# Quick guide to sourceONE

## Supplier / Financial Operator
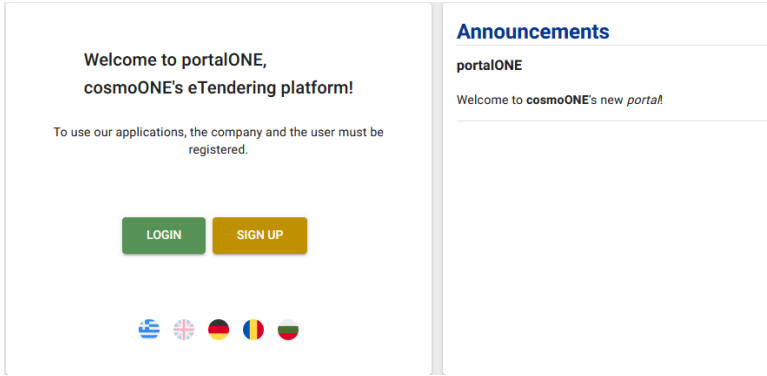
by

**cosmoONE**
a softone company

# Index

# A. Connecting to the platform

**A1**

Welcome to portalONE,
cosmoONE's eTendering platform!

To use our applications, the company and the user must be registered.

LOGIN   SIGN UP

**Announcements**

portalONE

Welcome to **cosmoONE**'s new *portal*!

Action 1: Visit www.marketsite.gr.

Step 2: Click Login..

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**A2**

English ∨
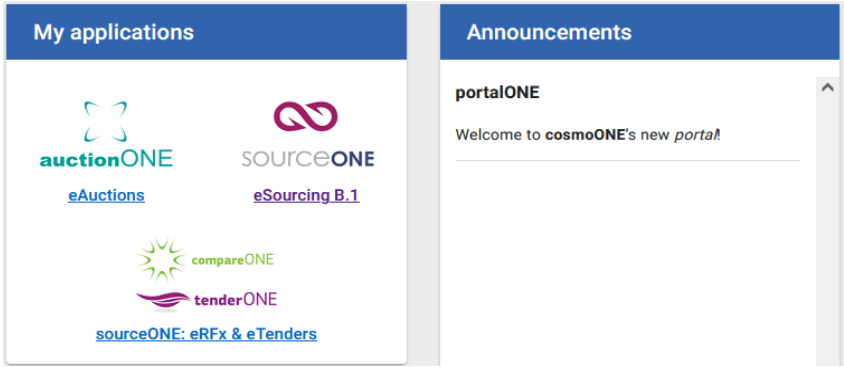
Login to cosmoONEs apps

Username

Password

Reset login password

Sign In

Clicking Login will redirect you to this page.

Action 1: Enter your Username and Password.

Action 2: Click Sign In.

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**A3**

**My applications**

auctionONE
eAuctions

sourceONE
eSourcing B.1

compareONE
tenderONE
sourceONE: eRFx & eTenders

**Announcements**

portalONE

Welcome to **cosmoONE**'s new *portal*!

After entering your Username and Password the system will redirect you to this page.

Action 1: Under the heading My applications, click **sourceONE** to connect to the platform.

# B. How can I find the tender I am looking for?

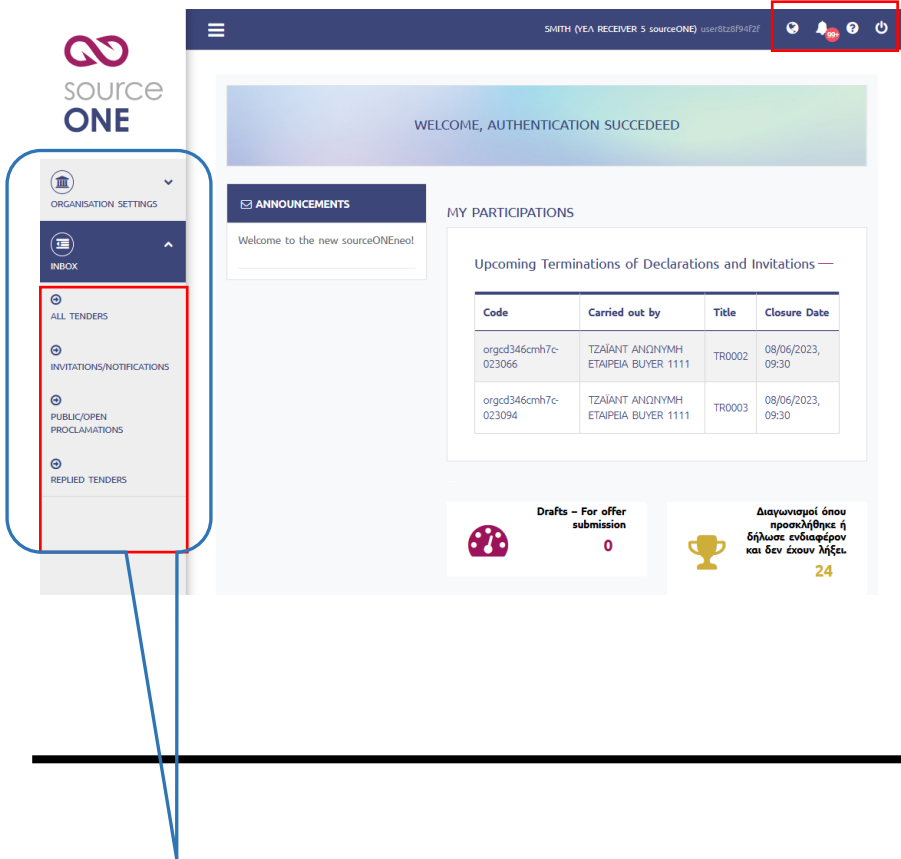Notifications button.

Log off button.

Language selection button.

Help page button.

**B1**



After having selected sourceONE (on slide 3) the system will direct you to this page.

**B2**



Clicking Inbox opens the following options:

All Tenders – Here you can find all Tenders.

Invitations/Notifications – Here you can find all the tenders you have been invited to participate in.

Public/Open Proclamations– Here you can find all the tenders which are open to participation for everyone.

Replied Tenders– Here you can find the tenders for which you have already submitted a bid/proposal.

So, in order to find a tender I was invited to participate in:

Action 1: Click Invitations/Notifications.

# B. How can I find the tender I am looking for?



Clicking Inbox and then Invitations/ Notifications will open the Inbound page.

**B3**

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There are 2 ways to locate a tender.



The first way is using the search criteria (e.g. Title, System code, Status etc.) tenders.

**B4**

The second way is manually from the list of tenders.



Action 1: Search for the tender using criteria or locate it from the list.
Action 2: Click on the tender's **title**. This will open the Tender Information page.

# Communication

### Tender information

| TENDER SYSTEM CODE | TENDER TITLE | TENDER TEMPLATE |
|---|---|---|
| orgomj7axchaf-033240 | MV | RFQ/1 Phase Procedure |

The Tender Information page displays information for the selected tender.

**C1**

| DETAILS | ATTACHMENTS & NOTES | PHASES / DOSSIERS | TENDER LOG | COMMUNICATION |
|---|---|---|---|---|
| EVALUATION | | | | |

**Action 1**: Click the Communication tab.

#### BASIC INFORMATION

| Status | Publication date | Submission Closure Date |
|---|---|---|
| ⚡ Cancelled | 06/06/2023 12:56:04 | 07/06/2023 14:00:00 |

Description/Scope

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| DETAILS | ATTACHMENTS & NOTES | PHASES / DOSSIERS | TENDER LOG | COMMUNICATION |
|---|---|---|---|---|
| EVALUATION | | | | |

Search [ ] 🔍 | ▼ All ⌄ | Type ⌄ | < >

➕

**C2**

| Type of Communication | Question Type | Organisation | Attached files | CC via email to: | Date | Answers |
|---|---|---|---|---|---|---|
| → | Announcement | DEMO AIRPORT Grey (ΔΗΜΙΟΥΡΓΟΣ - BUYER2) | Announcement: Attached you will find the template requested. Thank you. 📄 | | 08/06/2023 12:04:42 | |
| ← | Correspondence/Clarifications | EPSILON JOHN SMITH CO RECEIVER 5 SMITH (ΥΕΛ RECEIVER 5 sourceONE) | Hello. I would like to ask for a clarification on the template you have provided us. Regarding line 17 in the first page... | | 08/06/2023 12:03:11 | ↩ |
| → | Announcement | DEMO AIRPORT Grey (ΔΗΜΙΟΥΡΓΟΣ - BUYER2) | Announcement: Please remember to fill in and submit the XTF questionnaire. Thank you. | | 08/06/2023 12:01:44 | |

This table lists all the communications you have sent/received. Each column displays different information.

- Type of Communication: This column displays whether the communication is incoming or outgoing.
- Question Type: This column whether each communication is a Correspondence/Clarification or an Announcement.
- Organization: The user who sent the communication.
- Attached Files: If this icon 📄 is displayed then the corresponding communication has file(s) attached.
- Answers: This column marks which communications can be replied to. Clicking this icon ↩ will open the reply window. Please note that you cannot reply to Announcements.

# C. Communication

| | | | | | | |
|---|---|---|---|---|---|---|

**DETAILS** | **ATTACHMENTS & NOTES** | **PHASES / DOSSIERS** | **TENDER LOG** | **COMMUNICATION**

**EVALUATION**

Search | 🔍 | ▼ | All | Type | < >

➕

**C3**

| Type of Communication | Question Type | Organisation | Attached Files | CC via email to: | Date | Answers |
|---|---|---|---|---|---|---|
| ➡ | Announcement | DEMO AIRPORT Grey (ΔΗΜΙΟΥΡΓΟΣ - BUYER2) | Announcement: Attached you will find the template requested. Thank you. 📄 | | 08/06/2023 12:04:42 | |
| ➡ | Correspondence/Clarifications | EPSILON JOHN SMITH CO RECEIVER 5 SMITH (ΥΕΛ RECEIVER 5 sourceONE) | Hello. I would like to ask for a clarification on the template you have provided us. Regarding line 17 in the first page... | | 08/06/2023 12:03:11 | ↩ |
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**How to create a new communication**

**Message creation** ✕

**Communication type**
Correspondence/Clarifications

**CC via email to:**
Import e-mail

**Message (Maximum number of characters: 4000)**

**Attachments**
Select a file | Browse

Close | Send Message

**C4**

In the Communication tab, clicking ➕ will open the Message Creation window.

**Action 1**: Click the Communication tab from the Tender Information page.
**Action 2**: In the Communication tab, click the ➕ to open the message creation window.
**Action 3**: Select Communication type.
**Action 4**: Select receivers of your communication.
**Action 5**: Compose your message and attach files (if any).
**Action 6**: Click Send Message to send your communication.

# D. How do I submit a bid/proposal?

## Tender information

| TENDER SYSTEM CODE | TENDER TITLE | TENDER TEMPLATE |
|---|---|---|
| orgomj7axchaf-033240 | MV | RFQ/1 Phase Procedure |

**DETAILS** ATTACHMENTS & NOTES PHASES / DOSSIERS TENDER LOG COMMUNICATION
EVALUATION

**D1**

### BASIC INFORMATION

| Status | Publication date | Submission Closure Date |
|---|---|---|
| ⚡ Cancelled | 06/06/2023 12:56:04 | 07/06/2023 14:00:00 |

**Description/Scope**

Laptops and mouses

**Main Supply Item Category**

[30200000] Office and computing machinery, equipment and supplies except furniture and software packages > Computer equipment and supplies

**Additional Categories**

72514000: Computer facilities management services ✕

**Tender concerning**

Goods

### TENDER USERS

**Tender creator**

Ρολάνδρου (ΔΗΜΙΟΥΡΓΌΣ.ΑΓ.ΓΡΑΦΕΊΟΥ 1 - BUYER1) (usertvk:17wf822)

**NEW REPLY** ← I want to participate in the tender

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Action sequence to submit a bid/proposal.

Action 1: Go to the tender Information page.

Action 2: Click New Reply.

**Please note** that in Public tenders (for which you do not need to be invited in order to submit your bid/proposal), the button will be I want to participate in the Tender and after you click it, it will change to New Reply.

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**DETAILS** ATTACHMENTS & NOTES PHASES / DOSSIERS TENDER LOG COMMUNICATION
EVALUATION

**D2**

Clicking these headers at the top of the Tender Information page will open the corresponding tabs.

Attachments & Notes: In this tab you can find attached files and notes that the Buyer/Contracting Entity might have set for use by all the participants of the tender.

Phases / Dossiers: In this tab you may preview the phases, dossiers and elements of the tender (e.g. Economic Offer Table, Documents List etc).

Tender Log: In this tab you can see the log of actions of the tender. Please note that the Tender Log begins recording actions after you have clicked New Reply (which marks the beginning of the bid/proposal submission process).

Communication: In this tab you create and read communications between you and the Buyer/Contracting Entity.

Evaluation: In this tab you can see the proceedings/minutes of the tender that have been publicized for all participants, such as proceedings per phase, decisions etc.

# E. Submitting a bid/proposal – Tender elements

**Tender Elements - Financial Table**
In this element the Buyer/Contracting Entity is requesting that you fill in your bid/proposal for the tender.

You can fill in the Financial Table manually or using the Table Template. You can export the template, fill it in and then upload it. The table will then be automatically filled.



Drag the bar to the right to see/fill in the remaining columns of the Financial Table.

**E1** The columns of the table are as follows:
- Compulsory Item: Marked with ✔ are the lines whose products are mandatory for the bid/proposal. Marked with ✖ are the lines whose products are not mandatory for the bid/proposal.
- Participation on item: Mandatory items/lines are marked with ✔. If you choose to include a non-mandatory item in your bid/proposal it will be marked with ☑. If you don't want to include a non mandatory item in your bid/proposal simply untick it.
- Description: Description of the item/line.
- Buyer Comments: Comments by the Buyer/Contracting Entity.
- Unit of Measure: The unit by which the line/item is measured.
- Quantity: The quantity asked for the item/line.
- Unit Price: The price per unit for the item/line. Please note that 0 is an acceptable price and it means you are giving it away for free.
- Supplier Comments: Your comments for the item/line.

**Please note:** This symbol ✱ marks which columns/fields are mandatory. You cannot move on to the next step of the tender without filling in the mandatory columns/fields.

**Please Note**: A red paperclip above the financial table means that you need to upload your bid/proposal as a file too. Click it to upload your file. The paperclip will become green when at least one file is uploaded.

PC & Peripherals 🔗
→ 🔗

Action 1: Fill in the Financial Offer Table (manually or by exporting and importing the excel template).
Action 2: Click save.
Action 2: Click Next Step.

# Submitting a bid/proposal – Tender elements

**Tender Elements - Participation Documents**

In this element the Buyer/Contracting Entity has set which documents are to be uploaded for the purposes of the tender.



**E2**

When the paperclip is red it signals that there are no documents uploaded for that line while a green paperclip signals that there is at least one (1) document has been uploaded.

Furthermore, this icon ✔ signals that uploading a document for this line is mandatory.

Clicking the paperclip opens the Upload Files window. There you can click (or drag and drop) to upload the requested files.

Clicking this icon 🗑 deletes the corresponding file while clicking this icon 🔄 changes the confidentiality of the document (e.g. for a Public tender).

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**Tender Elements - Data Entry Form / Questionnaire**

In this element the Buyer/Contracting Entity has set some questions/fields for the participants of the tender to answer/fill in.



**E3**

This icon ✳ marks which fields are mandatory to complete before being able to move on to the next step of the competition.

Action 1: Upload the required Participation Documents (if applicable).
Action 2: Fill in the Questionnaire (if applicable).
Action 3: Click Next Step

# F. Previewing my submitted info and bid/proposal

**F1**

**4** TENDER CREATION
SUPPLIER/FINANCIAL OPERATOR INFORMATION

**Supplier/Financial Operator Information**

| Company Name | Username | Position in the company |
|---|---|---|
| Alpha Supplier IKE RECEIVER 111 | ΑΡΜΕΝΙΟΣ (ΥΕΛ RECEIVER 1 sourceONE) | Τμήμα Προμηθειών ΑΛΦΑW |

| Phone number | Fax | E-mail |
|---|---|---|
| 2104567330 | 2104567331 | demoportal_receiver1_yel@cosmoone.gr |

**Contact Info**

| Full Name * | Position in the company | Phone number * |
|---|---|---|
| ΑΡΜΕΝΙΟΣ (ΥΕΛ RECEIVER 1 ς | Τμήμα Προμηθειών ΑΛΦΑW | 2104567330 |

| Fax | Address | Region |
|---|---|---|
| 2104567331 | Πέτρου Ράλλη 1, ΘΗΒΑ ΒΟΙΩ | ΒΟΙΩΤΙΑΣ |

| Country | Postal Code | E-mail * |
|---|---|---|
| Greece | 17779 | demoportal_receiver1_yel@c |

**Save**

← Previous step          Next step →

During the process of filling in your bid/proposal, the system will direct you to the Supplier/Financial Operator Information page where you fill in/double-check your information.

After confirming your information is correct click Save and then Next Step.

Action 1: Fill in/double-check your Information.
Action 2: Click click Save and then Next Step.

---

**F2**

**1** TENDER CREATION
PARTICIPATION DOCUMENTS

| NAME | TEMPLATE | MANDATORY | |
|---|---|---|---|
| → Declaration of Eligibility | 4. Declaration Eligibility EN - 9.3.2023.docx | ✔ | 🔗 |
| → Non Disclosure Agreement | NDA_en.docx | ✔ | 🔗 |
| → Project Management & Time Plan | | | 🔗 |

**2** TENDER CREATION
TECHNICAL OFFER

| NAME | TEMPLATE | MANDATORY | |
|---|---|---|---|
| → Certificates | | ✔ | 🔗 |
| → Project Management & Time Plan | | ✔ | 🔗 |
| → Other Technical documents | | | 🔗 |

**3** TENDER CREATION
FINANCIAL OFFER TABLE

| Country | Postal Code | E-mail |
|---|---|---|
| Greece | 17779 | demoportal_receiver1_yel@cosmoone.gr |

← Previous step          Save Offer/Reply draft 💾

Edit draft 🔒          Final Offer/Reply Submission ⊕

On the Draft Preview page you can view **all** the information you have entered throughout the various tender elements.

When you are ready to submit your bid/proposal, scroll down and you will find one of 2 buttons (depending on the type of the tender), Save Offer/Reply draft **or** Final Offer/Reply Submission.

Action 1: Double-check your Bid.
Action 2: Click Save Offer/Reply draft (if applicable) and then click Final Offer/Reply Submission.

# G. Digital Signature

G1

Some tenders will ask you to add your Digital Signature to your bid/proposal. In these tenders, after you reach the end of the bid/proposal submission process, scroll down and click Save Offer/Reply draft.

The system will then direct you to the page with the Reply Files in order for you to add your Digital Signature.

G2

In this window, clicking the file under the heading File Name will download your bid/proposal in PDF form. Open it, add your digital signature and proceed by clicking Upload a digitally signed file.

Clicking Upload a digitally signed file will open the Files window. In this window select your digitally signed file and click Upload Attachment.

Please note the system will **not** accept any other file except for the one downloaded when you click under File name.

G3

Action 1: After reviewing your bid, click Save Offer/Reply draft.
Action 2: Download your bid's PDF file under the File name header.
Action 3: Add your Digital Signature to the file.
Action 4: Click Upload a digitally signed file, select the file and then click Upload Attachment.
Action 5: Submit your bid/proposal by clicking Final Offer/Reply Submission.

# H. How do I submit an Improved Bid/Best and Final Offer (BAFO)?

**H1**



The Buyer/Contracting Entity might begin an Improved Bid/Best and Final Offer (BAFO) round.

You may begin this process either from the Tender Information page or through the Notifications.

When on the Tender Information page scroll down and click Submit a new price improvement offer (BAFO).

The other method to find the tender for which you have advanced to an Improved Bid/Best and Final Offer (BAFO) is by clicking your Notifications button. This will open the page with your notifications in the form of a list.



Clicking on the notification will open a window with the same message.

In that window, clicking Show Tender will take you to the Tender Information page.

**H2**

NOTIFICATION: sourceONE: [orgomj7axchaf-033255] [Guide_User] New Improved Bid/Best and Final Offer (BAFO) round          09/06/2023 13:50

Action 1: Begin the process to submit an Improved Bid/Best and Final Offer (BAFO) by going to the Tender Information page or from the Notifications.
Action 2: On the Tender Information page, scroll down and click Submit a new price improvement offer (BAFO).
Action 3: Fill in your improved bid/price and submit.

# I. How do I know that I successfully submitted my bid/proposal? How do I see my submitted bid/proposal?



I1

After you have finished checking your bid/proposal (as you have seen in previous pages), click Final Offer/Reply Submission.

This will open a window asking for confirmation. Click Submit.

After you have clicked Submit the system will direct you to the Tender Information page.



I2

After loading you will notice a green system message ("Your offer/response dossier has been successfully submitted!") verifying that your bid/proposal/offer has been **submitted successfully**.

Lastly, your bid/offer will appear at the bottom of the page including the time and date it was submitted and the options to revoke and/or edit. By clicking the file you can open it and see your submission.

**Action 1**: Finish checking your bid/proposal and click Final Offer/Reply Submission to submit it.
**Action 2**: After loading has finished, you will notice on the Tender Information page the system message verifying your bid/offer submission. You will also be able to see your bid/offer's file and timestamp.