
Bid Locker
Secure Bid Submission
Vendor's Guide

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1 Introduction

Bid Locker is a secure e-procurement and bid submission platform that you can use to submit bids and proposal responses to the government agencies, universities and community colleges, and other types of organizations — anyone who has told you to submit your bid and proposal responses via Bid Locker.

Bid Locker works entirely in your web browser. You don't need to install anything and you don't need any additional software to use Bid Locker.

1.1 A Quick Overview of Bid Locker

If you're new to Bid Locker, the first thing you'll do is to create a profile for your business.

Once you've created your business profile, you can use that same profile for any agency that accepts bids through Bid Locker. You'll only need to set up a profile once.

All of your business information is stored securely, and it's only shared with the government agencies you choose. We'll never sell your information.

For each bid opportunity or RFP, Bid Locker creates a virtual bid window — this works just like the bid window in the procurement department. You can submit, revise, or withdraw your bid response or proposal right up until the due date. After the due date, the virtual bid window closes, and you can no longer submit a response or revise your submission.

Some government agencies also use Bid Locker to post their notices of intent to award and their bid tabulations. You'll want to check with the purchasing department for each bid or proposal you submit, as this varies by agency.

1.2 Supported Browsers

We support the following web browsers:

- Chrome or Chromium
- Firefox
- Safari
- Vivaldi

We do not support Microsoft Internet Explorer. If you're not using one of the supported browsers, we can't guarantee that Bid Locker will function properly.

Please note: *some PDF and document viewer software is set up to open the Bid Locker website directly within their viewer when you click on a link in a PDF document. This is also unsupported. If your PDF viewer doesn't open a new browser window with one of our supported browsers, Bid Locker won't work for you. If this happens, you'll need to reopen Bid Locker in one of our supported browsers.*

2 Getting Started

If you're new to Bid Locker, the first thing you'll do is to set up a vendor profile for your business. Your vendor profile is what you'll use to submit bids, ask questions, express interest in solicitations, and more.

The sign-up process will take between 5 to 10 minutes.

2.1 Creating Your Account Login

First, head over to Bid Locker: https://bidlocker.us

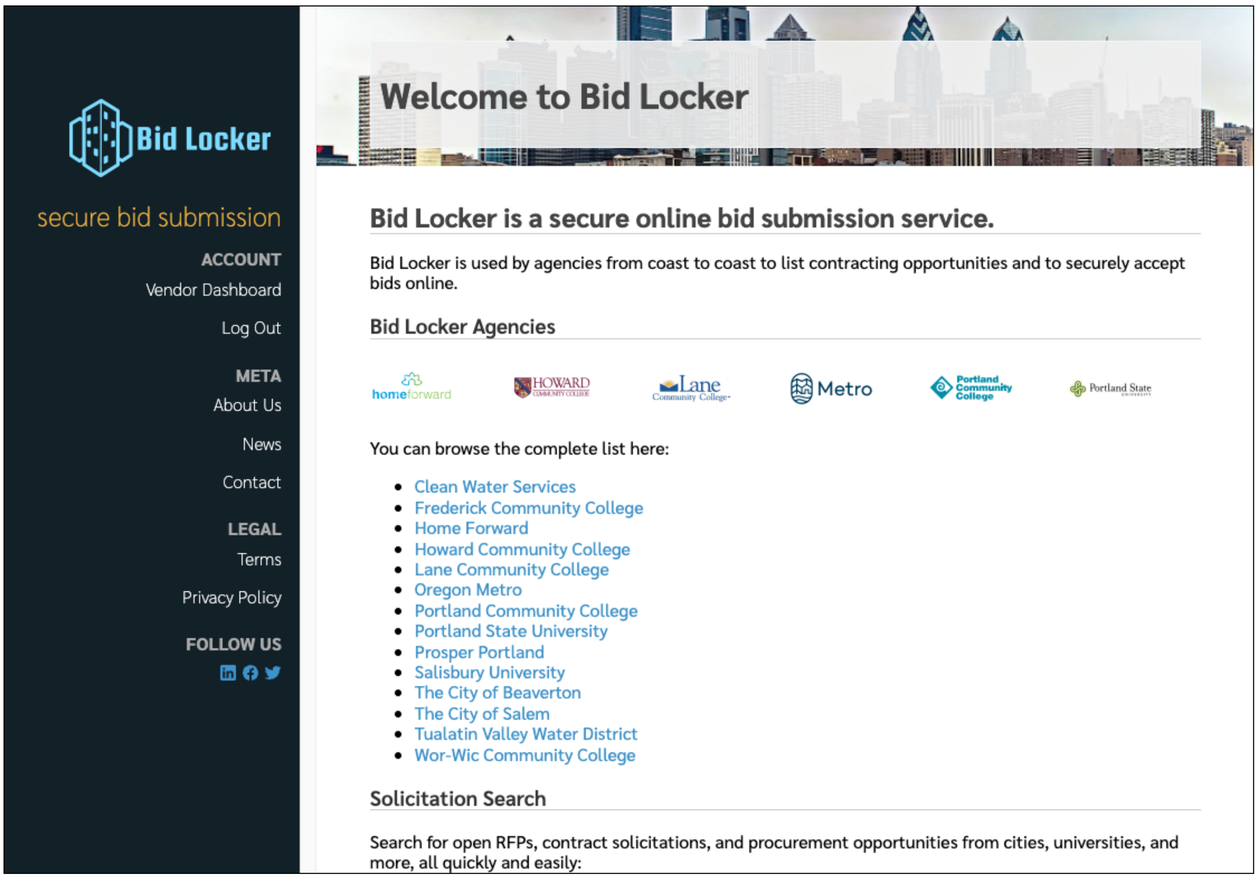


Figure 1: The Bid Locker Home Page

On the Bid Locker home page, look in the left-hand nav column for the "Sign Up" link, highlighted below.

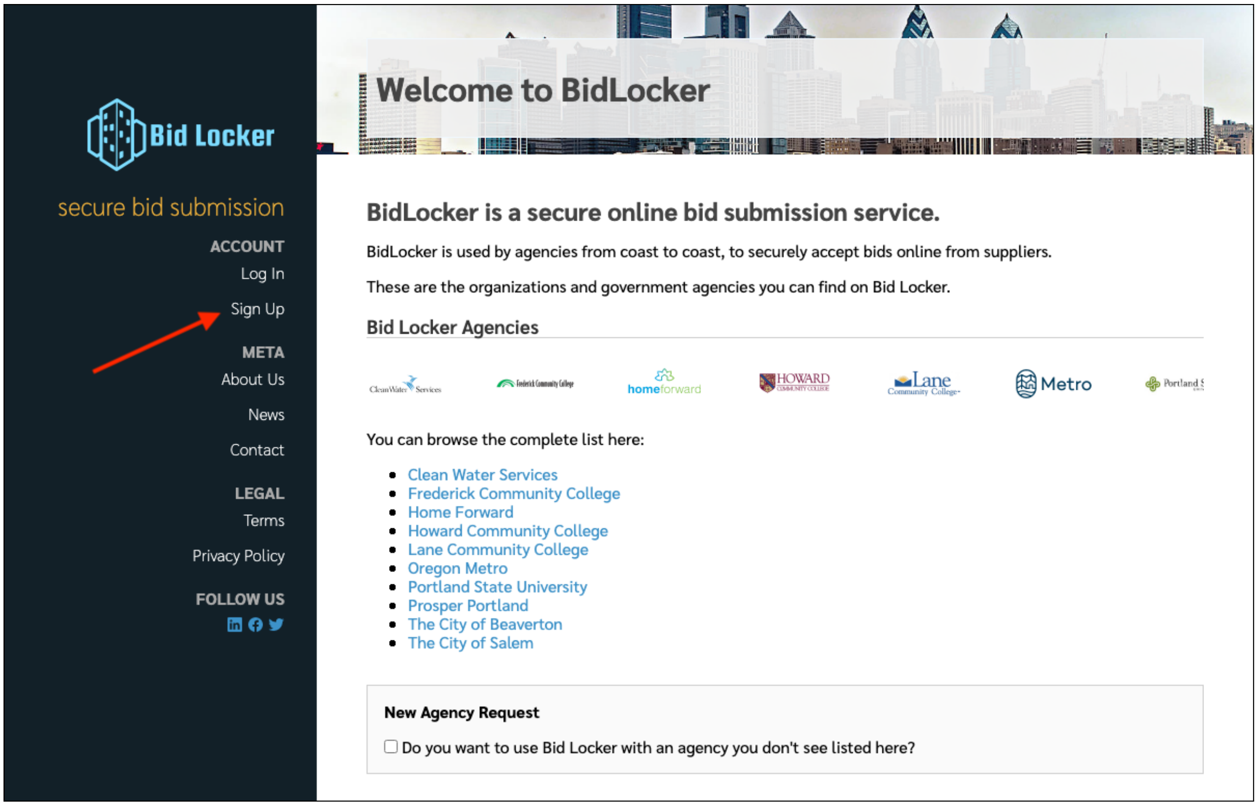


Figure 2: Signing up

Click the "Sign Up" link and you'll be taken to the secure Bid Locker login. Here, use your email address and select a strong password. Your password must be at least 8 characters long, and have a number and a special character.

This is what the login screen looks like:

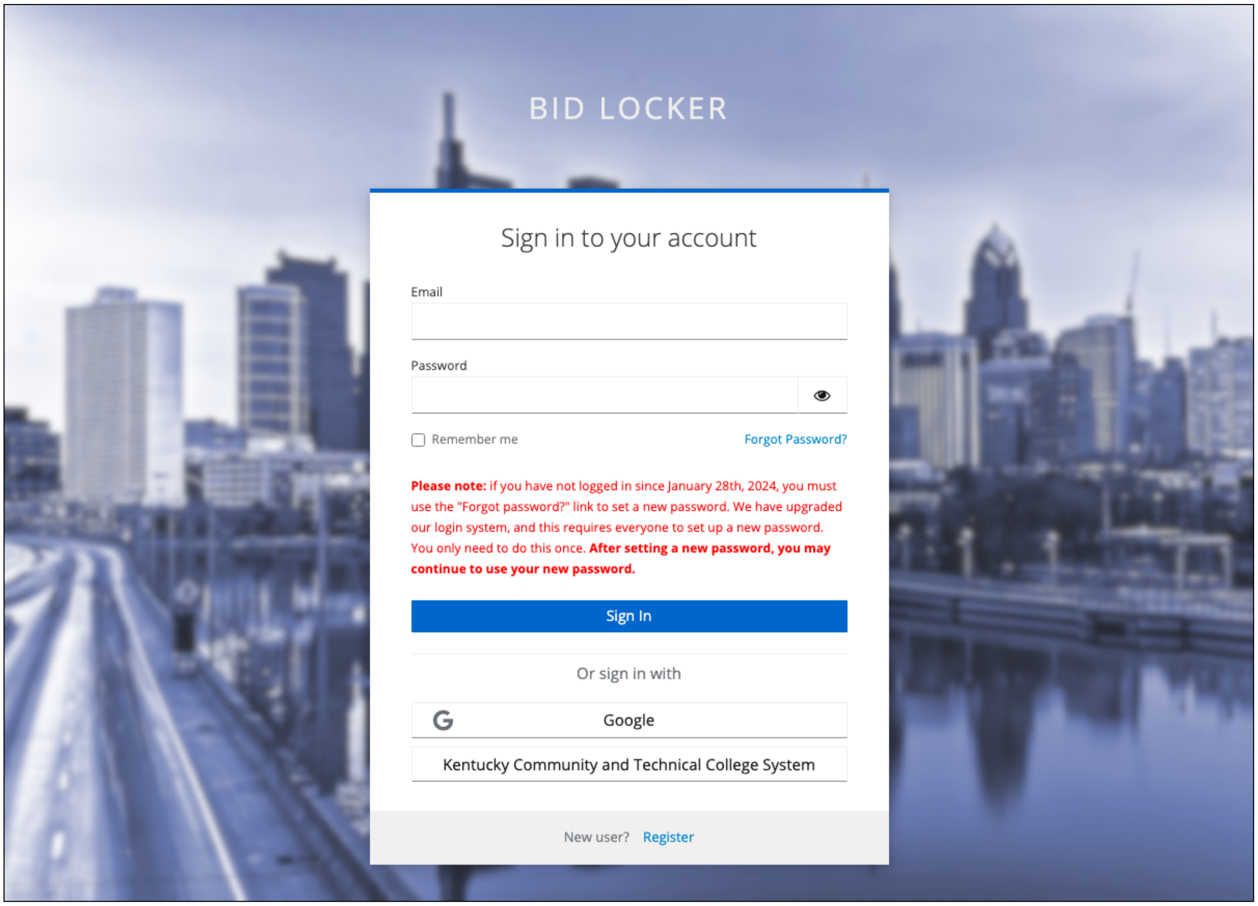


Figure 3: Signing up

You can also use your Google account to securely create your login. Click the "Sign in with Google" button to use your Google login instead of using an email address and password.

After signing up, you'll be taken to the Bid Locker profile setup process. There are five steps:

- Basic business profile information
- Physical and mailing address
- Additional business information, commodity codes, and profile tags (optional)
- Logo (optional)
- Certifications (optional)

After completing the sign-up process, you're automatically logged into Bid Locker.

2.2 Logging In

If you've just set up a new business profile, you're already logged in, and you can skip this section.

To log in, first load up Bid Locker in your browser: https://bidlocker.us

Then, click the "Log In" link in the left-hand column, as shown here:

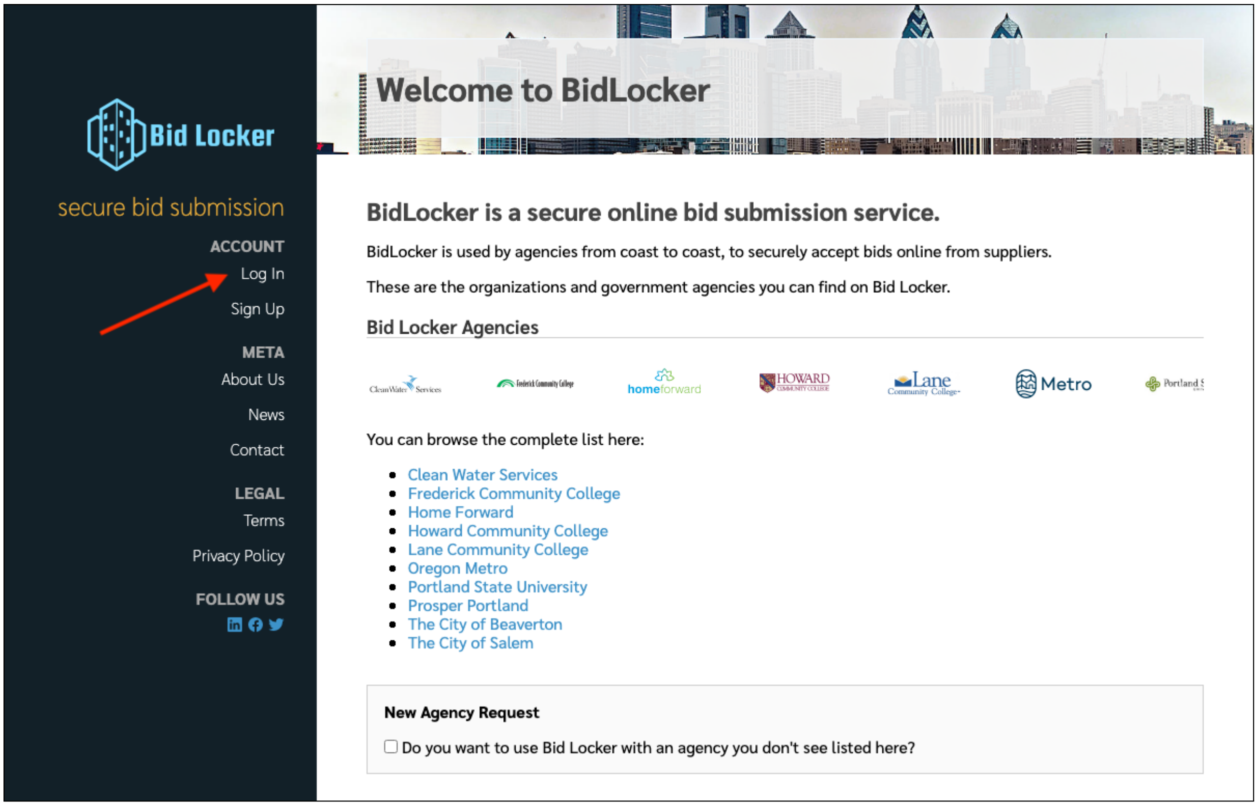


Figure 4: Logging in

You'll be taken to the secure Bid Locker login. Use the email address and password — or your Google account — you used when you first set up your profile. If you've used the correct email address and password, you'll be logged in and taken to your vendor dashboard.

2.2.1 Resetting Your Password

If you've forgotten your password, click the "Don't remember your password?" link on the login screen, as shown here:

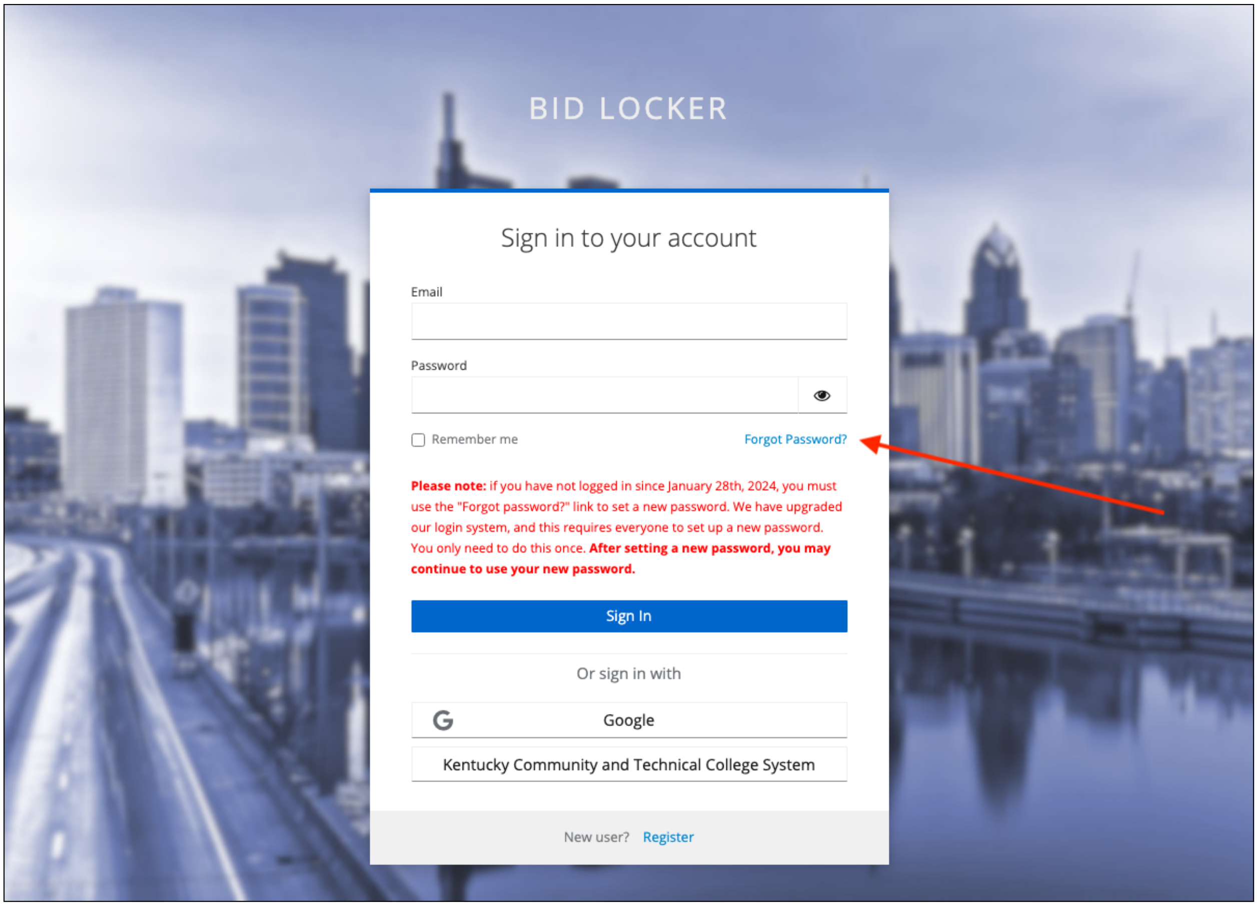


Figure 5: Resetting your password

Enter the email address you used when signing up, and a password reset link will be emailed to you.

3 Your Vendor Dashboard

After you log in, you'll be taken to your vendor dashboard. At the top you'll see your vendor dashboard navigation menu, where you can access your profile, see the agencies you've registered with, and update your login information.

Next you'll see saved searches, your agency watchlist, your project watchlist, and so on.

Last, you'll see your bid history, including completed and in-process bids.

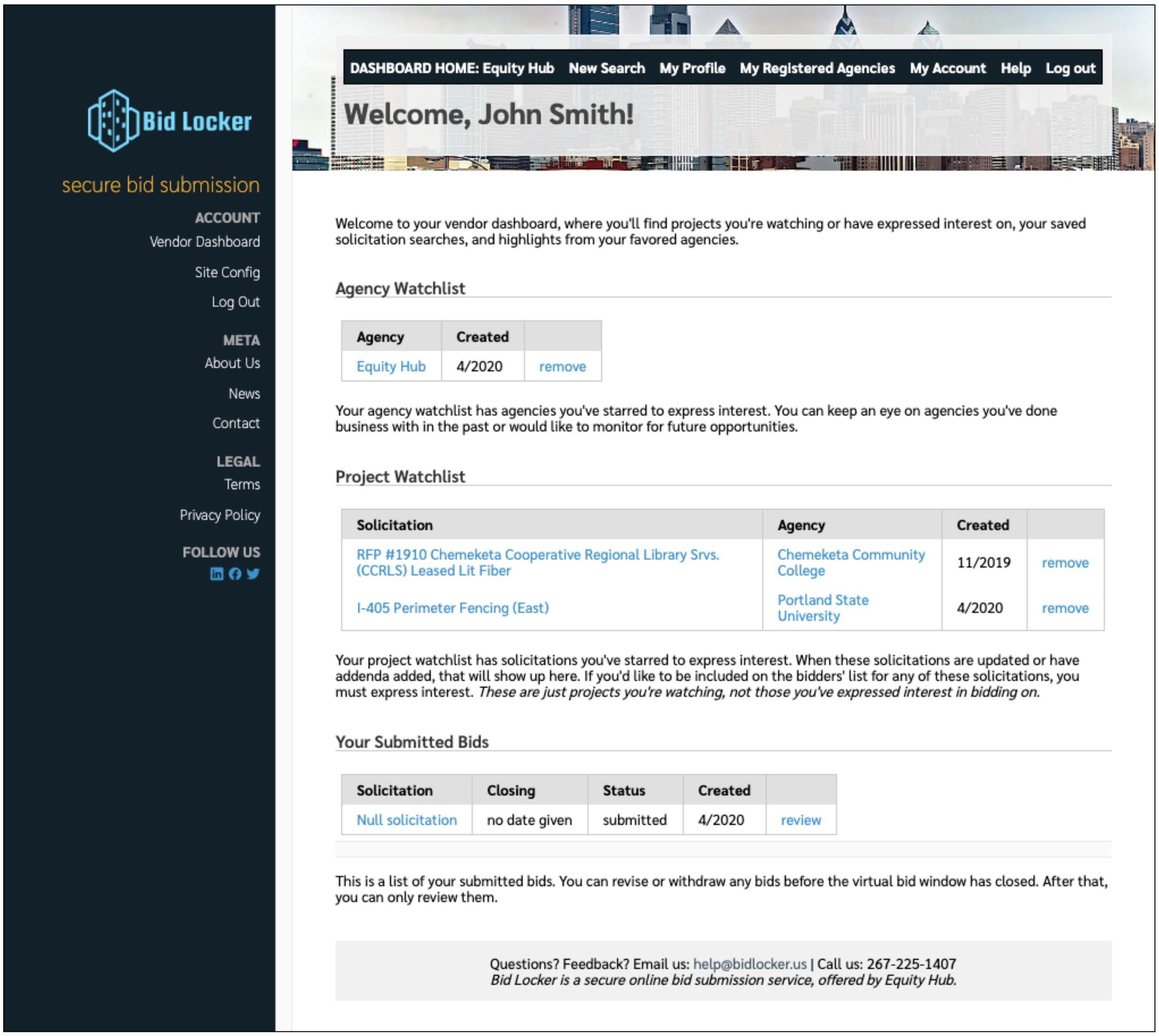


Figure 6: The vendor dashboard

4 Bid Locker's Agencies and Organizations

Every agency and organization on Bid Locker has their own landing page. Each agency's landing page shows you contact information, usually has a brief description of the agency, and often has links to agency pages where you can find additional information.

You can find agency landing pages either from your vendor dashboard or by browsing the complete agency list on the Bid Locker home page — *see the next section for more information.*

4.1 Browsing the Agency List

You can always browse the complete list of agencies on the Bid Locker home page at: https://bidlocker.us

Click the agency name, or their logo, to go to any agency's landing page.

4.1.1 The Agency Landing Page

Once you've found your agency landing page, you can see its list of solicitations under the heading **Our Active Solicitations**, as seen below:

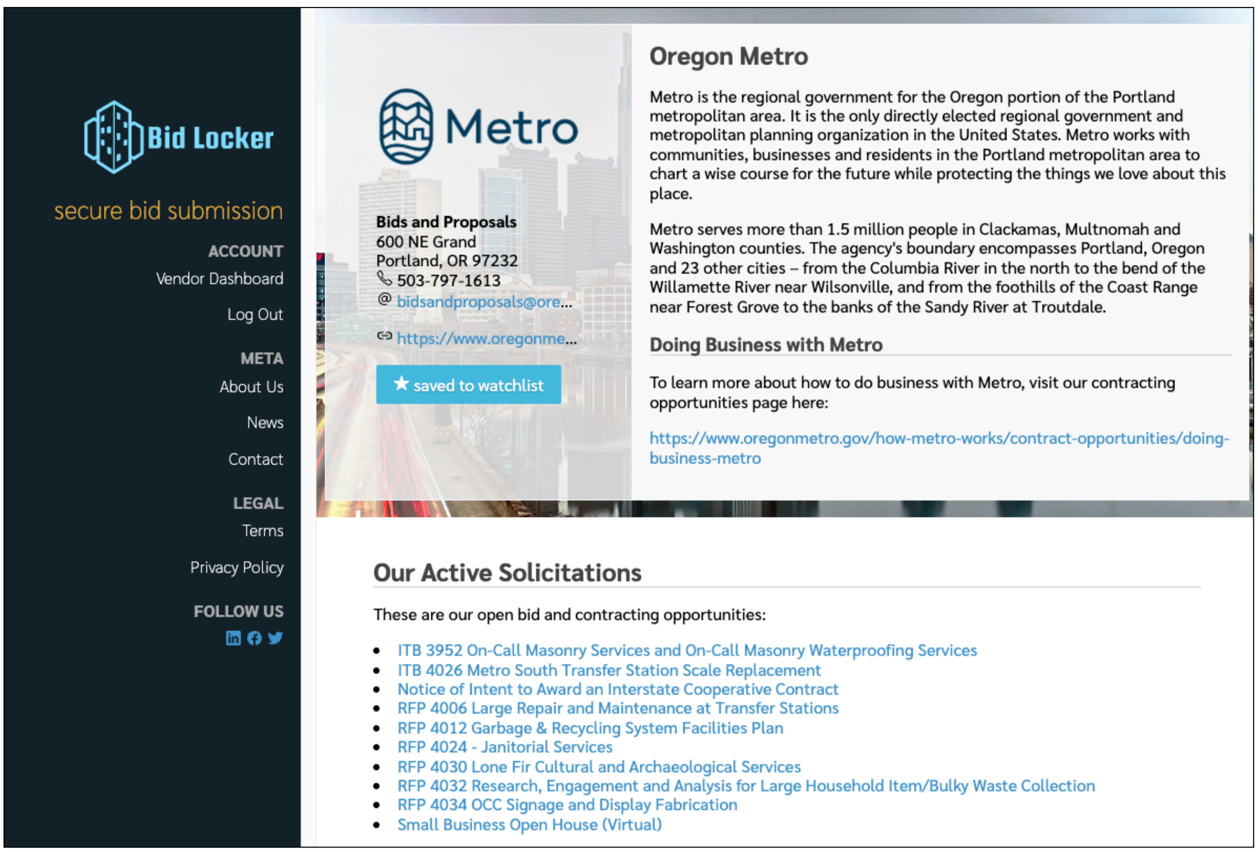


Figure 7: Bid Locker Agency Landing Page

You can also save any agency to your agency watchlist by clicking the "save to watchlist" button.

Please note: *you must be logged in to save an agency to your watchlist.*

4.2 Sharing Your Profile With an Agency

When you've created a vendor profile for your business, your profile is kept private until you register with agencies and opt into sharing it with them. In other words, we don't automatically share your profile with every agency on Bid Locker — we leave it up to you who you want to register with, so that you decide who you're sharing your vendor profile with.

Registering with an agency and sharing your profile with them is simple, and there are several places where you can do this, including the agency's landing page and the bid and proposal details pages.

For example, when you're logged in, you can register your vendor profile with an agency on their landing page. At the bottom of the agency's landing page, you'll see a section with a button you can click to share your profile:

Figure 8: Registering with an agency

In most cases, clicking that button is all it takes to register with the agency and share your vendor profile with them.

4.2.1 Additional Questions

An agency may have created additional questions that you must answer as part of their vendor registration process, and if they have, you'll be prompted to answer those when you register with them. These may be questions about the service areas you cover, or they may include forms that you must fill out or documents to sign.

If an agency has asked additional questions, you'll see their questions on an "Additional Questions" screen that looks something like this:

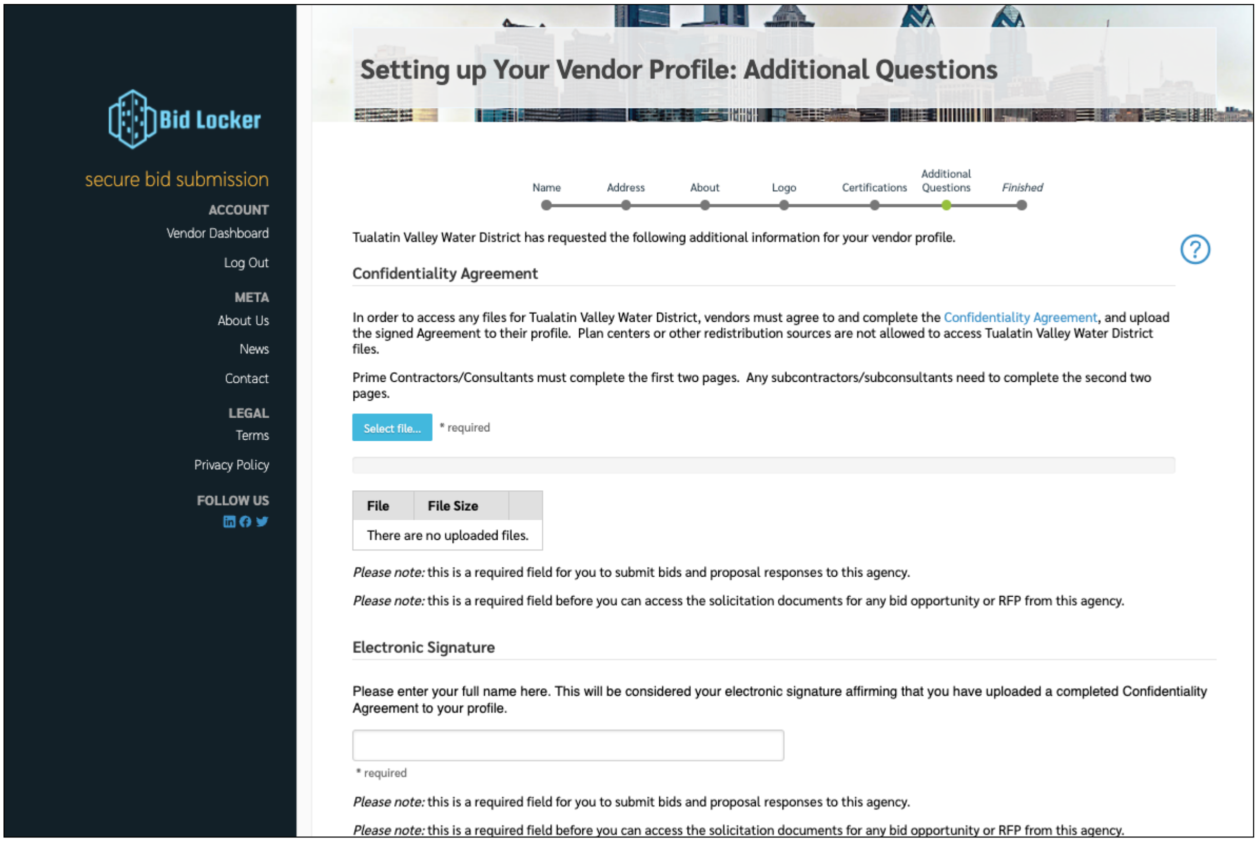


Figure 9: Additional questions for an agency's vendor registration

If an agency asks you any additional questions, your answers will be visible on your vendor profile only to that agency — no other agencies will see how you've answered any such questions.

5 Bid Opportunities and RFPs, *or, the Virtual Bid Window*

On Bid Locker, every contracting opportunity (i.e. a bid opportunity or an RFP) has its own details page, containing a wide variety of information about that contracting opportunity.

On every agency landing page, there is a section labeled "Our Active Solicitations" which has a list of the agency's open bid and proposal opportunities. Each item in the list is a link, which you can click to see the details page for that contracting opportunity, whether a bid opportunity or RFP.

5.1 The Bid Opportunity and RFP Details Pages

The details page for the bid opportunity or RFP that you're interested in will contain a variety of information, including:

- The title of the contracting opportunity,
- The due date,
- Additional contact information,
- Bid/proposal documents,
- And numerous other details.

Below is a screenshot of what the solicitation details page will look like:

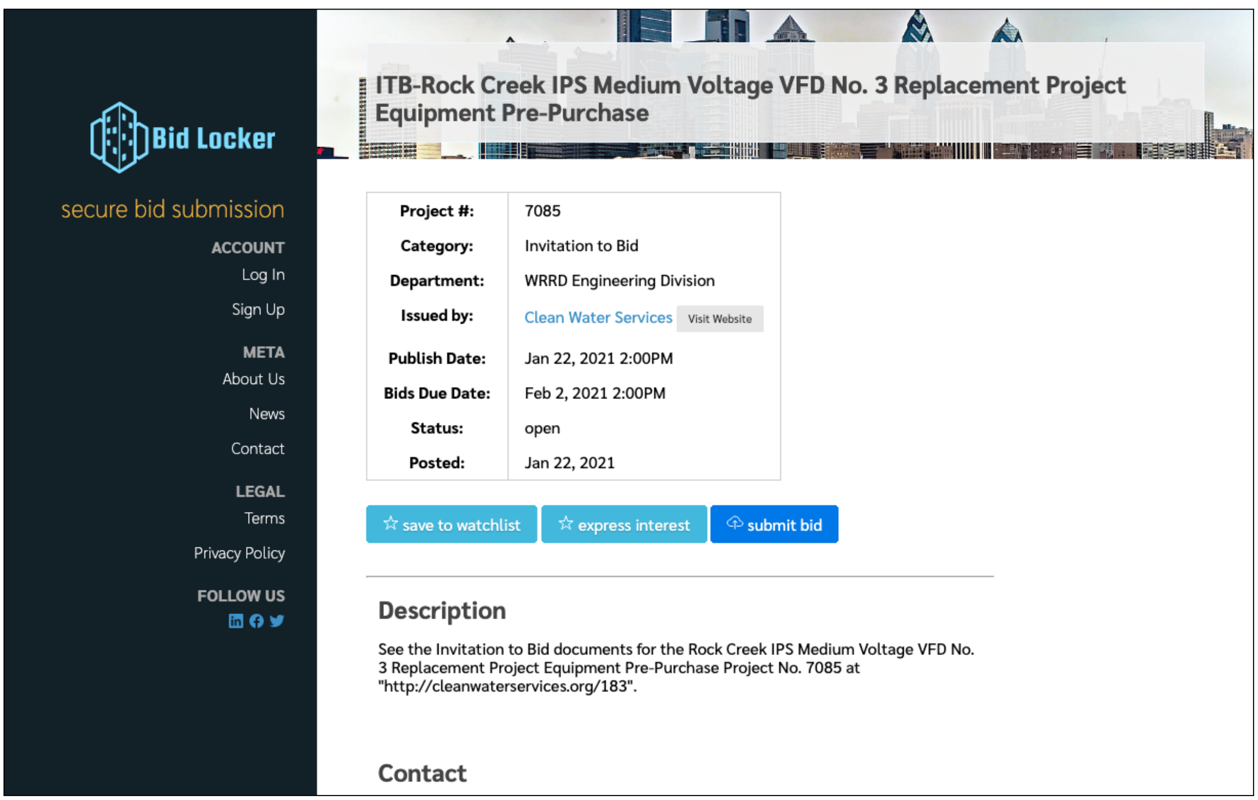


Figure 10: Solicitation Details Page

The bid opportunity and proposal details page is also your starting point for submitting a bid, so if you're ready to jump right in, you can click the "submit bid" button and then follow the instructions in the Submitting a Bid or Proposal section of this user guide.

5.2 Adding a Solicitation to Your Watchlist

You have a private watchlist for solicitations, and you can add any solicitation to your watchlist at any time. This keeps solicitations you're interested in handy, as they all appear on your dashboard under the "Project Watchlist" section.

To add a solicitation to your watchlist, click the "save to watchlist" button on the solicitation details page, e.g.:

Figure 11: The Watchlist Button

You can remove a solicitation from your watchlist at any time by clicking the button again. You can also remove it by clicking the "remove" link on the dashboard.

Note that agencies cannot see when you've added a solicitation to your watchlist. The watchlist is only for your convenience.

5.3 The Interested Parties List

Please note: *not all agencies use the interested parties list on Bid Locker. These directions only apply to agencies that use Bid Locker's interested parties list. If your agency uses a different website to advertise its bid and proposal opportunities, and only uses Bid Locker for bid submission, you may need to consult with them to use the interested parties list on their advertisement website.*

To add your business to the interested parties list, look for the button labeled "Express Interest" on the solicitation details page. Click this button, and it should toggle on. That's it! You've added yourself to the interested parties list.

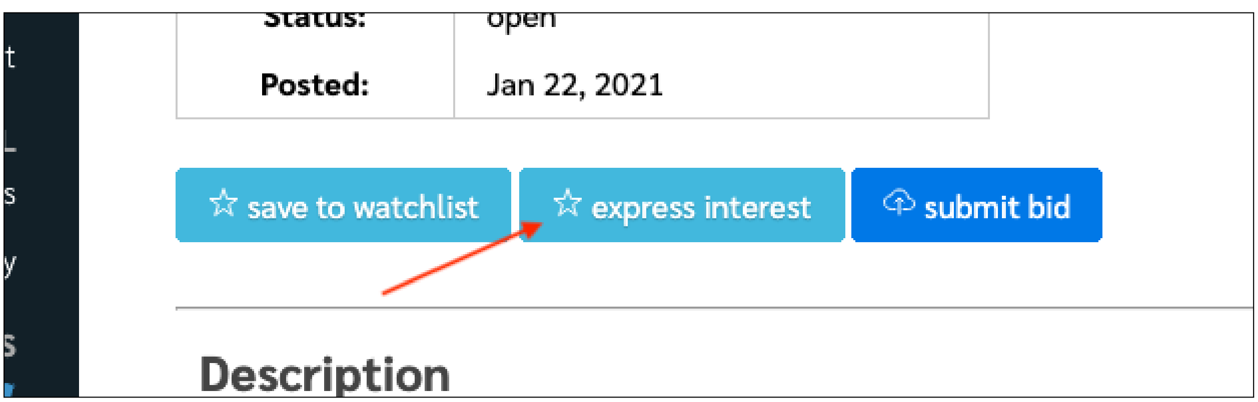


Figure 12: The Express Interest Button

You can also remove yourself from the interested parties list by clicking the button again.

5.3.1 Seeing the Interested Parties and Planholders Lists

If your agency has made the interested parties or planholders lists visible, you can see these lists on the details page.

Please note: *you may need to be logged in to see it, if the agency has required vendors to log in to see these lists.*

5.4 Restricted-Access Solicitations

Some solicitations may be restricted by the agency, so in order to see these solicitations, you must request access from the agency. If your request has been approved, you'll receive an email letting you know that you can proceed onto the solicitation to review the information, submit a bid, and so on.

5.5 Downloading Solicitation Documents

If the bid opportunity or RFP you're viewing has bid documents attached to it, those will be listed under the section titled **Attachments**.

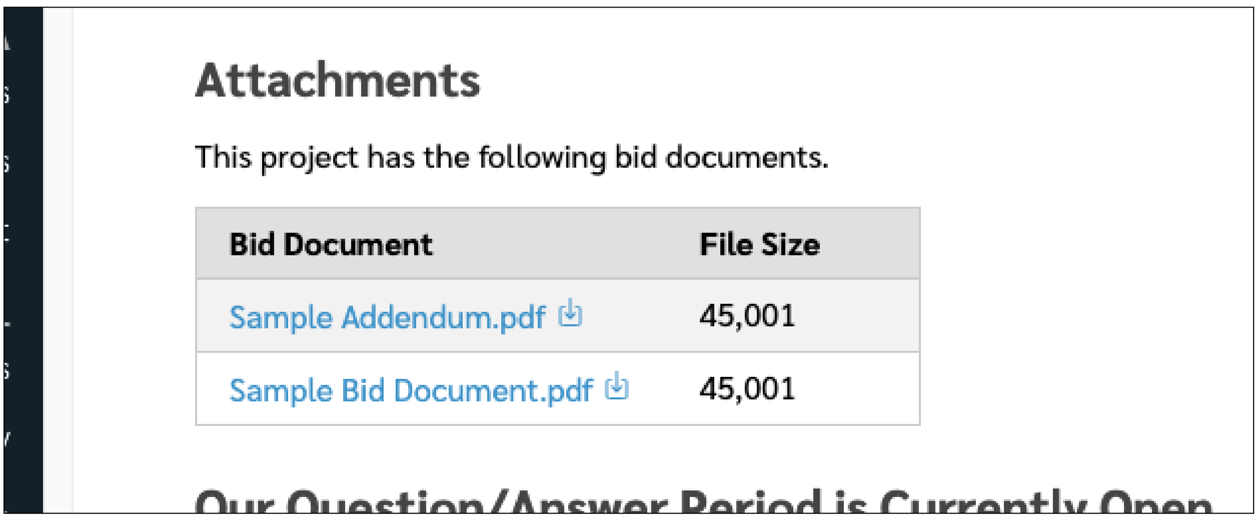


Figure 13: Downloading Solicitation Attachments

Click the document title to view it in your browser, or if you prefer, click the download icon to download the document directly to your computer.

If the agency has set restrictions on who can download their attached documents, you'll see a list of requirements underneath the document table. It will tell you what you need to do to gain access to the solicitation documents, e.g. being registered with the agency or expressing interest, e.g.:

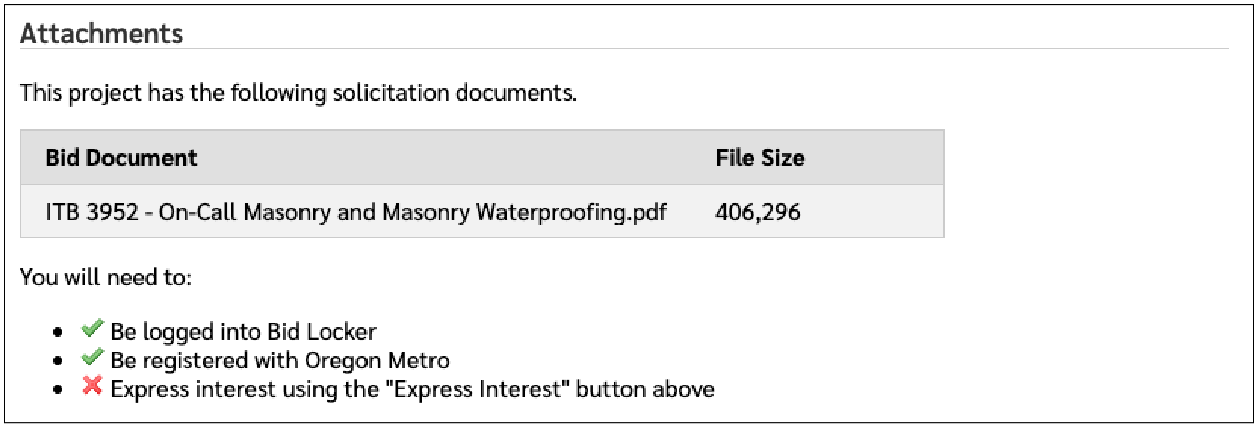


Figure 14: Attachment Requirements

In the above example, you must be logged in, have registered with the agency (in this case, Oregon Metro), and you must express interest using the "Express Interest" button.

5.5.1 Notices of Intent to Award

Please note: *not all agencies post their notices of intent to award on Bid Locker. These directions only apply to agencies that use Bid Locker to post their notices of intent to award. If your agency uses another solicitation websit together with Bid Locker, you may need to consult with them to find their notices of intent to award.*

When an agency has completed their bid tabulation or proposal evaluation, they may post their notice of intent to award to Bid Locker. You can see these in the solicitation documents section, along with the rest of the solicitation documents. These will be marked as "Bid Tabulation" or "Intent to Award" in the list of documents. You can download them as you would any other document.

5.6 Participating in Q&A

Please note: *not all agencies allow you to ask questions about the solicitation on Bid Locker. These directions only apply to agencies that use Bid Locker's QA function. If your agency uses another solicitation websit together with Bid Locker, you may need to consult with them to ask questions via their other website.*

When an agency lists their solicitation, they may also set up a QA period, during which you can ask questions about your solicitation. If the QA period is currently open, then you'll be able to submit your questions via the details page, e.g.:

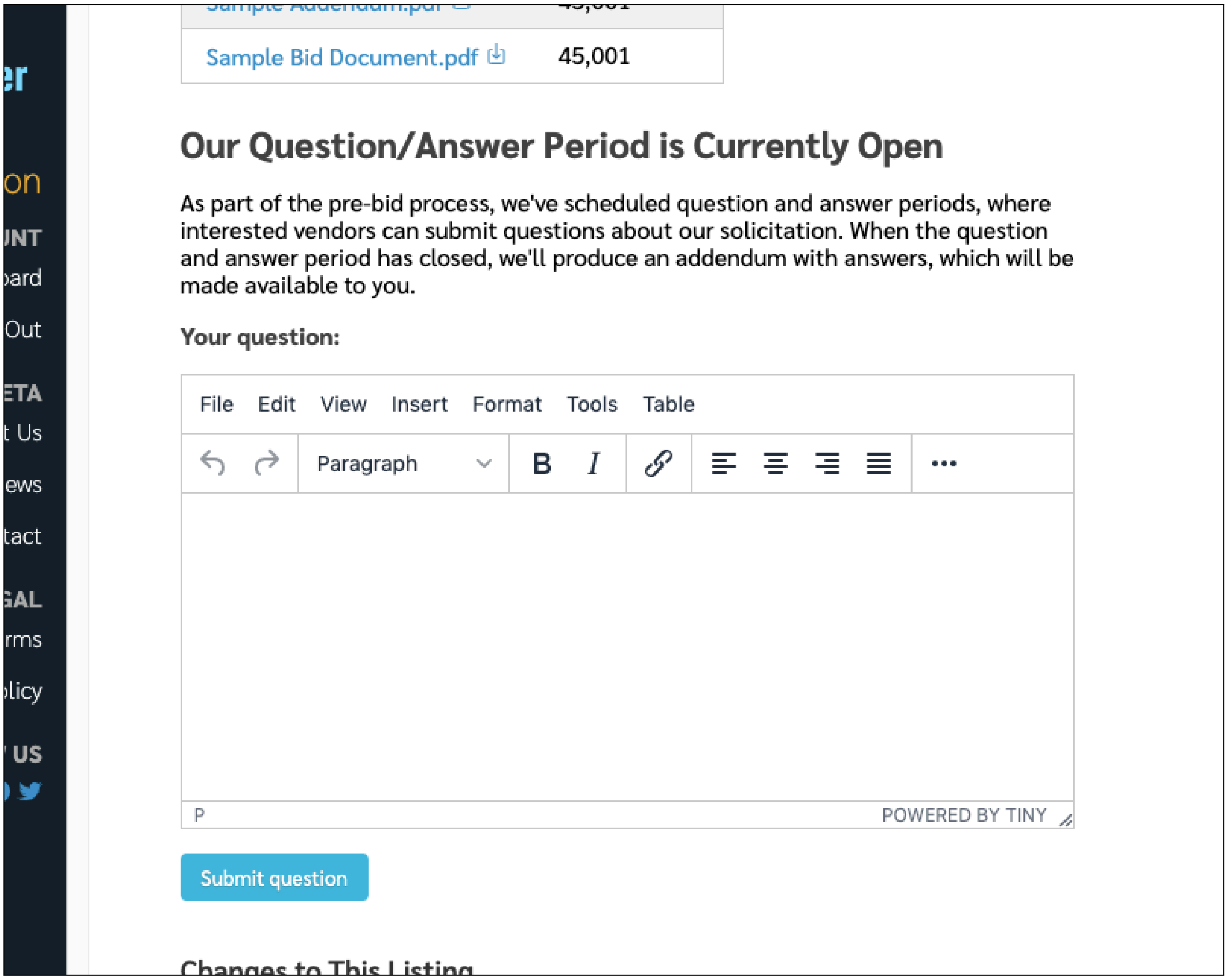


Figure 15: Asking questions during the Q&A period

Enter your question in the text area and click the “Submit Question” button. The agency will now see your question and will be able to answer it when the QA period has closed. Generally, agencies will post their answers to all submitted questions as a new addendum attached to the original solicitation.

6 Submitting a Bid or Proposal

When you're ready to submit your bid or proposal with Bid Locker, you can follow these instructions to upload and submit your bid or proposal documents.

Before you start this, make sure you've read the solicitation requirements carefully and have everything ready. If you need to make changes to your submission later on, you can always do so, up until the bid window has closed.

When you're ready, here's how to submit your response.

6.1 Starting Your Bid Submission

On the details page, look for the "submit bid" button, as shown below:

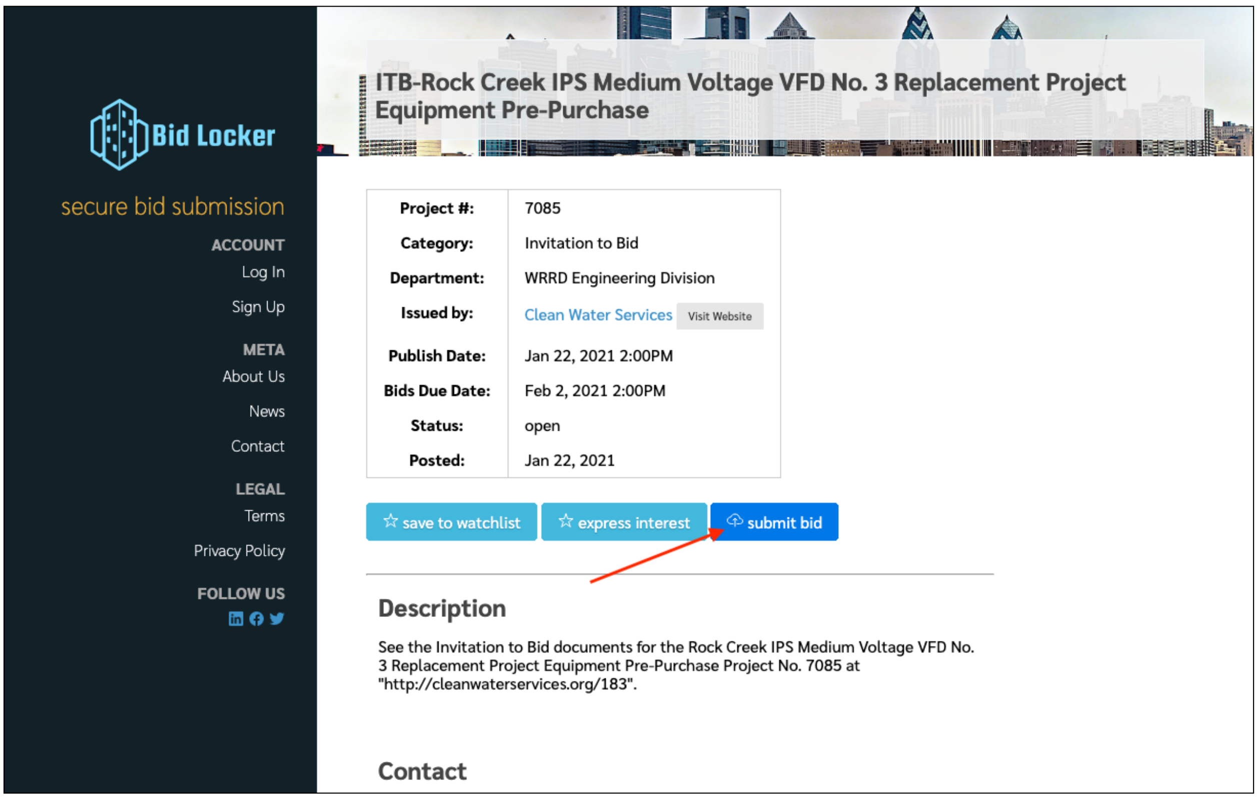


Figure 16: The "submit bid" button

Click the "submit bid" button to begin, and you'll be taken to first step of the bid submission process.

Please note: *if you've already submitted a bid for this solicitation, then you'll see that the button now reads "review bid" — this button takes you to your bid review page where you can make revisions.*

6.1.1 The Pre-Submission Review Page

After clicking "submit bid" you'll be taken to a review page that lists the solicitation title, closing date, and other information, to help make sure you're submitting your response to the right location. After reviewing the information on this step, click the "Begin Bid Submission" button as shown below:

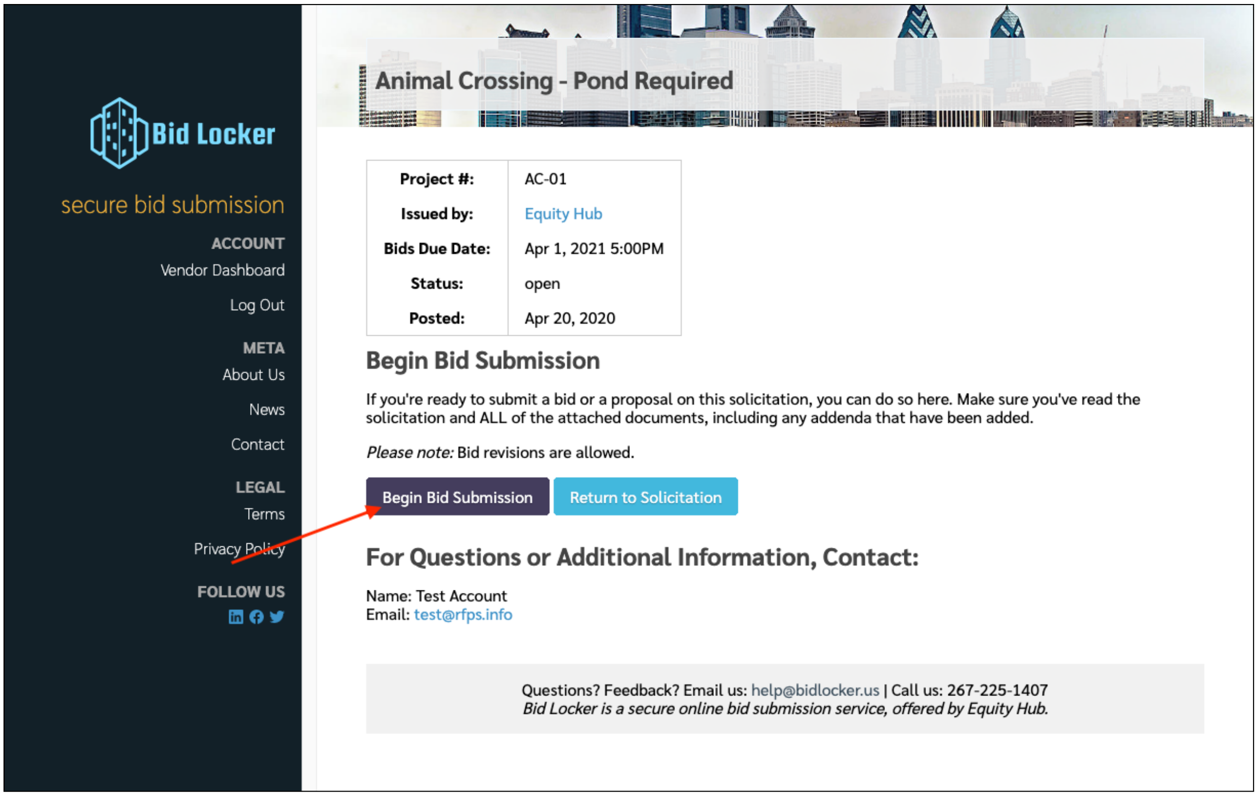


Figure 17: Beginning a response

Also note that if the solicitation has just closed while you were reviewing the information, you won't be able to proceed past this screen.

6.2 Step 1: Uploading Your Bid Documents

Now, you can upload your bid or proposal documents. You can upload as many documents as you need here — there's no limit on the number of documents per submission.

Click the "Select files..." button to select the files on your computer that you wish to upload, e.g.:

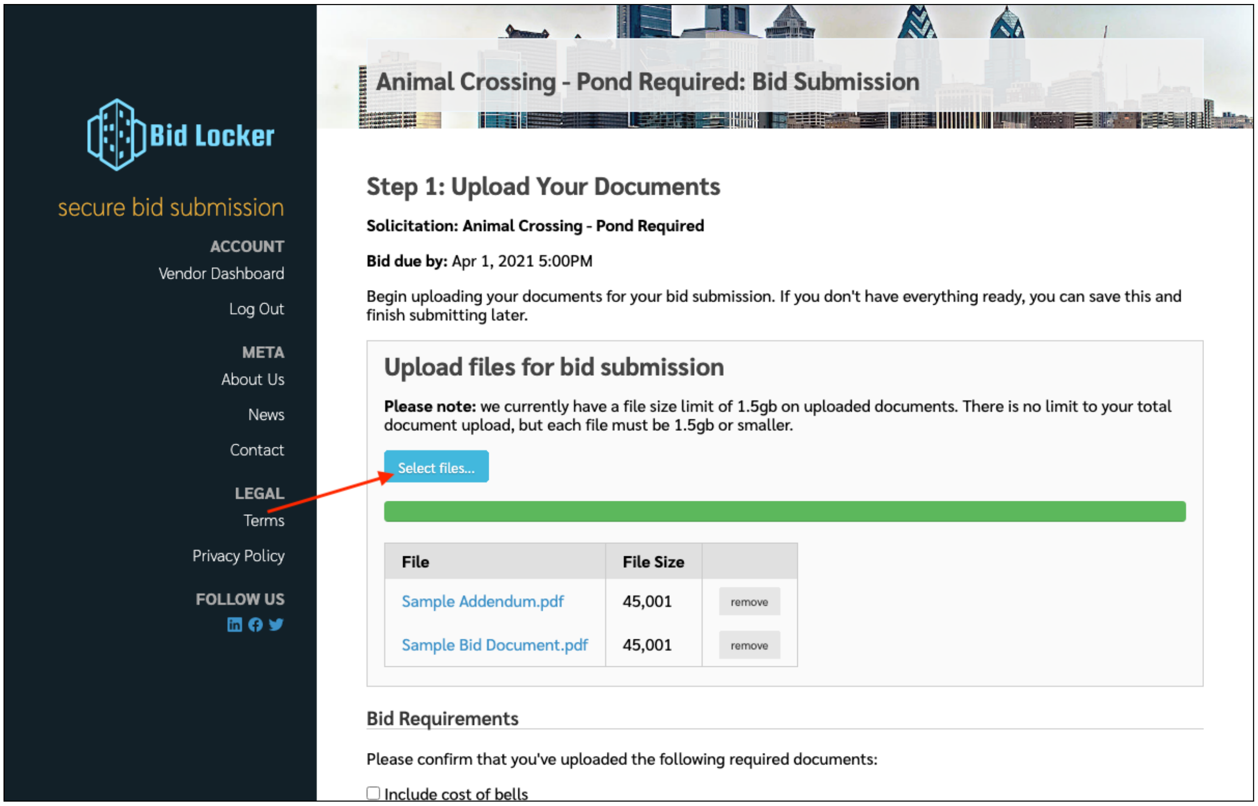


Figure 18: Uploading Bid Documents

You can upload one file at a time, or many, whichever your preference. As each file uploads, the progress bar will begin to fill out. When it's completely filled, your file upload has finished, and you're ready for the next step.

6.2.1 Line-Item Bidding

If the bid opportunity you're responding to has a line-item quote component, you'll be able to complete your line item responses here. In addition to the file upload section of this page, you'll see a section labeled "Line Items" that will contain a grid of line items for you to fill out:

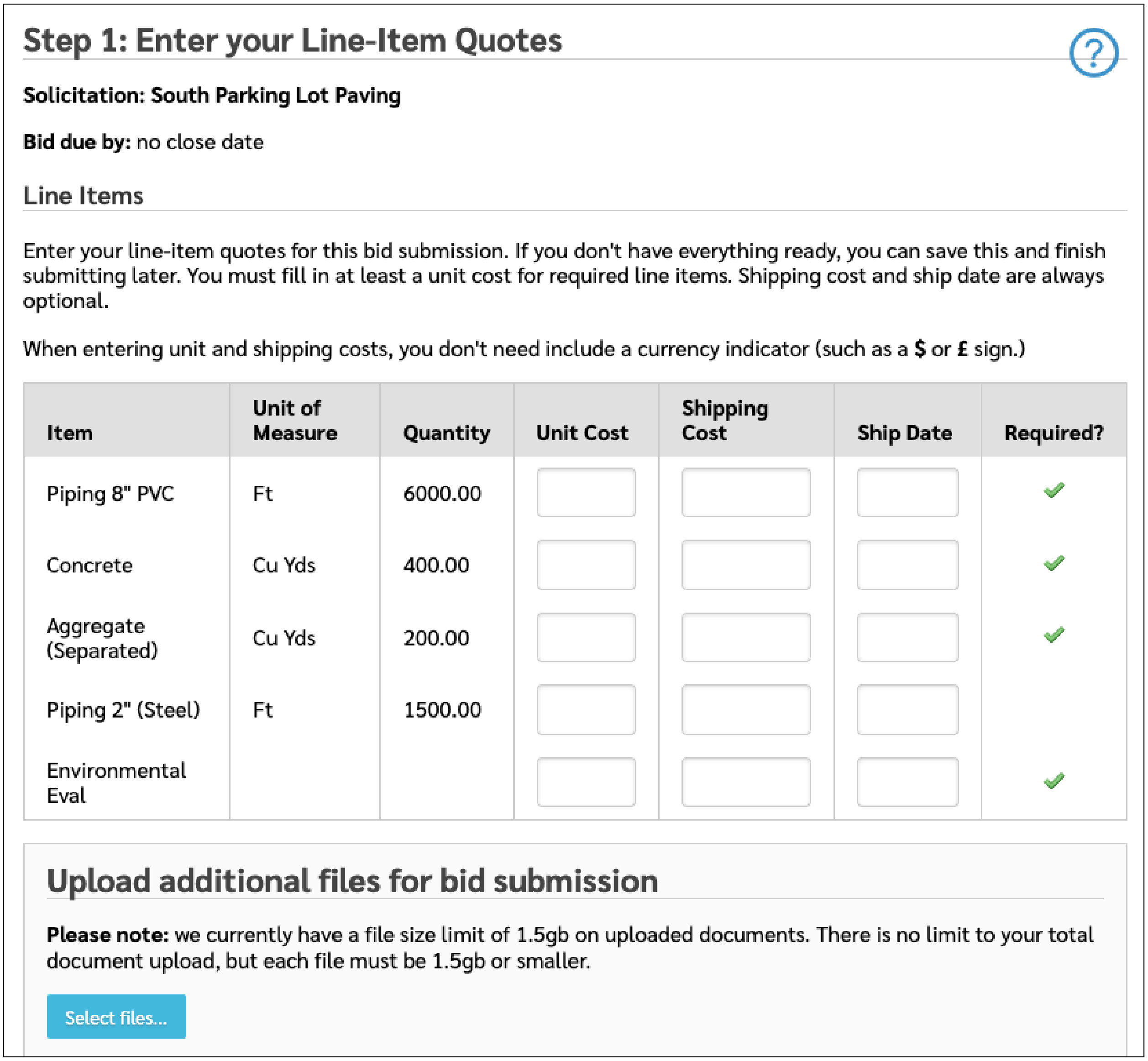


Figure 19: Line-item Bidding

You must complete any line items marked as “required” — anything not marked as required is optional, but please consult the original bid documents to determine how you should complete those line items.

6.2.2 Bid Requirements

Some solicitations will have a list of requirements you must confirm before you finish your submission. These requirements are shown as a checklist on the submission upload page, e.g.:

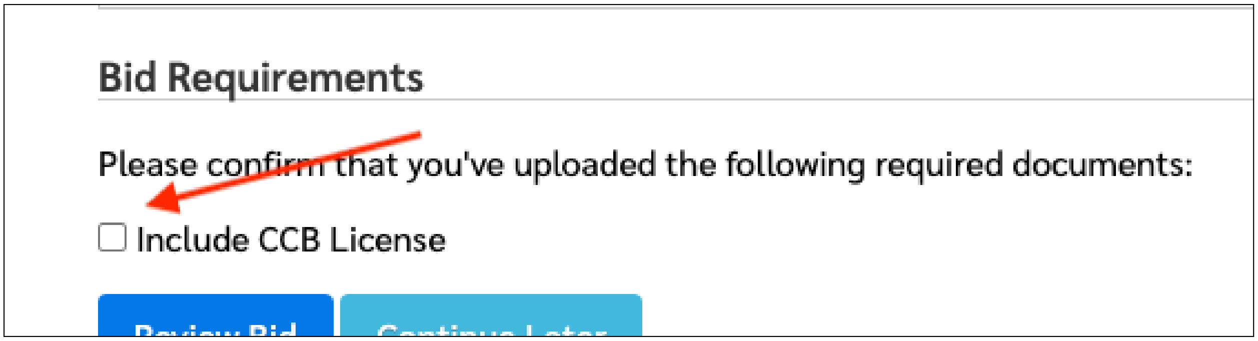


Figure 20: Bid Requirements

Click each checkbox to affirm that you've satisfied the given requirement – but only do so if you've actually completed the requirement.

If you haven't met the requirement, you can save your submission in progress and return later. **Even if you save your submission in progress, you must still complete it before the closing date.**

6.2.3 Bid Document Types

For some solicitations, the agency may set up document types for each of the documents you upload as your response — they might do this to have you separate out the different parts of your proposal into different sections, e.g. to upload your fee schedule separately from your technical proposal, or to upload a signature page as its own separate document.

If the agency has set up document types for this solicitation, then you will see a dropdown menu next to each document as you upload it:

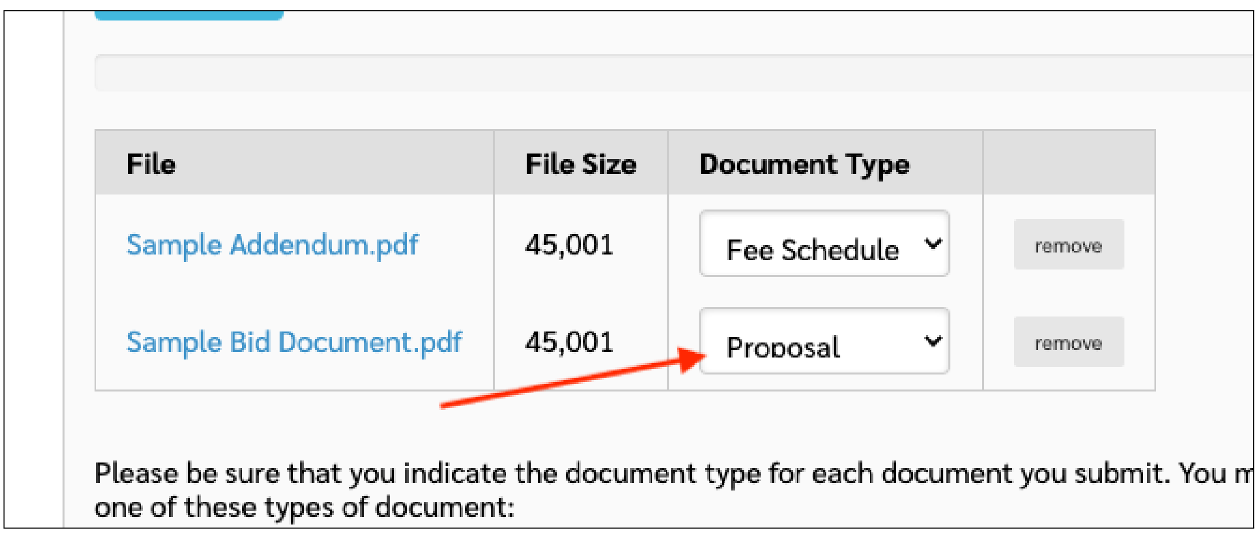


Figure 21: Bid Document Types

Select the document type for each document you upload, making sure you upload at least one document of each required document type.

6.2.4 Saving Your Submission in Progress

If you have only some of your documents ready, or you'd like to complete your submission later on, you can save your work in progress and return to it from your vendor dashboard at any time. All of your file uploads will be saved, and any bid requirements you've checked will also be saved.

To save your submission in progress and continue later, click the "Continue Later" button:

Figure 22: Saving a Submission in Progress

This will save your submission in progress and return you to your vendor dashboard.

6.3 Step 2: Reviewing and Confirming Your Submission

After you've uploaded all of your submission documents, and completed any additional steps (such as line-item bidding, bid requirements, or document types), you're ready to submit your response.

If you're on *Step 1*, click the "Review Bid" button to continue to the review and confirmation page:

Figure 23: Reviewing a Bid Before Submitting

On this page, you'll see all of your uploaded documents and submitted information, presented as a review step so that you can make sure everything for your bid response or proposal is as you intend it.

When you're ready to confirm your submission, first check the box labeled "Please check here to confirm your bid submission":

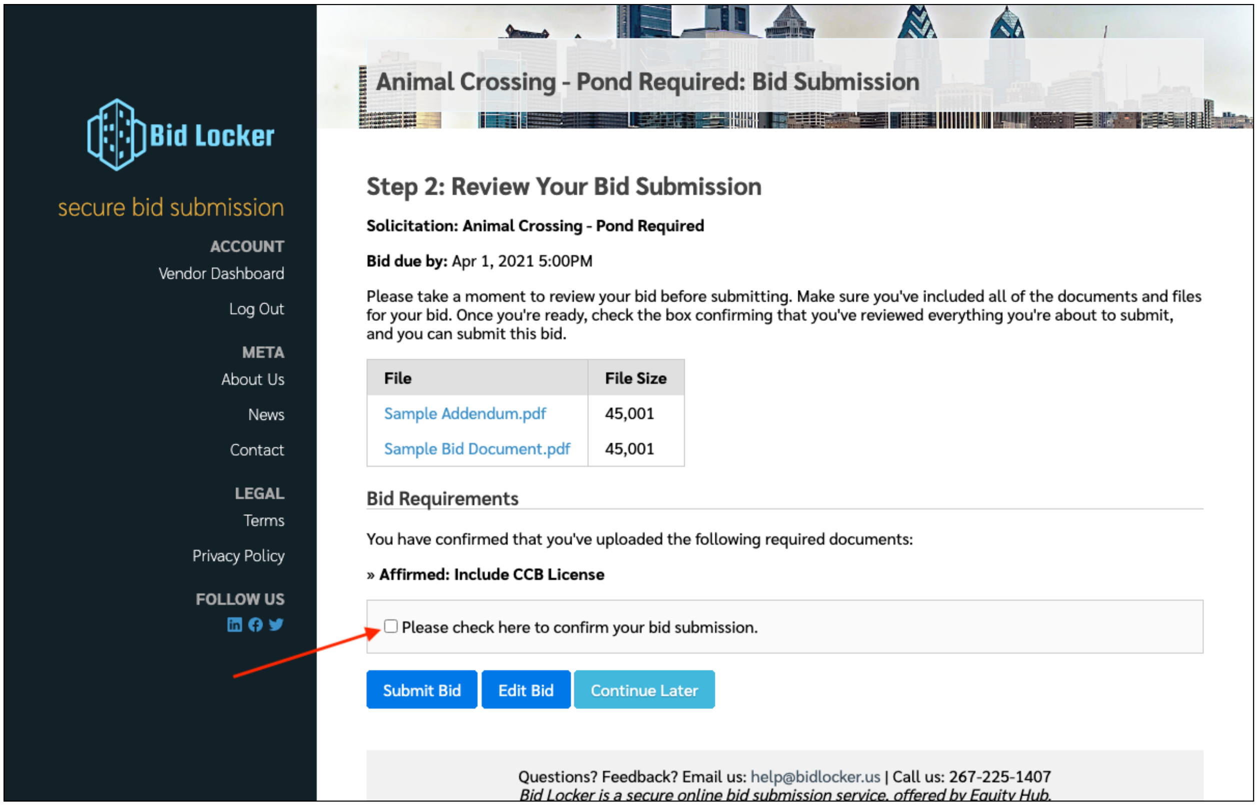


Figure 24: Confirming your response

Then click the "Submit Bid" button — that's it!

If you need to revise your submission, you can do so by clicking the "Edit Bid" button. If you need to return to your submission to finish it later, click the button labeled "Continue Later":

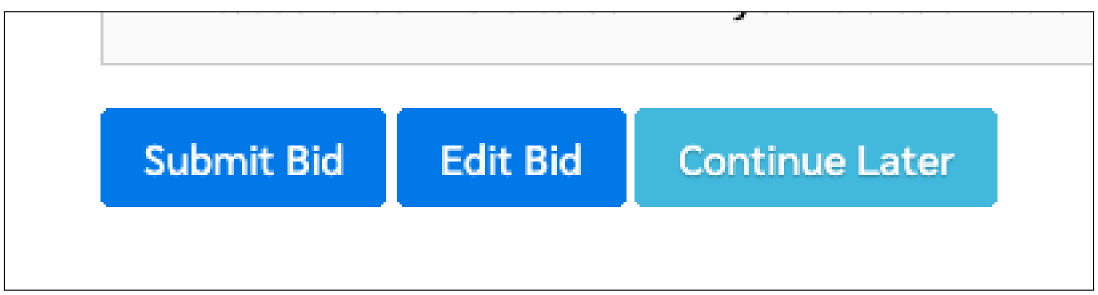


Figure 25: Submitting, editing, continuing later

After you've hit the "Submit Bid" button, you'll see your confirmation screen and will receive an email confirmation within a few minutes.

6.3.1 Downloading a Submission Receipt

On the confirmation page, you can download a PDF receipt of your submission by clicking the "Download Submission Receipt" button:

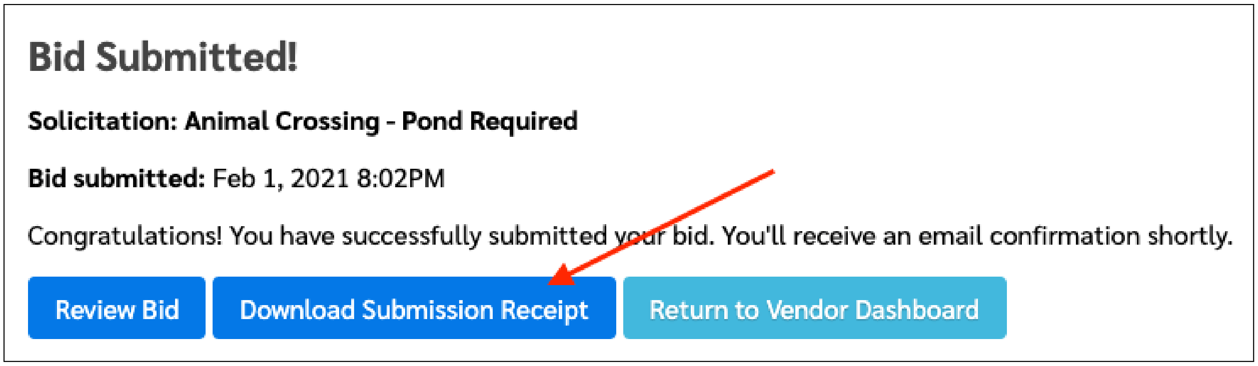


Figure 26: Downloading a submission receipt

You can download this immediately upon submitting your response, but you can also download it at any later time on the Bid Review page, which you can get to from your vendor dashboard.

6.3.2 Additional Documentation and Multi-Stage Bids

For some solicitations, your agency may request or require some additional supplemental documentation, separate from the bid submission itself. This could be, for example, a first-tier subcontractor disclosure form. If your solicitation requires some kind of supplemental documentation, it will be described in the solicitation documents, so be sure check if there are any such requirements.

If this solicitation requires some additional documentation, you will also see a notice on your document upload page, e.g.:

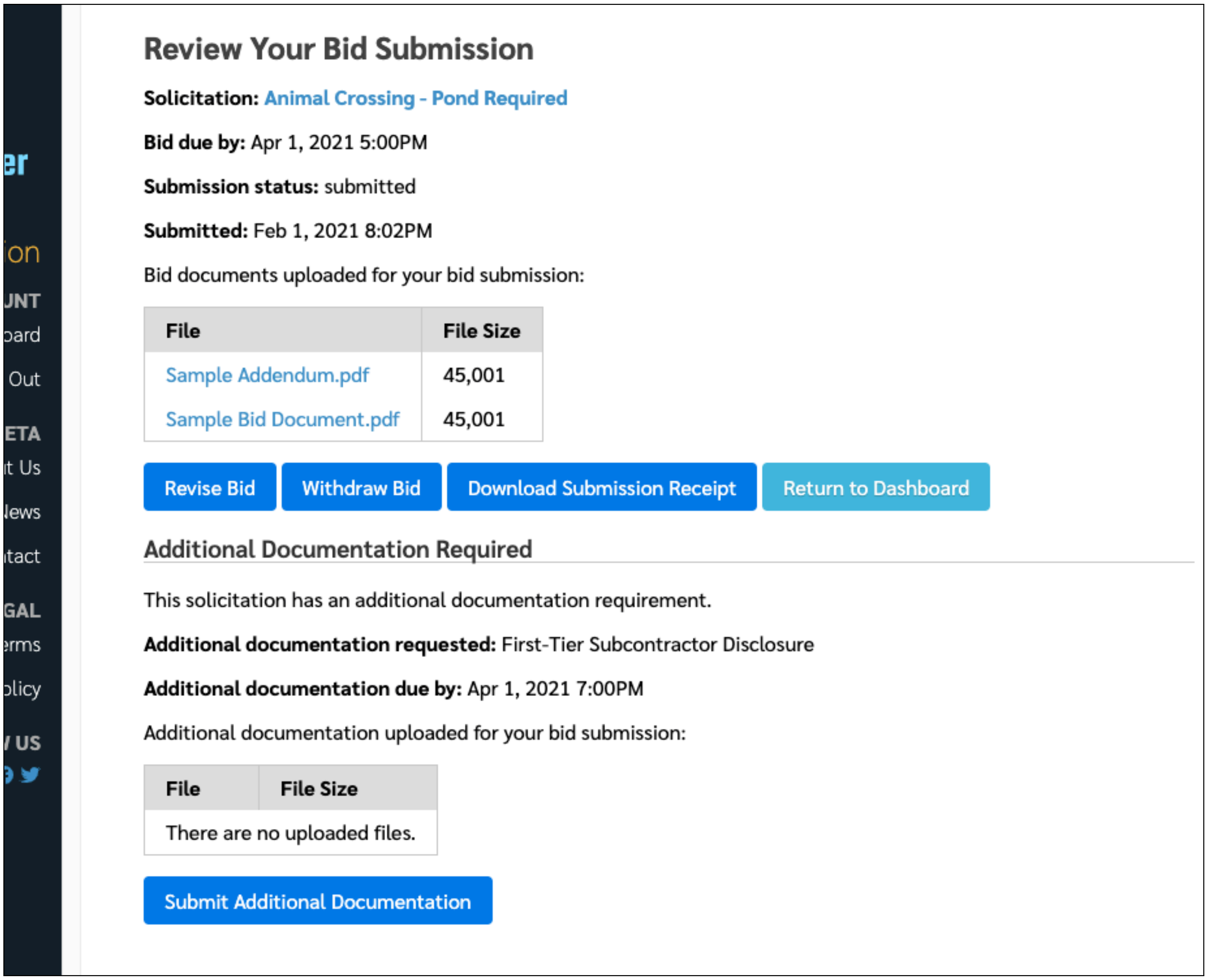


Figure 27: The Supplemental Documentation Notice

Please note: *You won't be able to upload any additional documentation until you've completed your bid submission.*

6.3.2.1 Uploading Documents for Additional Bid Stages After you've completed your bid submission, you'll see a section on your submission confirmation page where you can upload your additional documentation, as shown below:

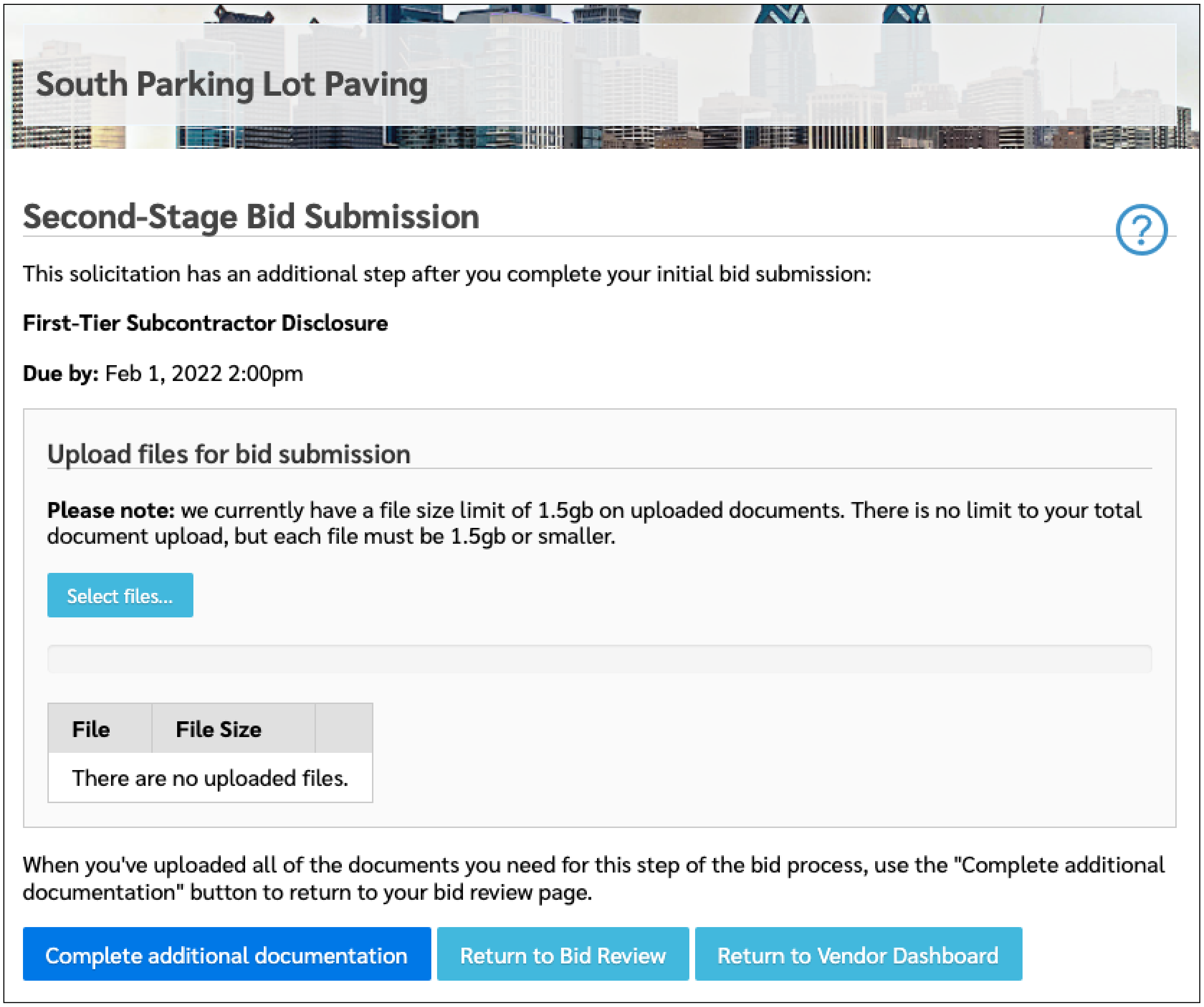


Figure 28: Uploading the Supplemental Documentation

To upload your additional documention or final-stage bid documents, click the "Begin Additional Document Request" button. This takes you to the page where you can upload whatever final-stage documents the agency has requested.

Once you're on the additional documentation upload page, click the "Select files…" button and select the files to upload from your computer. When you're done, click the "Complete Additional Documentation" button to finish up and return to your bid review page.

6.3.3 Pre-Qualification Documentation

For certain solicitations, an agency will have pre-qualification requirements that they will specify in their instructions. If an agency has pre-qualification requirements, they will likely have set up a given solicitation to collect those separately. In these cases, on the *Step 1* screen of the bid submission process, you will see a "Pre-Qualification" section at the top of the page. As long as the pre-qualification due date has not yet passed — or in cases where they haven't specified a due date and the solicitation is still open — you can use the "Attach Pre-Qualification Documentation" button to go to the pre-qualification page. On this page, you can upload whatever pre-qualification information is being requested of you.

6.3.4 Cure Documents

In some cases, an agency will require additional documentation from you to consider your bid or proposal responsive to their solicitation. In these cases, you may receive an email request from an agency for one or more *cure documents*. If you've received a cure request from an agency, you can either follow the link in the email to upload your documents, or you can go to your vendor dashboard and click the "cure response" button at the top of your dashboard. On the Cure Response page, you can provide the requested files for the solicitation.

6.4 Reviewing Your Completed Submissions

At any time, you can review your bid submissions from your vendor dashboard. Click the "review" link next to any submission you wish to review:

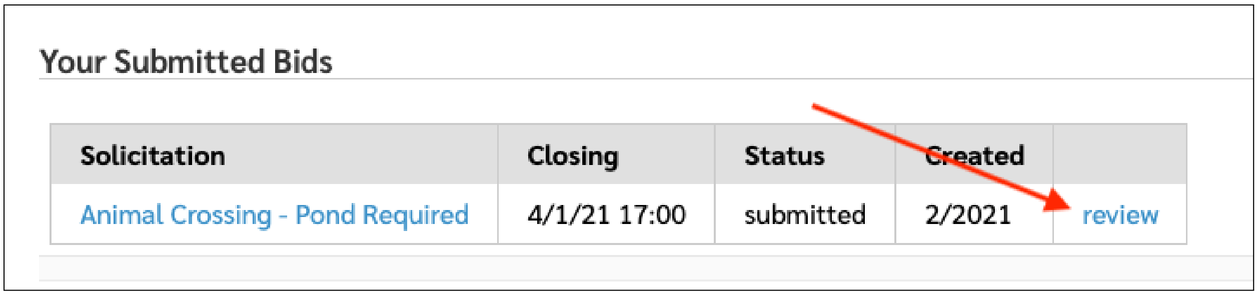


Figure 29: Revising Your Solicitation from the Vendor Dashboard

This will take you to your bid review page.

6.4.1 The Bid Review Page

On the bid review page, you'll see your entire submission, including submitted documents, line-items, and so on. You can revise your bid by clicking the "Revise Bid" button, withdraw it by clicking the "Withdraw Bid" button, or download a submission receipt:

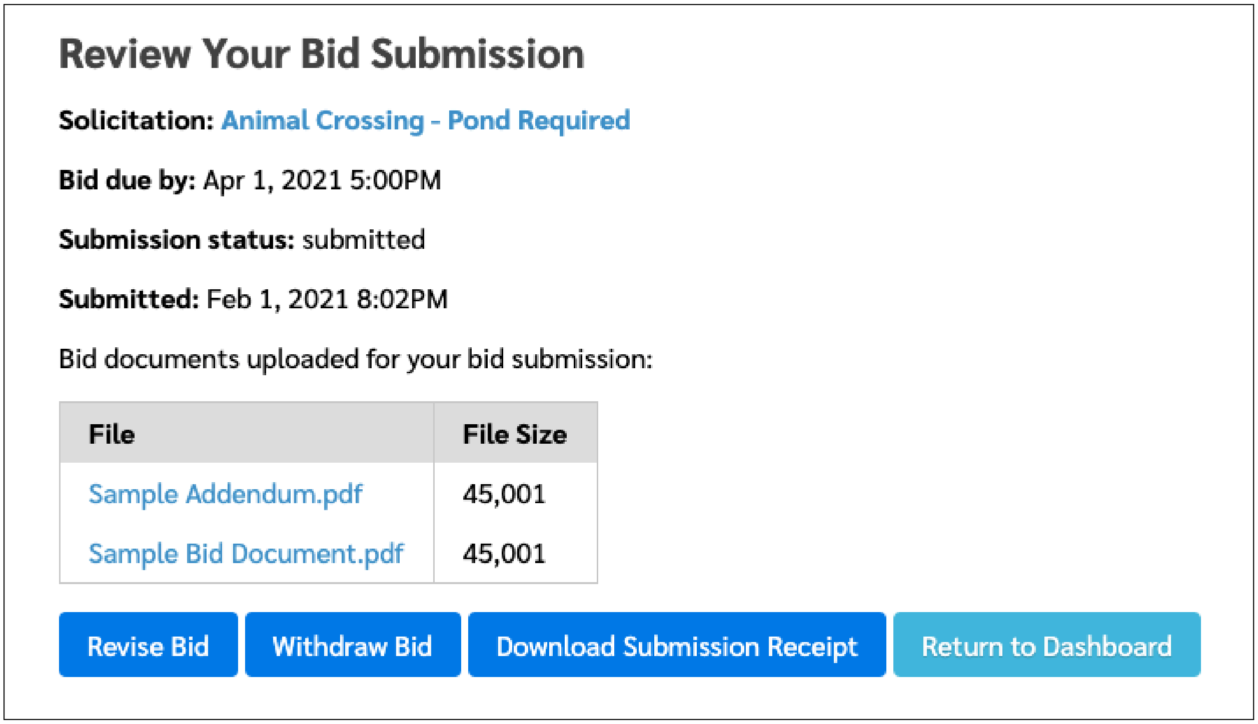


Figure 30: Reviewing your solicitation from the vendor dashboard

6.4.2 Revising Your Bid Submission

If you need to revise your bid or proposal after submitting it, you can do so here, as long as the due date has not yet passed. Start by clicking the "Revise Bid" button:

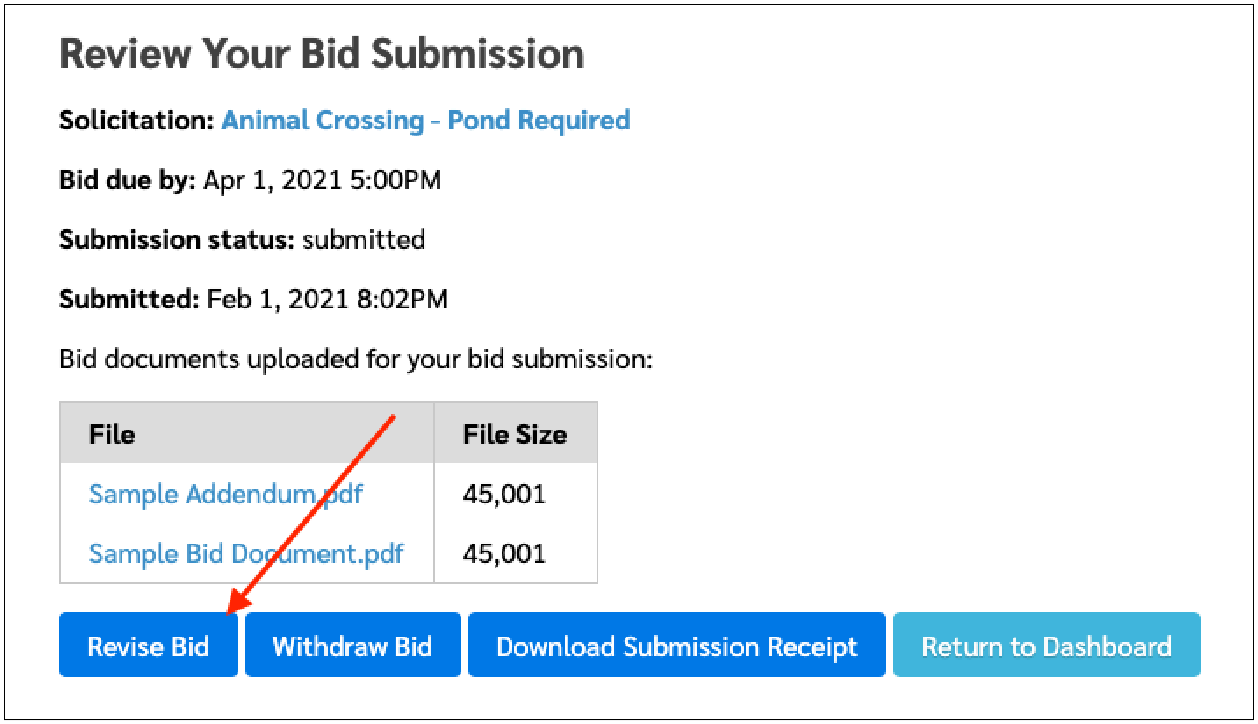


Figure 31: Revising Your Solicitation Submission

This takes you back to the document upload page, described in the Step 1: Uploading Your Bid Documents section.

You can now remove bid documents, upload new ones, and make any other changes as needed. Submit your revision by continuing through the review screen, as before, and by confirming and submitting your response again.

6.4.3 Withdrawing Your Bid Submission

If you need to withdraw your submission (e.g. if you're no longer interested in participating in the solicitation), you can do so at any time before the due date, using the "Withdraw Bid" button on the bid review page:

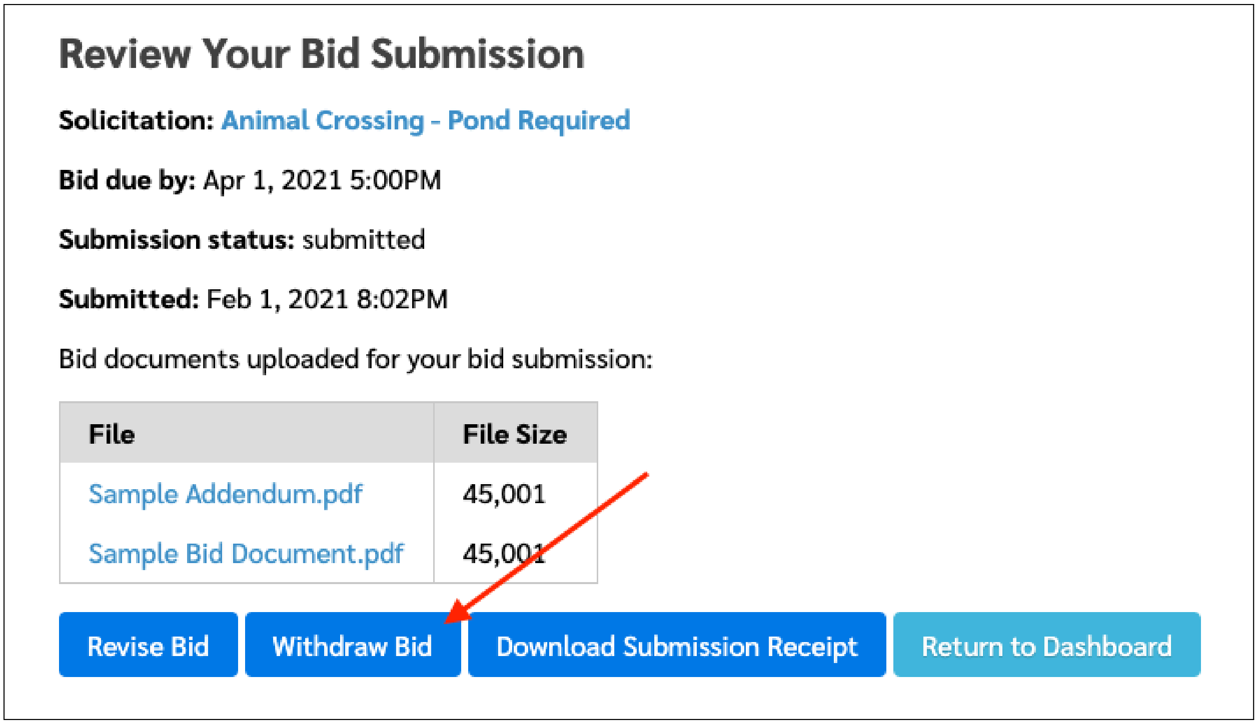


Figure 32: Withdrawing your submission

After clicking this button, you'll be asked to confirm that you really do want to withdraw your solicitation. Once you confirm that you want to withdraw your solicitation, it will be withdrawn immediately.

If you want to resubmit, you can do so by starting the bid submission process over again.

6.4.3.1 Notes for Agencies that Disallow Revision ***Please note:*** *this section only applies to a handful of agencies with a specific procurement process requirement — that vendors cannot "amend" or "revise" their submissions, but must withdraw and resubmit if they wish to make changes.*

If you have submitted a bid or proposal to an agency that disallows revision, don't worry! You can still make changes to your submission, but you must follow a slightly different process to do so.

If your agency has disabled the "Revise Bid" button, then you must first withdraw your bid. After withdrawing your submission, you will be able to edit and resubmit your bid or proposal, so long as the due date has not yet passed.

7 Additional Options

You may, from time to time, want to update your vendor profile, change your password, or review your account history. You can do all of these tasks from your vendor dashboard, using the links in the top nav.

7.1 Your Vendor Profile

Your vendor profile is the primary information about your business that agencies see when you register with them. This is the information you entered when you first set up your profile. You can update it at any time using the "My Profile" link in the top nav on your vendor dashboard.

You'll see your vendor profile information in a single page, and can make any changes you need:

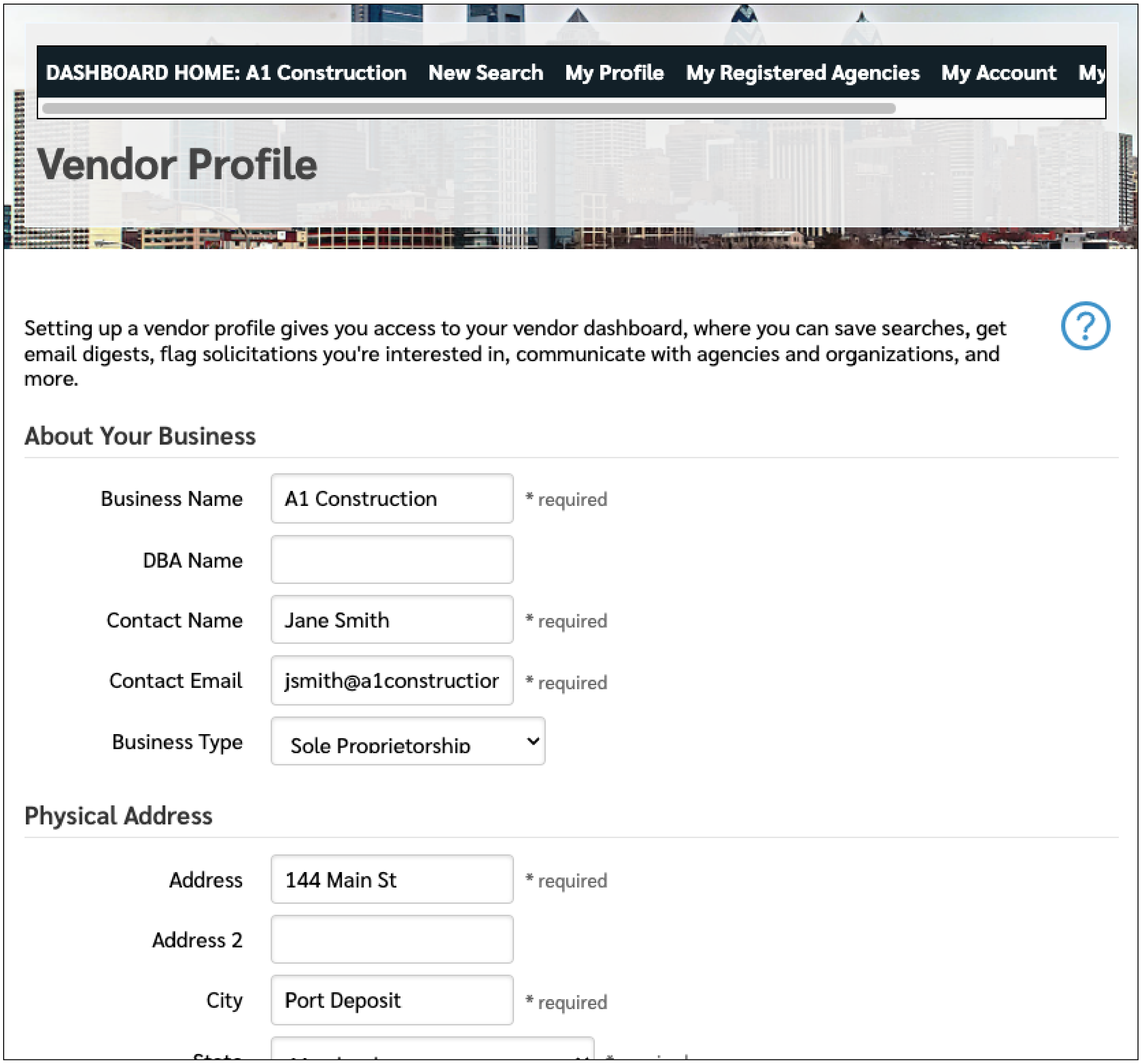


Figure 33: Updating your vendor profile

Be sure to click the "Update My Profile" button when you're done. Your profile will be updated immediately.

7.2 Your Registered Agencies

If you've registered with agencies, you can see a list of them using the "My Registered Agencies" link in the top nav:

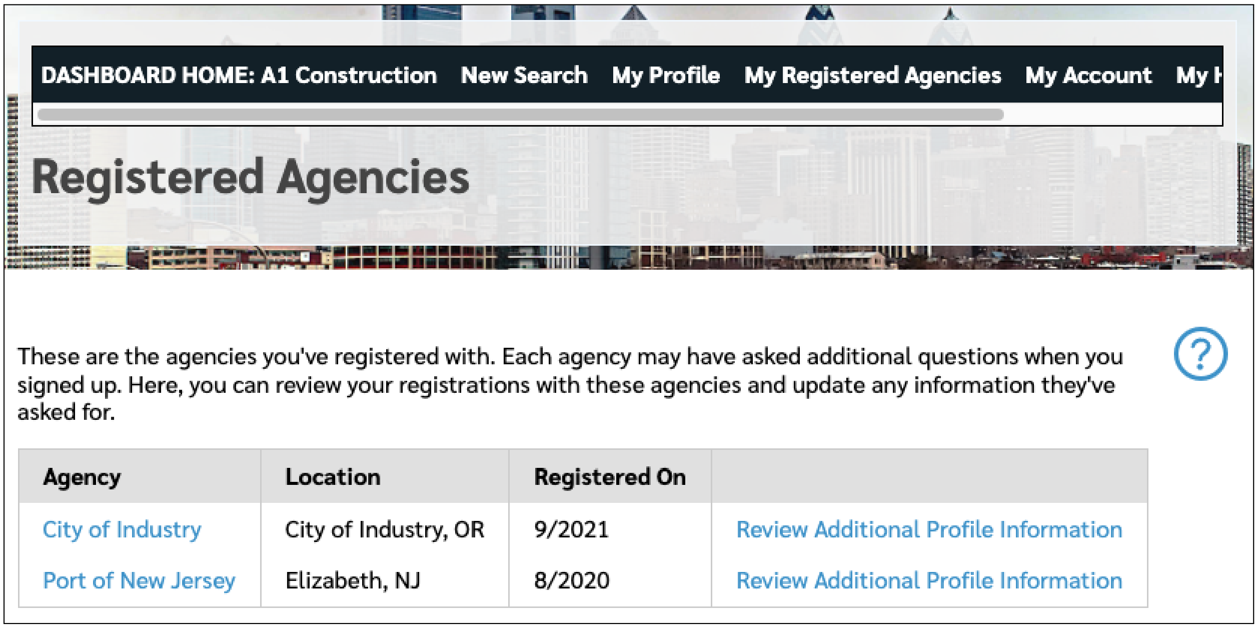


Figure 34: Updating your registered agency information

Click the "Review Additional Profile Information" to review and update any agency-specific vendor questions each agency may have asked.

7.3 Your Account Login

If you need to change your account login email address or password, you can do so via the "My Account" link in the top nav:

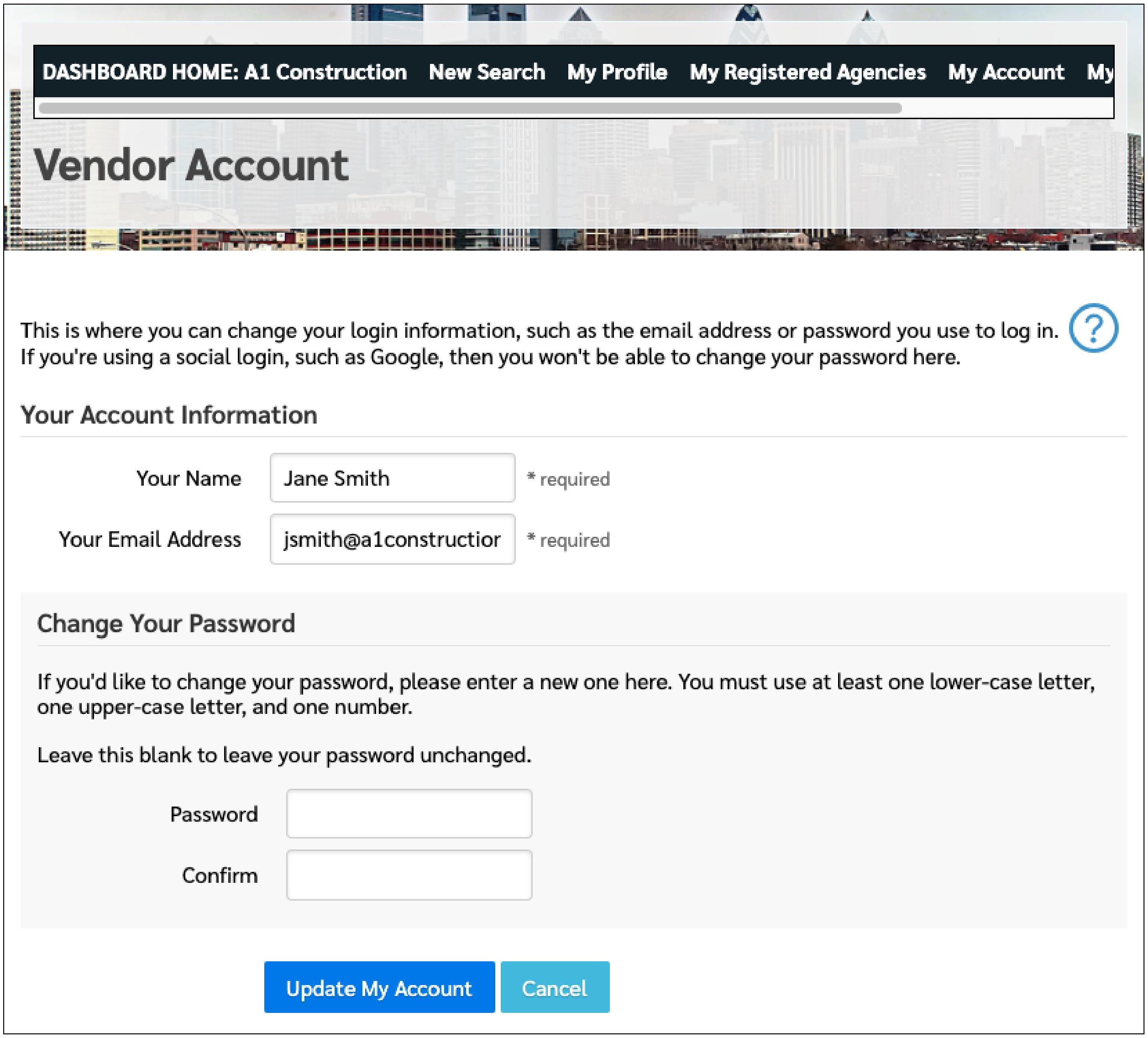


Figure 35: Updating your account login

Here, you can update your display name (shown only on your vendor dashboard, not shown to anyone else) and the login email address you use. If you want to change your password, you can enter in a new password and confirmation. Otherwise, you can leave the password and confirmation blank to leave your password unchanged.

7.3.1 Preferred Watchlist Day of Week

If you have any agencies or solicitations on your watchlists, and you've selected weekly reminders on them, you can choose the day of the week that you'd like to receive an email digest with updates.

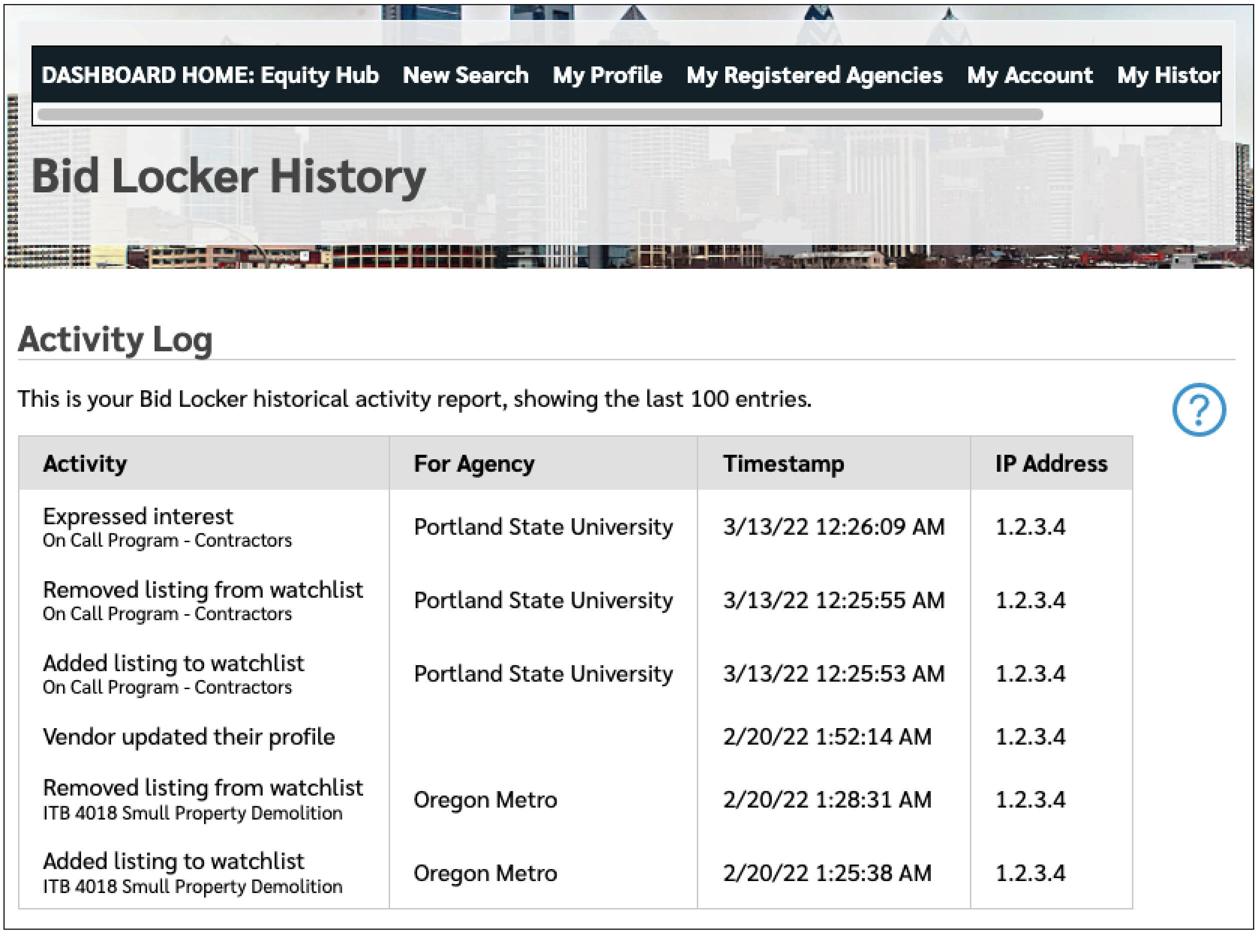
7.3.2 Courtesy Email Reminder Before Solicitation Close

If you'd like an email reminder that relevant solicitations are closing soon, you can set a duration of time here to remind you. This includes emails that you've submitted bids to, begun to submit bids to, and added to your watchlists.

7.4 Your Account History

At any time, you can access your account history using the "My History" link in the top nav. On the account history page, you'll see a detailed log of everything you've done on Bid Locker, including updating your profile, submitting bids and proposals, and more.

Your account history will look something like this:



Activity	For Agency	Timestamp	IP Address
Expressed interest On Call Program - Contractors	Portland State University	3/13/22 12:26:09 AM	1.2.3.4
Removed listing from watchlist On Call Program - Contractors	Portland State University	3/13/22 12:25:55 AM	1.2.3.4
Added listing to watchlist On Call Program - Contractors	Portland State University	3/13/22 12:25:53 AM	1.2.3.4
Vendor updated their profile		2/20/22 1:52:14 AM	1.2.3.4
Removed listing from watchlist ITB 4018 Smull Property Demolition	Oregon Metro	2/20/22 1:28:31 AM	1.2.3.4
Added listing to watchlist ITB 4018 Smull Property Demolition	Oregon Metro	2/20/22 1:25:38 AM	1.2.3.4

Figure 36: Your account history

This account history viewer will show you the last hundred history entries for your Bid Locker account.

8 For Additional Help

If you have questions or need help setting up your vendor profile or submitting bids, we're always happy to help. You can reach us at:

Phone: 267-225-1407

Email: help@equityhub.us