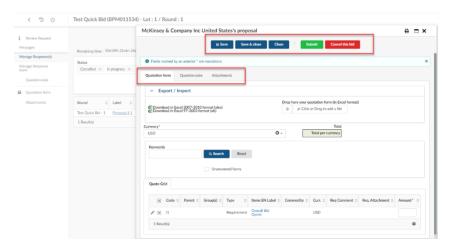

Manage Response(s):

12. You can access and response to the event by clicking on the **label** *Proposal#1*.
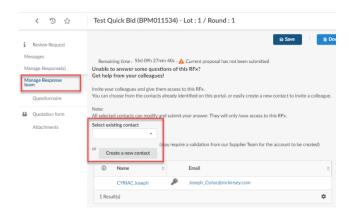
13. Once you click **Proposal#1,** the tool will display a page where you respond to the event and enter the information under each tab (Quotation form, General info., Questonnaire, & Attachments)

Manage Response Team:

14. You can invite colleagues to access and contribute to the event. Note that if they do not have a login, they will need to be validated by the Fannie Mae's supplier team.
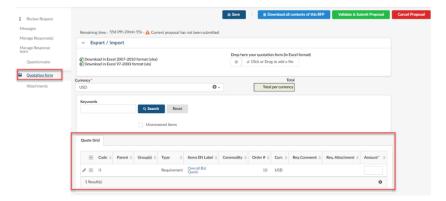
Questionnaire:

15. Click the **Questionnaire** tab and answer the questions listed. Note: In order to submit your proposal, you **must** respond to all required questions. It is recommended that you respond to all applicable questions. Click the **Save** button often while answering the questions to save your responses.

16. Sections where you have answered **at least 60%** of the questions will show **green** on the progress bar.

17. Sections where you have answered **less than 60%** of the questions will show **red** on the progress bar.

18. Required answers are marked with a red astrix. If you attempt to submit your response without completing all required answers, the system will indicate missing required fields.

19. You will be able to submit your response even if there are some sections showing red on the progress bar if you have answered every required question.
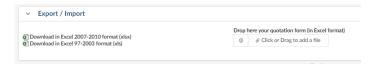

Quotation Form:

20. Next, select **Quotation form** from the left navigation bar.

21. If the RFx instructions require you to enter just one amount (typically, the total cost of ownership (TCO)), enter the **Amount** in the field and click **Save**.

22. If there is more than one item listed in the Quote Grid, then you can download, complete, and upload a pre- filled quotation spreadsheet. Download the Excel spreadsheet in one of the formats listed. Open the spreadsheet and click on the **Quote Grid** tab. Complete the **Amount** field. Then save the Excel file.

23. The screen will open, indicating that the spreadsheet/quote grid has been updated. Click **Import items and close** to upload the spreadsheet and close the tab, or click **Import items** to upload the spreadsheet and continue working on the **Quotation form** tab.

Attachments:

24. Select the **Attachments** tab to attach any documents that support your response to the RFx.
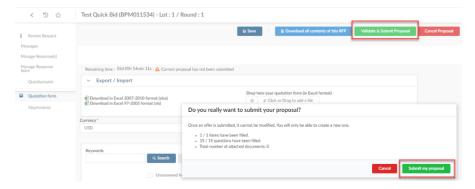
25. Attach documents to the file area.

26. Once completed, click submit the Response on the top of the page.

Submit your Response:

27. If you are not ready to submit your proposal, click the **Save** button and you can return to your response at a later time.

28. If you have attached all necessary documents and your response is complete, click **Validate & Submit Proposal**.

29. A confirmation message or pop-up window with required fields that remain unanswered will appear.

30. After you have completed all require responses, click **Validate & Send my answer**; a confirmation message will appear. Click **Submit my Proposal**

31. You will receive an email to confirm your submission.
    a. You will see the following at the top of the screen indicating that your response has been submitted:

32. Logout of your account in the upper right-hand corner