



Supplier Guide: Responding to an RFx

Steps to Respond to an RFx:

Recommended browsers that are compatible with ProcureOne are as follows:

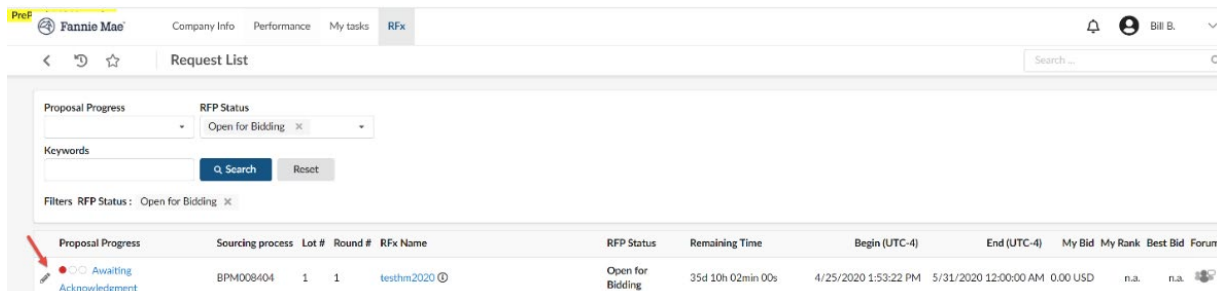
- **Microsoft Edge, Google Chrome, & Mozilla Firefox**

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 **Acknowledgment** page on the **Review Request** tab. Click **I acknowledge receipt of this RFP**. This must be completed before any additional information/steps will be made available.



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Review Request

General Info.

Messages

Manage Response team

Prepare Response

Manage Response(s)

To keep the Online Sourcing event contents confidential, as applicable, the Non-Disclosure Agreement (NDA) between Fannie Mae and Bidder controlling the exchange of confidential information in the context of proposed new services shall further control.

Bidder shall make these products and/or services available to Fannie Mae at the time requested in this Online sourcing event. Bidder should be aware that all bids including services, expenses, and discounts shall represent a totality of all costs and fees charged to Fannie Mae.

Bidder may not disclose or make available to any third party your password for the Sourcing Tool. If you believe that someone else has obtained access to your password, you must immediately notify Fannie Mae, take any steps necessary to protect the disclosed information, and change your password.

Bidder may not copy, translate, disassemble, or decompile, nor create or attempt to create, by reverse engineering or otherwise, the software in the ProcureOne Sourcing Tool (the "Sourcing Tool"), nor shall you make derivative works thereof.

Fannie Mae assumes no responsibility or liability for any technical difficulties, including, without limitation, communications breakdowns, system failures, and software failures, that you may encounter in connection with your efforts to participate in this Online sourcing event.

If Bidder accepts the Event Terms and enters into the Online sourcing event, but does not wish to participate further in the process, Bidder is under no obligation to do so.

Fannie Mae reserves the right to:

- Discontinue this process without obligation
- Extend the response time-frame, at Fannie Mae's sole discretion
- Reject any Proposal, all Proposals, or any portion of one or more of the Proposals
- Not enter into any contract
- Award a contract to any participating or non-participating bidders
- Withhold information pertaining to any final selection process

To answer to this RFx, please acknowledge receipt

☐ I acknowledge receipt of this RFx

6. Once you select **WILL BID** and click **Valid**, 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.

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Review Request

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✓ Data has been saved

Remaining time : 35d 10h 00min 44s - No proposal has been submitted

Receipt acknowledged on 4/25/2020 1:59:10 PM (UTC-4)

To answer to this RFx, please confirm that you intend to bid.

☒ WILL BID: our intent is to respond to this RFx.

☐ NO BID: we will not be able to respond to this RFx.

Valid

7. You will now see items shown below on the following screen. All attached Fannie Mae RFx documents will appear **at the bottom of this page**. Click **View Questionnaire** or **Access to quotation form** to view these documents. Alternatively, the **Quotation form, Questionnaire and Attachments** tabs are also located on the top left side of the screen.

Messages:

8. Click on **Messages**, 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

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Messages

My Company Information

Exceptions

Improvement Plans

Save

Download all contents of this RFP

Validate & Submit Proposal

Cancel Proposal

Remaining time : 35d 09h 56min 30s - No proposal has been submitted

Keywords

Search

Reset

Advanced search

New thread

Message History

0 Result(s)

Message Type *

Clarification

From

Bisbee Bill

Subject *

test

Send To

Sourcing process - Owner

CGI Technologies And Solutions Inc.

> CGI Technologies And Solutions Inc - BISBEE BILL

Cancel



9. Drafting the Message

- Message Type** field defaults to **Clarification** – leave it at that
- From** field: will display your name
- Subject** field: enter a subject
- Send To** field: Select the person to whom you will be sending the message to
- Enter your message in this section
- Click or Drag to add files:** add any and all supporting documentation
- Click **Send**

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

Manage Response Team:

- You can collaborate with colleagues on the RFX response in the **Manage Response Team** tab by clicking **Create a new contact** and completing the fields.



Prepare Response – General Info.:

12. To start the RFX response, click the **Prepare Response** tab.
13. Enter the name of the response in the **Label** field. By default, the system will enter **Proposal # X** in this field.
14. All other fields are optional. You can attach the documents that you want included in your response here.

Prepare Response – Quotation Form:

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

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

17. 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.

Download in Excel 2007-2010 format (xlsx)
 Download in Excel 97-2003 format (xls)

Drop here your quotation form (in Excel format)

Click or Drag to add a file



18. The screen below 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.

Prepare Response – Questionnaire:

19. 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.
20. Sections where you have answered **at least 60%** of the questions will show **green** on the progress bar.
21. Sections where you have answered **less than 60%** of the questions will show **red** on the progress bar.
22. Required answers are marked with a red bar. If you attempt to submit your response without completing all required answers, the system will indicate missing required fields.
23. You will be able to submit your response even if there are some sections showing red on the progress bar as long as you have answered every required question.

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Remaining time : 35d 09h 52min 22s - No proposal has been submitted

Overview

General Company Overview 0 / 13

Supporting Materials Overview 0 / 3

Campaign < Medium Quote Template >

Supplier CGI Technologies And Solutions Inc

Organization 006 - Servicing Production Support

Answered by Bisbee Bill

Commodity Advertising: Creative Services

Answer Questionnaire

Access Questionnaire

Download in Excel 2007-2010 format (xlsx)

Download in Excel 97-2003 format (xls)

Click or Drag to add a file

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Remaining time : 35d 09h 50min 45s - No proposal has been submitted

Overview

General Company Overview 0 / 13

Supporting Materials Overview 0 / 3

General Company Overview

Enter Bidder's Primary and Secondary Contact Information for this RFx

For each contact, enter the name, title, address, phone number(s) and email address.

Answer

Bidder certifies that its Bidder profile within Fannie Mae's Procurement system includes current information, including latest certificates of insurance and diversity, W-9, and other required items as requested and attached on profile tab.

Profile is updated from Bidder's workbench page by clicking "Update Bidder Information". Certifications and W-9's are attached within this section. Do not attach W9 or certifications within this RFP response.

Answer

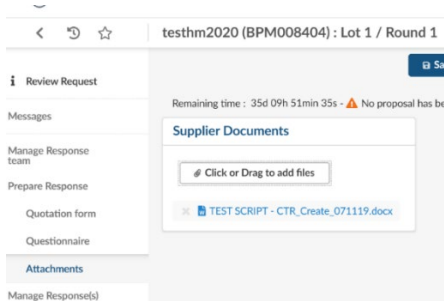
Yes No

How many years has your company been in business?



Prepare Response - Attachment:

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



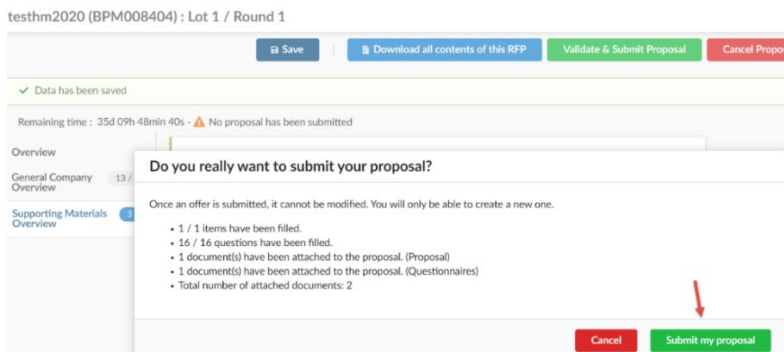
26. Once completed, click submit the Response on the top of the page.

Submit your Response:

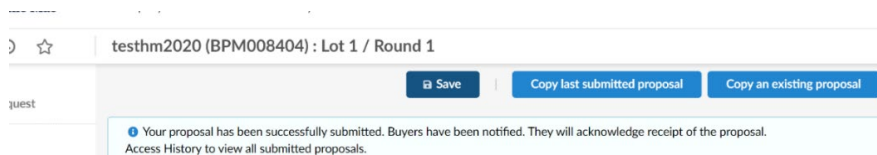
27. If you are not ready to submit your proposal, click the **Save** button and you can return to your response at a later time.
28. If you have attached all necessary documents and your response is complete, click **Validate & Send my answer**.



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