

How to Use the Supplier Portal to Participate in the RFX

Step 1: Log into the Supplier Portal and Access the RFX2

Step 2: Review and Accept RFX Guidelines/Prerequisites.....3

Step 3: Review RFX Details.....4

Step 4: Ask Questions to AHA using the Discussion Forum6

Step 5: Prepare Your Proposal - Answer Questionnaires.....7

Step 5: Prepare Your Proposal - Complete Price Sheets8

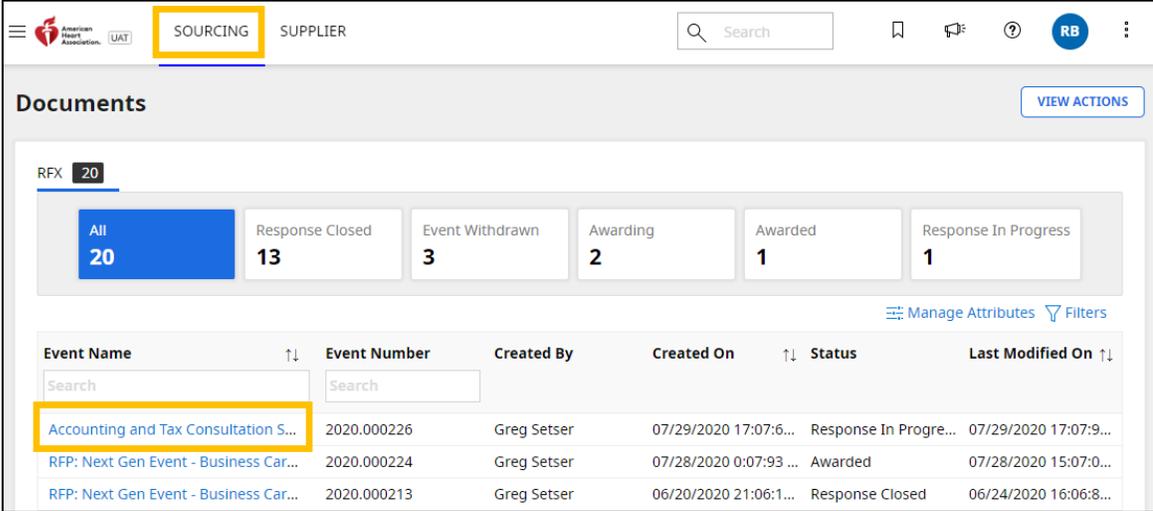
Step 5: Prepare Your Proposal - Upload Additional Attachments.....9

Step 6: Submit Your Proposal..... 10

Optional Step: Add Additional RFX Collaborators.....11

AHA Supplier Portal Guide: Participate in RFx

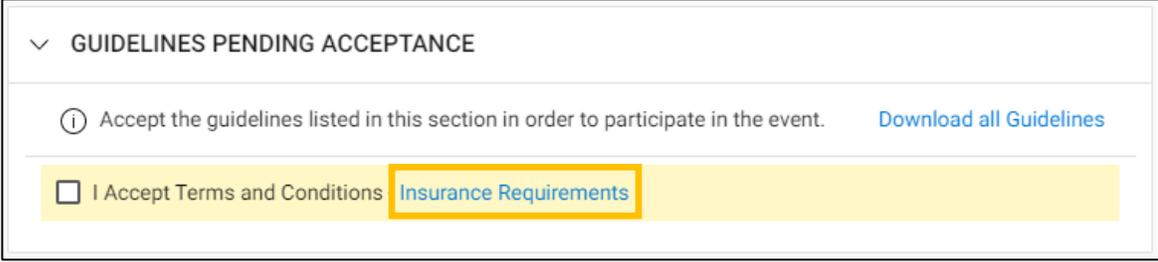
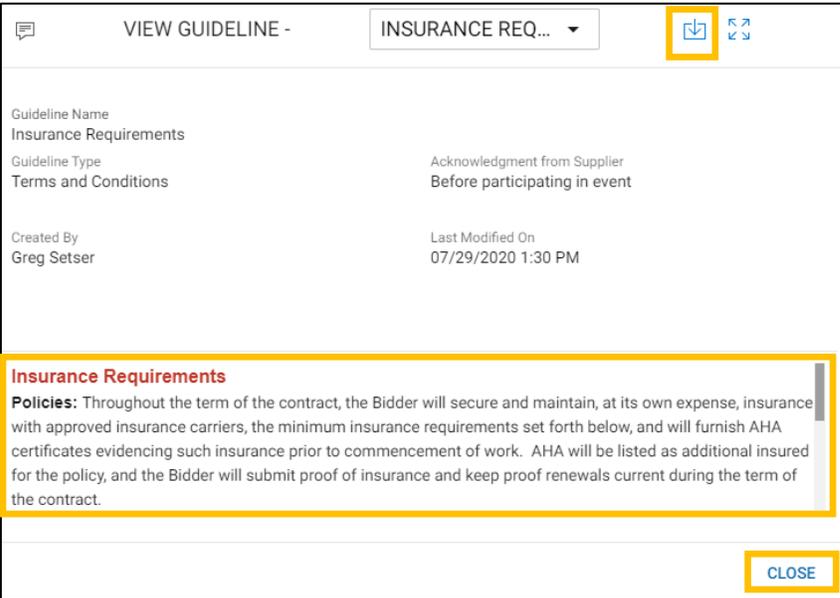
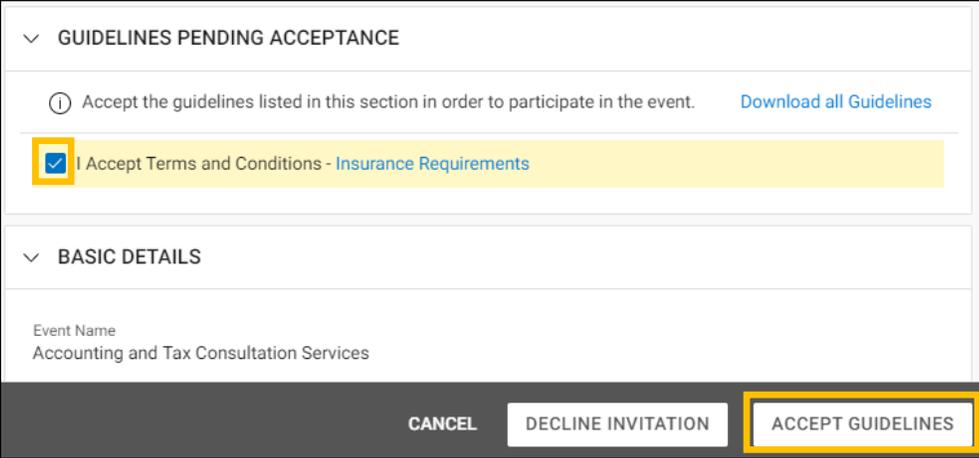
Step 1: Log into the Supplier Portal and Access the RFx

Step	Description																								
1	<ul style="list-style-type: none"> • Within your web browser go to https://smart.gep.com/ • You will be taken to a login screen where you will enter your Username and Password. 																								
2	<ul style="list-style-type: none"> • Once you are logged in, click on the SOURCING tab at the top of the page • Click on the name of the RFx within the list in the center of the screen <i>(Note: The list shows RFx's your invited to participate in along with all publicly posted RFx's)</i>  <table border="1"> <thead> <tr> <th>Event Name</th> <th>Event Number</th> <th>Created By</th> <th>Created On</th> <th>Status</th> <th>Last Modified On</th> </tr> </thead> <tbody> <tr> <td>Accounting and Tax Consultation S...</td> <td>2020.000226</td> <td>Greg Setser</td> <td>07/29/2020 17:07:6...</td> <td>Response In Progre...</td> <td>07/29/2020 17:07:9...</td> </tr> <tr> <td>RFP: Next Gen Event - Business Car...</td> <td>2020.000224</td> <td>Greg Setser</td> <td>07/28/2020 0:07:93 ...</td> <td>Awarded</td> <td>07/28/2020 15:07:0...</td> </tr> <tr> <td>RFP: Next Gen Event - Business Car...</td> <td>2020.000213</td> <td>Greg Setser</td> <td>06/20/2020 21:06:1...</td> <td>Response Closed</td> <td>06/24/2020 16:06:8...</td> </tr> </tbody> </table>	Event Name	Event Number	Created By	Created On	Status	Last Modified On	Accounting and Tax Consultation S...	2020.000226	Greg Setser	07/29/2020 17:07:6...	Response In Progre...	07/29/2020 17:07:9...	RFP: Next Gen Event - Business Car...	2020.000224	Greg Setser	07/28/2020 0:07:93 ...	Awarded	07/28/2020 15:07:0...	RFP: Next Gen Event - Business Car...	2020.000213	Greg Setser	06/20/2020 21:06:1...	Response Closed	06/24/2020 16:06:8...
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AHA Supplier Portal Guide: Participate in RFx

Step 2: Review and Accept RFx Guidelines/Prerequisites

AHA may post prerequisites that bidders must confirm they can meet in order to participate in the RFx.

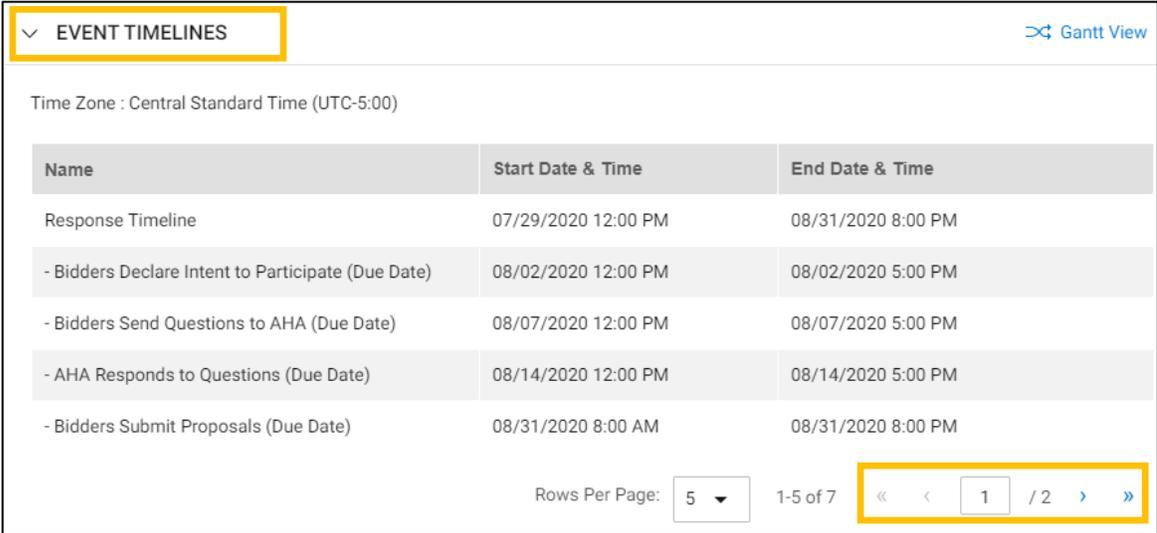
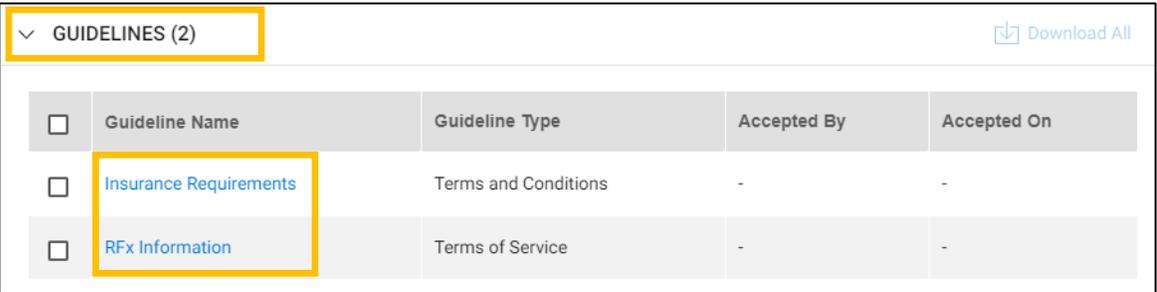
Step	Description
1	<ul style="list-style-type: none">The list of prerequisites will display at the top of the page within a yellow background.Click on the title of each line (blue text) to review the details. 
2	<ul style="list-style-type: none">You can review the details on screen or download the details by clicking on the  icon.When done, click on the CLOSE button at the bottom right of the page. 
3	<ul style="list-style-type: none">After reviewing the guidelines, click on the check box next to each line.Click on the ACCEPT GUIDELINES button at the bottom right of the page.  <ul style="list-style-type: none">After accepting the guidelines, you will be able to see the rest of the RFx information.

AHA Supplier Portal Guide: Participate in RFX

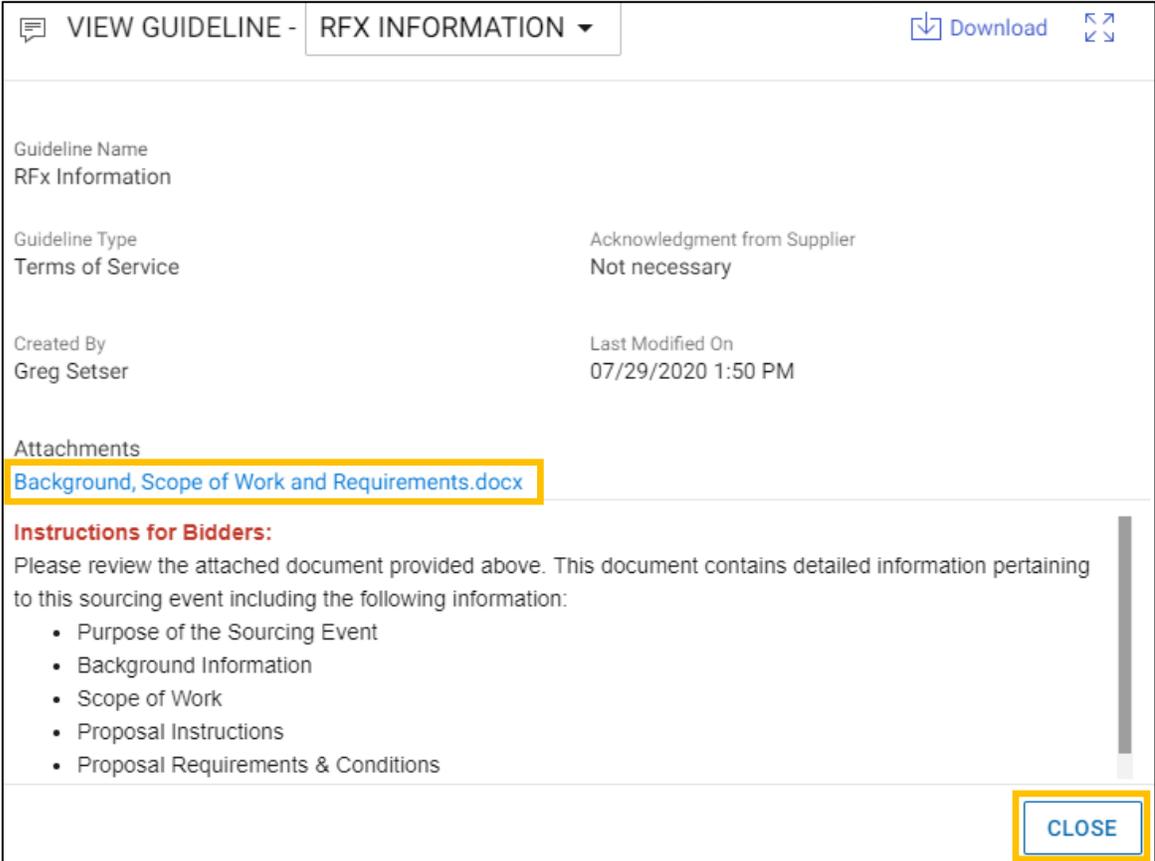
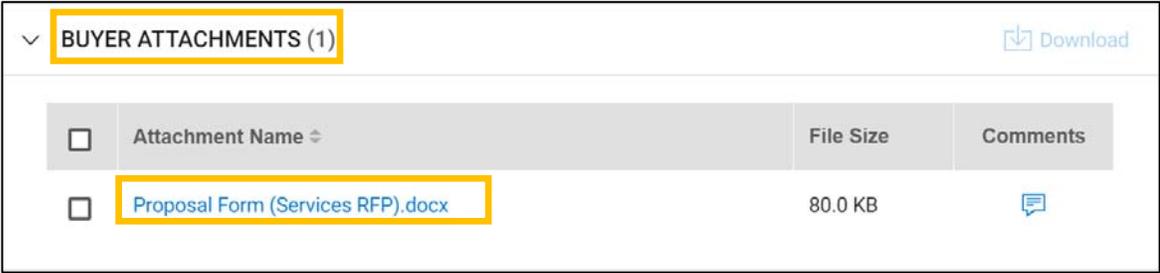
Step 3: Review RFX Details

Bidders should review all information posted in the following sections:

- **EVENT TIMELINES:** Key dates pertaining to the RFX Event
- **GUIDELINES:** Key terms and requirements
- **ATTACHMENTS:** Documents and Exhibits AHA has posted for bidders to review and/or complete

Step	Description																		
1	<ul style="list-style-type: none"> • Scroll to the EVENT TIMELINES section to review the key dates of the RFX event. • The timeline may have multiple pages, click on the arrows at the bottom right of the section  <p>The screenshot shows the 'EVENT TIMELINES' section with a 'Gantt View' link. Below the title, it specifies the 'Time Zone : Central Standard Time (UTC-5:00)'. A table lists the following events:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Start Date & Time</th> <th>End Date & Time</th> </tr> </thead> <tbody> <tr> <td>Response Timeline</td> <td>07/29/2020 12:00 PM</td> <td>08/31/2020 8:00 PM</td> </tr> <tr> <td>- Bidders Declare Intent to Participate (Due Date)</td> <td>08/02/2020 12:00 PM</td> <td>08/02/2020 5:00 PM</td> </tr> <tr> <td>- Bidders Send Questions to AHA (Due Date)</td> <td>08/07/2020 12:00 PM</td> <td>08/07/2020 5:00 PM</td> </tr> <tr> <td>- AHA Responds to Questions (Due Date)</td> <td>08/14/2020 12:00 PM</td> <td>08/14/2020 5:00 PM</td> </tr> <tr> <td>- Bidders Submit Proposals (Due Date)</td> <td>08/31/2020 8:00 AM</td> <td>08/31/2020 8:00 PM</td> </tr> </tbody> </table> <p>At the bottom, the pagination control shows 'Rows Per Page: 5' and '1-5 of 7' with navigation arrows. The current page is 1 of 2.</p>	Name	Start Date & Time	End Date & Time	Response Timeline	07/29/2020 12:00 PM	08/31/2020 8:00 PM	- Bidders Declare Intent to Participate (Due Date)	08/02/2020 12:00 PM	08/02/2020 5:00 PM	- Bidders Send Questions to AHA (Due Date)	08/07/2020 12:00 PM	08/07/2020 5:00 PM	- AHA Responds to Questions (Due Date)	08/14/2020 12:00 PM	08/14/2020 5:00 PM	- Bidders Submit Proposals (Due Date)	08/31/2020 8:00 AM	08/31/2020 8:00 PM
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2	<ul style="list-style-type: none"> • Scroll to the GUIDELINES section to find details specific to the RFX Background, Requirements and Terms. • Click on the name of each line (blue text) to review the details  <p>The screenshot shows the 'GUIDELINES (2)' section with a 'Download All' link. A table lists the following guidelines:</p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Guideline Name</th> <th>Guideline Type</th> <th>Accepted By</th> <th>Accepted On</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Insurance Requirements</td> <td>Terms and Conditions</td> <td>-</td> <td>-</td> </tr> <tr> <td><input type="checkbox"/></td> <td>RFX Information</td> <td>Terms of Service</td> <td>-</td> <td>-</td> </tr> </tbody> </table>	<input type="checkbox"/>	Guideline Name	Guideline Type	Accepted By	Accepted On	<input type="checkbox"/>	Insurance Requirements	Terms and Conditions	-	-	<input type="checkbox"/>	RFX Information	Terms of Service	-	-			
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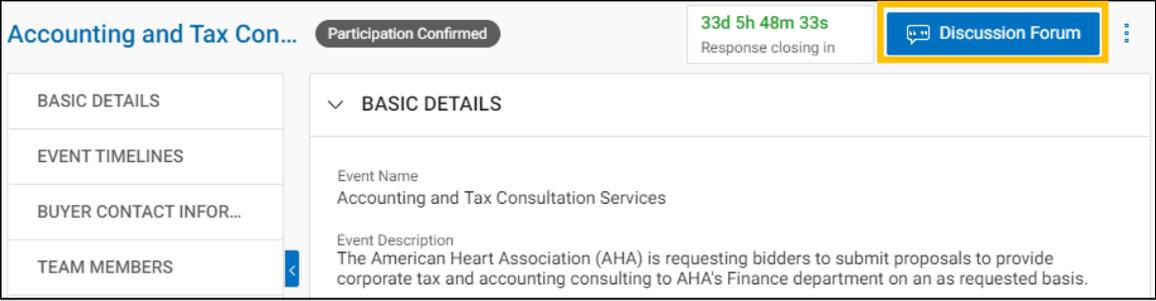
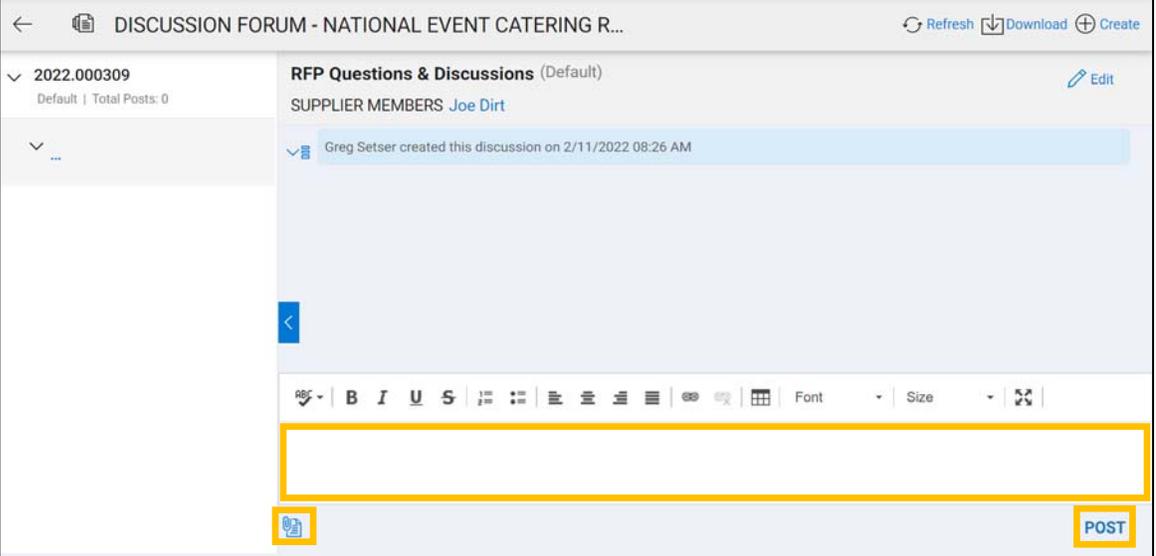
AHA Supplier Portal Guide: Participate in RFx

Step	Description								
3	<ul style="list-style-type: none"> You can review the details on screen. Some guidelines may contain attachments. Click on the name of the attachment to download it. When done, click on the CLOSE button at the bottom right of the page.  <p>The screenshot shows a web interface for 'VIEW GUIDELINE - RFX INFORMATION'. It includes a 'Download' button in the top right. The main content area displays: <ul style="list-style-type: none"> Guideline Name: RFX Information Guideline Type: Acknowledgment from Supplier Terms of Service: Not necessary Created By: Greg Setser Last Modified On: 07/29/2020 1:50 PM An 'Attachments' section lists 'Background, Scope of Work and Requirements.docx'. Below this is a section titled 'Instructions for Bidders:' with a list of items to review. A 'CLOSE' button is located in the bottom right corner of the screenshot. </p>								
4	<ul style="list-style-type: none"> Scroll to the BUYER ATTACHMENTS section. Documents in this section may include: <ul style="list-style-type: none"> Background details or exhibits Forms bidders must complete and attach too your proposal submission Sample of the AHA Agreement/Contract template Click on the name of each line (blue text) to download the attachment  <p>The screenshot shows a 'BUYER ATTACHMENTS (1)' section with a 'Download' button. Below is a table with the following data: <table border="1"> <thead> <tr> <th data-bbox="305 1472 370 1528"><input type="checkbox"/></th> <th data-bbox="375 1472 1057 1528">Attachment Name ↕</th> <th data-bbox="1062 1472 1214 1528">File Size</th> <th data-bbox="1219 1472 1372 1528">Comments</th> </tr> </thead> <tbody> <tr> <td data-bbox="305 1535 370 1591"><input type="checkbox"/></td> <td data-bbox="375 1535 1057 1591">Proposal Form (Services RFP).docx</td> <td data-bbox="1062 1535 1214 1591">80.0 KB</td> <td data-bbox="1219 1535 1372 1591"></td> </tr> </tbody> </table> </p>	<input type="checkbox"/>	Attachment Name ↕	File Size	Comments	<input type="checkbox"/>	Proposal Form (Services RFP).docx	80.0 KB	
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AHA Supplier Portal Guide: Participate in RFx

Step 4: Ask Questions to AHA using the Discussion Forum

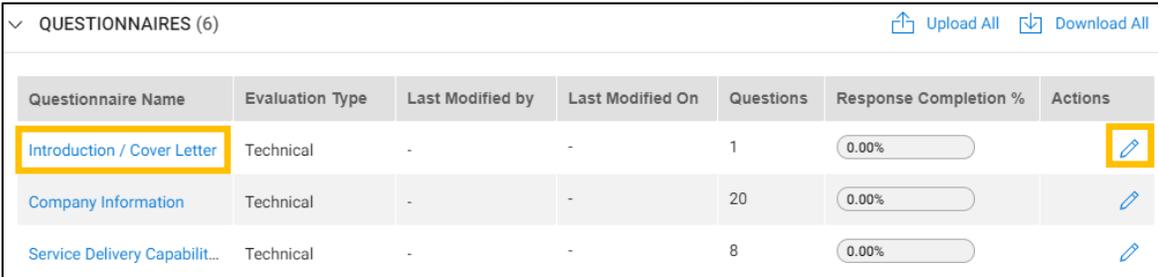
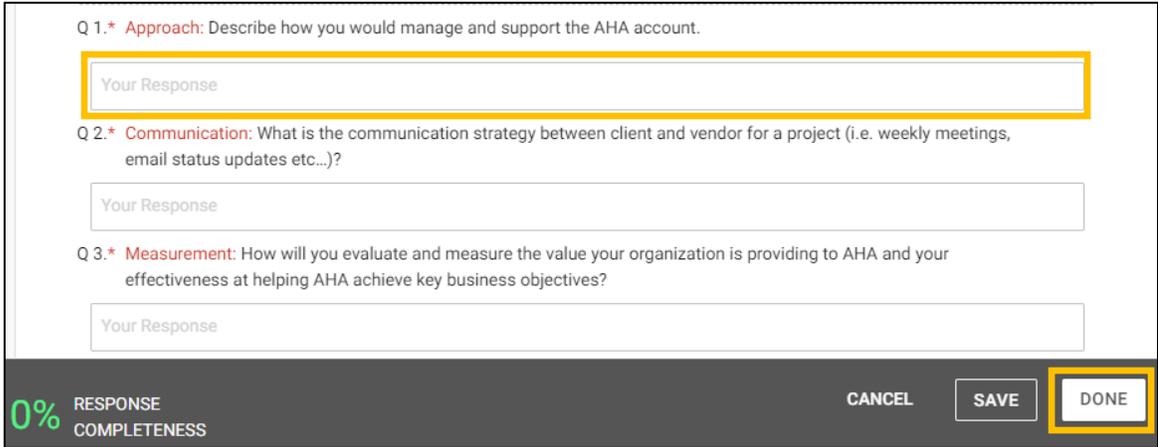
AHA prefers bidders submit questions via the Discussion Forum within the RFx.

Step	Description
1	<ul style="list-style-type: none">Click on the Discussion Forum icon toward the top right of your screen  <p>The screenshot shows the top right corner of an RFx event page. The event title is 'Accounting and Tax Con...' with a 'Participation Confirmed' badge. A timer indicates '33d 5h 48m 33s' remaining for 'Response closing in'. A blue 'Discussion Forum' button with a speech bubble icon is highlighted with a yellow border. Below the button is a sidebar with menu items: 'BASIC DETAILS', 'EVENT TIMELINES', 'BUYER CONTACT INFOR...', and 'TEAM MEMBERS'. The main content area shows 'BASIC DETAILS' expanded, listing the event name 'Accounting and Tax Consultation Services' and a description: 'The American Heart Association (AHA) is requesting bidders to submit proposals to provide corporate tax and accounting consulting to AHA's Finance department on an as requested basis.'</p>
2	<ul style="list-style-type: none">A new tab/window will open with the Discussion ForumEnter the details of your message/questionClick on the Attachments button to attach a file with your questions or backup informationClick on the Post button when you are ready to send your message to AHA.  <p>The screenshot shows a mobile browser view of a discussion forum. The title bar reads 'DISCUSSION FORUM - NATIONAL EVENT CATERING R...'. The forum is titled 'RFP Questions & Discussions (Default)' and lists 'SUPPLIER MEMBERS Joe Dirt'. A message from 'Greg Setser' is visible, dated '2/11/2022 08:26 AM'. Below the message is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, font color, and size. A large text input area is highlighted with a yellow border. At the bottom left of the input area is an 'Attachments' icon, and at the bottom right is a yellow 'POST' button.</p>

AHA Supplier Portal Guide: Participate in RFx

Step 5: Prepare Your Proposal - Answer Questionnaires

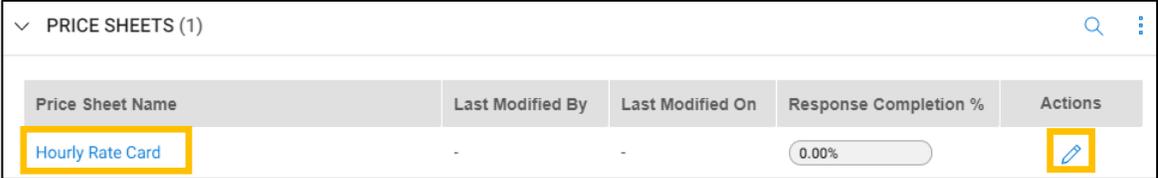
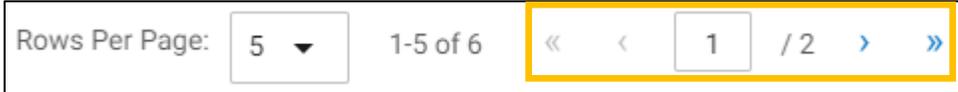
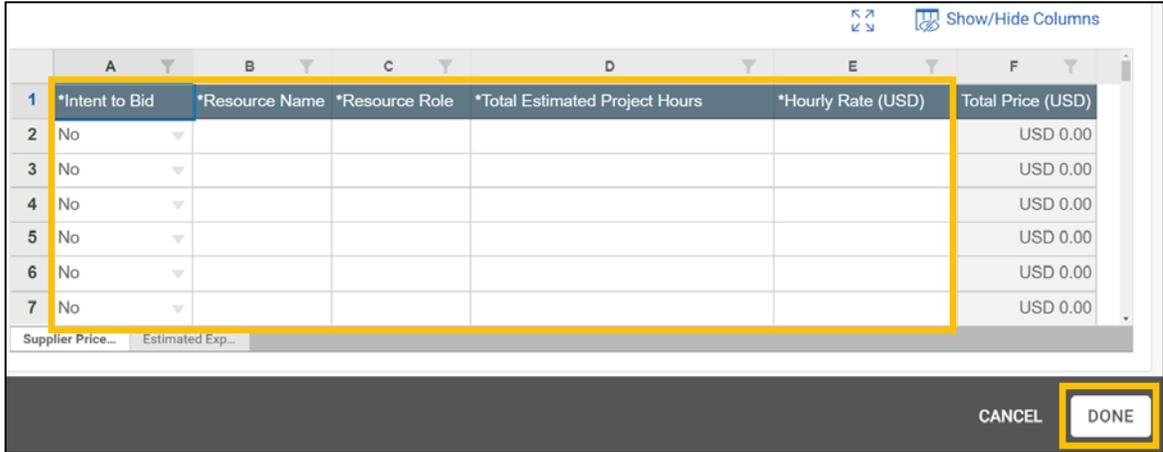
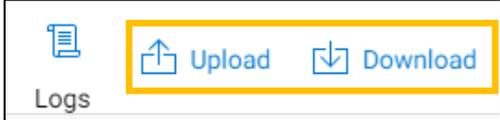
Depending on how AHA has setup the RFx, bidders may be required to complete one or more questionnaires within the RFx portal to provide details on your organizations' background, capabilities and ability to perform the scope of work.

Step	Description
1	<ul style="list-style-type: none"> Scroll to the QUESTIONNAIRES section Click on the questionnaire name or the pencil icon  to open a questionnaire  <ul style="list-style-type: none"> The section may have multiple pages, click on the arrows at the bottom right of the section 
2	<ul style="list-style-type: none"> Enter your responses, to each question, directly on screen within the system Click the "DONE" button, at the bottom right of the page, to exit the questionnaire 
3	<ul style="list-style-type: none"> Repeat the steps above until you have completed all questionnaires The Response Completion % shows the percent of questions answered within a questionnaire All questionnaires must have a 100% completion before bidders can submit the proposal

AHA Supplier Portal Guide: Participate in RFX

Step 5: Prepare Your Proposal - Complete Price Sheets

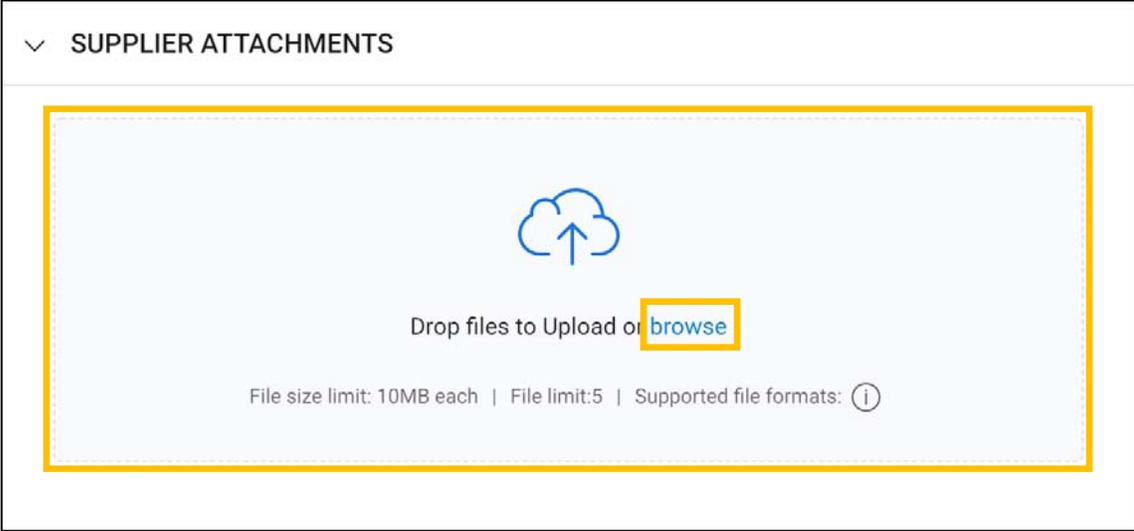
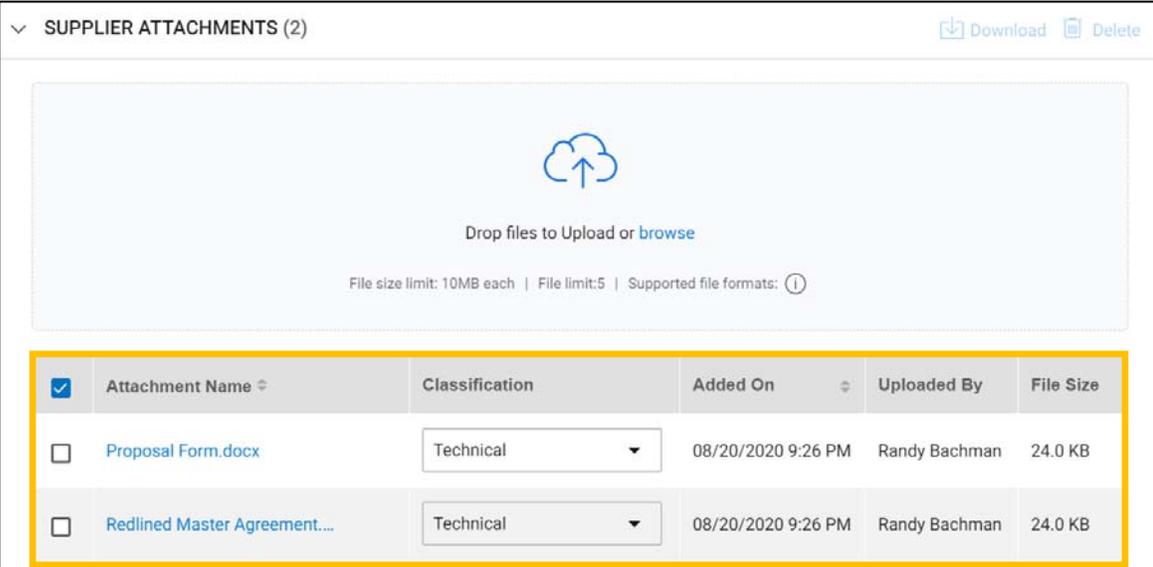
Depending on how AHA has setup the RFX, bidders may be required to complete one or more price sheets within the RFX portal for proposing pricing to the AHA.

Step	Description
1	<ul style="list-style-type: none"> Scroll to the PRICE SHEETS section Click on the price sheet name or the pencil icon to open a price sheet  <ul style="list-style-type: none"> The section may have multiple pages, click on the arrows at the bottom right of the section 
2	<ul style="list-style-type: none"> Set the Intent to Bid column to Yes for each line that you wish to propose pricing on, Complete each required field for the lines where you set the Intent to Bid to Yes Click the DONE button, at the bottom right of the page, to exit the price sheet 
3	<ul style="list-style-type: none"> The sheet can be downloaded & completed in Excel by clicking on the Download button at the top right of the page, then click the Upload button to import the completed sheet  <ul style="list-style-type: none"> Do not make any edits to the Excel sheet other than entering your answers/pricing
4	<ul style="list-style-type: none"> Repeat the steps above until you have completed all price sheets All price sheets must have a 100% completion before bidders can submit the proposal

AHA Supplier Portal Guide: Participate in RFx

Step 5: Prepare Your Proposal - Upload Additional Attachments

Bidders should use the SUPPLIER ATTACHMENTS section to upload/attach additional supporting documentation.

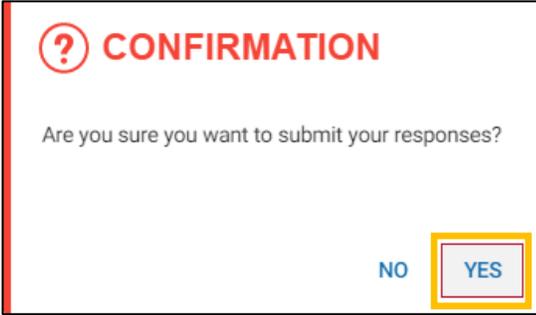
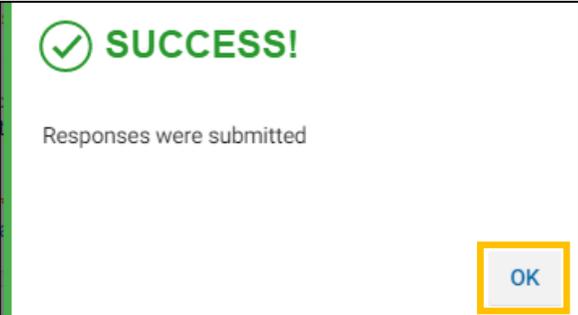
Step	Description
1	<ul style="list-style-type: none"> • Scroll to the SUPPLIER ATTACHMENTS section • Drag and Drop your attachment or click on the browse link to add your attachments 
2	<ul style="list-style-type: none"> • Attachments you add will display at the bottom of the section 

AHA Supplier Portal Guide: Participate in RFx

Step 6: Submit Your Proposal

Before you submit your proposal to AHA be sure the following items are complete

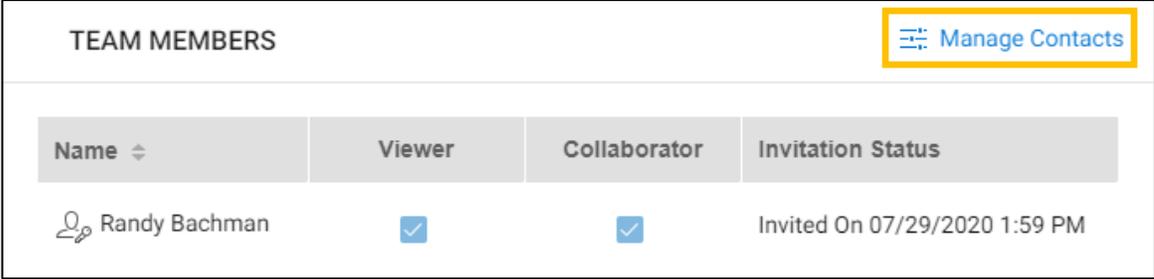
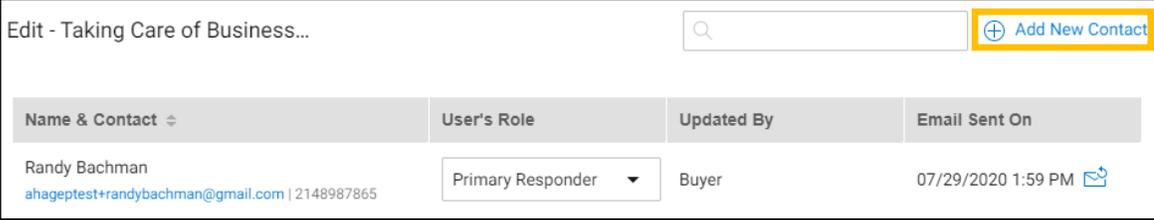
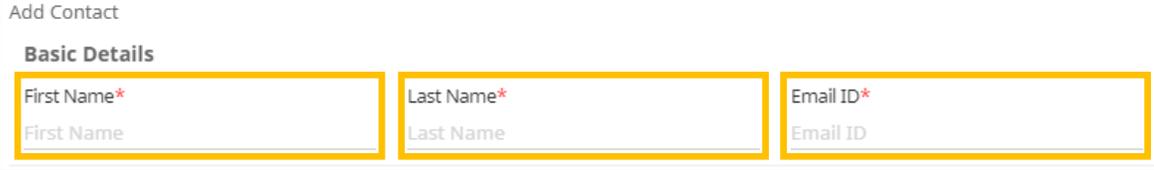
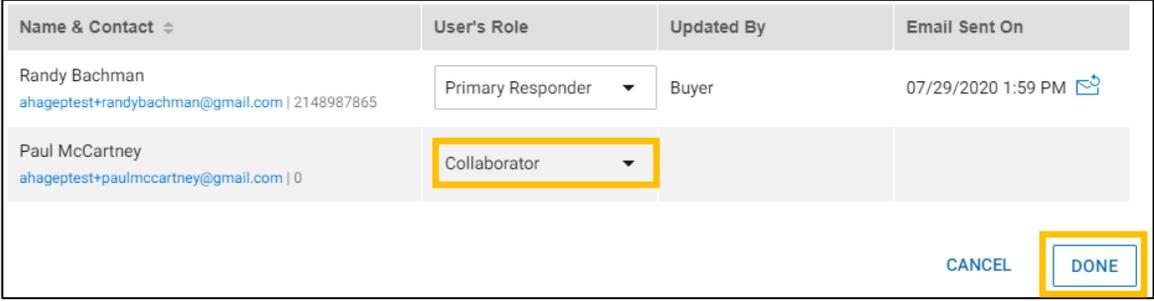
- All **QUESTIONNAIRES** show a 100% completion (If the Questionnaire section appears in the RFx)
- All **PRICE SHEETS** show a 100% completion (If the Price Sheets section appears in the RFx)
- All **ATTACHMENTS** you want to include in your proposal are uploaded in the SUPPLIER ATTACHMENTS

Step	Description
1	<ul style="list-style-type: none">• Click the SUBMIT RESPONSE button at the bottom right of the screen  <p>The screenshot shows a user interface with a dark grey footer bar. On the left, there are two buttons: 'BUYER (1)' and 'SUPPLIER (3)'. On the right, there are two buttons: 'CANCEL' and 'SUBMIT RESPONSE'. The 'SUBMIT RESPONSE' button is highlighted with a yellow border.</p>
2	<ul style="list-style-type: none">• A pop-up message will appear asking you to confirm that you want to submit your proposal.• Click on the YES button.  <p>The screenshot shows a white pop-up window with a red border. At the top left is a red question mark icon followed by the word 'CONFIRMATION' in red. Below this is the text 'Are you sure you want to submit your responses?'. At the bottom right, there are two buttons: 'NO' and 'YES'. The 'YES' button is highlighted with a yellow border.</p>
3	<ul style="list-style-type: none">• A pop-up message will appear indicating your RFx response was successfully submitted.• Click the OK button  <p>The screenshot shows a white pop-up window with a green border. At the top left is a green checkmark icon followed by the word 'SUCCESS!' in green. Below this is the text 'Responses were submitted'. At the bottom right, there is a button labeled 'OK' which is highlighted with a yellow border.</p>

AHA Supplier Portal Guide: Participate in RFx

Optional Step: Add Additional RFx Collaborators

Bidders can add additional contacts to collaborate on the RFx without needing to contact the AHA.

Step	Description
1	<ul style="list-style-type: none"> Scroll to the TEAM MEMBERS section, then Click on the Manage Contacts icon  <p>The screenshot shows a 'TEAM MEMBERS' section with a 'Manage Contacts' button highlighted in yellow. Below the button is a table with columns: Name, Viewer, Collaborator, and Invitation Status. A row for 'Randy Bachman' is shown with checkmarks in the Viewer and Collaborator columns and an invitation status of 'Invited On 07/29/2020 1:59 PM'.</p>
2	<ul style="list-style-type: none"> A pop-window will appear with a list of contacts who are setup for your company Click the Add New Contact icon if you need to add a new contact If the contact is already in the list, skip to step 4  <p>The screenshot shows a pop-up window titled 'Edit - Taking Care of Business...'. It has a search bar and an 'Add New Contact' button highlighted in yellow. Below is a table with columns: Name & Contact, User's Role, Updated By, and Email Sent On. A row for 'Randy Bachman' is shown with a role of 'Primary Responder' and an update by 'Buyer'.</p>
3	<ul style="list-style-type: none"> A pop-up window will appear. Enter the contact's First Name, Last Name & Email Address  <p>The screenshot shows the 'Add Contact' form. The 'Basic Details' section has three input fields: 'First Name*', 'Last Name*', and 'Email ID*', each highlighted in yellow. Below the form is a 'Send Invitation' checkbox and a 'Done' button highlighted in yellow.</p> <ul style="list-style-type: none"> Scroll to the bottom of the window and check Send Invitation, then click DONE A notification will be sent to the contact to register in the supplier portal to access the RFx
4	<ul style="list-style-type: none"> Set the contacts User Role to Collaborator, then click the DONE button  <p>The screenshot shows the contact management pop-up window. The 'User's Role' dropdown for 'Paul McCartney' is set to 'Collaborator' and is highlighted in yellow. The 'DONE' button is also highlighted in yellow.</p>