CobbleStone Systems

Manuals: Vendor/Client Collaboration Gateway
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Vendor/Client Collaboration Gateway Planning

CobbleStone Systems Corp.
IT Department
Version 2.0
**Wednesday March 11th, 2020**

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Navigating the Vendor Gateway

Utilize the Top Navigation Menu to navigate throughout the Vendor Gateway.

Top Navigation Menu

Depending on the Gateway organization's configuration settings for menu items to be displayed on the Gateway as well as Gateway Access/Content settings that have been specified, please note that the top navigation menu may look different than what is shown.
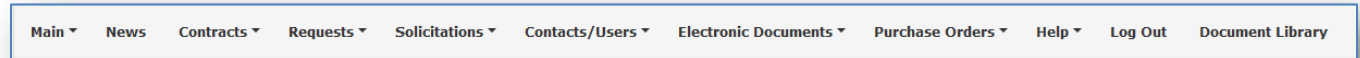
From the Top Navigation Menu, the following sub-menus may be available as well:

- **Main**
  - **My Home** - opens the logged in Gateway Welcome screen
  - **Overview**
- **News**
  - (No Sub-menus) - main menu opens the "News List" screen to display a list of Newsletters that have been made available to the public
- **Contracts**
  - **My Contracts** - (menu will only be available when logged into the Vendor Gateway) opens the "My Contracts List" screen to display a searchable list of all Contracts with your company/organization that have been made available to the Gateway
  - **Search All Public Contracts** - opens the "Public Contracts Search" screen to display a searchable list of all Contracts that have been made available to the public on the Vendor Gateway
- **Contract Requests**
  - **Request a Contract** - only available to active users, opens the "Create a Contract Request" screen
  - **View Contract Requests** - opens the "My Contract Requests List" to display all requests submitted by your Company
- **Solicitations**
  - **My Solicitations** - opens the "My Solicitations List" screen to display all Solicitations your Company has responded to
  - **Search All Solicitations** - (menu will only be available when logged into the Vendor Gateway) opens the "Solicitations Search" screen to display a searchable list of all Solicitations that have been made available to the Gateway
  - **Search Public Solicitations** - opens the "Public Solicitations Search" screen to display a searchable list of all Solicitations that have been made available to the Public on the Vendor Gateway
- **Contacts/Users**
  - **Add Contact/User** - available only to Company Admins, opens the "Create a New User Account" screen
  - **Contact/User List** - opens the "My Company Contacts/Users" screen to display a list of all Contacts from your Company that are users of the Gateway
  - **My Company Info** - opens the "My Company Information" screen that displays all of your company information that has been made available to be displayed on the Vendor Gateway
- **Electronic Documents**
  - **My Assignments** - opens the "My Approval & Signature Assignments" page where you can search for approval and signature processes that you have been invited to participate in from the Gateway's owning company/organization.

- o **My Approval & Signature Settings** - opens the "My Approval & Signature Information" page where you can reset your secure PIN that you will need in order to participate in any e-approval and e-signing processes where you have been invited to be a participant. Additionally, you can configure saved signatures for these processes.
- ➢ **Help**
  - o **Gateway Help** - opens the "Help & Support" screen to display help options available to you
  - o **Visit CobbleStone** - direct link to CobbleStone website
- ➢ **Document Library**
  - o (No Sub-menus) - Main menu opens the "Document Library: Standard Files & Attachments" page that will list any files/documents that the Gateway's owning company/organization has made available for you to download and save

Vendor Gateway Access

In order for companies to become Interested Respondents for posted Solicitations as well as submit bids and responses to available solicitations, a company contact must have authenticated him or herself and log into the Vendor Gateway. There are two main ways for companies to obtain access to the Vendor Gateway:

1. Create a New Company Account
2. Contact the Vendor Gateway's Company/Organization

Creating a New Account

To create a new account to sign up and log-in to the Vendor/Client Gateway, click the "Create Account" button in the right-hand menu of the Gateway Introduction screen.
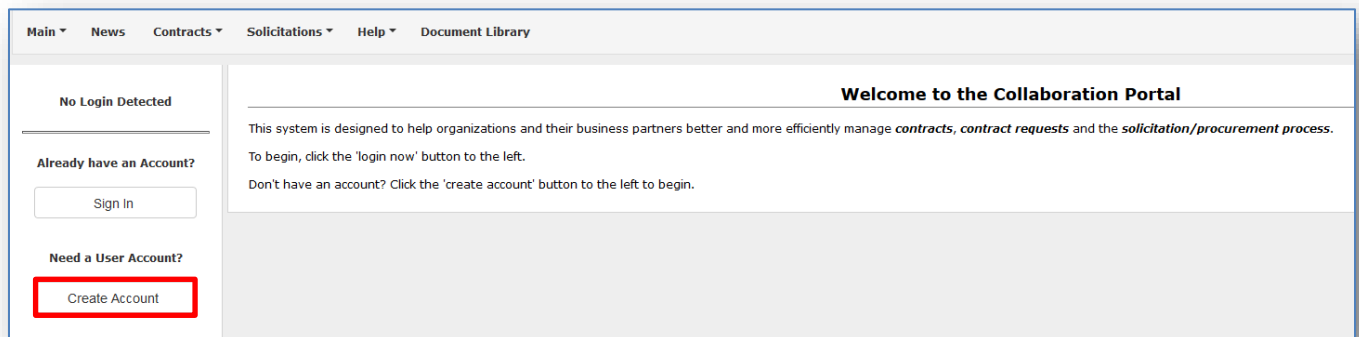
If the Gateway's owning organization has allowed Vendors/Clients to sign up and create a new account through the Gateway, you will select your vendor type and the "New Account Signup" screen will open:

Once you have entered all necessary and required information in the "Company Information" screen click the "Continue" button at the bottom of the page. Repeat this for the "User Information" section. You will be brought to the "Finish" screen and to enter a verification code that you will received via email.
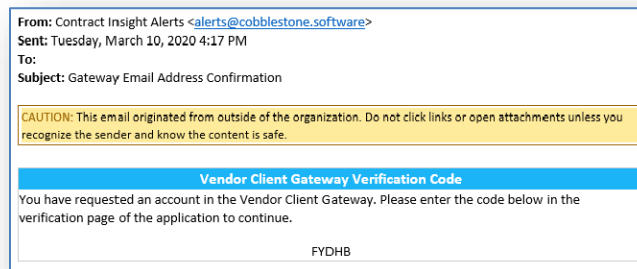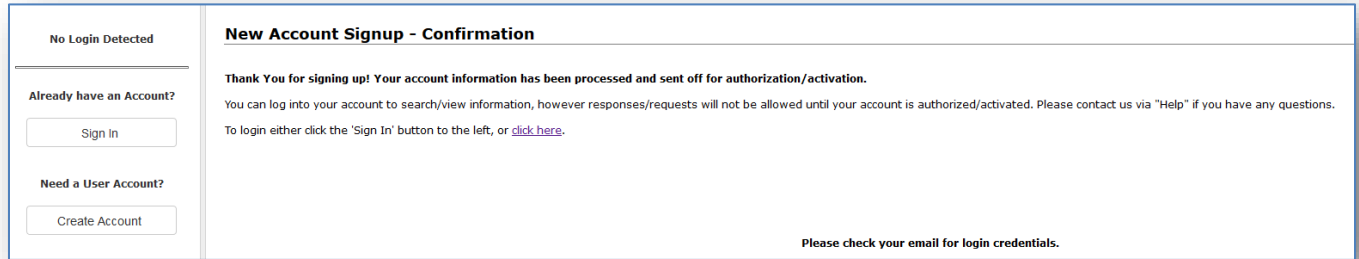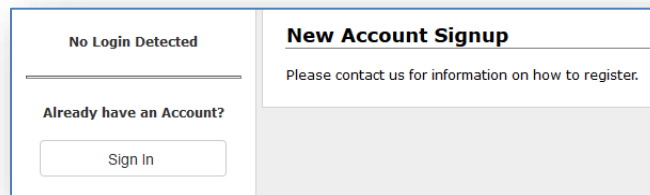
Upon clicking the "Save" button on the Finish screen, the "New Account Signup - Confirmation" screen will open and the organization will be notified for authorization / activation of your account.

Please note that once you have created the new account you are then able to log into the Gateway to view/search information, but you will not be authorized to submit responses/requests until your account has been authenticated and activated by the Gateway's organization. Click the "Click Here" link or the "Login Now" button to log-in to the Gateway.

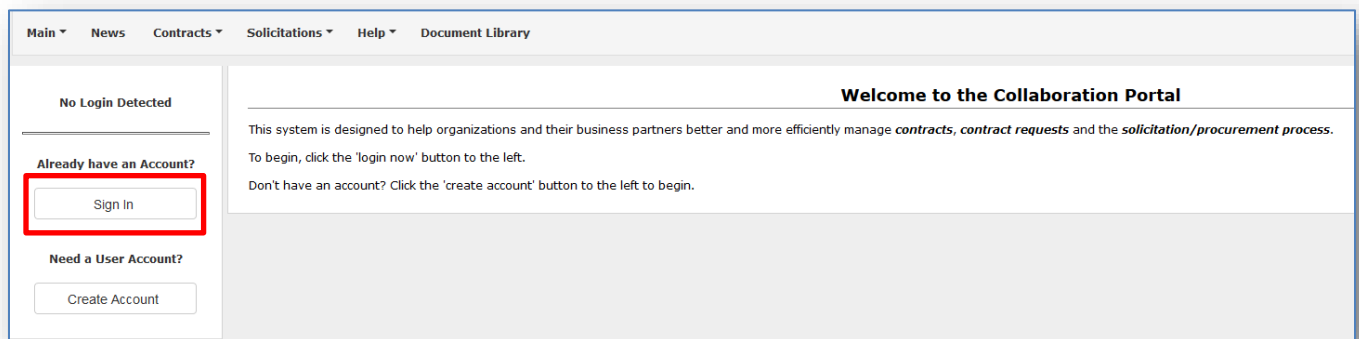## Contacting Gateway's Company for Login Access

You will need to contact the Gateway's owning company/organization if the "New Account Signup" screen displays a message notifying you that you must 'contact us for information on how to register'.
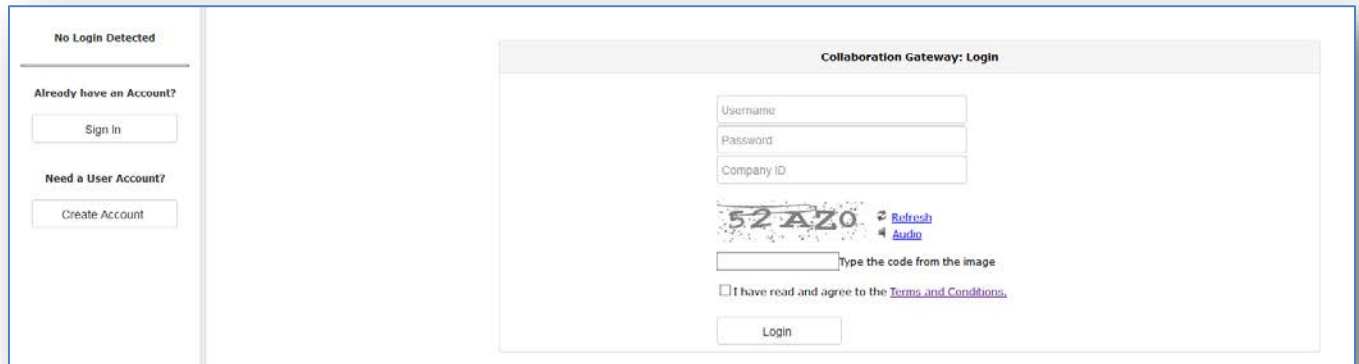

Click on the "Help" top navigation menu and select the link to the organization's site to learn how to sign up and register for a new account.

Signing into the Vendor Gateway

In order to log into the Vendor Gateway, click on the "Sign In" button on the left side of the screen:
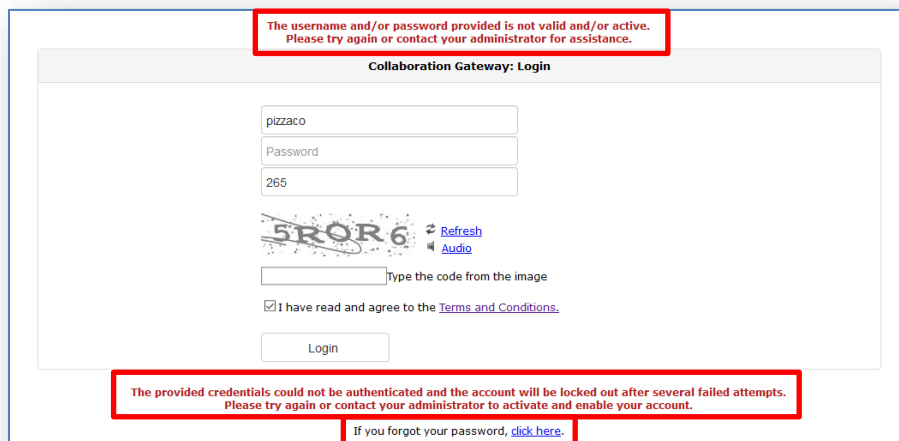
On the login page enter your username, password, and Company ID into the appropriate fields. Type the code from the image and check the box confirming you've read and agree to the terms and conditions then click the "Login" button.

Password Reset

For users that have forgotten his/her password to the Vendor Gateway click on the "Sign In" button. Fill-out the designated fields. *A password must be entered to prompt the forgot password link; even if you know the password you are entering is incorrect you must enter something. This will open the "Invalid Username and/or Password" page where you can click on the "click here" link at the bottom of the page.

Please note that in order to reset your password you will need to have an already active account for logging into the Vendor Gateway as well as your valid Username and Company ID. If you do not have or have forgotten either your Username or Company ID you will need to contact the Vendor Gateway's company in order to obtain this information and reset your password. Contact information for the Vendor Gateway's company can be

found under the "Help" top main menu.

Forgot My Password

The password reset information will attempted to be e-mailed to your account shortly.
AuthGUI: 8652677b-d94c-4051-b26b-164a27a9ca1f
Email: dshipe@cobblestonesoftware.com
CustID: 22
EMAIL SENT!

Once you enter your valid Username and Company ID click on the "Reset Password" button. You will see a message similar to the one on the right if you entered a valid/active Username and Company ID, which is confirming that the Password

Collaboration Gateway: Reset Password

Username: pizzaco

Company ID: 265

Back to Login

NOTE: Passwords can only be reset for active accounts.

To reset your password, key in your Username and Company ID (above), then click the 'Reset Password' button.
An e-mail will be sent to your e-mail address on file with a link to reset your password.
Password Reset e-mails are time sensitive, and will auto-expire after 20 minutes.

To reset your password enter your Username and Company ID and click on the "Reset Password" button. An email with a password reset link will be sent to the email address that the company has on file for you. Please remember that the password reset link within the email is time sensitive and will auto-expire 20 minutes after the email was originally sent. After 20 minutes you will need to go to the Vendor Gateway and request another reset password email (using the same steps that you performed to reset your password). Once the system has sent the password reset email a confirmation message will show on the screen confirming that the email was sent and the email address that the password reset email was sent to.

Once you have received the password reset email you will want to click on (or copy and paste into the web address bar in your browser) the URL provided.

Mon 5/23/2016 1:15 PM

Contract Insight Alerts <alerts@cobblestonesystems.com>

Contract Insight Vendor/Client Gateway Password Reset

To   iYour Name

You have been sent this e-mail to assist you with resetting your user account password.

To reset your password, click on the following link (or copy and paste it in your web browser):
        URL Link to Reset Your Password
and follow the instructions on the screen.

If you need assistance with this e-mail, please utilize the help page located at: **URL of Vendor Gateway**

Thank You,

CobbleStone Systems
Leaders in Contract Management Software
http://www.CobbleStoneSystems.com

Note: This is an automated e-mail, please do not reply.

Gateway Portal Address: **URL of Vendor Gateway**
Reference: 10

Upon clicking on the link from the email to reset your password you will be brought to the "Reset My Password" screen where you can enter and confirm your new password and then click on the "Save Password" button to save your new password.

Once the system has updated your password a confirmation message will be displayed.
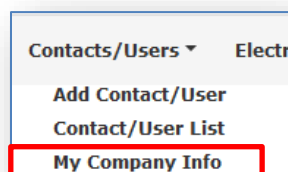

Once you have successfully changed your password you can log into the Vendor Gateway using the "Sign In" button in the "Gateway Login" menu on the left side of the screen.

View & Manage your Company & Contact Information

Once you have successfully logged into the Vendor Gateway you can view your own personal contact information as well as view information about your company that has been made available by the Vendor Gateway's company/organization. If enabled by the Vendor Gateway's company you will also be able to create additional user accounts for individuals at your company in order to log into the Vendor Gateway as well.

Viewing My Company Information

In order to view the available information about your company on the Vendor Gateway go to the "Contacts/Users" top menu and select the "My Company Info" sub-menu:

This will open the "My Company Information" screen:

In order to upload files to be associated with your company's record you will want to click on the "Select" button to browse your computer and select a file that you would like to upload. Once you have selected a file you can optionally enter a file description. To save and upload the selected file click on the "Save File" button:

To view a file that has been uploaded, click on the file name in the "View File" column in order to download and open the file.

Viewing & Managing My Login Information

Once you have successfully logged into the Vendor Gateway you can view your contact information by clicking Contacts/Users on the top navigation ribbon and select Contact/user List from the drop-down menu. You will be brought to a list of your company contacts.

On the "My Company Contacts/Users Details" screen you will be able to view and edit contact information as well as unsubscribe from Emails and Alerts from Vendor Gateway site:

Creating Additional Company Contact/User Accounts

For authenticated (logged in) company contacts that are marked as Vendor Administrators for their company there will be the option to view, manage, and create login accounts for other individuals at their company. If you are authorized to add new/additional contacts to log into the Vendor Gateway you will see the "Add Contact/User" menu under the "Contacts/Users" top navigation menu:
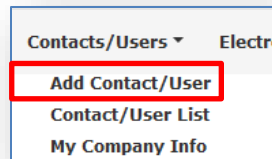
To create the new contact user account, click on the "Add Contact/User" sub-menu to navigate to the "Create a New User Account" screen:

The list of fields for you to populate information into will vary based on the Vendor Gateway Company's specifications. Any information that has a red asterisk to the left of the field name is required to be populated in order to create the new contact record. Once you have entered all of the new user's information and populated all of the required fields you will want to click on the "Continue" button at the bottom of the screen in order to save and create the new contact's user account.

Solicitations & Bids

The Solicitations area of the Gateway will allow vendors to search for and view solicitations that have been posted by the Gateway's owning company/organization. In order for vendors to become interested respondents as well as potentially respond to posted solicitations a vendor contact must log into the Vendor Gateway.

Searching for Solicitations

Whether you are searching public solicitations, all solicitations, or only solicitations that your company is a registered respondent, in order to search the solicitations you will want to go to one of the solicitation search screens using one of the top navigation menus under the "Solicitations" menu.

The Solicitations Search screen can be filtered by entering the filter criteria into the appropriate column's text box and then clicking on the filter icon to determine how the screen will be filtered off of the entered keyword. To remove the filter, click the filter icon and select the "No Filter" option.

Each column can be sorted as well by clicking on the column name once to sort ascending, a second time for descending, and a third time to remove the sort.

Viewing Solicitation Details

To view the details for a solicitation that is listed on the Solicitations Search screen, click on the "View" link to the left of the solicitation row:

This will open the Solicitation Details screen, which will show any additional information that the Gateway's owning company has made available to users.

Opportunity Details

Opportunities: Opportunities - Search All: Opportunity Details (ID: 18)

Details

Solicitation Name	**Solicitation Type**	
Food Truck for Summer Holiday Party	RFP	

Description
Food truck - all cuisines welcome
Outside backyard BBQ style party
Date - July 3, 2020
Time - 11 AM EST to 4PM EST
Location - Lindenwold, NJ
About 50 people

Status	**Solicitation Amount**	**NAICS**
Pending	10,000.00	Mobile Food Services

Invitation Type	**Line Item Bid/Reverse Auction**	
Public	No	

Dates

Bid Open/Release Date	**Bid Close Date**	**Questions Due Date**
3/10/2020 12:00:00 AM	3/31/2020 12:00:00 AM	3/24/2020 12:00:00 AM

Response View/Open Date		
3/10/2020 12:00:00 AM		

Please note that the list of fields and information will vary based on the Vendor Gateway's owning company's specifications.

From the Solicitation Details screen, you will be able to do the following:
1. Register as a Respondent (this allows you to submit bids/responses for this solicitation)
2. Upload files/documents/responses
3. Submit questions to the company about the solicitation
4. Answer Surveys & Questionnaires posted by the owning company

Register as an Interested Respondent for a Solicitation

In order to submit a bid/response for an open solicitation you must first register as a respondent for that solicitation. This can be done by updating the response status to "Interested in Responding" in the Response Status section.

Response Status

Your organization response to this opportunity is: Assigned.

Indicate your organization's response status: | Interested in Responding   ▼ | Submit

Interested in Responding
NOT Interested in Responding
Withdraw Response
Bid is Finalized and Fully Submitted

Solicitation Questions & Answers (Interested Respondents only)

Registered respondents for a solicitation can submit questions to the gateway's owning company by scrolling down the Solicitation Details screen to the "Questions & Answers" section of the page. In this section there will be a list of the public questions and answers (questions that other respondents have submitted if the gateway's owning company has marked the question as 'Public') as well as a list of the questions that you (or another contact from your company) have submitted for that solicitation.

Submitting Questions

In order to submit a question to the gateway's owning company, scroll down the Solicitation Details screen to the "My Questions/Answers" section and type your question into the text box provided.

Once you have entered your entire question into the text box, click the "Ask Question" button above the text box in order to submit your question. Once your question has been submitted successfully it will show at the bottom of the "My Questions/Answers" section under the "Question" column:

Please note that questions will only be allowed/accepted up until the "Questions Due Date" specified by the gateway's owning company. If you are unsure of the Questions Due Date (which is usually shown at the top of the Solicitation Details screen in the "Details" section) you will need to contact the gateway's owning company.

Viewing Answers to Questions Submitted

If you have submitted a question about the solicitation you can see if an answer has been submitted by logging into the Vendor Gateway and navigating to the Solicitation Details screen. If an answer has been submitted for your question it will show at the bottom of the Solicitation Details screen in the "My Questions/Answers" section to the right of your original question:

Uploading Files/Responses to Solicitation Details (Interested Respondents only)

In order to upload files/response documents to the Solicitation Details record, scroll down the Solicitation Details screen to the "Files, Documents, Images" section and click on the "Select" button. Next, browse your computer and select a file that you would like to upload. Once you have selected a file you can optionally enter a file description. To save and upload the selected file click on the "Save File" button:

To view a file that has been uploaded, click on the file name in the "View File" column in order to download and open the file.

Surveys & Questionnaires

You can respond to surveys/questionnaires posted by the owning organization. These surveys and questionnaires are typically collection points for the data and information on questions that respondents must answer for a record (such as questions to answer prior to submitting a bid for a solicitation).

Responding to Surveys & Questionnaires

To respond to a Survey or Questionnaire posted by the owning company, scroll down to the Surveys/Reponses area of the record and click "Manage/Respond**"**

The "Survey Welcome" page displays. Read the information available and click "Begin Survey" to begin answering the survey questions.

Answer the questions displayed. Utilize the "Section Name" drop down or "Next" button to move to the next section. Click the "Submit" button when you are finished answering the survey. When submitting responses, you are required to attest to the validity of the responses provided. You must enter your full name, mark the attestation tick-box, and click Complete and Submit.

Contracts & Committals

Once a Vendor/Client Contact has logged in to the Vendor/Client Gateway and the Contact's log-in information has been approved by the owning organization of the Gateway, the Company Contact will then be able to view all Contract Records that the owning organization has made available to be viewed.

Searching Contracts

Whether you are searching public contracts or contracts that are with your company, in order to search the Contracts you will want to go to one of the contract search screens using one of the top navigation menus under the "Contracts" menu.

The Contracts Search screen can be filtered by entering the filter criteria into the appropriate column's text box and then clicking on the filter icon to determine how the screen will be filtered off of the entered keyword. To remove the filter, click the filter icon and select the "No Filter" option.

Each column can be sorted as well by clicking on the column name once to sort ascending, a second time for descending, and a third time to remove the sort.

Viewing Contract Details

To view the details for a contract that is listed on the Contracts Search screen, click on the "View" link to the left of the contract row:

This will open the Contract Details screen, which will show any additional information that the Gateway's owning company has made available to users.

Please note that the list of fields and information will vary based on the Vendor Gateway's owning company's specifications.

Contract Files/Attachments

To view a file that has been uploaded and made available for you to download from the Vendor Gateway, scroll down the Contract Details screen to the "Attached Files, Documents, Images" section of the screen and click on the file name in the "View File" column in order to download and open the file.

In order to upload files to a Contract Details record, click on the "Select" button to browse your computer and select a file that you would like to upload. Once you have selected a file you can optionally enter a file description. To save and upload the selected file click on the "Save File" button:

Contract Notes/Comments

You can submit notes/comments for a Contract Details record with your company by navigating to the Contract Details screen and then scrolling down to the "Notes/Comments" section of the screen.
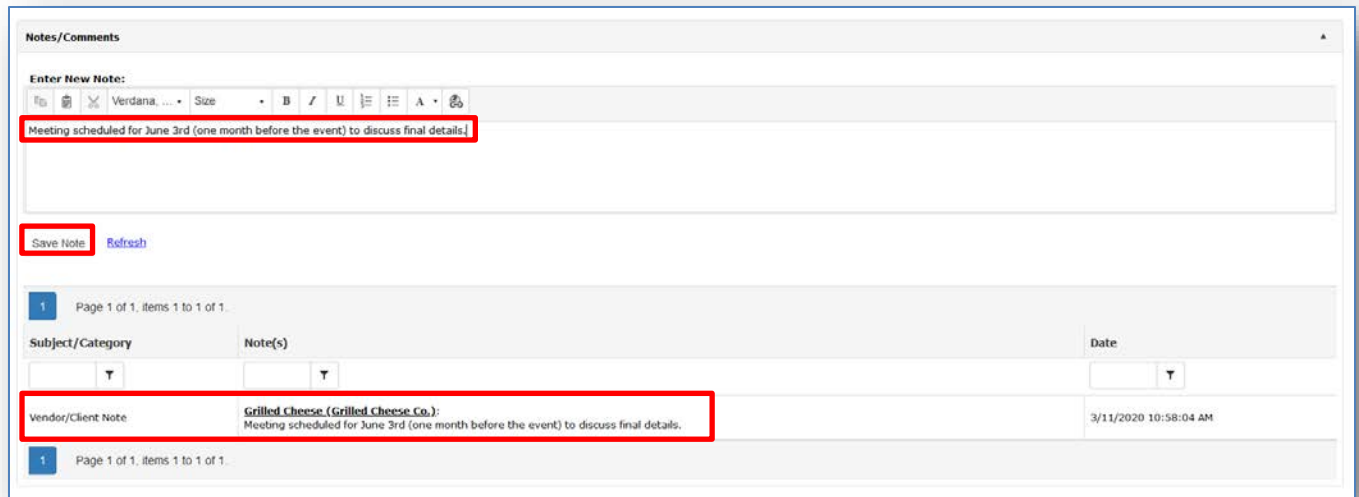
In order to enter a new note type the note into the text box provided (under "Enter New Note") and then click on the "Save Note" button above the text box to save the new note. Once your note has been saved successfully it will be displayed below the note text box as shown above.

Document Library

The Document Library will provide any files/documents for download from the Gateway's owning company. Please note that the list of files available to download from the Document Library will be different based on whether you are logged into the Vendor Gateway.

To download and save a file from the Document Library, click on the version link to the left of the file name:
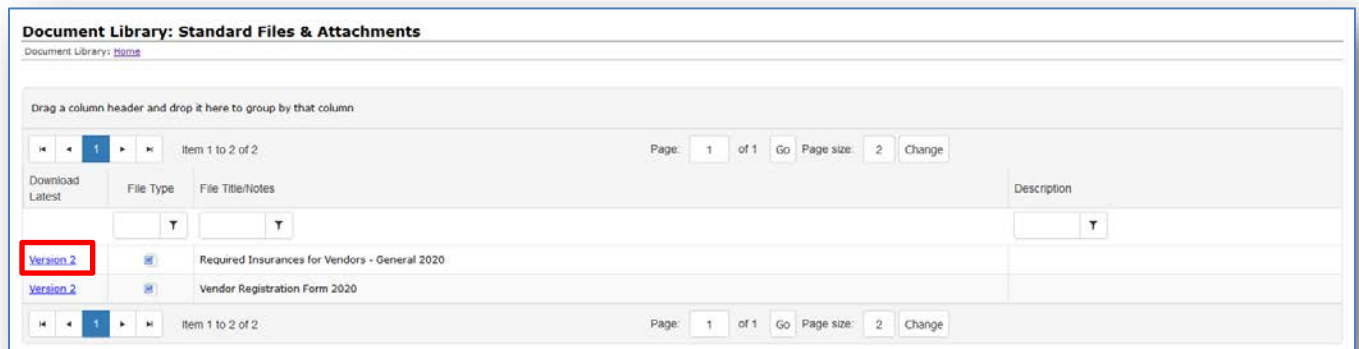
Revision History

Version	Date	Summary of Changes	Author
1.0	4-1-2016	New document	Kelly Allen
2.0	3-11-2020	Updated to meet Version: 17.5.4	Demetria Shipe