knowledge services

Getting Started

Vendor Project Guide

Contents

Activate your Account

To activate your account, your company Administrator must first create it

Once created an activation email is sent with a link to activate the account

1. Click the secure **link** provided in the email
2. **Complete the form** entirely and click **Activate**
3. A success message appears. Click **OK**
4. **Login** utilizing the newly created credentials

For additional assistance, contact the Support Team at Knowledge Services

Reset your password

1. From the login screen, click the **Need help signing in?** hyperlink
2. Select the **Forgot Password?** hyperlink
3. Enter your **Username**
4. Select a reset option:
   a. **Reset via SMS**: A text will be sent to the SMS phone number on file

b.   **Reset via Email**: An email is sent with a link
5.   **Click the link** in the email or SMS text received
6.   **Answer** your security question
7.   Click **Reset Password**
8.   Type a **New Password**
9.   Type/**Repeat password**
10.   Click **Reset Password**

For further assistance, contact the Support Team at Knowledge Services.

Submit a Project Proposal

1.   Navigate to **Opportunity Management > View Postings**
2.   Open the posting of interest by **double clicking** on it in the data grid
3.   Click on **Add Bid** to submit the bid
4.   Complete the **Bid Information Form.**
5.   Verify the information is correct. Click **Submit Bid**
6.   Once submitted, a success message will appear. Click **OK**

View a Proposal Submission

1.   Navigate to **Opportunity Management > View Postings**
2.   Locate the **Posting** the bid is associated with. If necessary, use the **Date Selection Zone**
3.   Having located the desired posting:
      a.   **Double Click** on the Posting in the data grid and click the **Bids** button
      b.   Or, Click on the **View Bid Icon** in the action bar

View all Company Proposal Submissions

1.   Navigate to **Opportunity Management > View Bids**
2.   View Bids of interest by using the standard data grid **sort and filter features**
3.   The **Status** column identifies the stage at which a submission resides

Withdraw a Proposal Submission

1.   Navigate to **Opportunity Management > View Postings**
2.   Locate the Posting the bid is associated with. If necessary, use the Date Selection Zone.

3. Having located the desired posting, open it by **double clicking** on it in the data grid

4. Click the **Bids** button

5. Using the various filters and search options, locate the **Bid** for which you wish to withdraw

6. **Double click** to open the bid

7. Click the **Withdraw** button to withdraw the bid

Best and Final Offer Submittal

An email is generated once the Client requests a best and final offer. Follow these steps to submit the best and final offer.

1. Select **Opportunity Management** > **View Bids**

2. Locate the Bid you wish to submit a best and final offer

3. Double-click to open the bid

4. Enter the best and final offer amount in the **BAFO Rate** column (right-hand corner)

5. Click **Submit Best Offer** (upper right-hand corner)

6. A success message appears. Click **OK**

7. An email generated to the Client and MSP indicating the offer amount

Submit a Milestone

1. Navigate to **Time/Projects > Add Milestone**

2. Use the dropdown to select the **contract** you wish to enter

3. Use the dropdown to select the **Project** you wish to enter

4. Use the dropdown to select the **Milestone** you wish to enter

5. Use the calendar icon to select the **Completed date** of the Milestone

6. The **amount** will auto-populate based upon the agreed Proposal

7. Provide any **Comments** if necessary

8. Click **Attachments**, to upload necessary attachments.

   a. **Type a name** for the file

   b. Click **Select** and locate the file you wish to attach

   c. Click **Upload** and a success message will appear

9. Click **Save**. *The Milestone will be removed from the list of available Milestones and submitted for approval.*

View Milestones

1. Navigate to **Time/Projects > view Milestones**

2. Use the **Date Selection Zone** to bring forward the Milestone(s) of interest

3. Results can further be filtered. Enter the relevant search term in the relating column, click the dropdown button, and choose the appropriate filter parameter. (i.e. Contains, Starts With, Equal To, etc.).

    a. *If entering a date such as 5/21/2019, choose the Equal to filter. If entering a status, such as "Approved", choose the Contains filter.*