



Solicitation ATTACHMENT 1

ATTACHMENT 1. Submitting Offers online using eResponse.

1. **Create a Response.** Find the Solicitation you wish to respond to in Austin Finance Online (AFO), located at: <https://www.austintexas.gov/financeonline/finance/>. If the Solicitation includes the “eResponse” function, it will have a “My Response” section in the Solicitation’s Detail page. Click on “Create Response” to start a Response (Fig. 1).

SOLICITATION DETAILS

SOLICITATION DETAILS

Type: Invitation For Bids (IFB)
Status: Open
Solicitation Number: IFB 7400 TEST9884
Description: TEST SOLICITATION 15/16
Summary: This solicitation is for testing purposes only.

My Response

To begin creating a Response to this Solicitation, click the “Create Response” button below.
See the Solicitation documents in the Attachments section below for further instructions on developing and submitting your Response.

Create Response

(Fig.1)

- a. Offerors must be logged into AFO in order to create, edit or submit a Response.
- b. If you click on “Create Response” but you have not yet logged into AFO, the system will redirect you to a login screen (Fig. 2). Once you have logged into AFO, the system will take you back to the Solicitation.

AUSTIN FINANCE ONLINE

FINANCIAL DOCUMENTS STRATEGIC PLAN CHECKBOOK UNCLAIMED PROPERTY PROCUREMENT

ACCOUNT LOGIN

Username
Password

Login

Don't remember your username? [Retrieve your username](#)
Forgot your password? [Reset your password](#)
Don't have an account yet ? [Create an account](#)

(Fig. 2)



Solicitation ATTACHMENT 1

- c. Once you click “Create Response”, you will now see a Response ID, Vendor Name, the date that you Created your Response, the date and time you Last Revised your Response and the Status of your Response, which should be “DRAFT” initially (Fig. 3).

The screenshot shows the 'SOLICITATION DETAILS' page. At the top, there are buttons for 'Subscribe' and 'Print PDF'. Below this, a summary box contains the following information:

- Type: Invitation For Bids (IFB)
- Status: Open
- Solicitation Number: IFB 7400 TEST9902
- Description: TEST SOLICITATION 1/1
- Summary:

Below the summary box is a section titled 'My Response' with a dropdown arrow. Inside this section, a red banner states 'Price Offer document is required.' Below the banner is a table with the following data:

Response ID	Vendor	Created	Last Revised	Status
353	TEST VENDOR 10 - JG	12/06/2019, 09:32 AM	12/06/2019, 09:32 AM	DRAFT

Below the table is a blue '+ Add Files' button. At the bottom of the 'My Response' section, there is a 'Filename' input field and a 'Type' dropdown menu. At the very bottom of the page are two buttons: 'Submit Response' (yellow) and 'Delete' (red).

(Fig. 3)

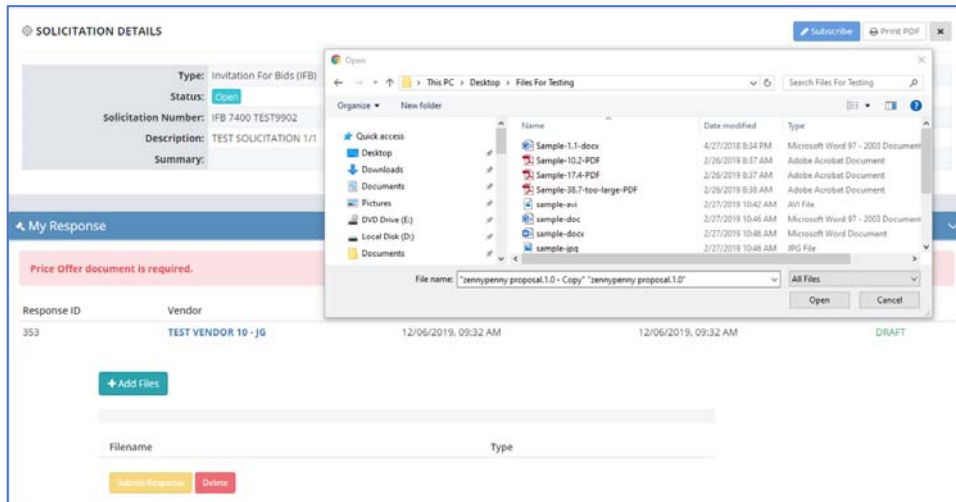
2. **Adding Files to Your Response.** To upload files to your Response click on the blue “+ Add Files” button (Fig. 4).

This screenshot is identical to Figure 3, showing the 'My Response' section with the response table and the '+ Add Files' button. A red arrow points directly to the '+ Add Files' button, highlighting it as the action to be taken.

(Fig. 4)

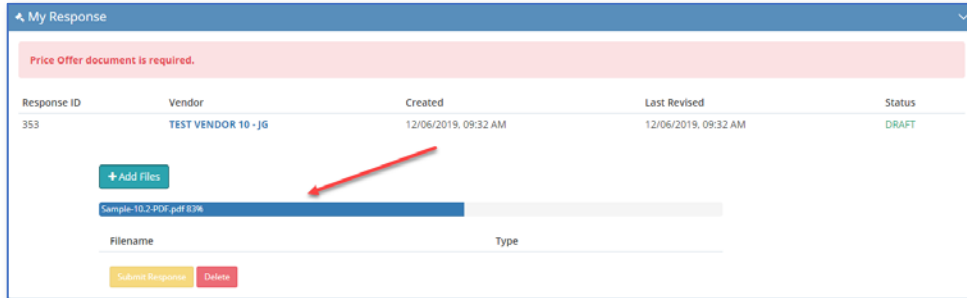


Solicitation ATTACHMENT 1



(Fig. 5)

- After clicking the “+ Add Files” button, a pop-up window will open displaying files on your computer (Fig. 5).
- Navigate on your computer to where your files are located. Select the file you wish to upload and click “Open”. The blue indicator bar moving from left to right will show your file being uploaded (Fig. 6)



(Fig. 6)

- Repeat this step to add additional files to your Response.



Solicitation ATTACHMENT 1

3. **File Types Accepted.** The eResponse functionality in AFO supports (accepts) the following electronic file types (Fig. 7).

.PDF	.XLS	.GIF
.DOC	.XLSX	.PNG
.DOCX	.PPT	
.TXT	.PPTX	
.ZIP	.JPG	

(Fig. 7)

4. **Number and Size of Files Allowable.** The eResponse functionality in AFO supports (accepts) no more than ten (10) files in a Response. eResponse will not accept a single file greater than 40 MB.
5. **Identify Your Files.** As you add files, you will see a dropdown menu to the right of the Filename, under "Type". Use this dropdown menu to select the appropriate file types (Fig. 8).

a. For Invitations for Bids, the following files must be included:

- Select the "Offer and Certifications" type for the file which contains your signed Offer Sheet and all the certifications in that attachment which require completion and signature. You can only identify one (1) file as your "Offer and Certifications."
- Select "Price Offer" type to identify the file that includes your price submission. You can only identify one (1) file as your "Price Offer."
- Select the "Technical Offer" type for any files that contain any information required to be submitted other than the Offer and Certifications and Price Sheet. You can identify multiple files as "Technical Offer" types.
- You will not be able to submit your Response if you have not identified at least one file as "Offer and Certification" and another as "Price Offer". Once you do, the red warning bar across the top of the My Response box will disappear.

b. For Requests for Proposals, the following files must be included:

- Select the "Offer and Certifications" type for the file which contains your signed Offer Sheet and all the certifications in that attachment which require completion and signature. You can only identify one (1) file as your "Offer and Certifications."
- Select "Price Offer" type to identify the file that includes your price submission. You can only identify one (1) file as your "Price Offer."
- Select the "Technical Offer" type for any files that contain any information required as part of the proposal submittal requirements in the instructions section. You can identify multiple files as "Technical Offer" types.



Solicitation ATTACHMENT 1

- iv. You will not be able to submit your Response if you have not identified at least one file as “Offer and Certification” and another as “Price Offer”. Once you do, the red warning bar across the top of the My Response box will disappear.

c. For Requests for Qualifications Statements, the following files must be included:

- i. Select the “Offer and Certifications” type for the file which contains your signed Offer Sheet and all the certifications in that attachment which require completion and signature. You can only identify one (1) file as your “Offer and Certifications.”
- ii. Select the “Technical Offer” type for any files that contain any information required as part of the qualifications submittal requirements in the instructions section. You can identify multiple files as “Technical Offer” types.
- iii. You will not be able to submit your Response if you have not identified at least one file as “Offer and Certification”. Once you do, the red warning bar across the top of the My Response box will disappear.

The screenshot shows the 'My Response' interface. At the top, there's a header with a back arrow, 'My Response', and a dropdown arrow. Below this is a table with columns: Response ID, Vendor, Created, Last Revised, and Status. The table contains one row with Response ID 456, Vendor TEST VENDOR 10 - JG, Created 03/14/2020, 12:06 PM, Last Revised 03/14/2020, 12:14 PM, and Status DRAFT. Below the table is a '+ Add Files' button. Underneath is a section for uploaded files with columns 'Filename' and 'Type'. There are four files listed: 'Sample-10.2-PDF.pdf', 'Sample-1.1-docx.docx', 'sample-doc.doc', and 'sample-docx.docx'. The 'Type' dropdown for the first file is open, showing options: 'Price Offer', 'Price Offer' (highlighted), 'Offer and Certifications', 'Technical Offer', and 'Other'. A red arrow points to the highlighted 'Price Offer' option. At the bottom, there are 'Submit Response' and 'Delete' buttons.

Response ID	Vendor	Created	Last Revised	Status
456	TEST VENDOR 10 - JG	03/14/2020, 12:06 PM	03/14/2020, 12:14 PM	DRAFT

Filename	Type
Sample-10.2-PDF.pdf	Price Offer
Sample-1.1-docx.docx	Price Offer
sample-doc.doc	Offer and Certifications
sample-docx.docx	Technical Offer

(Fig. 8)

- 6. Submitting your response.** Once you have uploaded and identified the types of all the files you need to for your Response, click the “Submit Response” button (Fig. 9).



Solicitation ATTACHMENT 1

Response ID	Vendor	Created	Last Revised	Status
456	TEST VENDOR 10 - JG	03/14/2020, 12:06 PM	03/14/2020, 12:14 PM	DRAFT

Filename	Type
Sample-10.2-PDF.pdf	Price Offer
Sample-1.1-docx.doc	Offer and Certifications
sample-doc.doc	Technical Offer
sample-docx.docx	Other

[Submit Response](#) [Delete](#)

(Fig. 9)

- a. After you click the “Submit” button, you will be redirected to the Response History Page of your User Dashboard (Fig. 10). You will be automatically Subscribed to the solicitation when you submit your Response.

Response ID	Solicitation Number	Solicitation Description	Created	Close Date
353	IFB 7400 TEST9902	TEST SOLICITATION 1/1	12/06/2019 09:32	01/03/2020
334	IFB 7400 TEST9900	TEST SOLICITATION 1/1	10/24/2019 01:01	10/28/2019
313	IFB 7400 TEST9895	TEST SOLICITATION 1/1 - SEPTEMBER	10/03/2019 10:06	10/04/2019
238	IFB 7400 TEST9893	TEST SOLICITATION 1/1 - AUGUST	09/05/2019 03:23	09/13/2019
207	IFB 7400 TEST9891	TEST SOLICITATION 1/1	06/06/2019 01:38	06/12/2019
173	IFB 7400 TEST9889	TEST SOLICITATION 1/2	04/15/2019 10:37	04/15/2019
113	IFB 7400 TEST9887	TEST SOLICITATION 2/3	04/05/2019 09:40	04/05/2019
112	IFB 7400 TEST9886	TEST SOLICITATION 1/3	03/29/2019 10:31	03/29/2019
105	IFB 7400 TEST9885	TEST SOLICITATION 16/16	03/10/2019 12:29	03/10/2019
85	IFB 7400 TEST9881	TEST SOLICITATION 12/16	03/09/2019 01:23	03/09/2019
84	IFB 7400 TEST9880	TEST SOLICITATION 11/16	03/09/2019 12:18	03/09/2019
57	IFB 7400 TEST9875	TEST SOLICITATION 6/16	03/08/2019 12:44	03/08/2019
27	IFB 7400 TEST9873	TEST SOLICITATION 4/16	03/07/2019 01:04	03/07/2019
22	IFB 7400 TEST9872	TEST SOLICITATION 3/16	03/07/2019 12:46	03/07/2019
20	IFB 7400 TEST9871	TEST SOLICITATION 2/16	03/07/2019 11:48	03/07/2019

(Fig. 10)

- b. You can return to the Solicitation or your Response through the Response History page, or by navigating directly to the Solicitation in AFO. When you return to the Solicitation, you will notice that your Status (upper right corner of the My Response section) will state “SUBMITTED”. Your Last Revised date and time will update to the date and time you clicked on the “Submit” button.



Solicitation ATTACHMENT 1

- c. If you start a response and don't click "Submit Response", your response will stay in "DRAFT" status. Before the Solicitation's Due Date and Time, you can navigate back to your draft Response and complete it.
 - d. Responses that are still in "DRAFT" status by the Solicitation's Due Date and Time will not be received by the City.
- 7. Withdrawing or Changing A Response After it has been Submitted.** Prior to the Solicitation's Due Date and Time, you may withdraw or modify your Response. You can delete the entire Response or individual files. To Withdraw or Change your Response, navigate back to the Solicitation. You will see your Response and files in the "My Response" section.
- a. To delete the entire Response, click the red "Delete" button at the bottom of the "My Response" section. You will receive an "Are You Sure" message to confirm your intent to delete your Response including all files within it. Click on Yes, to proceed with the deletion.
 - b. To delete individual files within a Response, click the red circle with the white "X" to the left of the file you wish to delete.



Solicitation ATTACHMENT 2

ATTACHMENT 2. Submitting Offers online using eResponse.

1. **Create a Response.** Find the Solicitation you wish to respond to in Austin Finance Online (AFO), located at: <https://www.austintexas.gov/financeonline/finance/>. If the Solicitation includes the “eResponse” function, it will have a “My Response” section in the Solicitation’s Detail page. Click on “Create Response” to start a Response (Fig. 1).

SOLICITATION DETAILS

SOLICITATION DETAILS

Type: Invitation For Bids (IFB)

Status: Open

Solicitation Number: IFB 7400 TEST9884

Description: TEST SOLICITATION 15/16

Summary: This solicitation is for testing purposes only.

My Response

To begin creating a Response to this Solicitation, click the “Create Response” button below.

See the Solicitation documents in the Attachments section below for further instructions on developing and submitting your Response.

Create Response

(Fig.1)

- a. Offerors must be logged into AFO in order to create, edit or submit a Response.
- b. If you click on “Create Response” but you have not yet logged into AFO, the system will redirect you to a login screen (Fig. 2). Once you have logged into AFO, the system will take you back to the Solicitation.

AUSTIN FINANCE ONLINE

FINANCIAL DOCUMENTS STRATEGIC PLAN CHECKBOOK UNCLAIMED PROPERTY PROCUREMENT

ACCOUNT LOGIN

Username

Password

Login

Don't remember your username? [Retrieve your username](#)

Forgot your password? [Reset your password](#)

Don't have an account yet ? [Create an account](#)

(Fig. 2)



Solicitation ATTACHMENT 2

- c. Once you click “Create Response”, you will now see a Response ID, Vendor Name, the date that you Created your Response, the date and time you Last Revised your Response and the Status of your Response, which should be “DRAFT” initially (Fig. 3).

The screenshot shows the 'SOLICITATION DETAILS' page. At the top, there are buttons for 'Subscribe' and 'Print PDF'. Below this, a summary box contains the following information:

- Type: Invitation For Bids (IFB)
- Status: Open
- Solicitation Number: IFB 7400 TEST9902
- Description: TEST SOLICITATION 1/1
- Summary:

Below the summary box is a section titled 'My Response' with a dropdown arrow. Inside this section, a red message box states 'Price Offer document is required.' Below this is a table with the following data:

Response ID	Vendor	Created	Last Revised	Status
353	TEST VENDOR 10 - JG	12/06/2019, 09:32 AM	12/06/2019, 09:32 AM	DRAFT

Below the table is a blue button labeled '+ Add Files'. At the bottom of the 'My Response' section, there are two buttons: 'Submit Response' (yellow) and 'Delete' (red).

(Fig. 3)

2. **Adding Files to Your Response.** To upload files to your Response click on the blue “+ Add Files” button (Fig. 4).

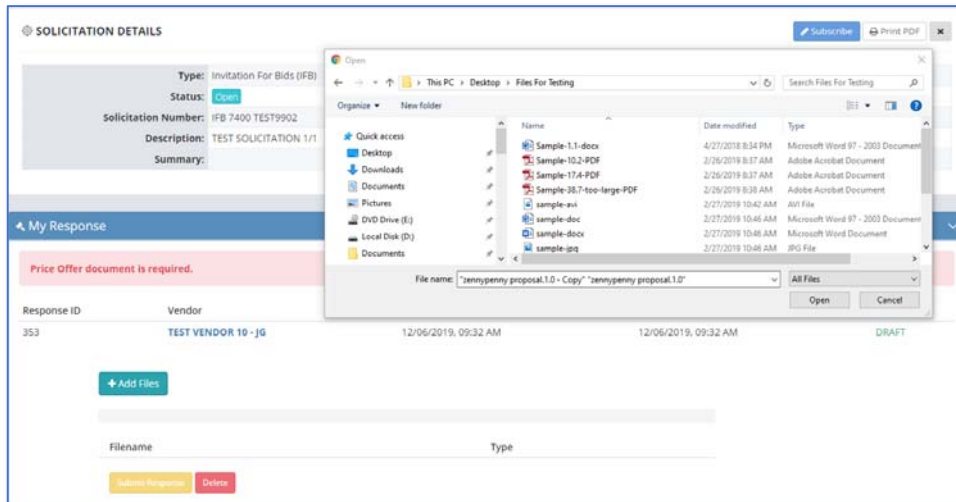
This screenshot is similar to Fig. 3, showing the 'My Response' section. A red arrow points to the blue '+ Add Files' button. The table below it shows the same response data as in Fig. 3.

Response ID	Vendor	Created	Last Revised	Status
353	TEST VENDOR 10 - JG	12/06/2019, 09:32 AM	12/06/2019, 09:32 AM	DRAFT

(Fig. 4)

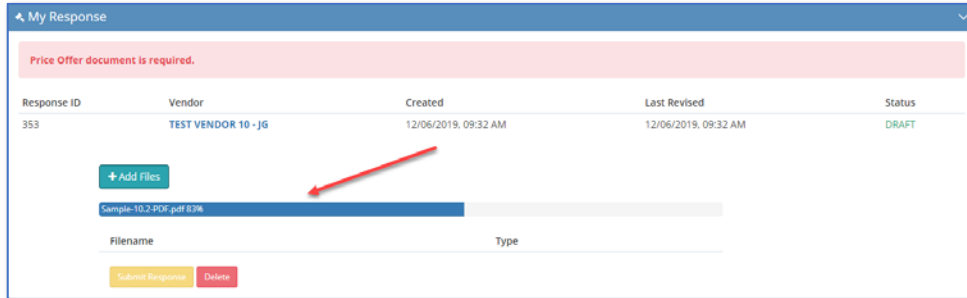


Solicitation ATTACHMENT 2



(Fig. 5)

- After clicking the “+ Add Files” button, a pop-up window will open displaying files on your computer (Fig. 5).
- Navigate on your computer to where your files are located. Select the file you wish to upload and click “Open”. The blue indicator bar moving from left to right will show your file being uploaded (Fig. 6)



(Fig. 6)

- Repeat this step to add additional files to your Response.



Solicitation ATTACHMENT 2

3. **File Types Accepted.** The eResponse functionality in AFO supports (accepts) the following electronic file types (Fig. 7).

.PDF	.XLS	.GIF
.DOC	.XLSX	.PNG
.DOCX	.PPT	
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.ZIP	.JPG	

(Fig. 7)

4. **Number and Size of Files Allowable.** The eResponse functionality in AFO supports (accepts) no more than ten (10) files in a Response. eResponse will not accept a single file greater than 40 MB.
5. **Identify Your Files.** As you add files, you will see a dropdown menu to the right of the Filename, under "Type". Use this dropdown menu to select the appropriate file types (Fig. 8).
- a. **For Invitations for Bids, the following files must be included:**
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 - Select the "Technical Offer" type for any files that contain any information required to be submitted other than the Offer and Certifications and Price Sheet. You can identify multiple files as "Technical Offer" types.
 - You will not be able to submit your Response if you have not identified at least one file as "Offer and Certification" and another as "Price Offer". Once you do, the red warning bar across the top of the My Response box will disappear.
- b. **For Requests for Proposals, the following files must be included:**
- Select the "Offer and Certifications" type for the file which contains your signed Offer Sheet and all the certifications in that attachment which require completion and signature. You can only identify one (1) file as your "Offer and Certifications."
 - Select "Price Offer" type to identify the file that includes your price submission. You can only identify one (1) file as your "Price Offer."
 - Select the "Technical Offer" type for any files that contain any information required as part of the proposal submittal requirements in the instructions section. You can identify multiple files as "Technical Offer" types.



Solicitation ATTACHMENT 2

- iv. You will not be able to submit your Response if you have not identified at least one file as “Offer and Certification” and another as “Price Offer”. Once you do, the red warning bar across the top of the My Response box will disappear.

c. For Requests for Qualifications Statements, the following files must be included:

- i. Select the “Offer and Certifications” type for the file which contains your signed Offer Sheet and all the certifications in that attachment which require completion and signature. You can only identify one (1) file as your “Offer and Certifications.”
- ii. Select the “Technical Offer” type for any files that contain any information required as part of the qualifications submittal requirements in the instructions section. You can identify multiple files as “Technical Offer” types.
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The screenshot shows the 'My Response' interface. At the top, there's a header with a back arrow, 'My Response', and a dropdown arrow. Below this is a table with columns: Response ID, Vendor, Created, Last Revised, and Status. The table contains one row with Response ID 456, Vendor TEST VENDOR 10 - JG, Created 03/14/2020, 12:06 PM, Last Revised 03/14/2020, 12:14 PM, and Status DRAFT. Below the table is a '+ Add Files' button. Underneath is a section for uploaded files with columns 'Filename' and 'Type'. There are four files listed: 'Sample-10.2-PDF.pdf', 'Sample-1.1-docx.doc', 'sample-doc.doc', and 'sample-docx.docx'. The 'Type' dropdown for the first file is open, showing options: 'Price Offer', 'Price Offer' (highlighted), 'Offer and Certifications', 'Technical Offer', and 'Other'. A red arrow points to the highlighted 'Price Offer' option. At the bottom of the file list are 'Submit Response' and 'Delete' buttons.

(Fig. 8)

- 6. Submitting your response.** Once you have uploaded and identified the types of all the files you need to for your Response, click the “Submit Response” button (Fig. 9).



Solicitation ATTACHMENT 2

My Response

Response ID	Vendor	Created	Last Revised	Status
456	TEST VENDOR 10 - JG	03/14/2020, 12:06 PM	03/14/2020, 12:14 PM	DRAFT

[+ Add Files](#)

Filename	Type
Sample-10.2-PDF.pdf	Price Offer
Sample-1.1-docx.doc	Offer and Certifications
sample-doc.doc	Technical Offer
sample-docx.docx	Other

[Submit Response](#) [Delete](#)

(Fig. 9)

- a. After you click the “Submit” button, you will be redirected to the Response History Page of your User Dashboard (Fig. 10). You will be automatically Subscribed to the solicitation when you submit your Response.

RESPONSE HISTORY

TES8304597
TES8304597

Account

- Home
- Contact/Password
- Vendor Information**
- Business
- Response History** (5)
- Addresses
- NAICS Codes
- Commodities
- Vendor Summary

Online Responses

Response ID	Solicitation Number	Solicitation Description	Created	Close Date
353	IFB 7400 TEST9902	TEST SOLICITATION 1/1	12/06/2019 09:32	01/03/2020
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112	IFB 7400 TEST9886	TEST SOLICITATION 1/3	03/29/2019 10:31	03/29/2019
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84	IFB 7400 TEST9880	TEST SOLICITATION 11/16	03/09/2019 12:18	03/09/2019
57	IFB 7400 TEST9875	TEST SOLICITATION 6/16	03/08/2019 12:44	03/08/2019
27	IFB 7400 TEST9873	TEST SOLICITATION 4/16	03/07/2019 01:04	03/07/2019
22	IFB 7400 TEST9872	TEST SOLICITATION 3/16	03/07/2019 12:46	03/07/2019
20	IFB 7400 TEST9871	TEST SOLICITATION 2/16	03/07/2019 11:48	03/07/2019

(Fig. 10)

- b. You can return to the Solicitation or your Response through the Response History page, or by navigating directly to the Solicitation in AFO. When you return to the Solicitation, you will notice that your Status (upper right corner of the My Response section) will state “SUBMITTED”. Your Last Revised date and time will update to the date and time you clicked on the “Submit” button.



Solicitation ATTACHMENT 2

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