


Solicitation Amendment - Creating New Lots

This document is a quick reference guide for users wishing to create a new lot for their sourcing project 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/>.

After a solicitation has been created and prepared, there may be times when a new lot needs to be created. A new lot is created when parallel sourcing projects have the exact requirements but require different offers and evaluations (i.e., trying to build parks in multiple cities). Issuing a new lot triggers the solicitation approval workflow.

Solicitation Amendment/Creating a New Lot

1. From any page in APP, select **Sourcing Projects** from the Sourcing drop-down menu.
2. Search for the solicitation in which the new lot will be created and click the **Pencil** icon to open.
3. Click the **Prepare RFx** left margin tab.
4. Click the **Create a new lot** button at the top of the page.



*If new lots are already created, click the **Other Actions** button and select **Create a new lot**.*

5. The Round/Lot pop-up displays. Confirm the tabs to be duplicated identified in the **Copy from selected RFx** column.
6. Click **Create**.

Round / Lot copy
🔍 🖨️ 🗑️ ✕

Create Save & Close Close

Commodity

50160000 - Chocolate and sugars and sweeteners and confectionary

Organization

Arizona Department of Administration

Templates only

RFx types	Lot #	Round #	Label	Begin	End	Status
RFP	1	1	Sourcing Test SM	7/3/2023	7/4/2023	In Evaluation

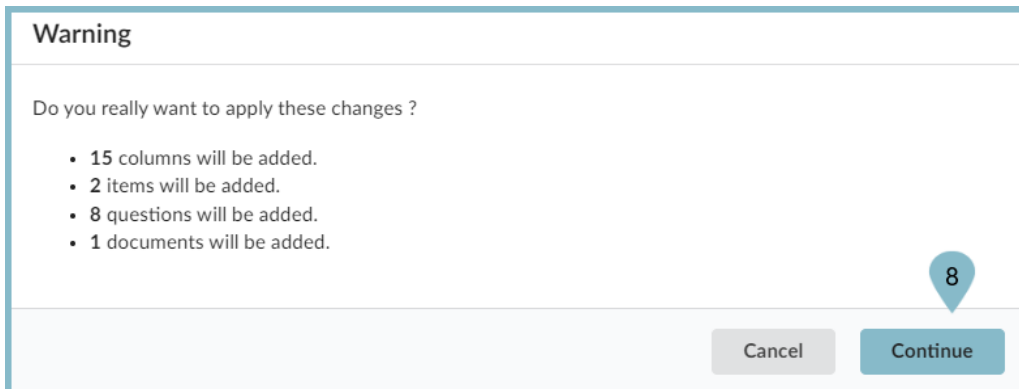
1 Record(s)

Copy Options

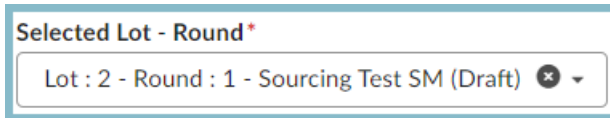
Choose what to copy

	Blank	Default from RFx Type	Copy from selected RFx
Setup Tab	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Item Columns	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Items	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

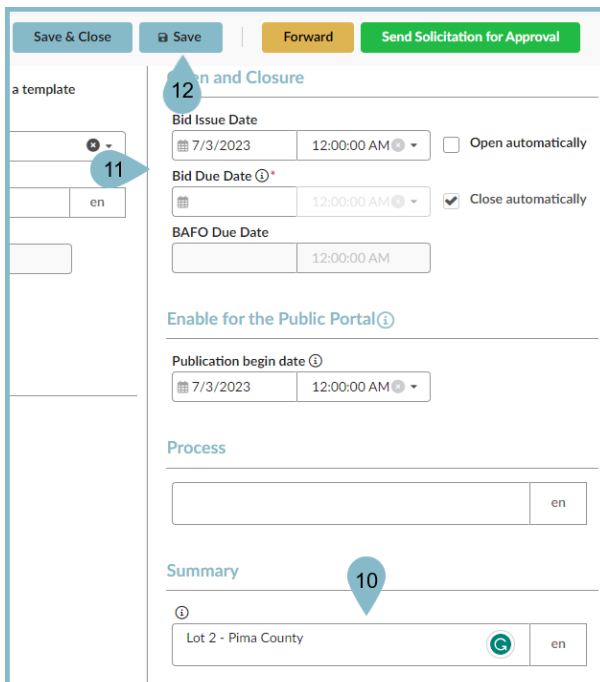
7. Review the information on the Warning pop-up.
8. Click **Continue**.



9. The new lot displays.



10. Enter the reason for the new lot in the **Summary** field.
11. Update the bid dates when applicable.
12. Click **Save**.



13. Click the **RFx Exhibits** header to upload any new documents.
 - a. Click the **Create a Document** button.
 - b. Click the **Solicitation Documents** link to upload.
14. Click **Save & Close**.

The screenshot shows the 'Solicitation Documents' form. At the top, there are buttons for 'Save', 'Save & Close', 'Close', 'Save & Preview', and 'Delete'. The 'Title' section has a text input field containing 'Lot 2 - Pima County' and a language dropdown set to 'en'. The 'Information' section includes a 'Status' dropdown menu set to 'Approved', a 'Document' field with a file upload icon and the text 'Click or Drag to add files', and a file named 'EN - Lot 2 Pima County.zip'. Below this is a 'Confidential?' checkbox. The 'RFx' section has a text input field containing 'Sourcing Test SM'.

15. Click the **Suppliers** header and select all suppliers in the newly created Lots most recent round. Add any additional suppliers when applicable.
16. Continue to make changes to the solicitation as necessary to capture the details of the new lot.
17. Once the new lot is updated, click the **Send Solicitation for Approval** button.
18. Click **Send**.
19. Confirm the suppliers for the new lot and update the email message.
20. Click **Send and Close**.

The screenshot shows the 'Send to' form. At the top, there are buttons for 'Send', 'Close', and 'Send and close'. The 'Send to' section has a table with columns 'Supplier' and 'User'. The 'Supplier' column has a dropdown menu set to 'RW&C' and a 'Contact' dropdown menu set to 'Murphy Hazel'. The 'Send and close' button is highlighted. Below this is a 'Copy all team members' checkbox. The 'Email' section has a 'Subject' field with the text 'A New Solicitation has been Sent' and a 'Send me a copy' checkbox. The email body contains a message to the supplier and a list of details: Label: Sourcing Test SM, Agency: Arizona Department of Administration, Process: UNDEFINED, Summary: Lot 2 - Pima County, Bid Due Date: 7/6/2023.

21. Click **OK**, twice.



View previous lots using the **Selected Lot - Round** drop-down in the Prepare RFx tab.

Selected Lot - Round*

Lot : 2 - Round : 1 - Sourcing Test SM (Draft) ✕ ▾

Resources

Click the link below for more information on the Sourcing Project creation processes in APP:

<https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/source-contract-qrgs-176>