



**First Citizens**  
*ProcureFirst*



**Bidder Rfx User Guide**  
**Desk Instructions**

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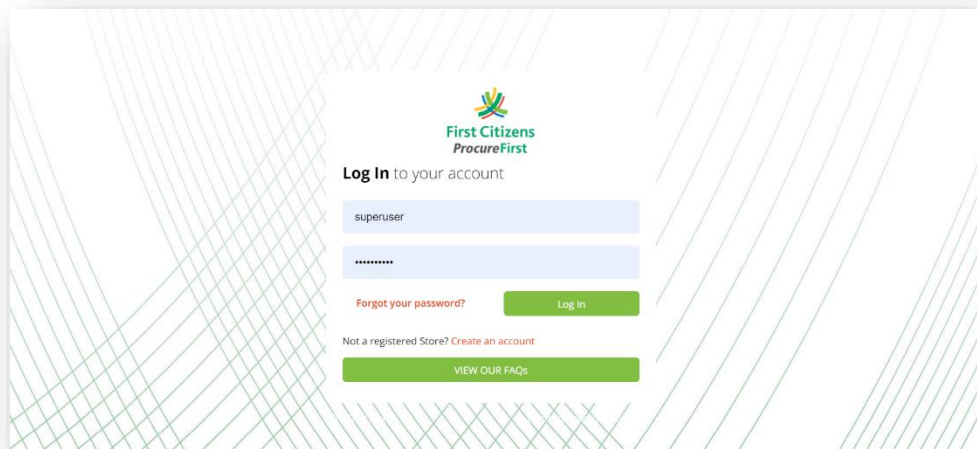
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## 1. Registering on *ProcureFirst*

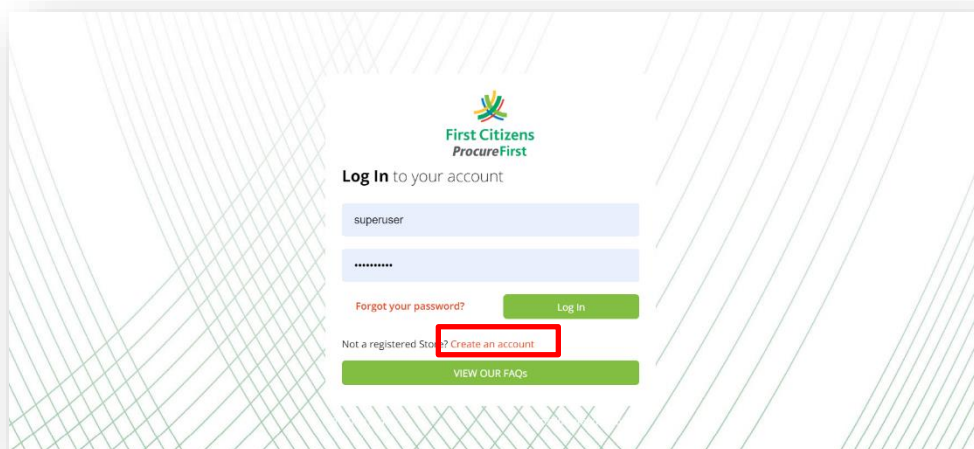
Registering on *ProcureFirst* is quick and easy!

To begin logging on using the *ProcureFirst* portal link, type in the company's website address in your preferred browser.

The following page will appear on your screen:

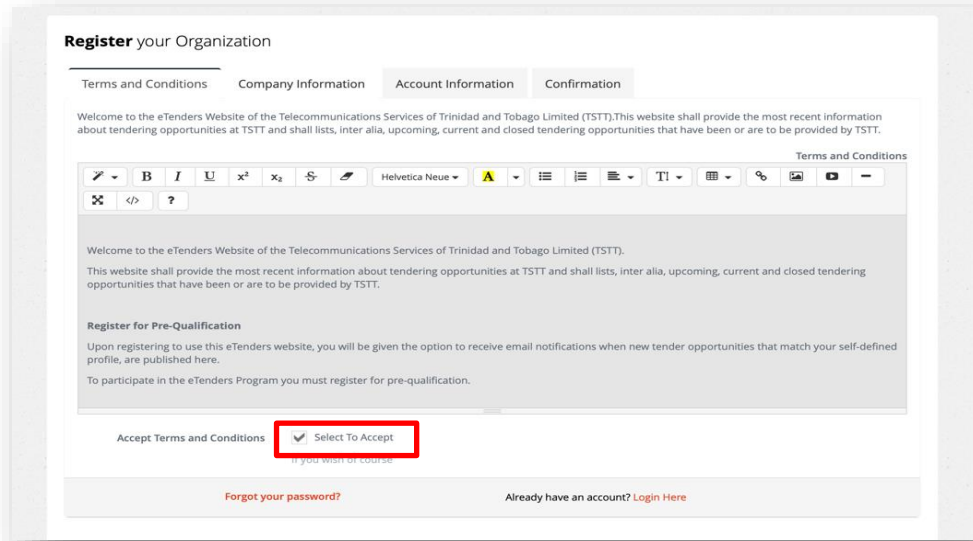


Select, **'Create an account'** as shown below:



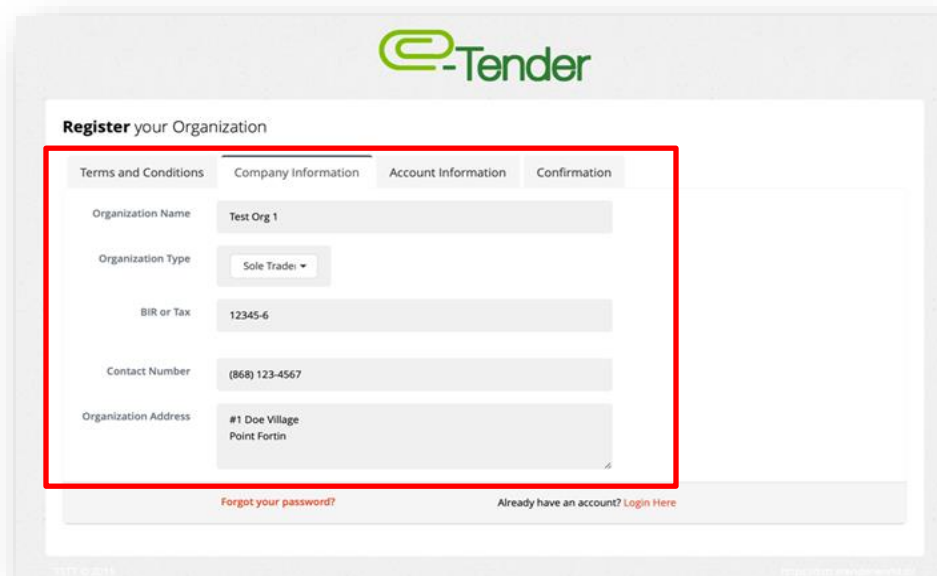
You will be directed to the **'Register your Organization'** page.

On this page, ensure that you read thoroughly the website’s Terms and Conditions. Upon completion, click **‘Select to Accept’**. You will not be allowed to continue registering if you do not accept the website’s Terms and Conditions:



After accepting the Terms and Conditions, you will be directed to the **‘Company Information’** tab on your screen.

Here, you will be required to input basic company information in the blank fields provided as shown below:



Once you have finished inputting your basic company data on this screen, select the ‘**Account Information**’ tab, to begin entering your User account information as shown below:

The screenshot shows the 'eTender' registration page with the 'Account Information' tab selected and highlighted by a red box. The form contains the following fields and text:

- Full Name:** Input field with placeholder 'Full Name'.
- E-mail:** Input field with placeholder 'johndoe@domain.com'. Below it, a note reads: 'NB: The email address must be valid. As it is eTender's main method of communicating with you'.
- Username:** Input field with placeholder 'username'.
- Password:** Input field.
- Confirm Password:** Input field.
- Upload Company Logo:** A 'Browse ...' button.
- Footer links: 'Forgot your password?' and 'Already have an account? Login Here'.

This screenshot shows the same 'eTender' registration page, but with the 'Account Information' tab selected and a red box highlighting the input fields. The data entered into the fields is as follows:

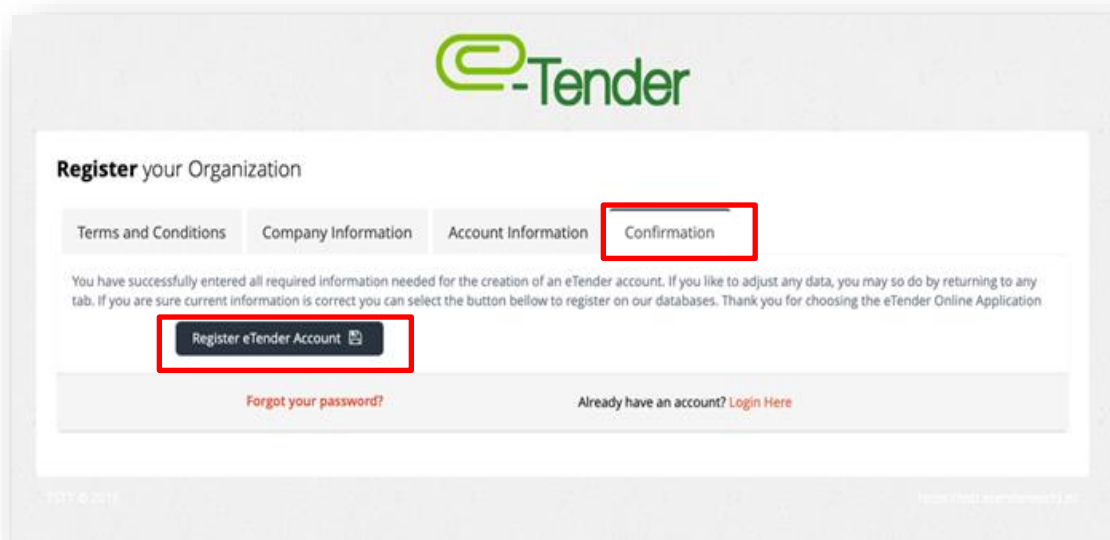
- Full Name:** John Doe
- E-mail:** johndoe@gmail.com
- Username:** jdoe1
- Password:** ..... (masked)
- Confirm Password:** ..... (masked)

The 'Upload Company Logo' button and footer links remain visible at the bottom of the form.

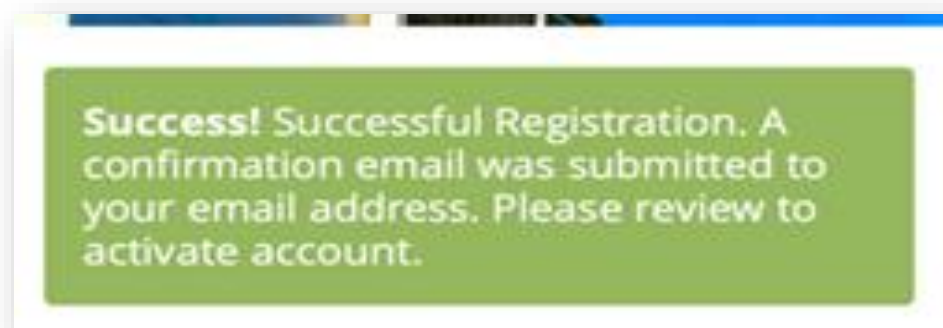
Please note that the Username and Password you enter in this section is case sensitive and will be required to authenticate your account after registration for future entry into the system.

It is imperative that you secure this information so that no one else can have access to your account. Also, when creating your Username, you are **not to include special characters** and you are to be mindful of including extra spaces or creating hyphenated usernames.

Once you are comfortable with the information submitted in the ‘**Account Information**’ section, proceed to the ‘**Confirmation**’ tab. Here, select, ‘**Register ProcureFirst Account**’ to complete the process.



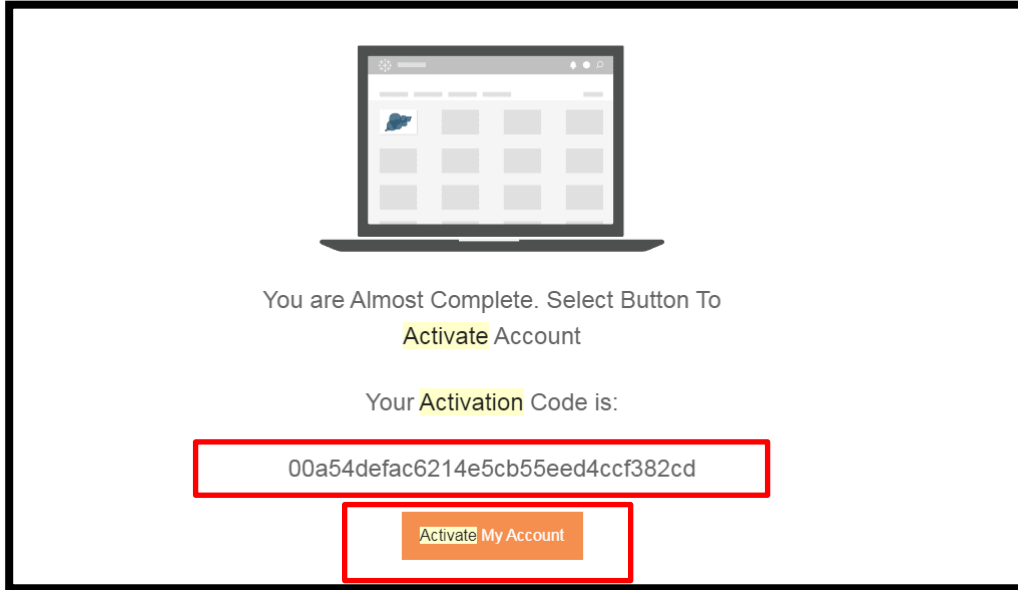
Once your registration is successful, you will receive the following confirmation:



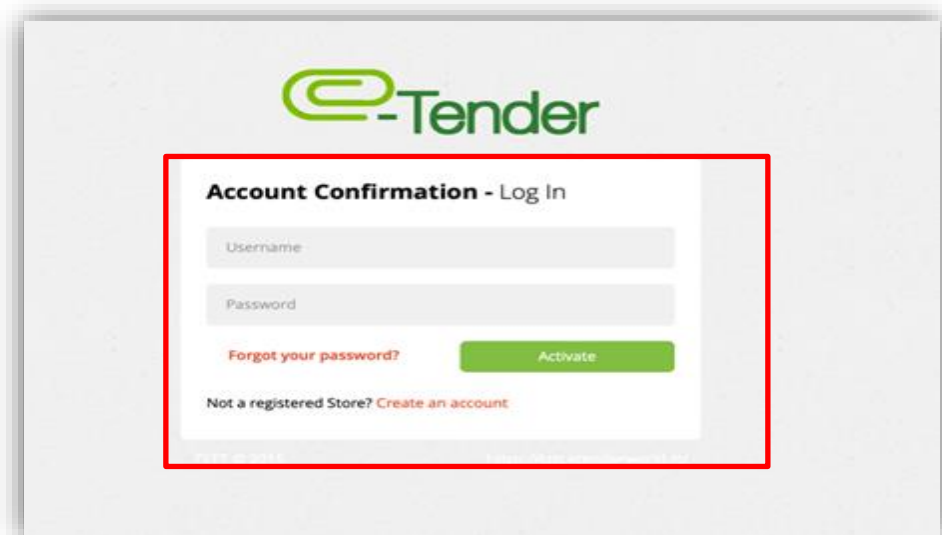
Proceed to your email account and verify that you have received the confirmation email. This step is important because if you do not activate your newly created **ProcureFirst** account, you will not

be able to access **ProcureFirst**. Be sure to check your ‘Junk Mail’ and ‘Spam’ folders if you have not received your email.

When you get the email, select, copy the activation code and select ‘**Activate Account**’:



You will be directed to a screen prompting you to enter your activation code. Once it is entered correctly, you will be prompted to log in using the credentials you entered when creating the account.




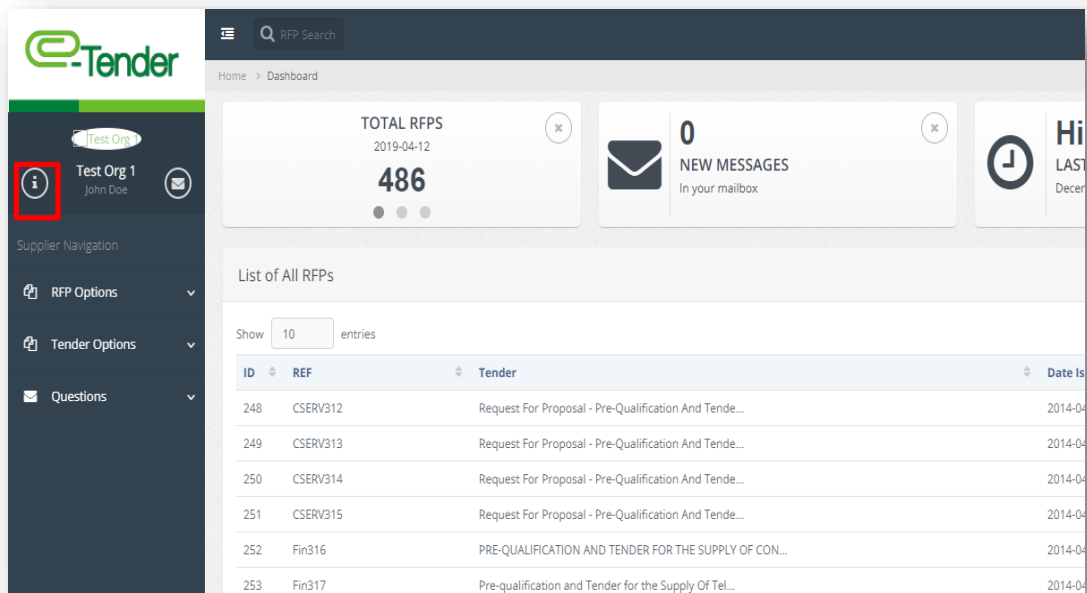
Congratulations! You are now registered to conduct business on **ProcureFirst!**

## 2. Updating Company Details

At some point, you may need to update your company's business details on **ProcureFirst**. These details may include:

- Full Name
- Company Name
- Contact Information
- Company Address
- Company Logo

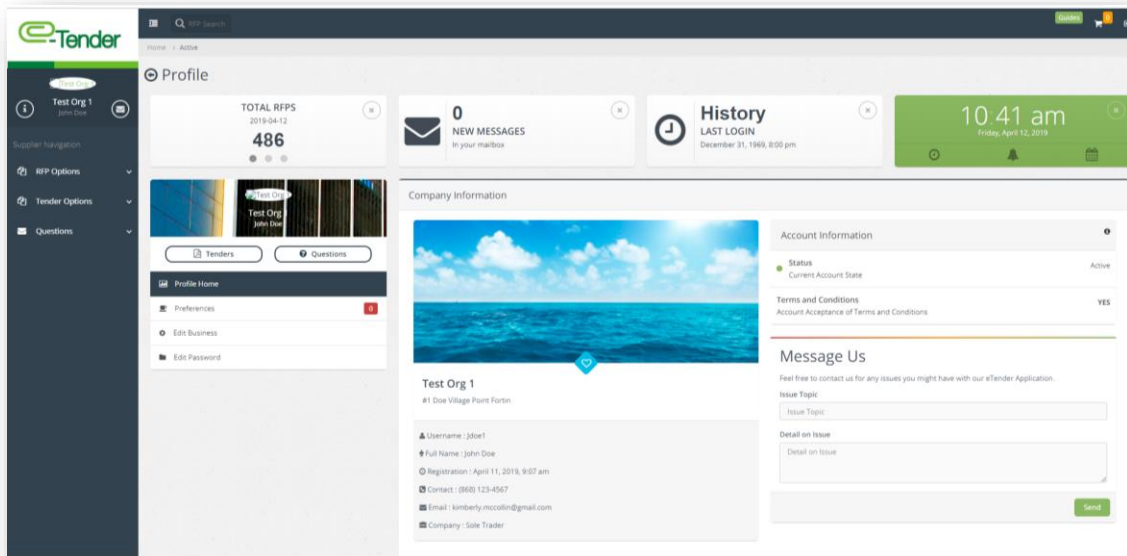
To begin editing/updating these details, select  as shown below:



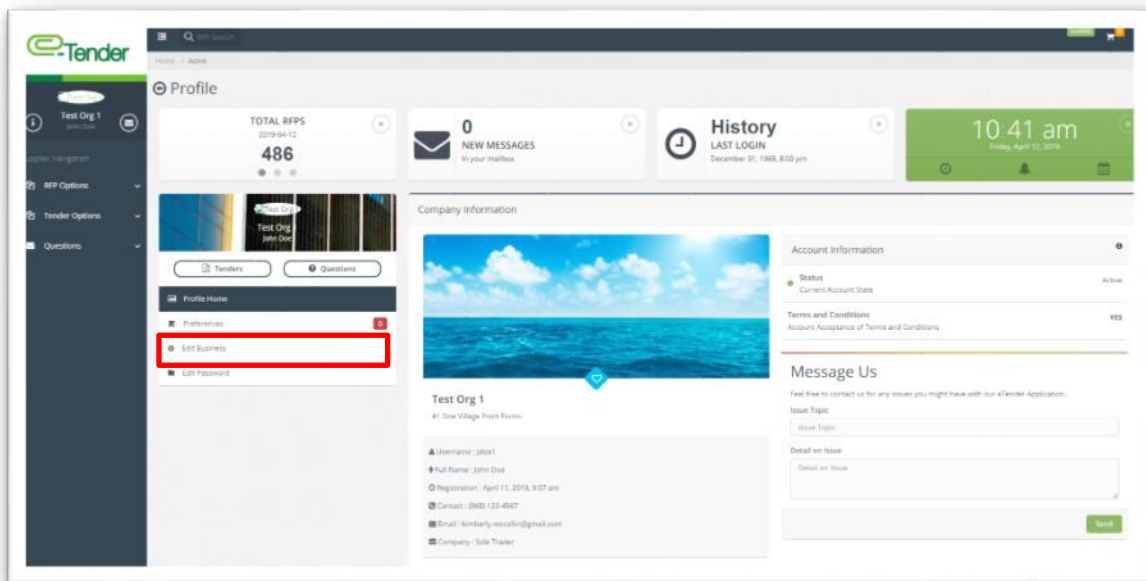
The screenshot shows the e-Tender dashboard interface. On the left, there is a dark sidebar with the 'e-Tender' logo at the top. Below the logo, the user profile is displayed as 'Test Org 1' with 'John Doe' underneath. A red square highlights an information icon (a lowercase 'i' inside a circle) next to the user name. Below the profile, there are three menu items: 'RFP Options', 'Tender Options', and 'Questions', each with a dropdown arrow. The main content area of the dashboard features a search bar at the top right, a breadcrumb trail 'Home > Dashboard', and three summary cards: 'TOTAL RFPs' (2019-04-12, 486), 'NEW MESSAGES' (0, 'In your mailbox'), and a partially visible 'Hi' card. Below these cards is a 'List of All RFPs' section with a 'Show 10 entries' dropdown. A table lists RFP entries with columns for ID, REF, Tender, and Date Issued.

ID	REF	Tender	Date Issued
248	CSERV312	Request For Proposal - Pre-Qualification And Tende...	2014-04-12
249	CSERV313	Request For Proposal - Pre-Qualification And Tende...	2014-04-12
250	CSERV314	Request For Proposal - Pre-Qualification And Tende...	2014-04-12
251	CSERV315	Request For Proposal - Pre-Qualification And Tende...	2014-04-12
252	Fin316	PRE-QUALIFICATION AND TENDER FOR THE SUPPLY OF CON...	2014-04-12
253	Fin317	Pre-qualification and Tender for the Supply Of Tel...	2014-04-12

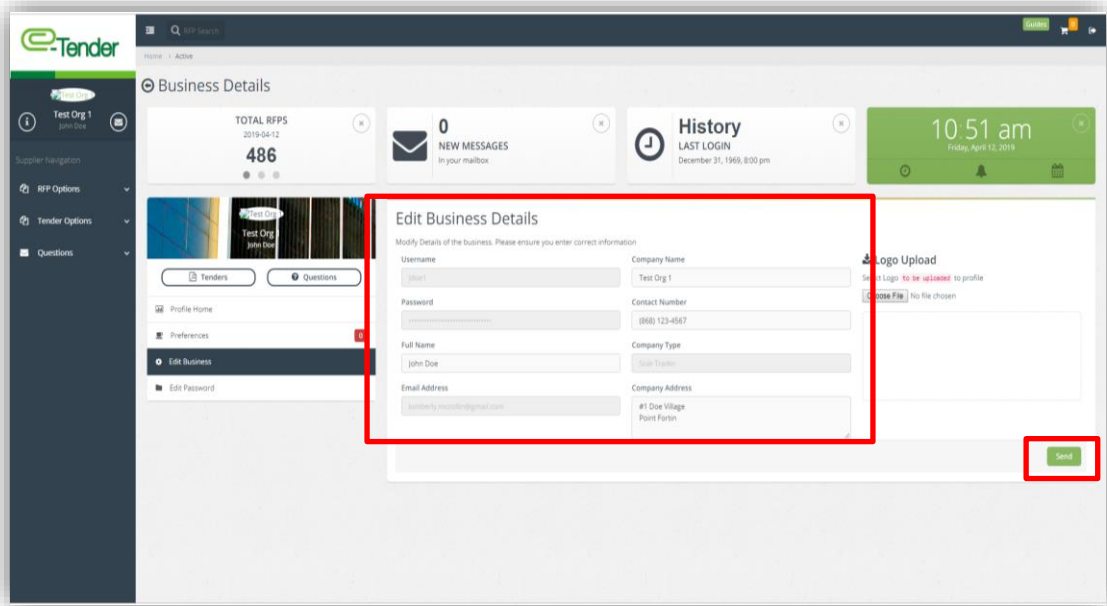
You will be directed to the following screen:



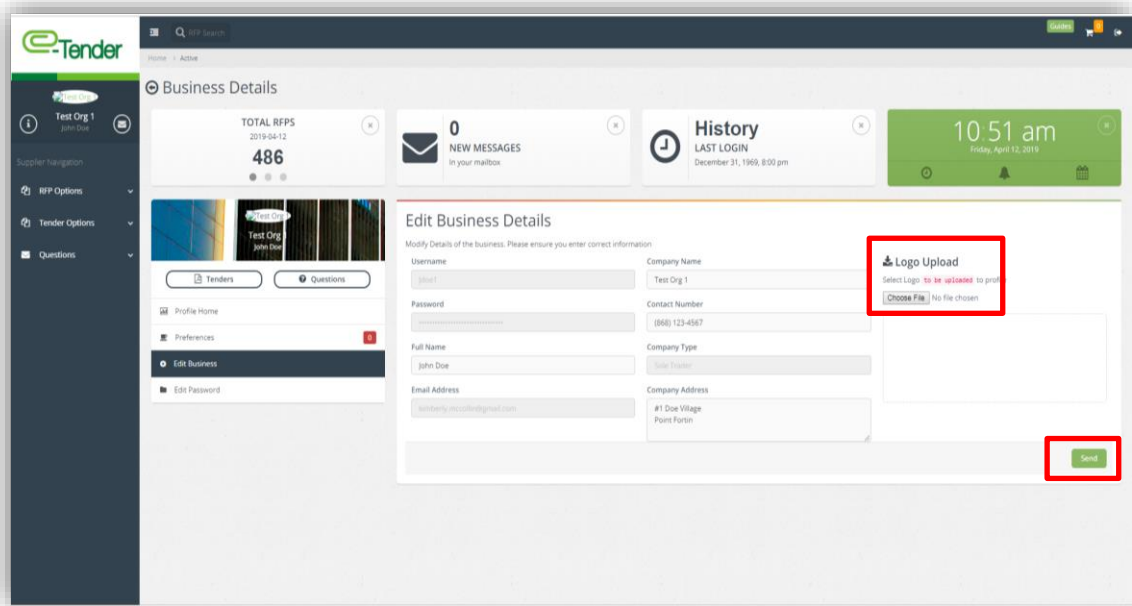
Select, **'Edit Business'** to begin the process of editing your company details:



You will be directed to the page shown below. Proceed to enter your updated company details. When you are finished, select **'Send'**:



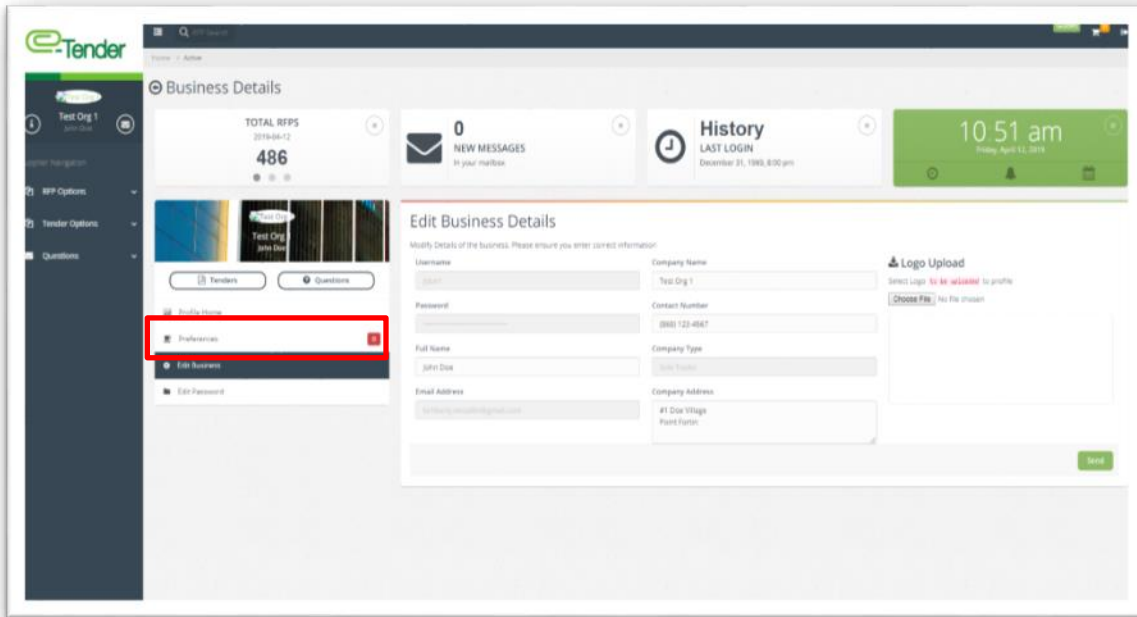
You can also upload and update your Company logo on this page as well. On the same page entitled **'Business Details'**, upload and update your logo by selecting **'Choose File'**. When you are finished, select, **'Send'**:



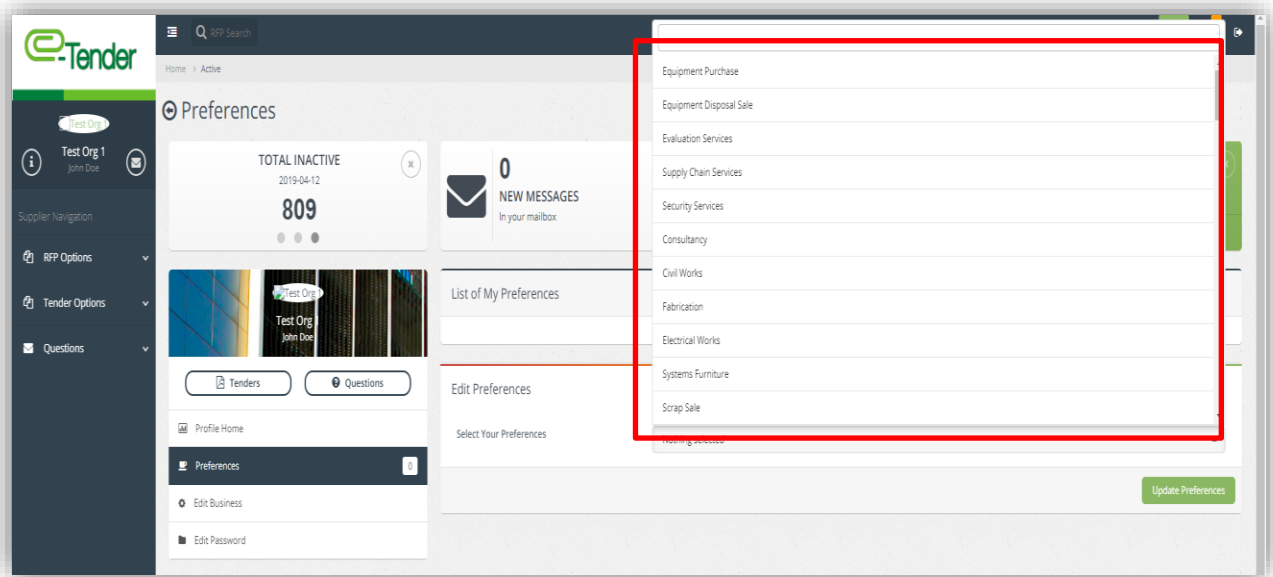
### 3. Selecting Company Preferences

Selecting Preferences are an important step in completing your Company profile.

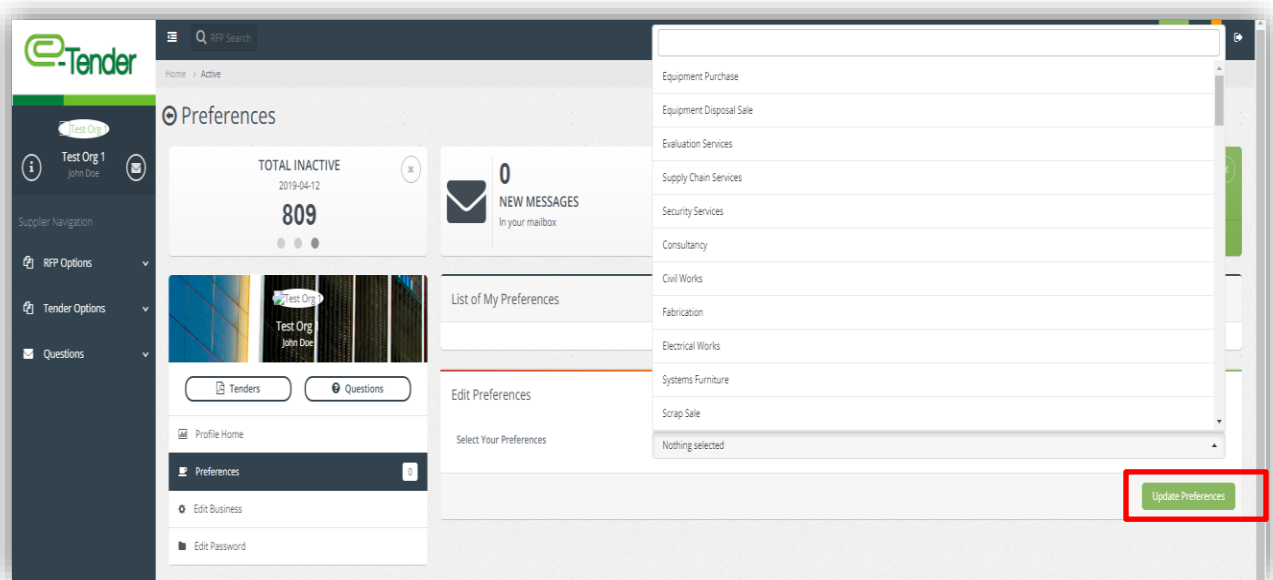
Preferences are general categories of work of interest to your Company. In order to receive email notifications of public tenders on these preferences, select, **‘Preferences’** on the **‘Business Details’** screen as shown below:




You will be directed to the screen shown below. Select the drop down arrow and all available preferences will appear. Feel free to select multiple preferences of goods and/or services that your Company may be interested in and would like to receive notifications for.

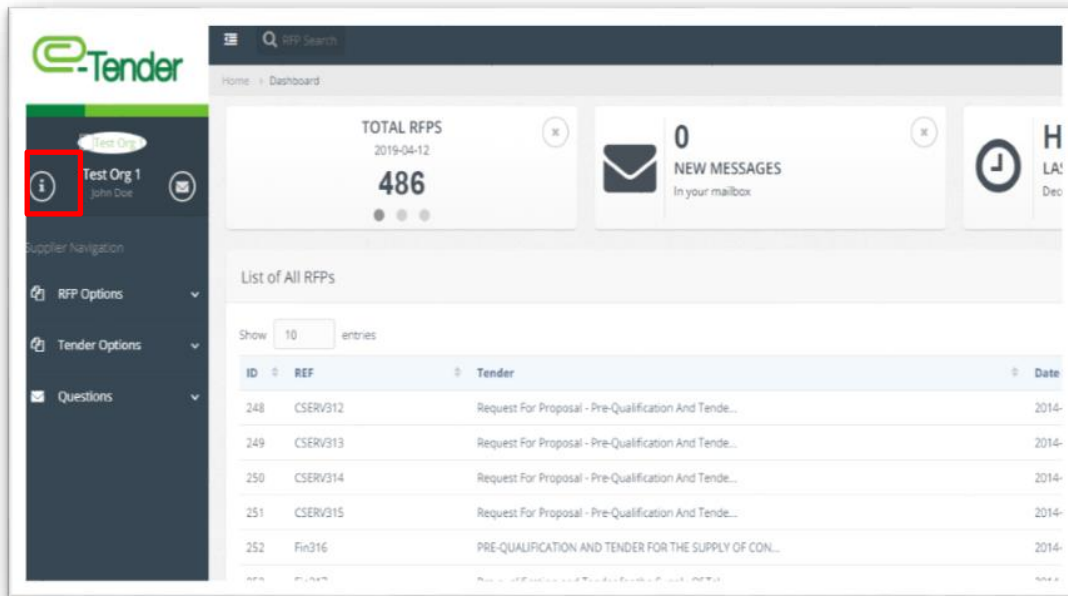


When you are finished selecting your preferences, select, **‘Update Preferences’** as shown below:

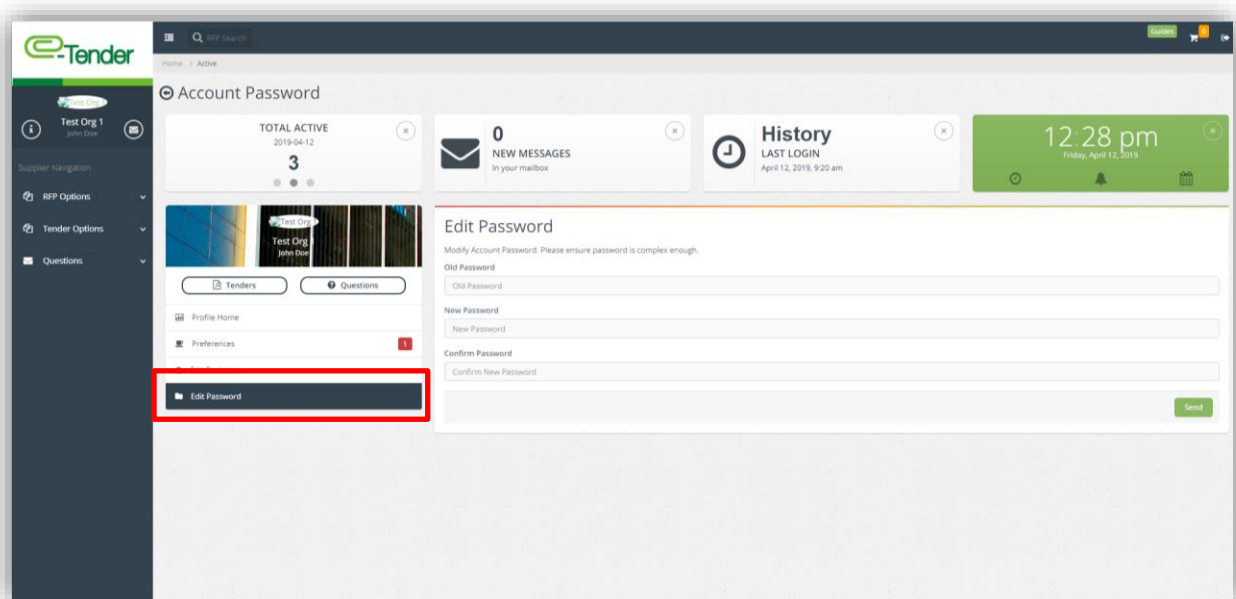


## 4. Changing your Password

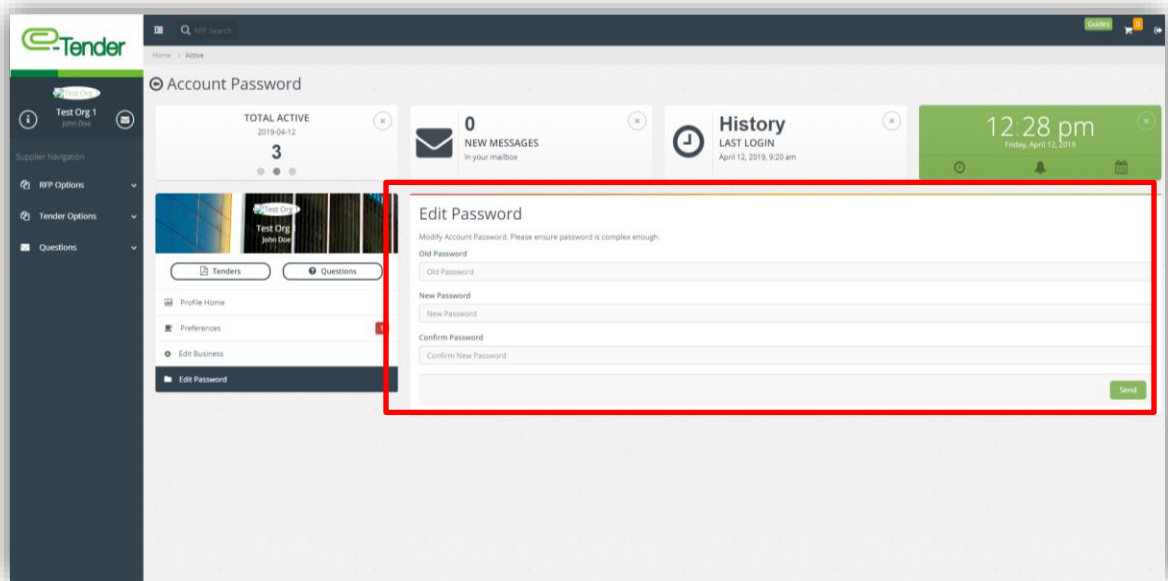
At some point, you may need to update your password details on *ProcureFirst*. To do this, select  as shown below:



Select, 'Edit Password':



Enter your old password and your updated password details in the fields as shown below. Upon completion, select ‘Send’.




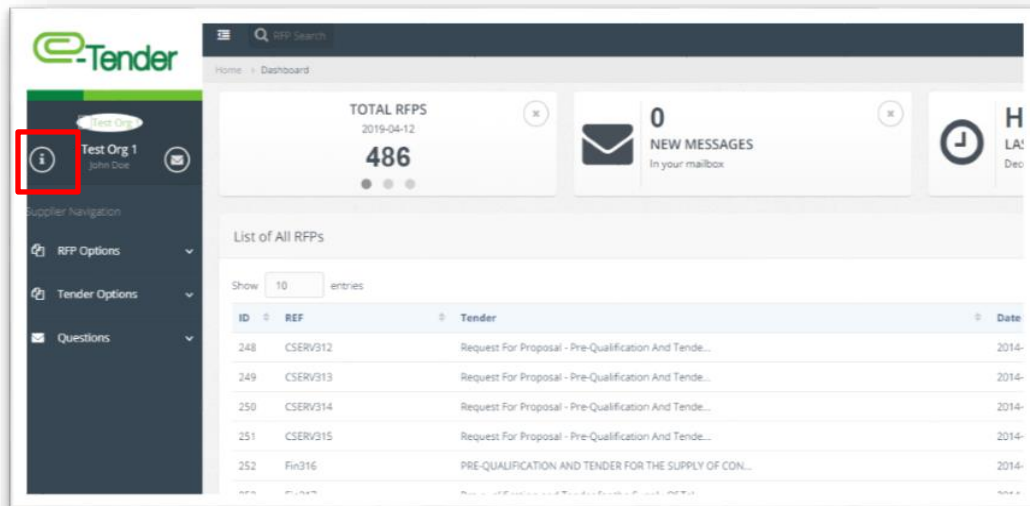
The screenshot shows the 'e-Tender' web application interface. The main content area is titled 'Account Password' and contains several widgets: 'TOTAL ACTIVE' (3), 'NEW MESSAGES' (0), and 'History' (LAST LOGIN: April 12, 2019, 9:20 am). A red box highlights the 'Edit Password' form, which includes the following fields: 'Old Password', 'New Password', and 'Confirm Password'. A 'Send' button is located at the bottom right of the form. The left sidebar shows navigation options like 'RFP Options', 'Tender Options', and 'Questions'. The top right corner displays the time '12:28 pm' and the date 'Friday, April 12, 2019'.

It is important that you remember your new password and that it is case sensitive. Failure to remember your new password will result in your inability to successfully access *ProcureFirst*.

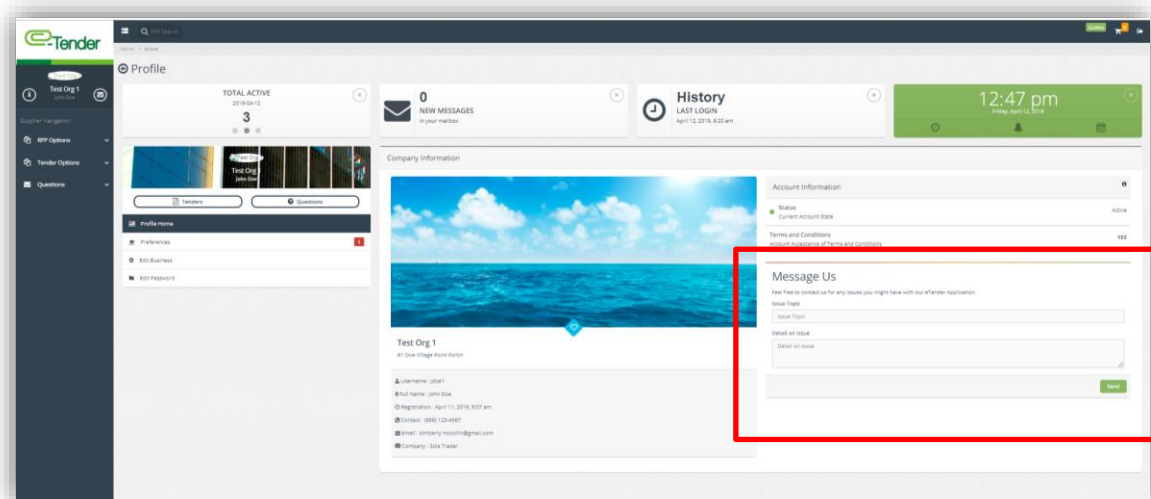
## 5. Using the Message Portal

If there are any queries or concerns regarding the use of **ProcureFirst**, there is a message portal available for your use.

To send a message via the message portal, select  as shown below:



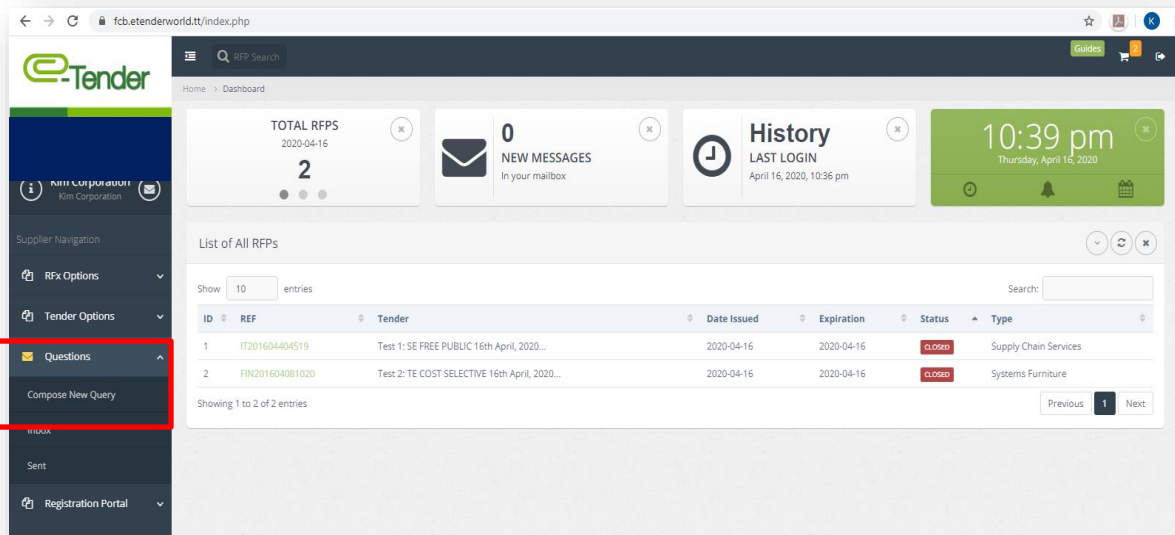
You will be directed to the '**Profile**' page as shown below. Use the available fields under '**Message Us**' to write and submit your message. When you are finished entering your query/question, select '**Send**':



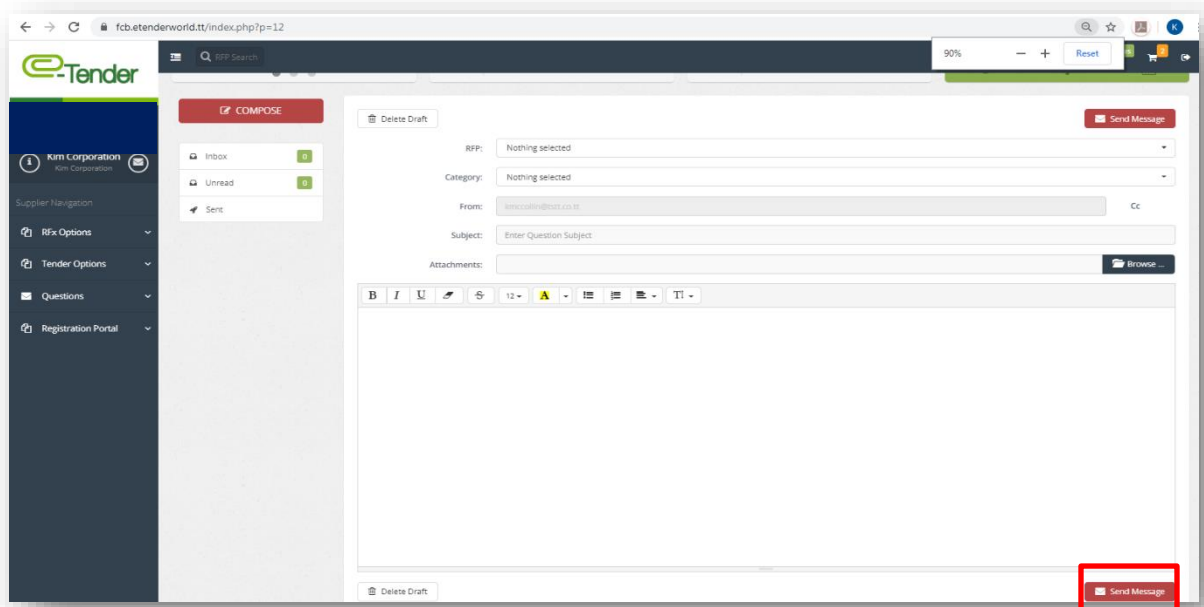
## 6. Submitting Queries regarding Live Tenders

If there are any queries or concerns regarding a live/open tender on *ProcureFirst*, there is a message portal available for this purpose.

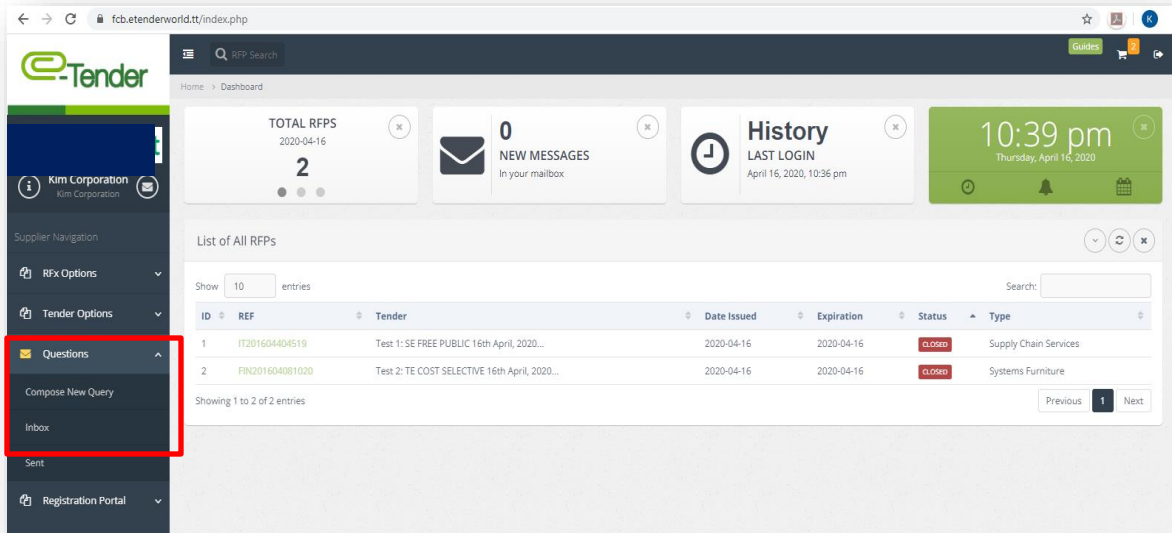
To submit a query regarding a live tender, select ‘**Questions**’ and select ‘**Compose New Query**’ as shown below:



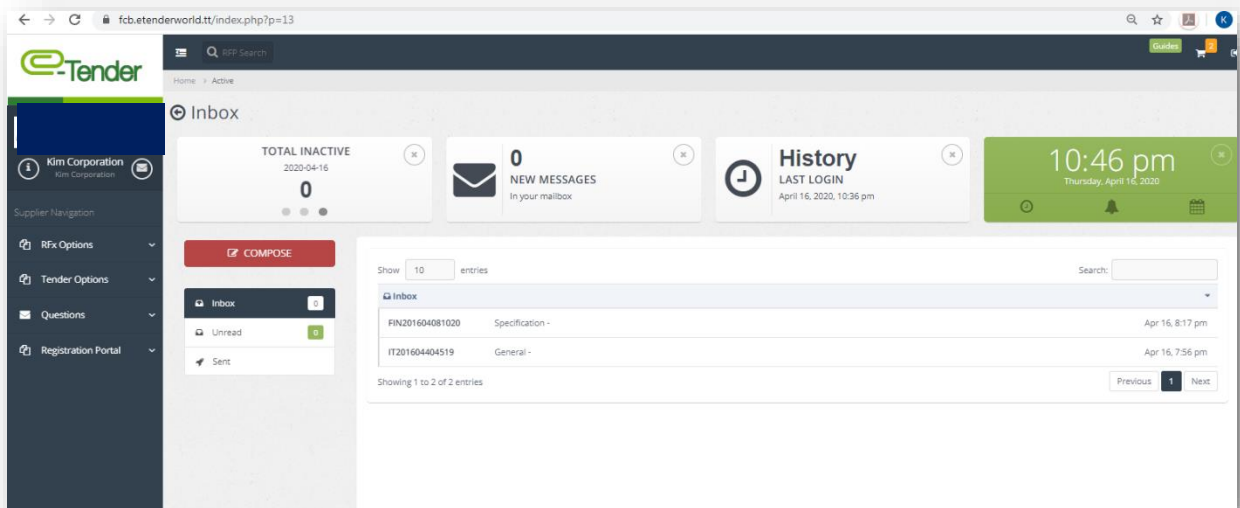
The following page will appear. Proceed to fill out the respective fields and once complete, select ‘**Send Message**’ as shown below:



To view responses to queries submitted after being notified via email, select **‘Questions’** and select **‘Inbox’** as shown below:

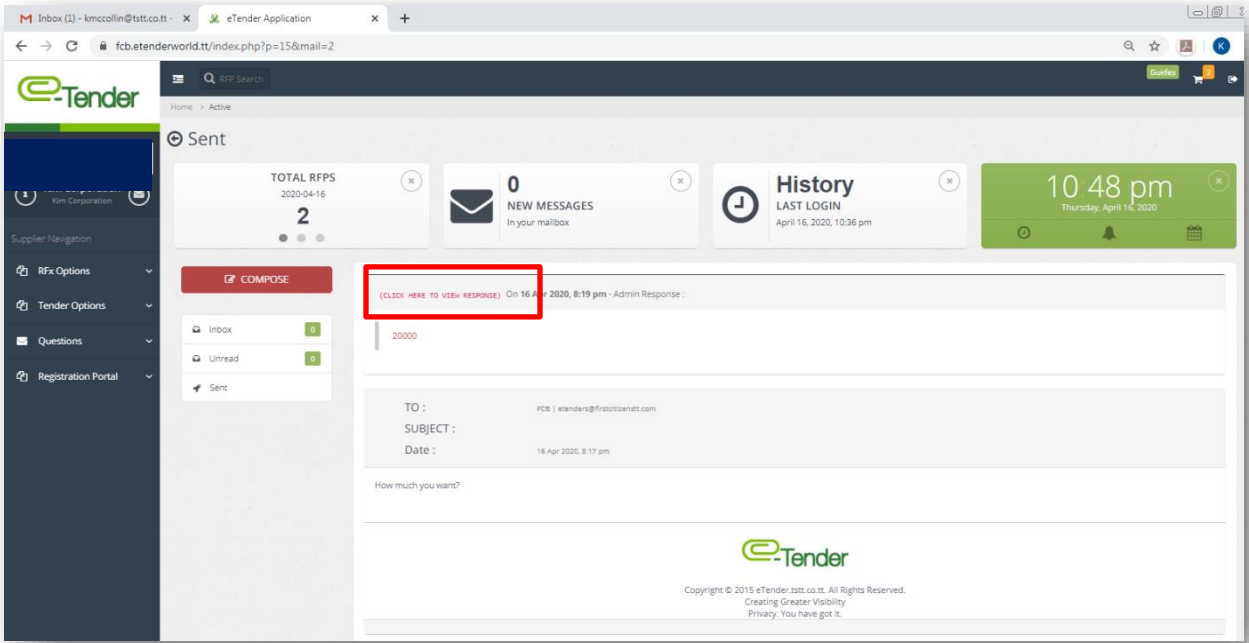


You will be directed to the following page:

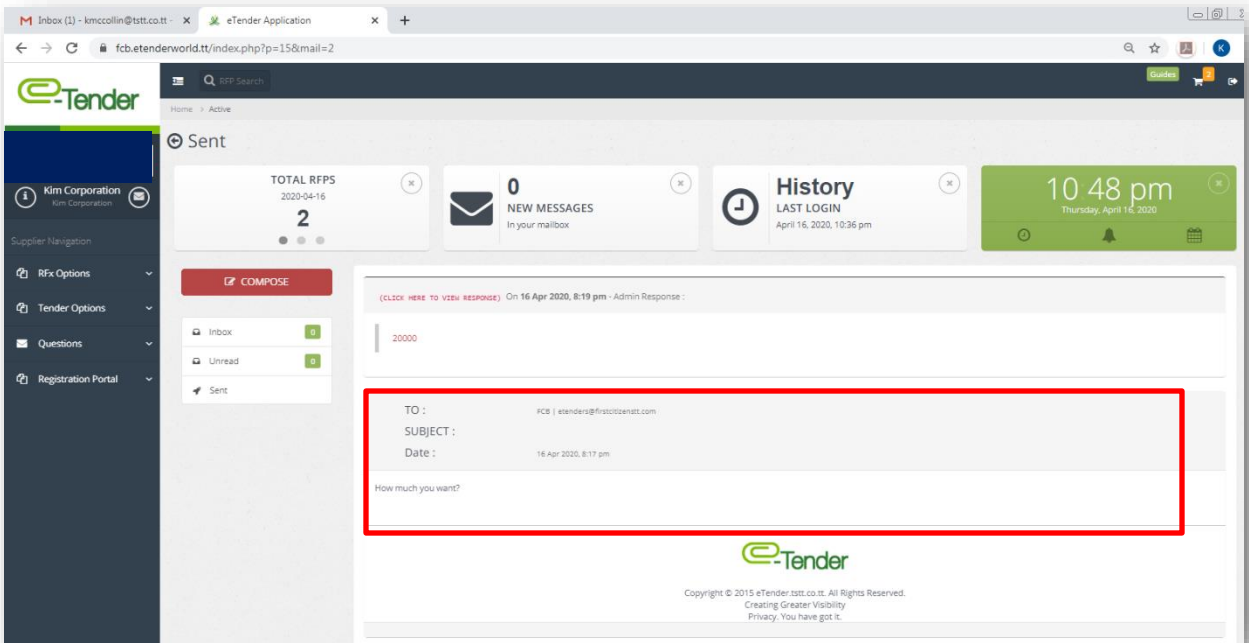


Select the response to the respective tender you would like to view and then select **‘Click Here To View Admin Response’** as shown below:

:

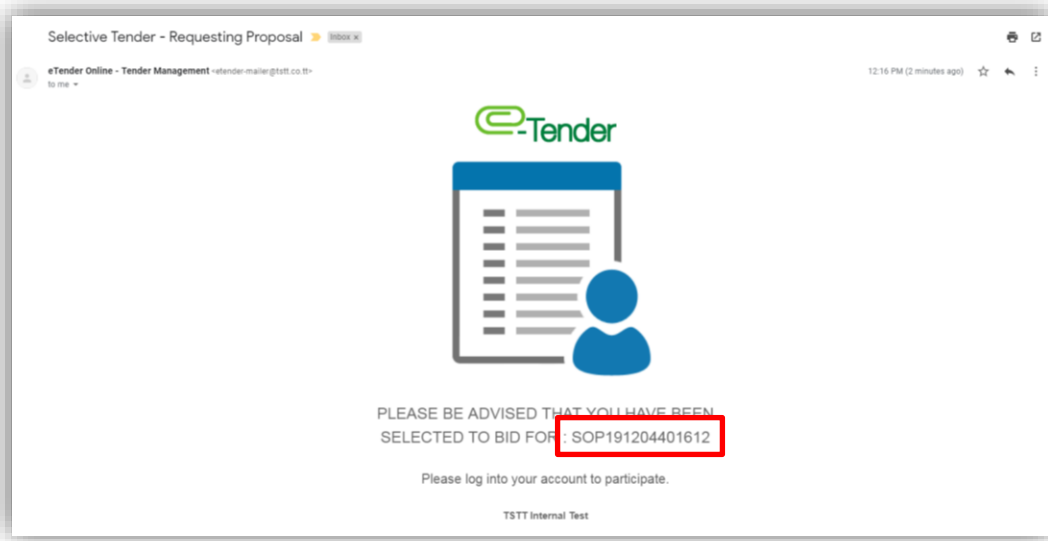


Please note that below you will be able to see the original query posted:

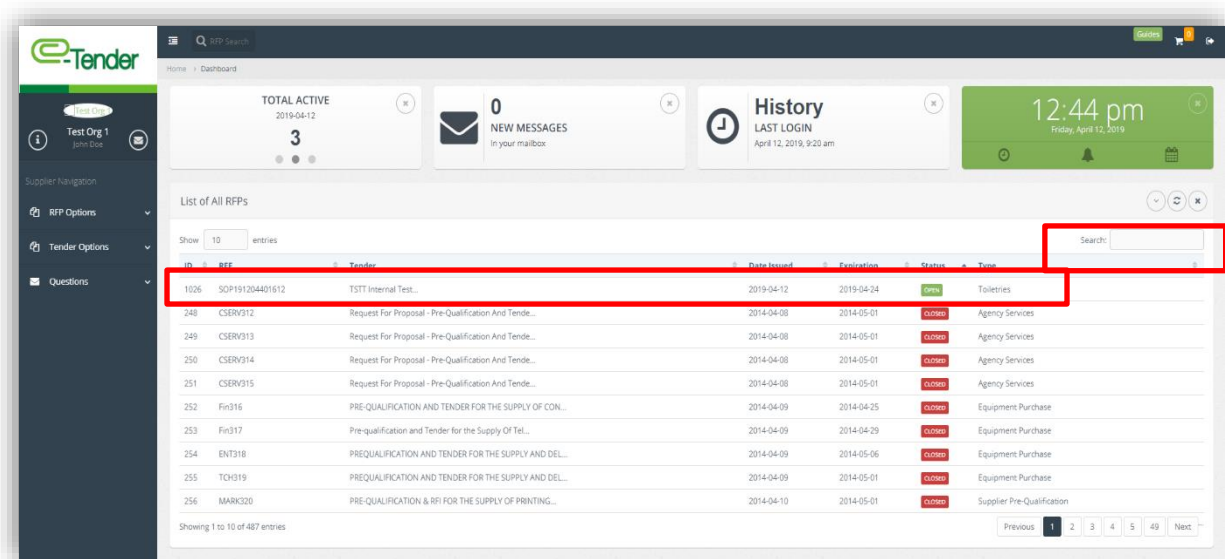


## 7. Participating in a Tender

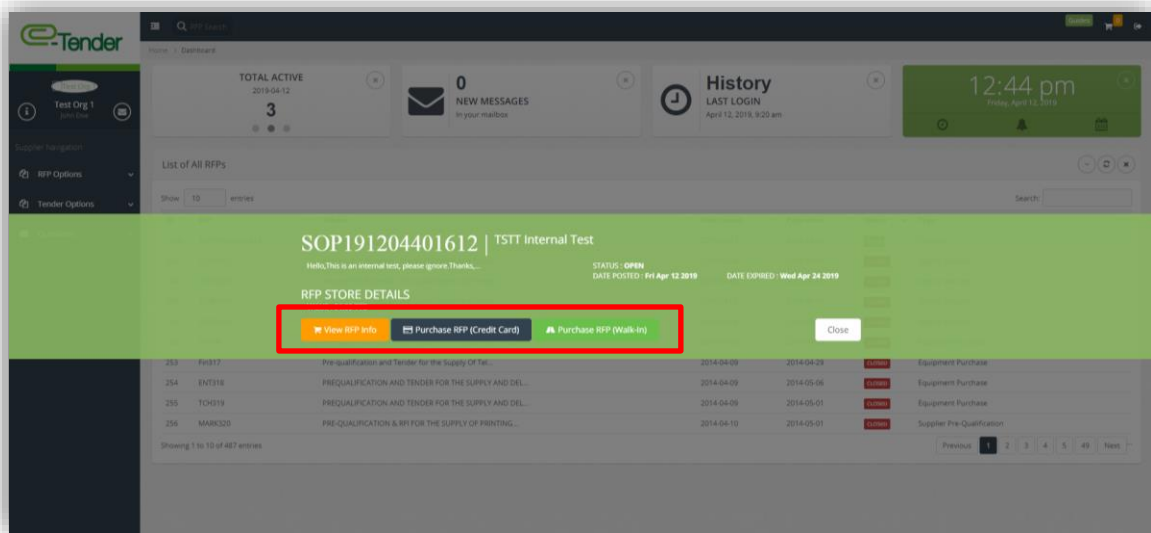
You will receive an email notifying you that you have been selected to submit a bid for a specific tender, or when a tender within your preferred good of service category is posted. The email will look like the one below. Use the unique Ref# to find the tender in **ProcureFirst** and to begin the bid submission process:



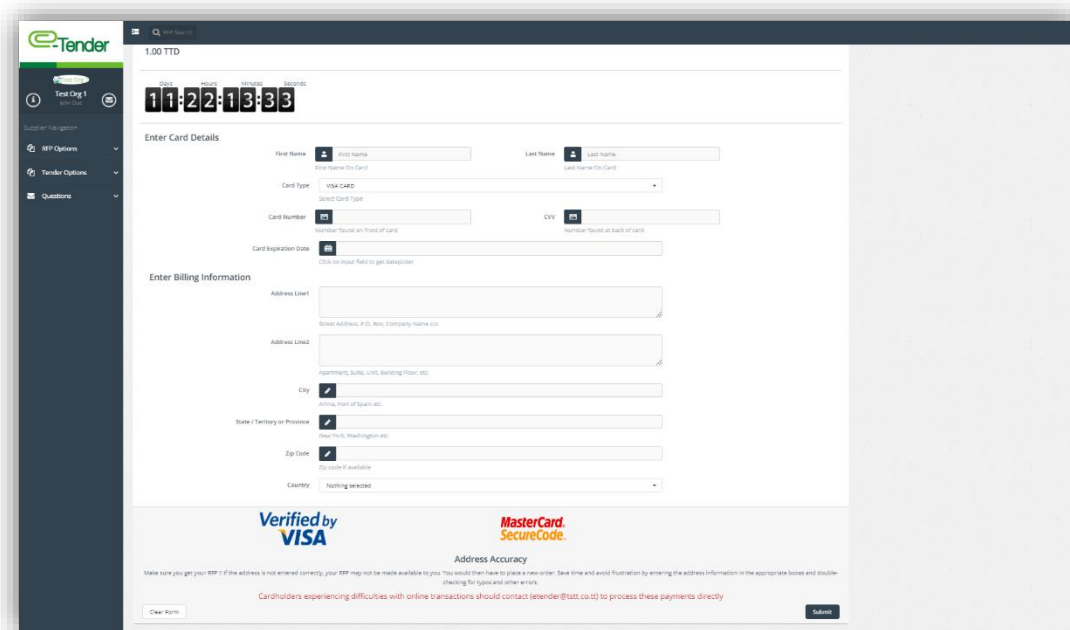
When you have successfully logged on to **ProcureFirst**, all tenders, both open and closed will be posted on your home screen. If not, feel free to search for the tender using the search box as shown below:



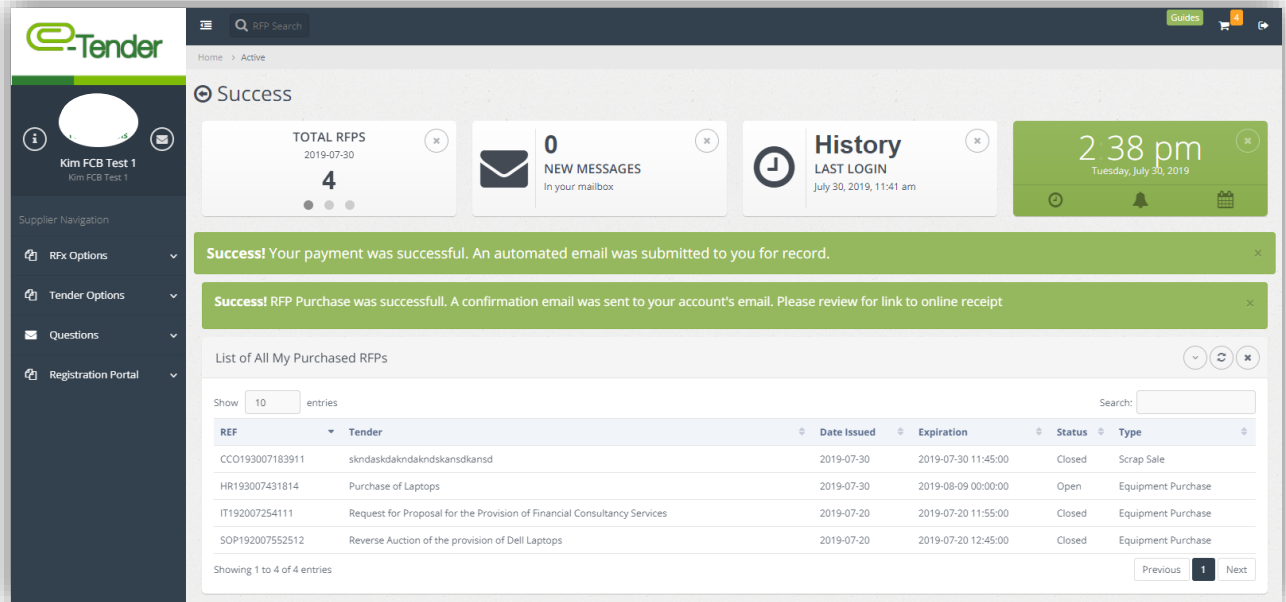
When you have located/selected the tender for which you have been invited or wish to participate in, select it. You will see a screen as shown below. This screen gives you preliminary information on the tender. To view additional details about the tender, select **‘View RFP info’**. If there is a cost to purchase the tender, it will be displayed here and you would be required to purchase the tender in order to have access to any additional information/the tender package:



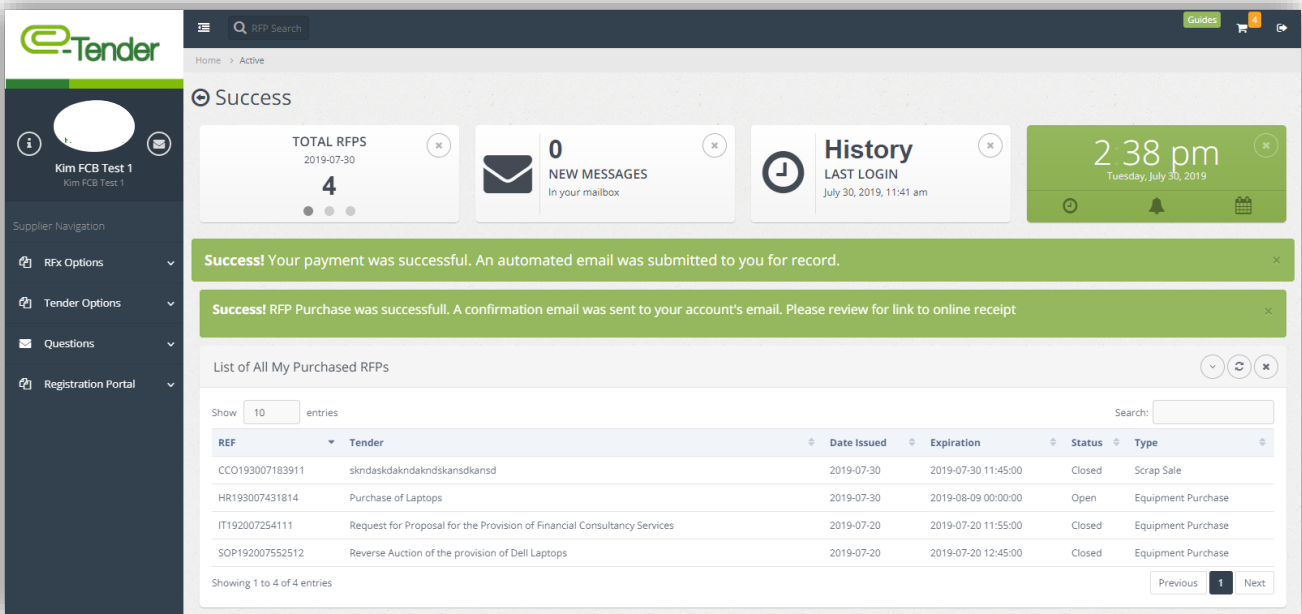
To begin, if there is a cost, you must select **‘Purchase RFP (Credit Card)’**. If there is no cost, select **‘FREE (Select to Own)’**. If you have to purchase this tender, the following screen will appear which will prompt you to enter your credit card details:



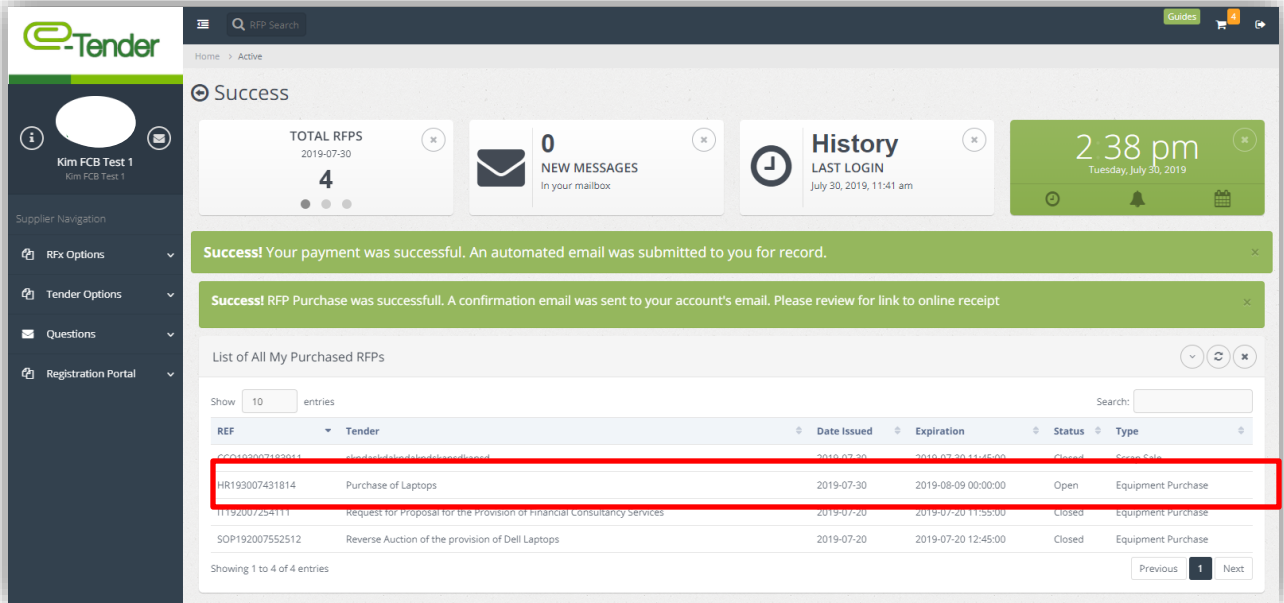
Once your credit card payment is successful, you will be directed to the following page:



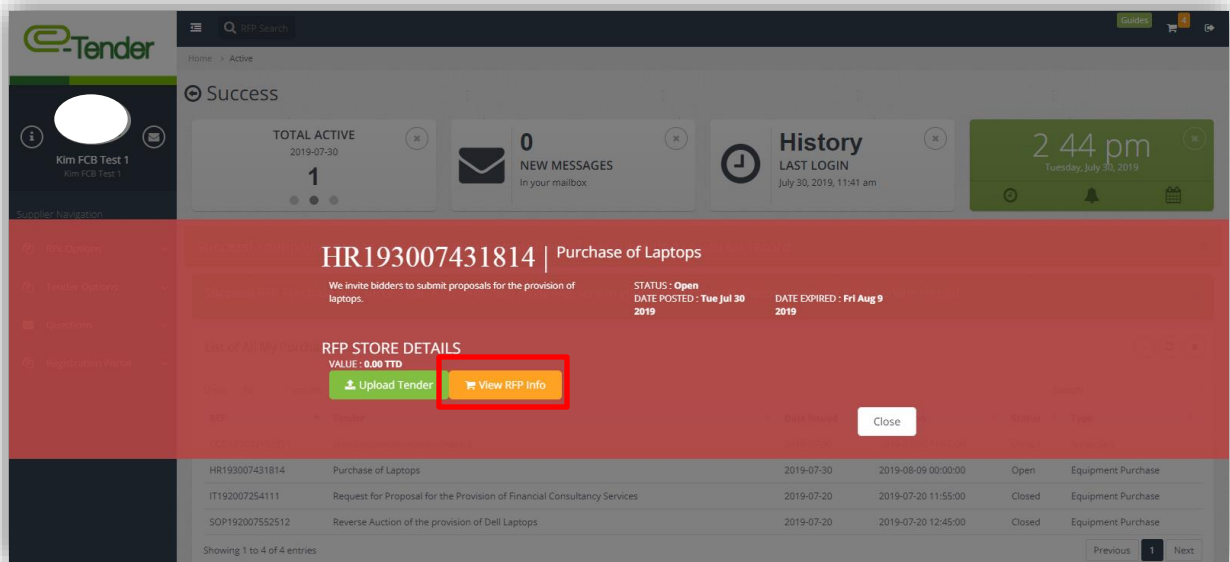
If there is no cost attached to the tender, and you select 'FREE (Select To Own)' you will be directed to the following page as well:



On this page, select the specific tender for which you are applying:

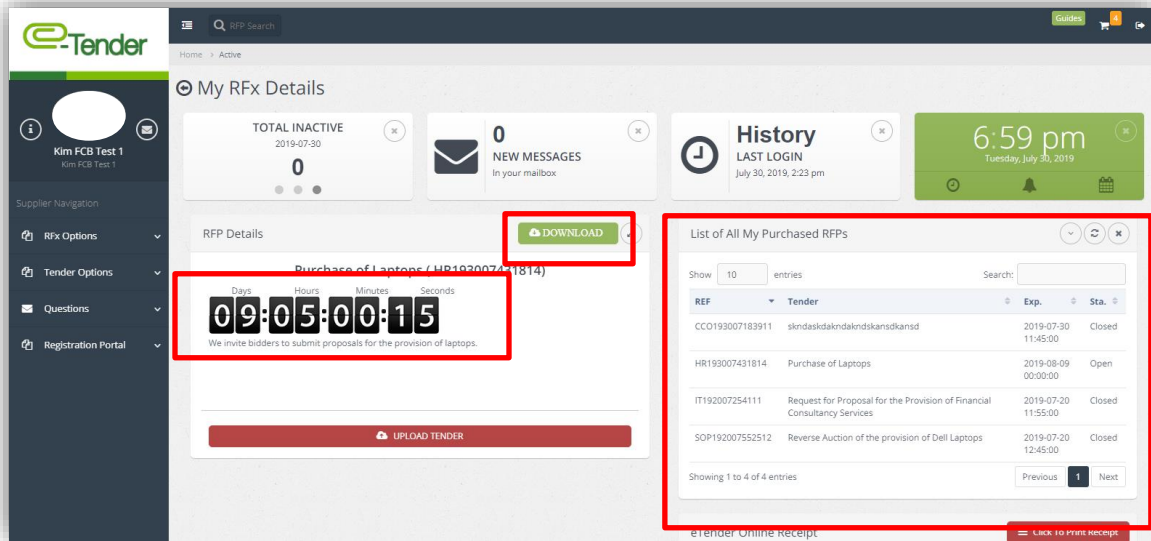


The following screen would appear. Select, 'View RFP Info' to see the details of this tender and to download tender documents/package:

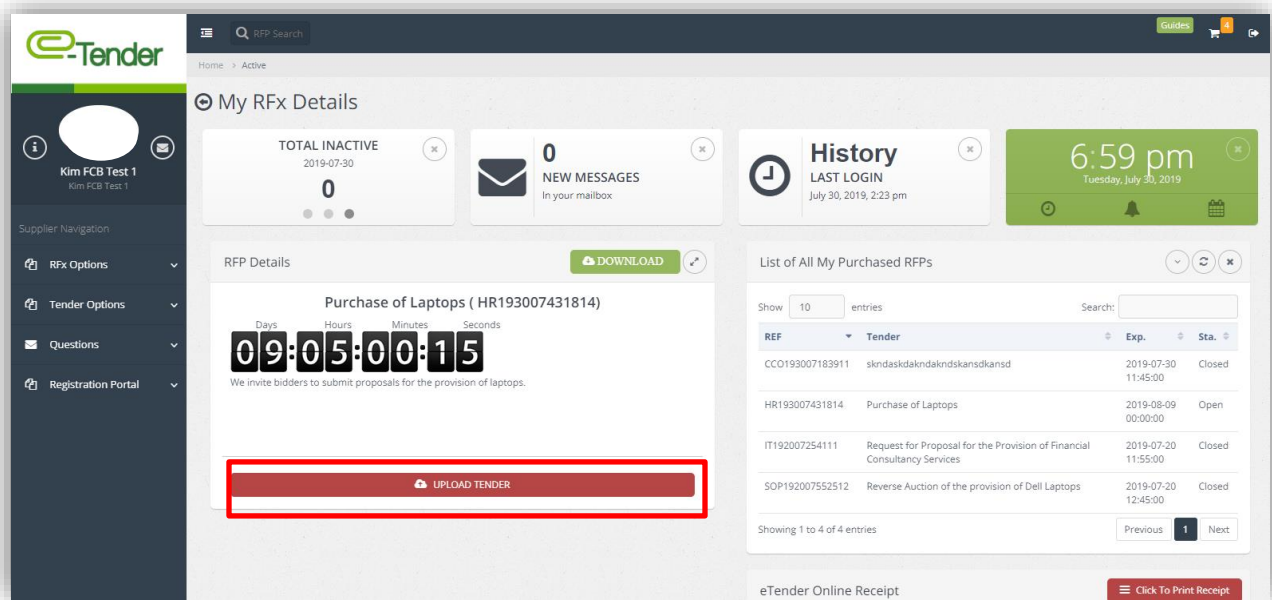


On this screen you will see the following:-

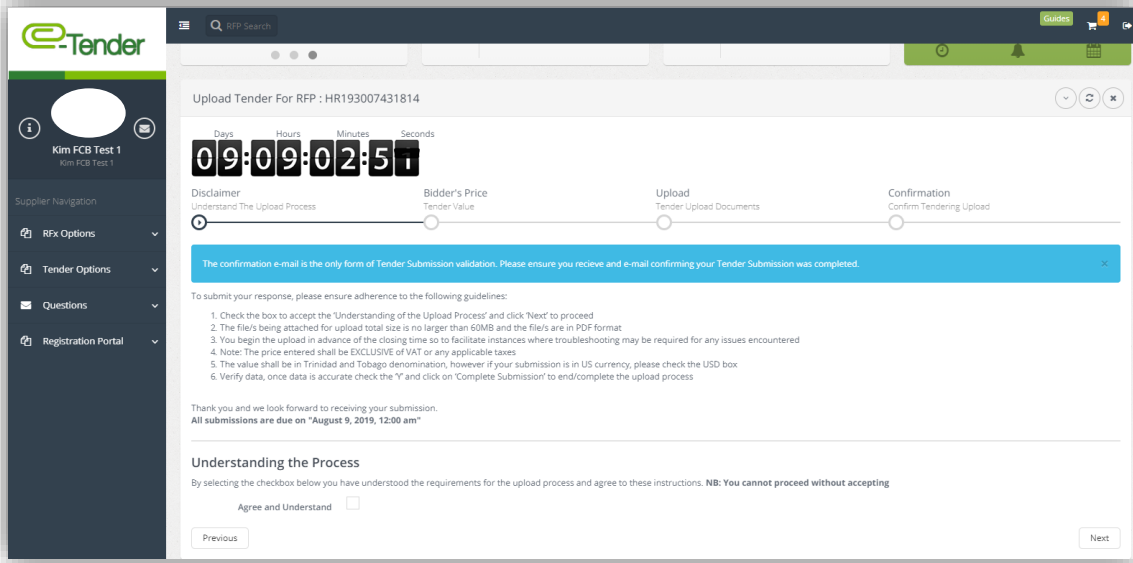
1. The **'Documents'** tab- This contains **all pertinent documents related to the tender** which you should download and review before submitting your bid. These documents can include but are not limited to: - Invitation to Bids, RFP Packages etc.
2. A countdown timer which lets you know how much time (days and hours) there is left before the tender closes
3. A list of all your previously purchased RFX's



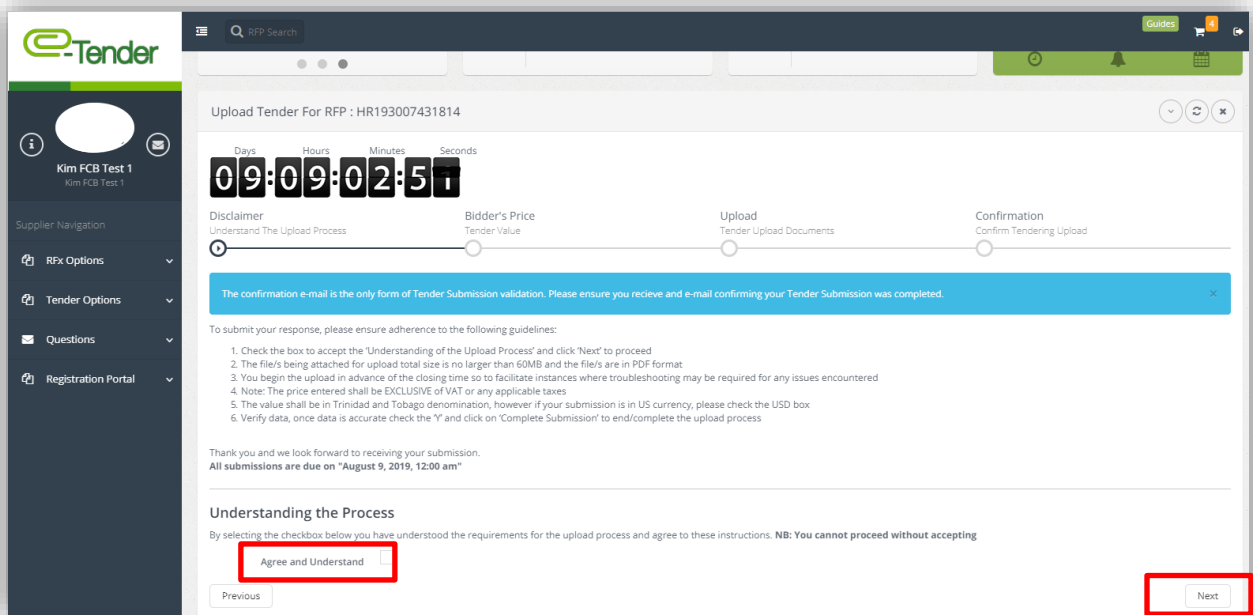
Once you have downloaded all required documents, select **'Upload Tender'** as shown below:



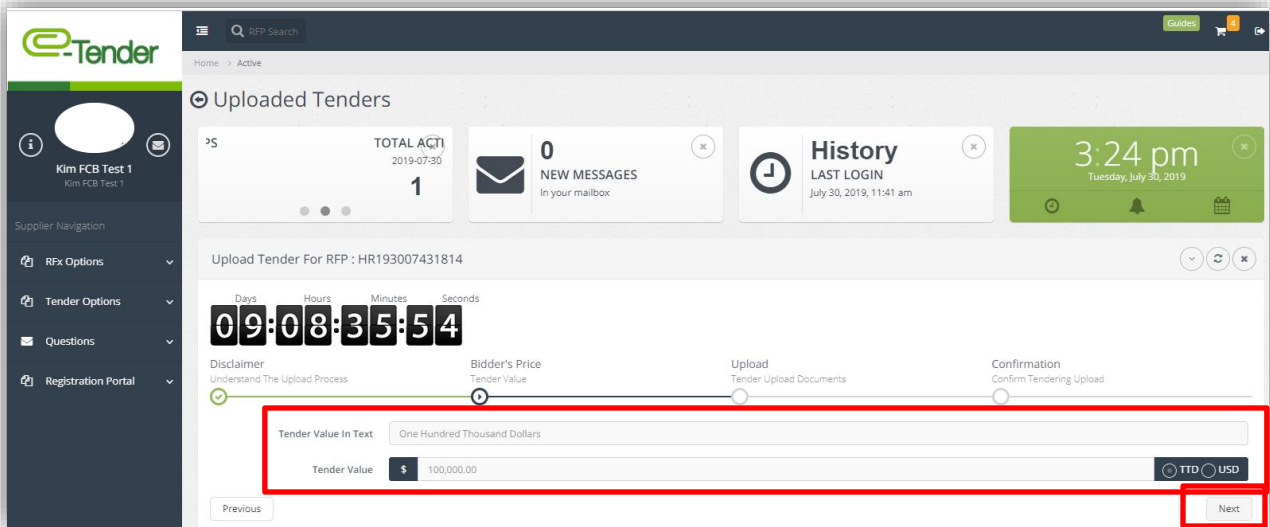
The following page will appear:



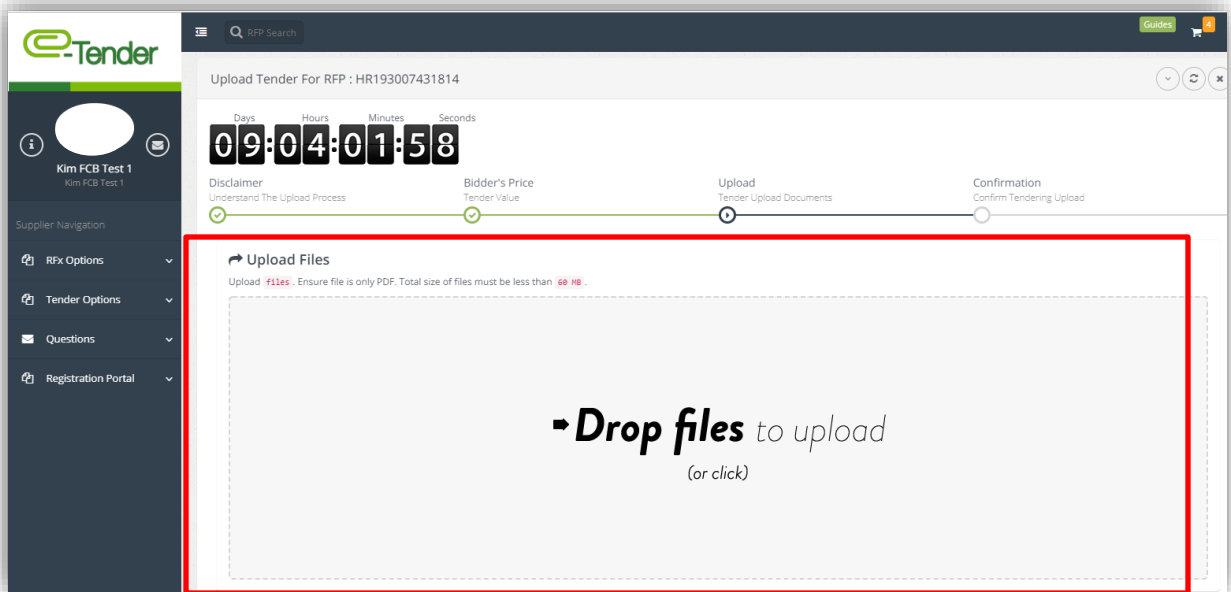
Here, you must accept that you agree and understand the posted disclaimer in order to participate in the tender. If you do not accept, you would not be able to move further in the process and participate in the tender. Once you have selected the disclaimer as shown below, select, 'Next':



You will be directed to the following page as shown below: Proceed to enter your price in both figures and words. Once you are finished, select 'Next':

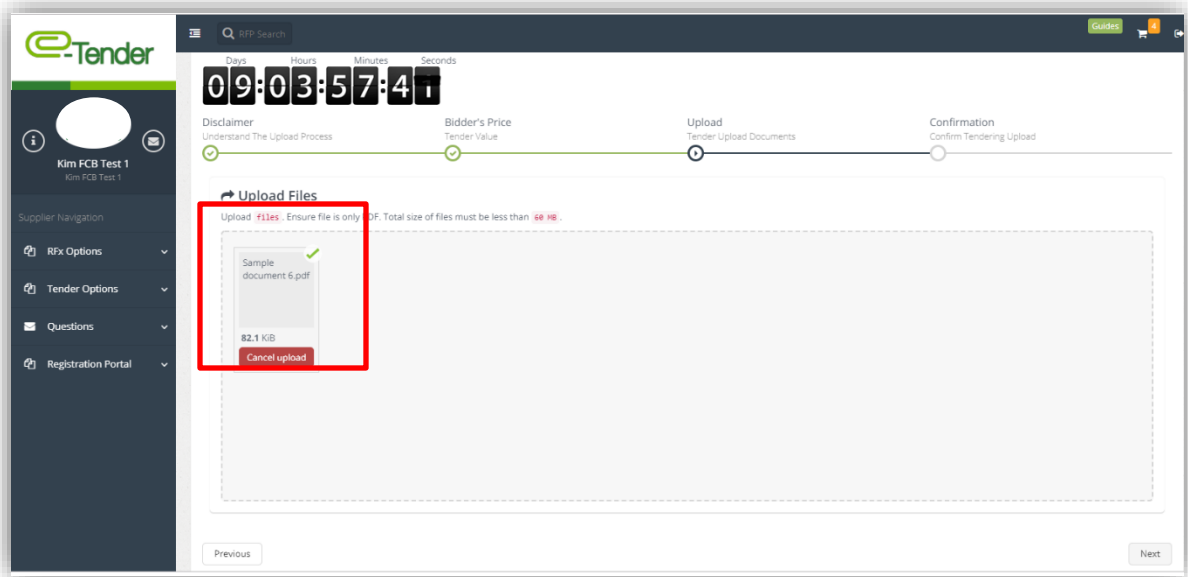


You will then be required to upload all required documents, in **PDF format**, as specified in the RFP Documents or Instructions to Bidders which were downloaded previously. To upload documents, select the field as shown below:

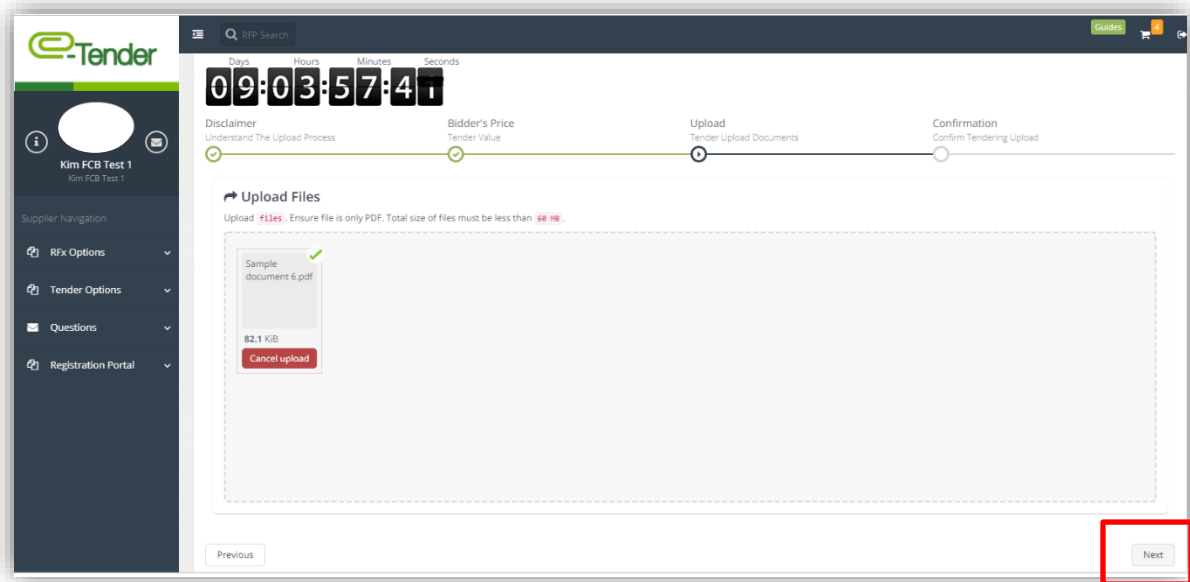


You must upload required documents to this section. If you do not upload the documents as requested by the organization, you will not be able to move forward in the bid submission process.

A successful document upload looks like this:



Once you are finished, select, 'Next':

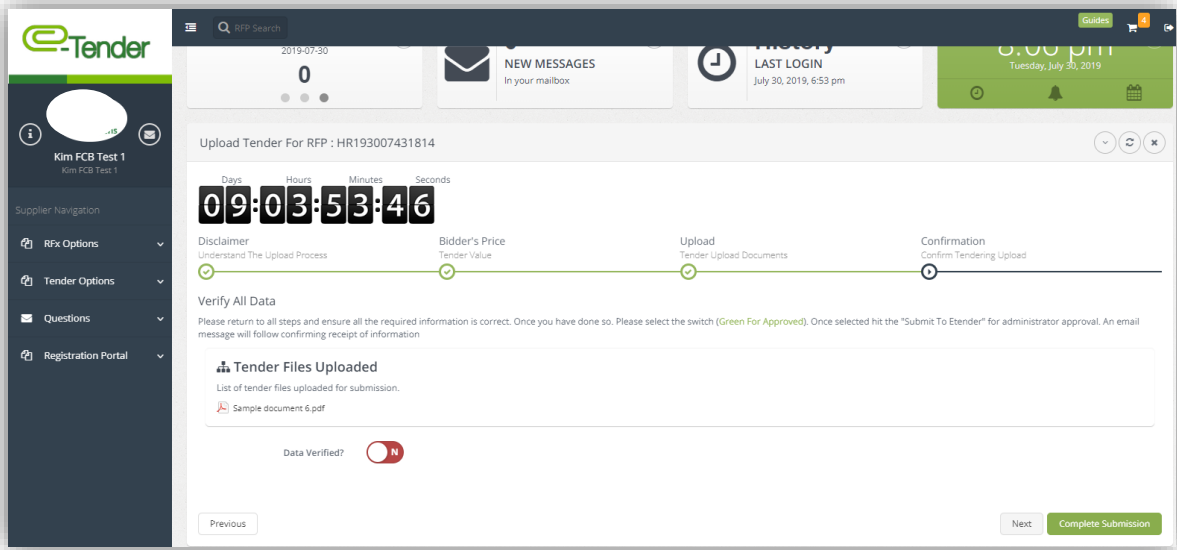


**Please note**, that when uploading a submission, kindly ensure;

1. The size of the total files is no larger than 60 MB
2. The files are in PDF format
3. You begin the upload in advance of the closing time so to facilitate instances where troubleshooting may be required.

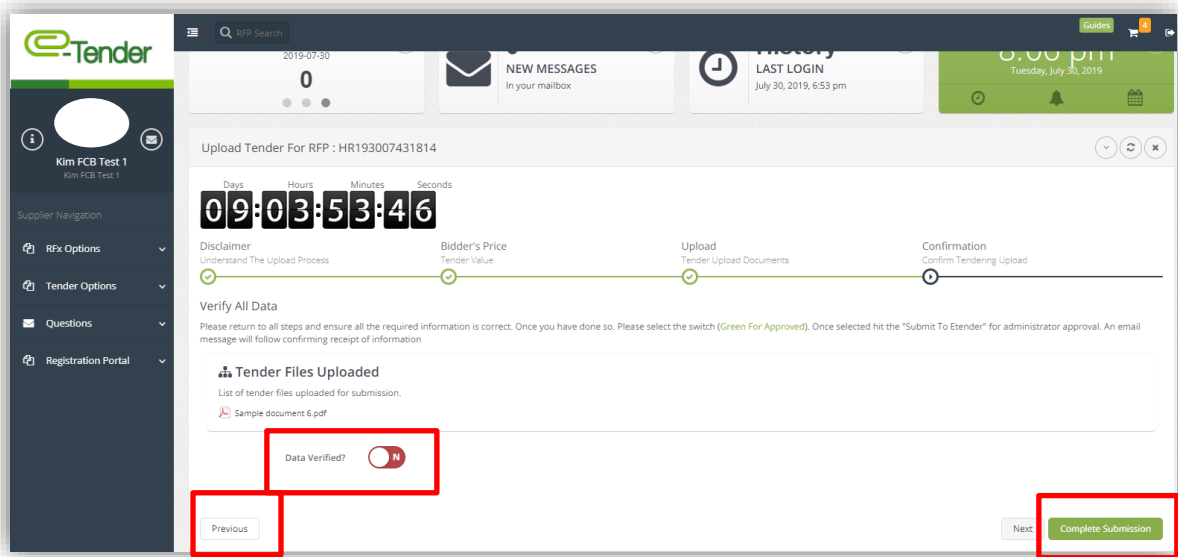
4. There are no special characters in the name of the document

Once you have finished uploading your bid submission, you will be directed to the following final page:



You will be instructed to verify that all the information submitted and uploaded to your bid submission is complete and correct. To do so you can select the **‘Previous’** tab to navigate back through each section. Once you are comfortable with the information:-

1. Select the **‘Data Verified’** tab so that it turns Green
2. Select **‘Complete Submission’**



## 8. Accessing/Editing Updated Tenders

From time to time, FC may edit/update live or existing tenders with new information such as addendums, closing date and time extensions or include additional documents as part of the tender package.

If a live tender in which you have participated in has been updated/edited, you will receive the following email:



To access the edited tender to view the new/additional documents added to the tender log in to your **ProcureFirst** account and under **'RFX Options'** select **'My Purchased RFX's'** as shown below: -

ID	REF	Tender	Date Issued	Expiration	Status
112	Fin200705081010	ABL #1234- Request for the Provision of Laptops fo...	2020-05-07	2020-05-07	CLOSED
111	IT200605220110	UTT 001- Request for Proposal for the Provision of...	2020-05-06	2020-05-06	CLOSED
109	Fin200405124616	Testing 04/05/2020...	2020-05-04	2020-06-06	OPEN
98	HR200104375708	APRIL TESTING KMC OE...	2020-04-01	2020-04-01	CLOSED
99	Fin200104372209	April Testing New KMC TE...	2020-04-01	2020-04-01	CLOSED
100	PREQFin200104513617	test...	2020-04-01	2020-04-23	CLOSED
93	MARK203103375715	Testing KMC 31.03.2020 TE...	2020-03-31	2020-03-31	CLOSED
94	SAN203103580016	Testing KMC 31.03.2020 OE...	2020-03-31	2020-03-31	CLOSED
95	SAN203103352016	TESTING NEW NEW KMC OE...	2020-03-31	2020-03-31	CLOSED
96	MARK203103082516	TESTING NEW NEW KMC TE...	2020-03-31	2020-03-31	CLOSED

Select the tender that was edited as outlined by the email:

ID	REF	Tender	Date Issued	Expiration	Status	Type
109	Fin200405124616	Testing 04/05/2020...	2020-05-04	2020-06-06	OPEN	
10	TCH192808304518	Two Envelope Test 1...	2019-08-28	2019-08-28	CLOSED	
11	IT193008561109	Two Envelope Test 2...	2019-08-30	2019-08-30	CLOSED	
13	SOP190309042120	Testing Testing 123...	2019-09-03	2019-09-03	CLOSED	
14	BMOB190309452820	Testing Kim...	2019-09-03	2019-09-03	CLOSED	
17	SAN190409543415	Testing TWO Envelope FINAL...	2019-09-04	2019-09-04	CLOSED	
6	BSOG192708324107	Tender for Insurance Services...	2019-08-27	2019-11-20	CLOSED	

The following page will appear. Select **'View RFP Info'** as shown below:

Fin200405124616 | Testing 04/05/2020

Two Envelope Test 1...

STATUS : OPEN  
DATE POSTED : Mon May 4 2020  
DATE EXPIRED : Sat Jun 6 2020

PAYMENT DETAILS  
VALUE : \$0.00 TTD

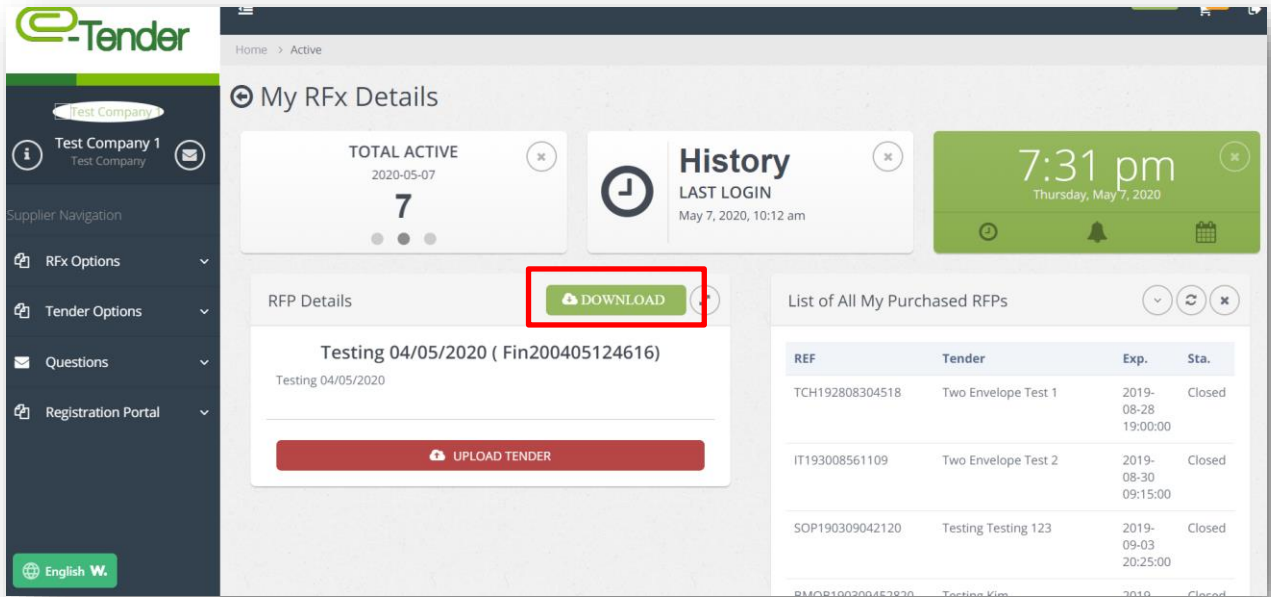
Upload Tender View RFP Info Close

21	SAN190509413514	Testing Testing KIM...	2019-09-05	2019-09-05	CLOSED
22	CSS190509044714	TESTING TWO ENVELOPE FINAL...	2019-09-05	2019-09-05	CLOSED

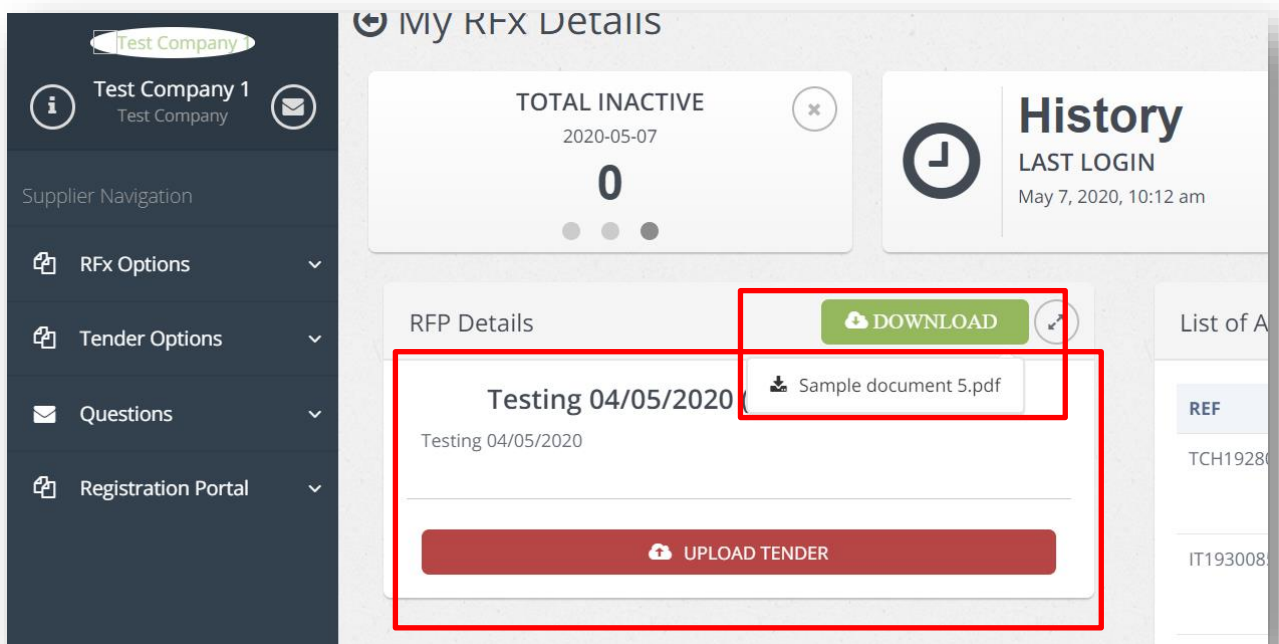
Showing 1 to 10 of 39 entries

Previous 1 2 3 4 Next

You will be directed to the following page:

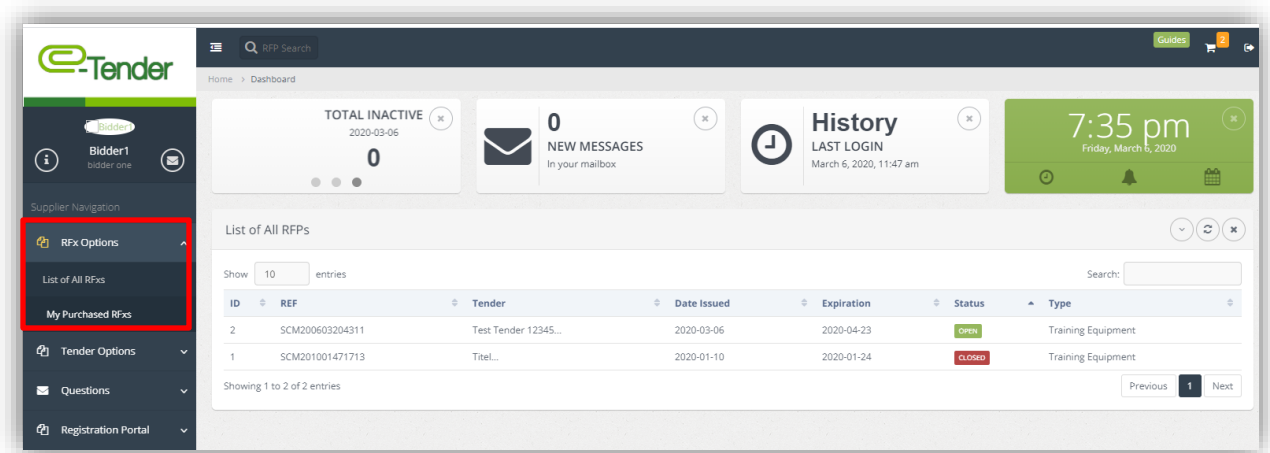


Select the **'Download'** tab as shown below and you will be able to access and re-download any additional documents posted by the organization. Also, if there are any new updates posted on the tender it will be posted under the **'RFP Details'** field highlighted below:



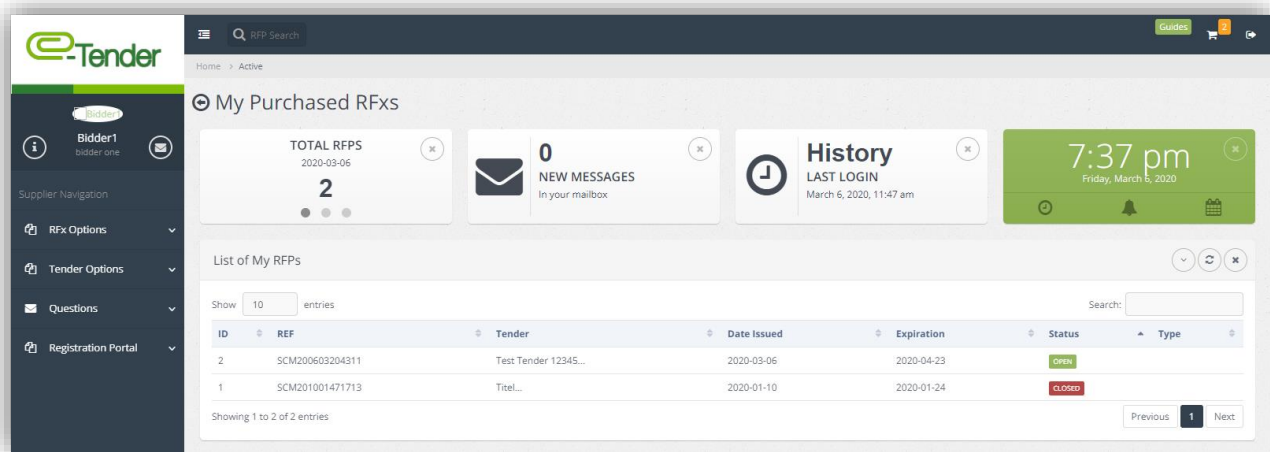
## 9. Editing your Bid Submission

You are free to edit your bid submission before the closing date and time of the tender. To edit your bid submission, select **'RFx Options'**, then select **'My Purchased RFx's'** as shown below:-



The screenshot shows the e-Tender dashboard. The left sidebar contains a navigation menu with 'RFx Options' highlighted in red. The main content area displays a dashboard with several widgets: 'TOTAL INACTIVE' (2020-03-06, 0), 'NEW MESSAGES' (0), 'History' (LAST LOGIN: March 6, 2020, 11:47 am), and a clock showing 7:35 pm on Friday, March 6, 2020. Below these widgets is a table titled 'List of All RFPs' with columns for ID, REF, Tender, Date Issued, Expiration, Status, and Type. The table contains two entries: one with ID 2, REF SCM200603204311, Tender 'Test Tender 12345...', Date Issued 2020-03-06, Expiration 2020-04-23, Status 'OPEN', and Type 'Training Equipment'; and another with ID 1, REF SCM201001471713, Tender 'Titel...', Date Issued 2020-01-10, Expiration 2020-01-24, Status 'CLOSED', and Type 'Training Equipment'.

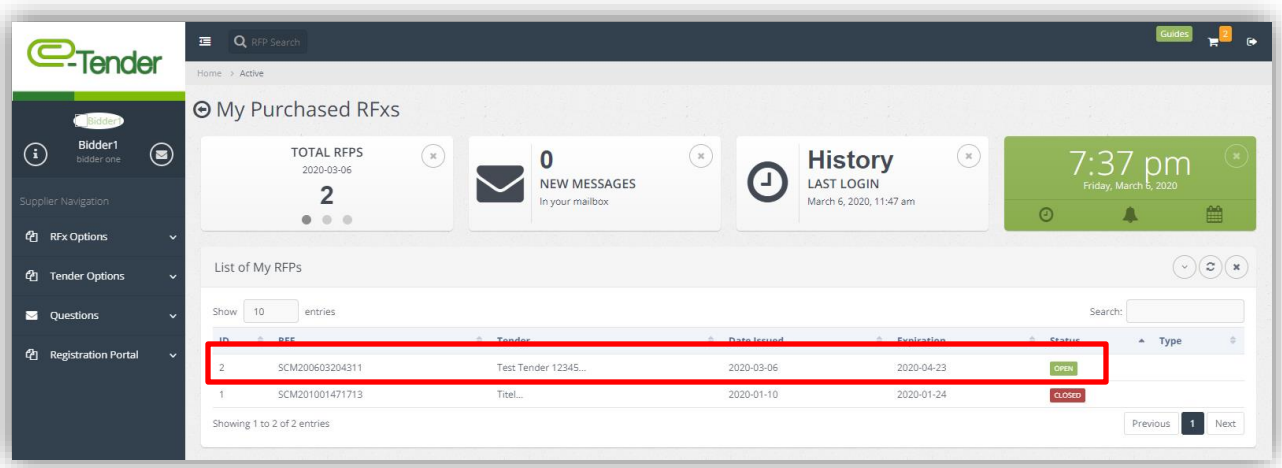
You will be directed to the following screen:



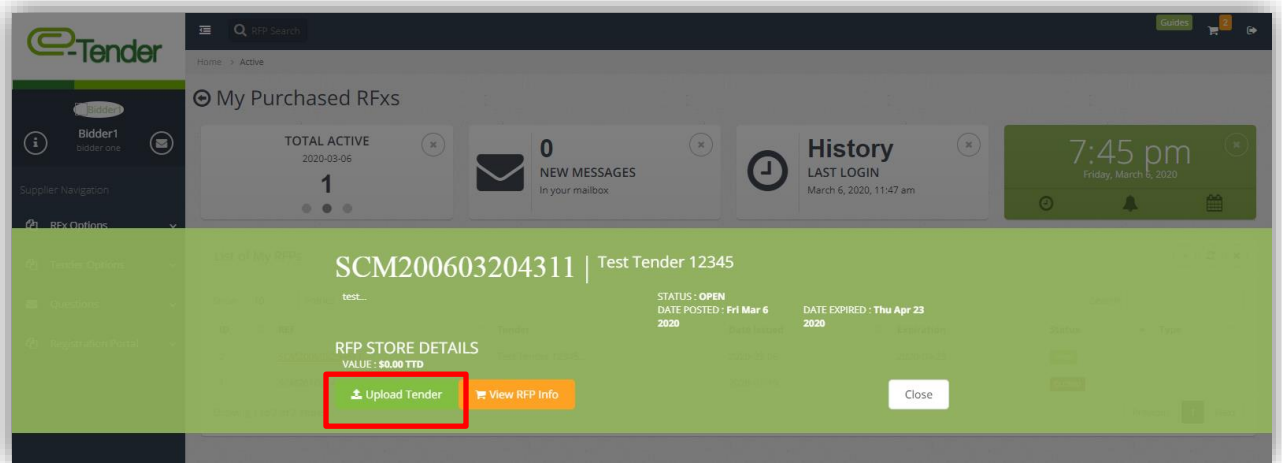
The screenshot shows the e-Tender dashboard with the 'My Purchased RFx's' screen. The left sidebar contains a navigation menu with 'RFx Options' highlighted. The main content area displays a dashboard with several widgets: 'TOTAL RFPs' (2020-03-06, 2), 'NEW MESSAGES' (0), 'History' (LAST LOGIN: March 6, 2020, 11:47 am), and a clock showing 7:37 pm on Friday, March 6, 2020. Below these widgets is a table titled 'List of My RFPs' with columns for ID, REF, Tender, Date Issued, Expiration, Status, and Type. The table contains two entries: one with ID 2, REF SCM200603204311, Tender 'Test Tender 12345...', Date Issued 2020-03-06, Expiration 2020-04-23, Status 'OPEN', and Type 'Training Equipment'; and another with ID 1, REF SCM201001471713, Tender 'Titel...', Date Issued 2020-01-10, Expiration 2020-01-24, Status 'CLOSED', and Type 'Training Equipment'.

This page displays all RFx's your would have purchased as well as their status. Remember, you can only edit those RFx's/tenders that are open.

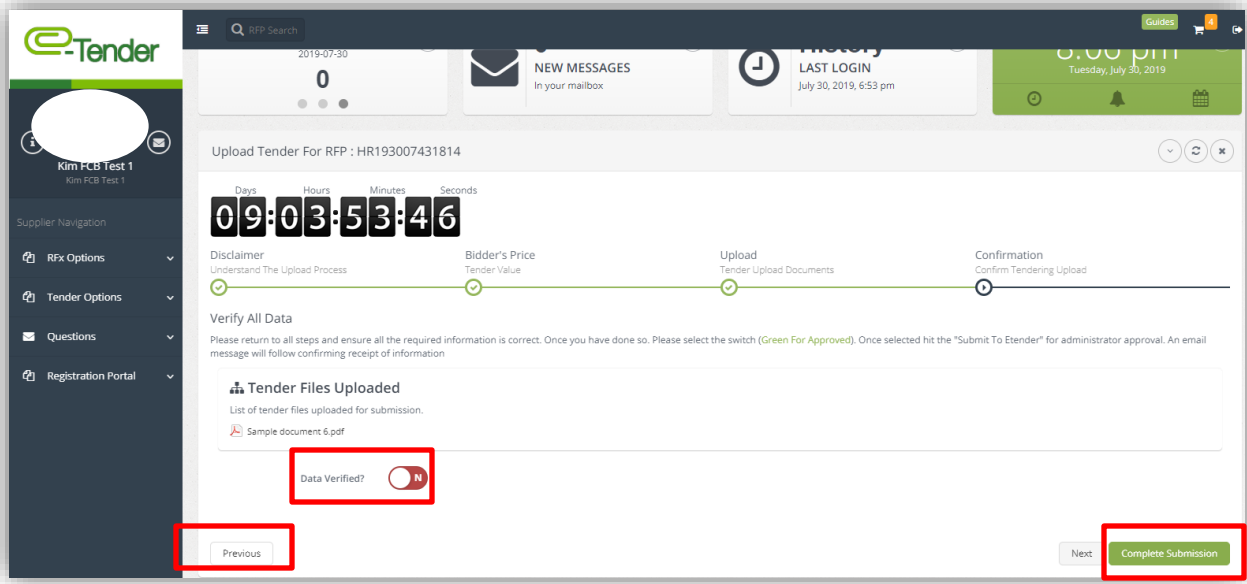
To edit an open RFX/tender, select the tender reference number as shown below:-



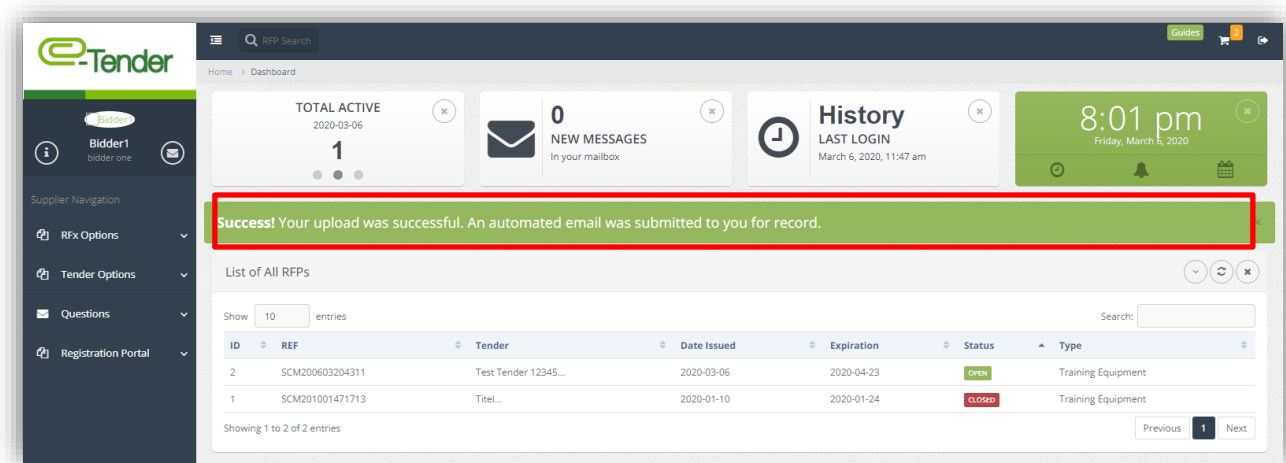
The following page will appear. Select **'Upload Tender'**:



Proceed to re-upload your tender as you would have done initially. It is important to note that once you proceed to edit your bid submission by re-entering the tender i.e clicking the **'Upload Tender'** button as shown above, you **MUST** re-enter the price as well as your bid submission. You must also ensure that you select the **'Data Verified'** tab so that it turns Green as well as the **'Complete Submission'** tab as shown below:

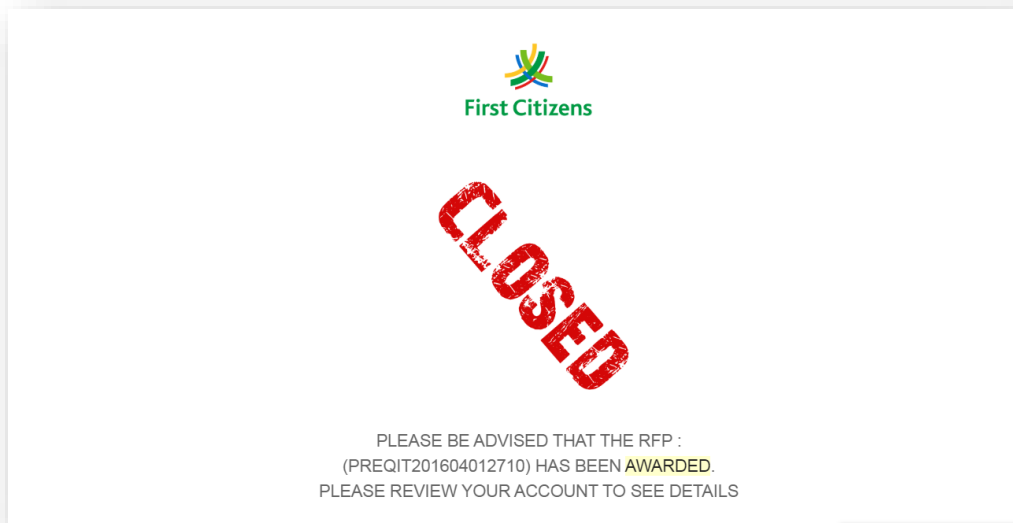


If you intend to edit your bid submission but fail to re-enter both your price as well as re-upload your bid submission, the status of your submission would be **'Incomplete'**. To verify that your re-upload was successful, ensure that you receive the following confirmation as well as email as shown below:



## 10. Viewing Awarded Tenders

You will receive an email when the tender for which you have applied has been awarded. A sample of this email is shown below:-

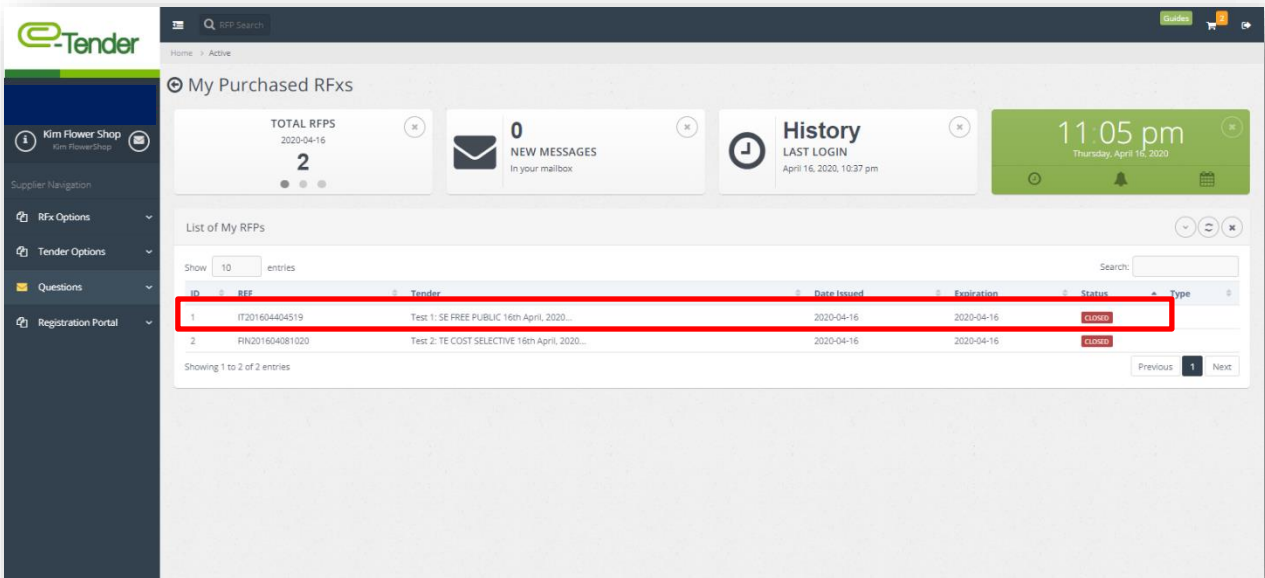


To view these details, log in to your *ProcureFirst* account and select ‘**RFX Options**’ and then select ‘**My Purchased RFX’s**’

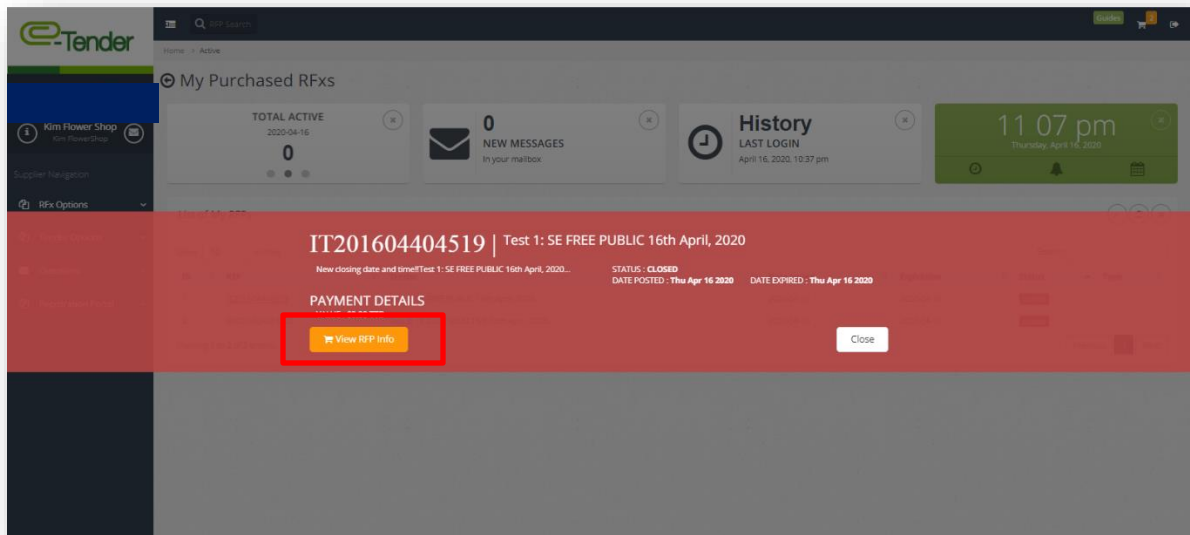
The screenshot displays the e-Tender web application interface. The browser address bar shows 'fcb.etenderworld.tt/index.php'. The page features a dark sidebar with the 'e-Tender' logo and a 'Supplier Navigation' menu. The 'RFX Options' menu item is highlighted with a red box. The main content area shows a dashboard with 'TOTAL RFPs 2020-04-16' (2), '0 NEW MESSAGES', and 'History LAST LOGIN April 16, 2020, 10:38 pm'. Below the dashboard is a 'List of All RFPs' table with columns for ID, REF, Tender, Date issued, Expiration, Status, and Type. Two entries are listed, both with a 'CLOSED' status.

ID	REF	Tender	Date issued	Expiration	Status	Type
1	IT201604404519	Test 1: SE FREE PUBLIC 16th April, 2020...	2020-04-16	2020-04-16	CLOSED	Supply Chain Services
2	FN201604081020	Test 2: TE COST SELECTIVE 16th April, 2020...	2020-04-16	2020-04-16	CLOSED	Systems Furniture

You will be directed to the following page, select the tender you would like to view the award details of by selecting the unique reference number as shown below:



The following page will appear. Select ‘View RFP info’ as shown below:



The following page will appear. The area highlighted below will display the Vendor to whom the tender was awarded:

**My RFX Details**

TOTAL ACTIVE: 0 (2020-04-16)

NEW MESSAGES: 0 (In your mailbox)

History: LAST LOGIN April 16, 2020, 10:37 pm

11:09 pm Thursday, April 16, 2020

**RFP Details** (Test 2: TE COST SELECTIVE 16th April, 2020 (FIN201604081020))

Tender Standing: **Kim Corporation Awarded**

Company	Bid Value	Currency
Kim Corporation	N/A	N/A
Kim Flower Shop	N/A	N/A

List of All My Purchased RFPs

REF	Tender	Exp.	Sta.
FIN201604081020	Test 2: TE COST SELECTIVE 16th April, 2020	2020-04-16 20:20:00	Closed
IT201604404519	Test 1: SE FREE PUBLIC 16th April, 2020	2020-04-16 20:20:00	Closed

eTender Online Receipt: Invoice for purchase : #ETEN\_FIN2016040810200416081328

Billing Details: Krystal peter; Payment Information: Card Name: VISA CARD

The Tender Standing Graph is also available for viewing as shown below:

**ProcureFirst**

Company Bid Value Currency

Kim Corporation	\$140,000.00	TTD
Kim Flower Shop	\$250,000.00	TTD

Tender Standing Graph: Bidder1 vs kses1

Invoice for purchase : #ETEN\_IT201604404519200416075314

Billing Details: Kim FlowerShop; Trinidad and Tobago; Payment Information: Card Name: FREE, Card Number: \*\*\*\*\*; Exp Date: April 16, 2020

Order summary

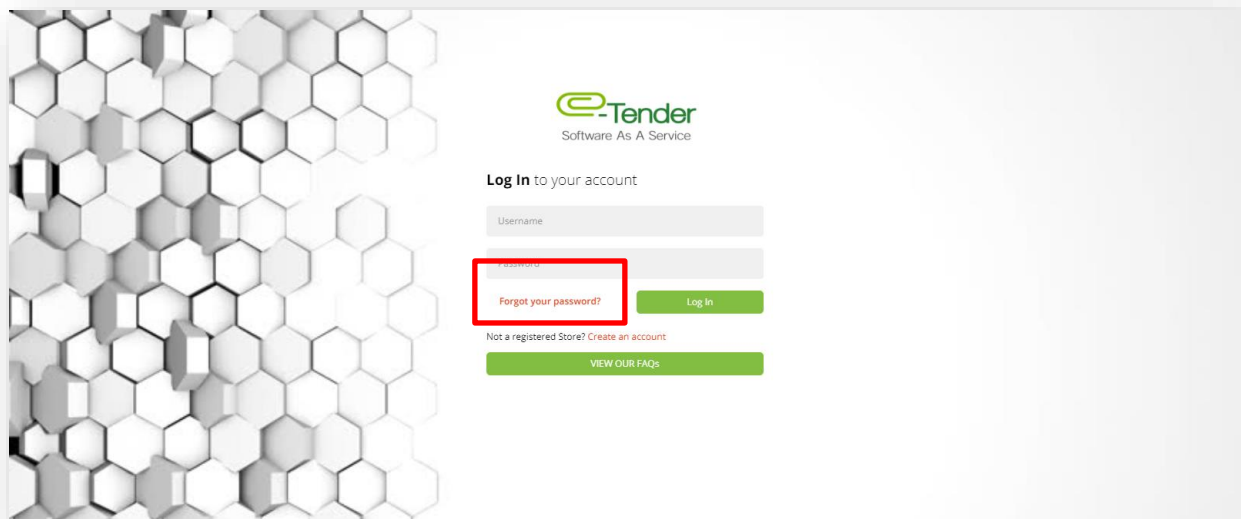
RFP	Details	Doc Price	Total
IT201604404519	Test 1: SE FREE PUBLIC 16th April, 2020	\$0.00TTD	\$0.00TTD
		Subtotal	\$0.00TTD
		Total	\$0.00TTD

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## 11. Key Things to Note

Username and Passwords on *ProcureFirst* are case sensitive. It is important that you take note of this when creating your account and entering your account information upon log in. Additionally, to log in, you require your Username and Password, **NOT** your email address. Also, please **do not include** special characters in your Username.

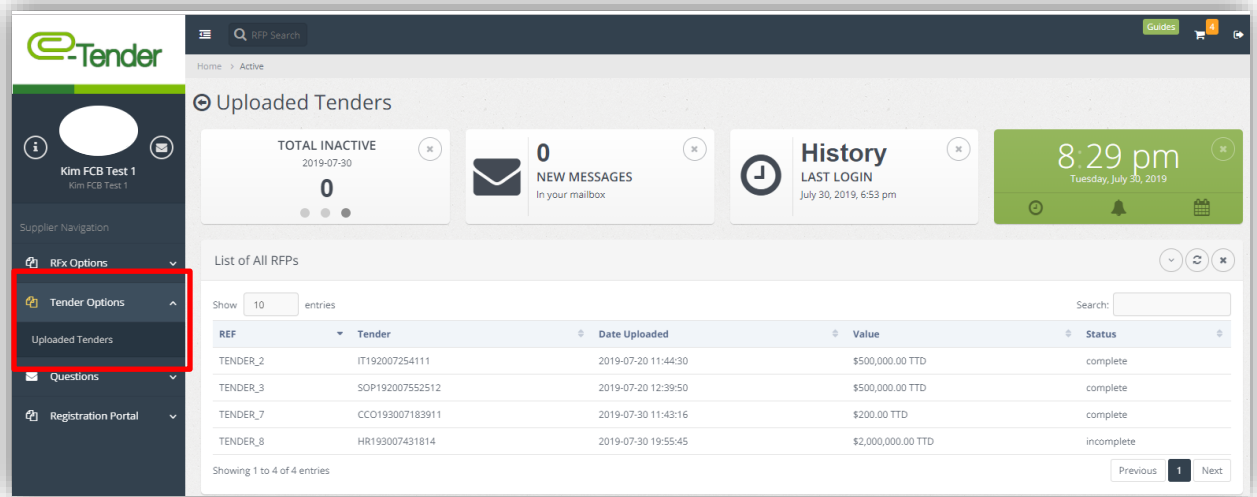
The Bidder is responsible for resetting his/her own password. This feature is available on your log in page as shown below:



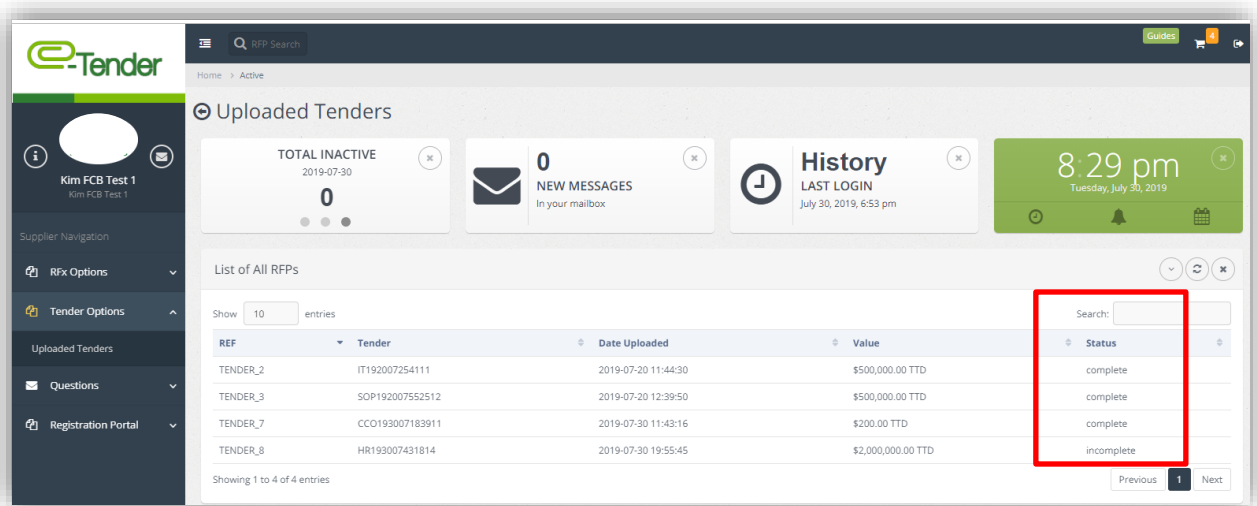
Only when you have exceeded your log in attempts and are instructed to contact the Administrator are you to send an email to the Procurement representative of the Company, requesting a password reset.

With regard to bid submissions, it is important to give yourself ample time to upload your bid. If the tender closes at 10:00 am, it is ill-advised to start uploading your tender at 9:50 am. If you are uploading your bid submission and the closing time for the tender has passed, the system will **not** allow you to upload your bid submission even though you have already begun the process. To confirm if your bid submission was uploaded/received, check to see if you would have received an email. Additionally, to check the status of your bid submission in *ProcureFirst*, you can do the following:

Select, 'Tender Options' in your Supplier Navigation Pane and then select, 'Uploaded Tenders':



The status of the all of your tenders would be on display as shown below:



- 'Complete' means that your bid submission was successfully submitted.
- 'Incomplete' (if the tender is still open) means that no final submission was done i.e. you started the process but did not select 'Complete Submission'.
- 'Incomplete' (if the tender is closed) means that the submission received is incomplete i.e. you were unable to complete your bid submission.
- 'Not Uploaded' means that no submission was done for that specific tender.

If you have any queries or concerns, please feel free to reach out the Procurement Department.