

Prepare RFX / Setup Tab

This document is a quick reference guide for users who are setting up their solicitation in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: <https://spo.az.gov/>.

Once a sourcing project has been created Procurement users will specify the type of request (IFB, Micro-Purchase, RFGA, RFI, RFQ, RFQual, RFP), enter their bid issue date, due date, and publication date on the Setup tab. Users can also provide details on the solicitation process and a summary on this tab.

RFX Setup

1. From any page in APP, select **Sourcing Projects** from the Sourcing drop-down menu.
2. Search for the solicitation you wish to edit and then click the Pencil icon to open it.
3. Navigate to the **Prepare RFX** tab.

The screenshot shows the 'RFX Setup' interface with the following fields and annotations:

- Status:** Draft
- Release Status:** Draft
- Save as a template:** (Annotation 4)
- RFx types *:** (Annotation 4)
- Label *:** Sweet Treats JSJ 2/24/2021 (Annotation 5)
- Lot #:** 1 (Annotation 6)
- Round #:** 1 (Annotation 6)
- RFP Response Cutoff:** 12:00:00 AM (Annotation 6)
- Dates - Open and Closure:**
 - Bid Issue Date:** 12:00:00 AM (Annotation 7)
 - Bid Due Date *:** 12:00:00 AM (Annotation 8)
- Enable for the Public Portal:** (Annotation 9)
- Publication begin date:** 12:00:00 AM (Annotation 9)
- Process:** (Annotation 10)
- Summary:** (Annotation 10)

4. Select the **RFX Type**
5. Verify the **Label**.
6. Enter a **RFP Response Cutoff** (optional) - The discussion forum will close for further questions on the date and time entered in this field.
7. Enter a **Bid Issue Date**.
8. Select a **Bid Due Date**.
9. If the solicitation is being posted on the public portal, indicate the **Publication begin date** of the solicitation.
10. Enter the **Process** and **Summary** of the solicitation, such as indicating pre-offer conference dates and times. Whatever is entered in this field will be sent to suppliers. This information will also be available on the public portal.
11. If necessary, adjust the Advanced Options to meet your needs, such as requiring suppliers acknowledge the receipt of the invitation to bid and allowing suppliers to partially bid. This is also where users will enable the Best and Final Offer functionality.

✓ Advanced Options

- Buyers can change bid due date
- Post to the Public Portal
- Sealed bids
- Suppliers must acknowledge
- Check the presence of a total column grid
- Suppliers can partially bid
- Enable Manage BAFO

12. Once complete click the **Save** button