EE Procurement Portal – User Manual

https://eeprocurementportal.icfwebservices.com/

Roles:

- Anonymous (Non-Logged In)
- Bidder (Logged In)

Please select appropriate role above to be directed to the corresponding section of the User Manual. For technical support please email us at EEProcurementPortalTeam@icfi.com.

## User Rights as Anonymous (Non-Logged In) User:

1. View Events - https://eeprocurementportal.icfwebservices.com/
2. Create New Account - https://eeprocurementportal.icfwebservices.com/user/register
   a. Receive on-screen notification of account pending admin approval
   b. Receive email notification of account pending admin approval
   c. Receive email notification of account approval
   d. Use one time login link

Please select appropriate user right to be directed to the corresponding section of the User Manual.
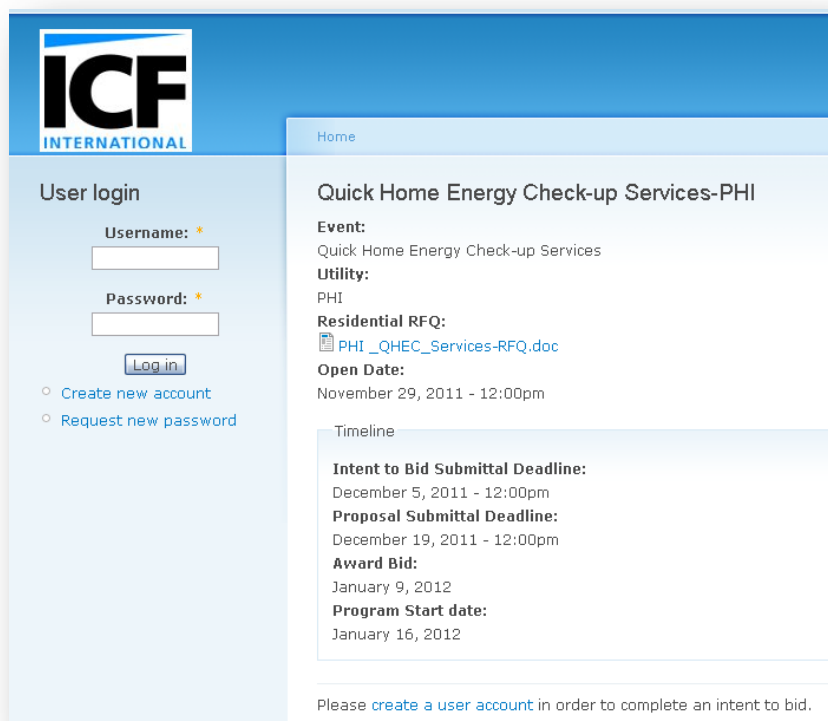
View Events

All events (RFPs/RFQs) will be listed on the homepage under the appropriate sector (Residential or Commercial and Industrial – C&I).

Please note: Each event has an 'Open Date' and 'Close Date'. The event will not be accessible before the open date or after the close date.
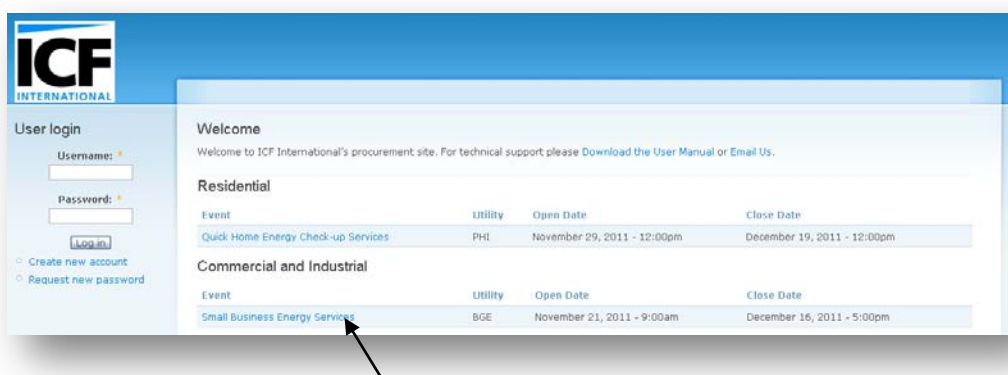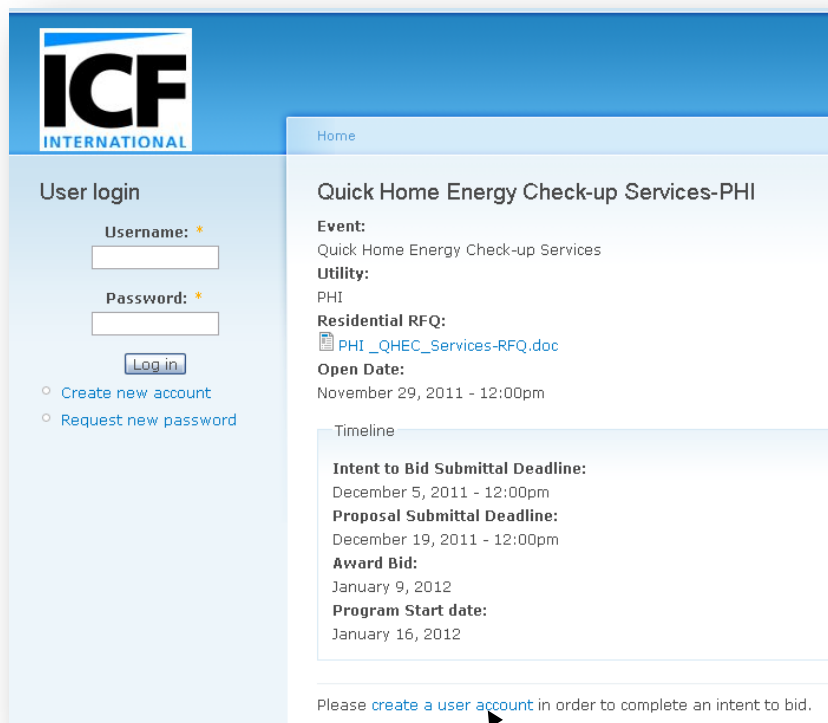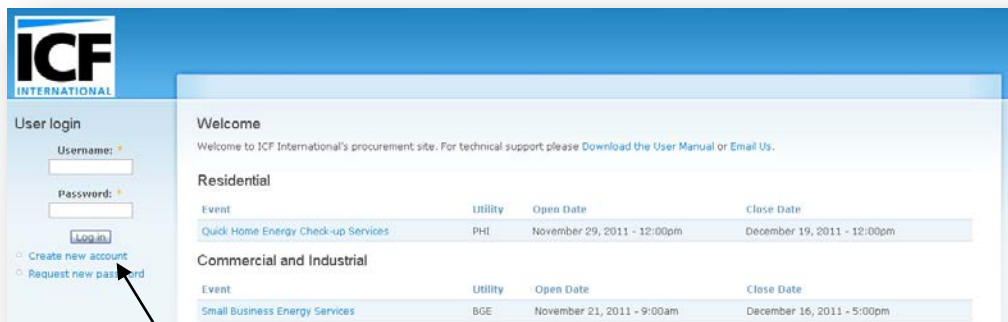

Be sure to adhere to the event timeline, which highlights important events and non-negotiable due dates.

Create New Account

In order to submit an Intent to Bid, all users MUST create an account. This option is available on the homepage or through a link on the event page.
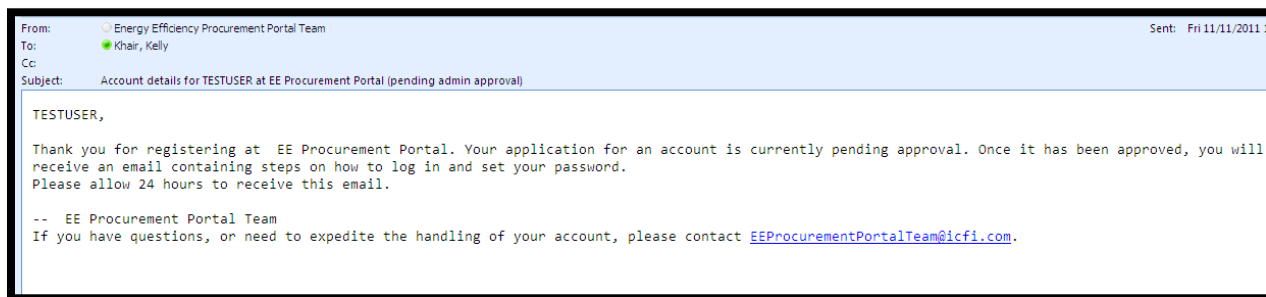
Required fields include username, email address, company name, contact name, address, city, state, zip code and phone number. Fax number is optional.

Once you click 'create new account' you will receive a notification, that your account pending approval, at the email address you provided.

On-screen notification of account pending admin approval

Email notification of account pending admin approval

From:	○ Energy Efficiency Procurement Portal Team	Sent: Fri 11/11/2011
To:	● Khair, Kelly	
Cc:		
Subject:	Account details for TESTUSER at EE Procurement Portal (pending admin approval)	

TESTUSER,

Thank you for registering at EE Procurement Portal. Your application for an account is currently pending approval. Once it has been approved, you will
receive an email containing steps on how to log in and set your password.
Please allow 24 hours to receive this email.

-- EE Procurement Portal Team
If you have questions, or need to expedite the handling of your account, please contact EEProcurementPortalTeam@icfi.com.

Receive notification of account approval

Once a site administrator has approved your account you will receive the following notification at the email address you provided.

From:	○ Energy Efficiency Procurement Portal Team	Sent:
To:	● Khair, Kelly	
Cc:		
Subject:	Account details for TESTUSER at EE Procurement Portal (approved)	

TESTUSER,

Your account at EE Procurement Portal has been activated.

You may now log in by clicking on this link or copying and pasting it in your
browser:

https://eeprocurementportal.icfwebservices.com/user/reset/18/1321028889/409821e8982c0dabeba6a163050e62ad

This is a one-time login, so it can be used only once.

After logging in, you will be redirected to https://eeprocurementportal.icfwebservices.com/user/18/edit so you can change your password.

Once you have set your own password, you will be able to log in to https://eeprocurementportal.icfwebservices.com/user in the future using:

username: TESTUSER

You must login through the one time login link provided within the account approval email.

Use one time login link
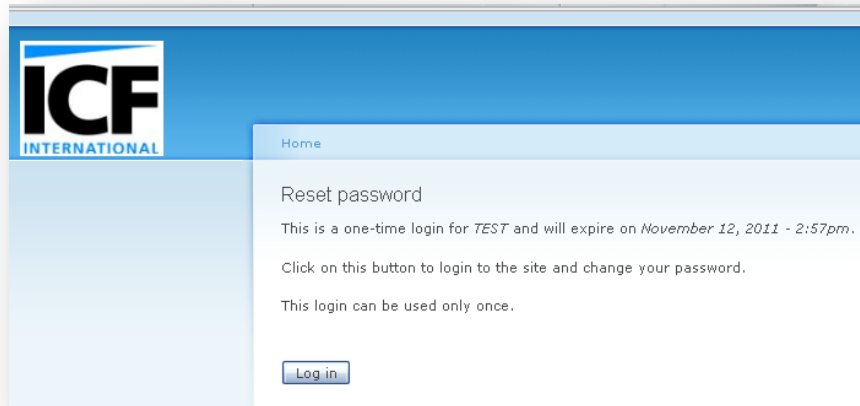
When you click 'Log in' you will be prompted to create a password and save your account information. Please make your password unique yet memorable. If you forget your password you will be able to request a new password.

User Rights as Bidder (Logged In):

1. Log In - https://eeprocurementportal.icfwebservices.com/
2. View/Update Account Information - https://eeprocurementportal.icfwebservices.com/user
3. Request New Password - https://eeprocurementportal.icfwebservices.com/user/password
   a. Receive on-screen confirmation of new password
   b. Receive email confirmation of new password
4. View Event - https://eeprocurementportal.icfwebservices.com/
5. Complete Intent to Bid Form – link is on each event page
   a. Receive on-screen notification of completion
   b. Receive email notification of completion
6. Submit Proposal/Quote – link is on each event page
   a. Receive on-screen notification of completion
   b. Receive email notification of completion
7. View all submitted intent to bids - https://eeprocurementportal.icfwebservices.com/intent-to-bid/submitted
8. View all submitted proposals/quotes - https://eeprocurementportal.icfwebservices.com/submissions
9. Log Out - https://eeprocurementportal.icfwebservices.com/home

Please select appropriate user right to be directed to the corresponding section of the User Manual.

Log In

View/Update Account Information

To ensure you receive all information and updates regarding the portal and listed events, please keep all contact information current.
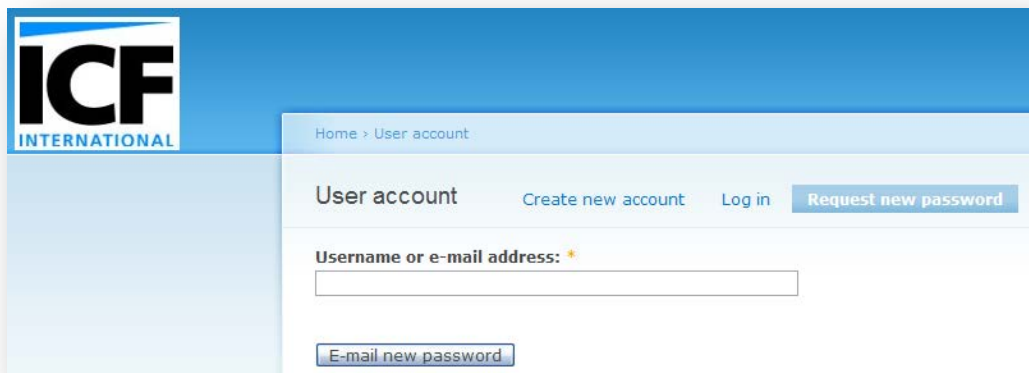
Request New Password

An on-screen confirmation will pop up explaining that further instructions have been sent to the email address you provided.

On-screen confirmation - New Password

Email confirmation - New Password
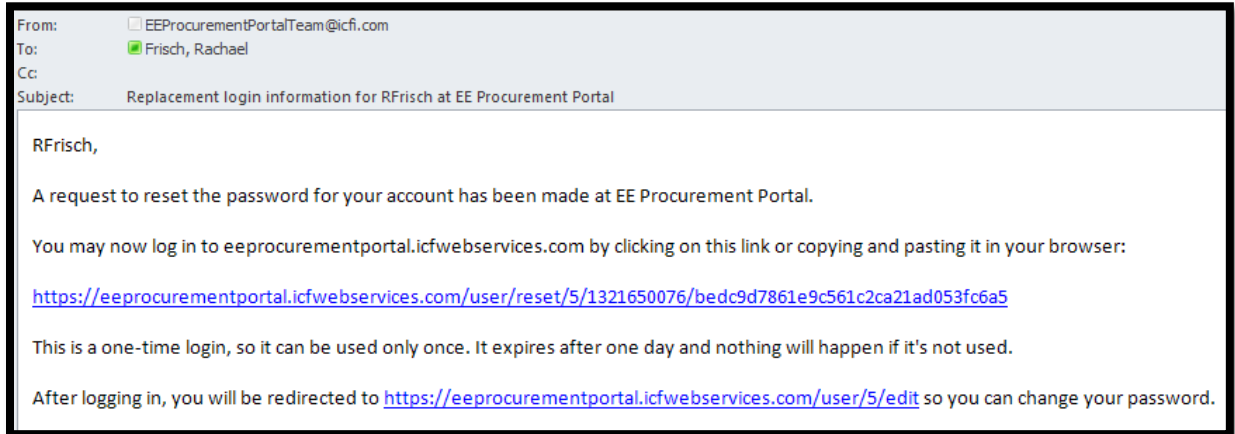
You must login through the one time login link provided within the replacement login email.
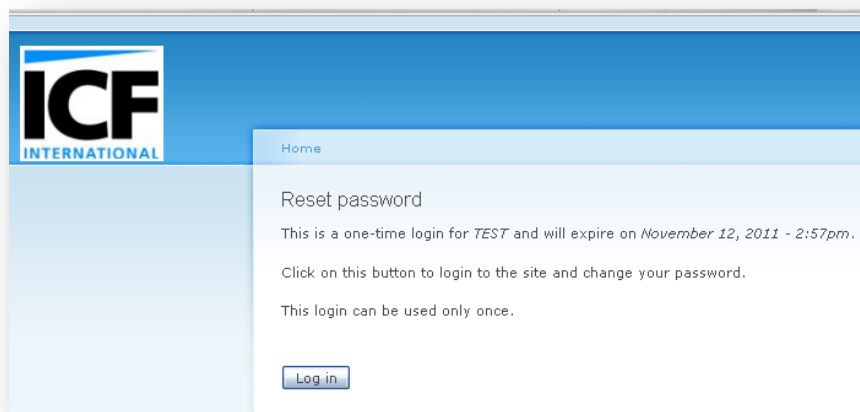
When you click 'Log in' you will be prompted to create a new password and save your account information.

Please make your password unique yet memorable.

View Event

All events (RFPs/RFQs) will be listed on the homepage under the appropriate sector (Residential or Commercial and Industrial – C&I).

Please note: Each event has and 'Open Date' and 'Close Date'. The event will be inaccessible before the open date and after the close date.
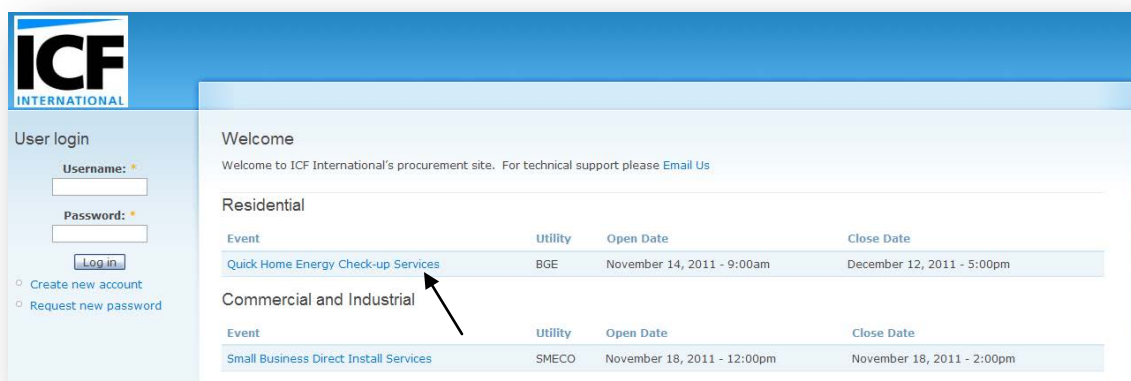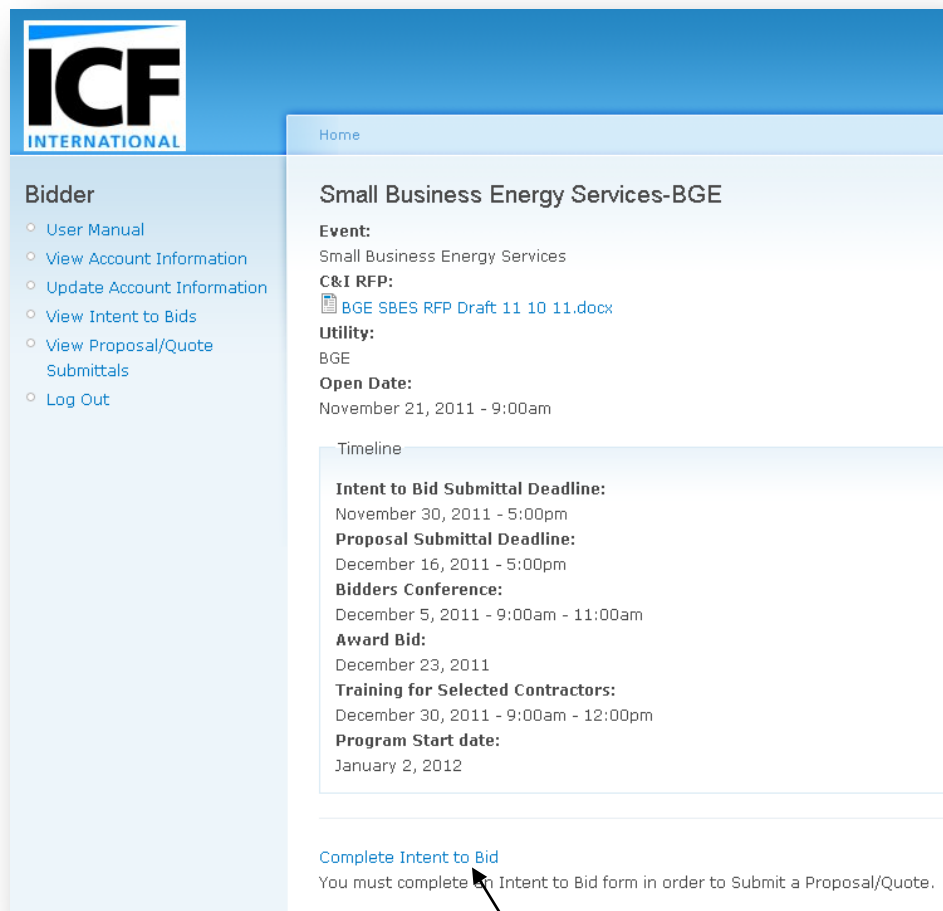
Be sure to adhere to the event timeline, which highlights important events and non-negotiable due dates.
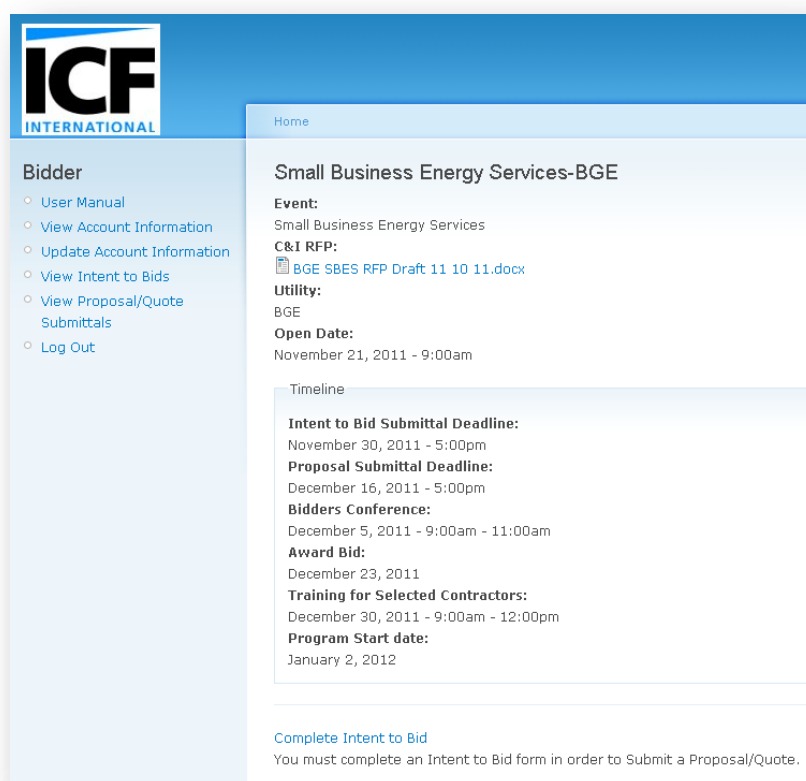
Complete Intent to Bid

You will not be permitted to submit a proposal unless you create an intent to bid prior to the intent to bid submittal deadline. The link to submit a proposal will appear once you've created an intent to bid.

Please note: Not all events will host a pre-bidders conference. If a Bidders Conference is not listed within the timeline, then one is not being offered for that event.

Due to location restraints, we are only allowing two attendees per company to the pre-bidders conference. All registered attendees will be emailed a Bidders Conference invitation when the conference details are set.
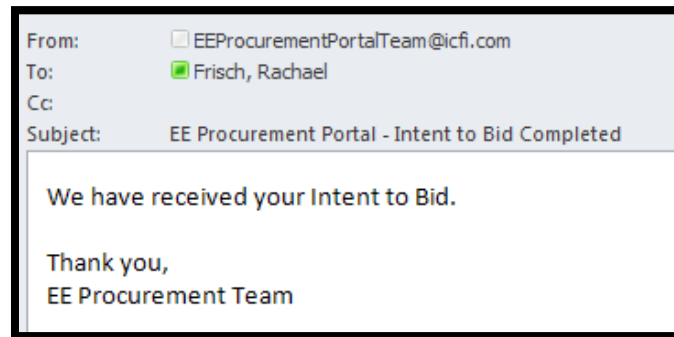
Intent to Bid – On-screen Confirmation

Intent to Bid - Email Confirmation

Submit Proposal/Quote

You will not be permitted to submit a proposal/quote unless you create an intent to bid prior to the intent to bid submittal deadline. The link to submit a proposal/quote will appear once you've created an intent to bid.
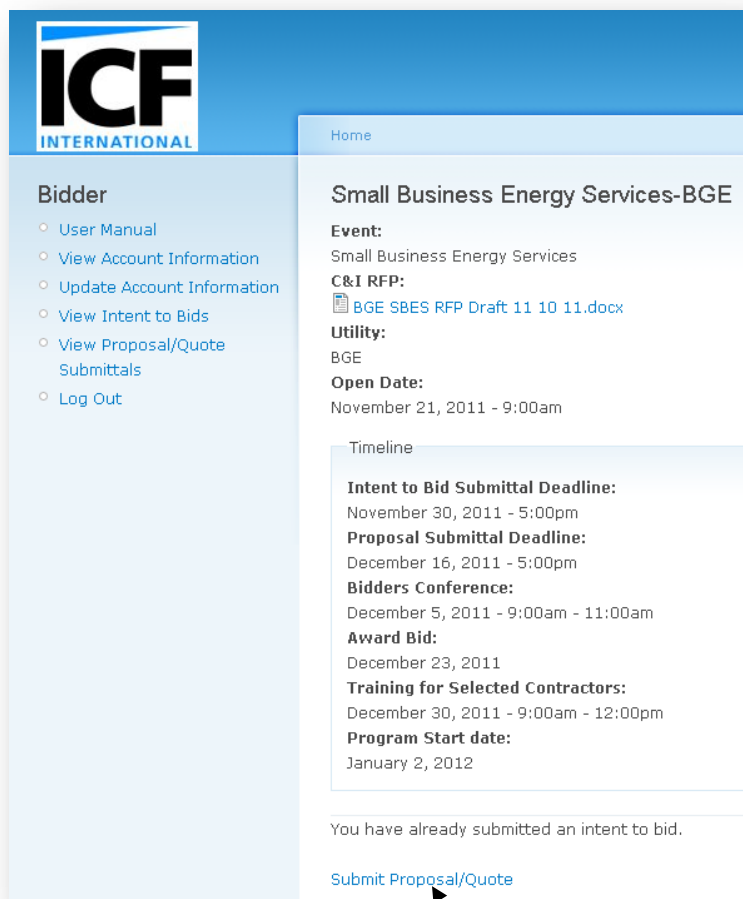
The portal accepts the following file extensions: txt, doc, docx, pdf, xls, xlsx


Please add an appropriate description to your submission. Click the add another item button to submit more than one file.

Please upload all documents before clicking "save". You will not be able to add additional files to this form after saving. Please contact us at EEProcurementPortalTeam@icfi.com to add or remove documents from your entry.
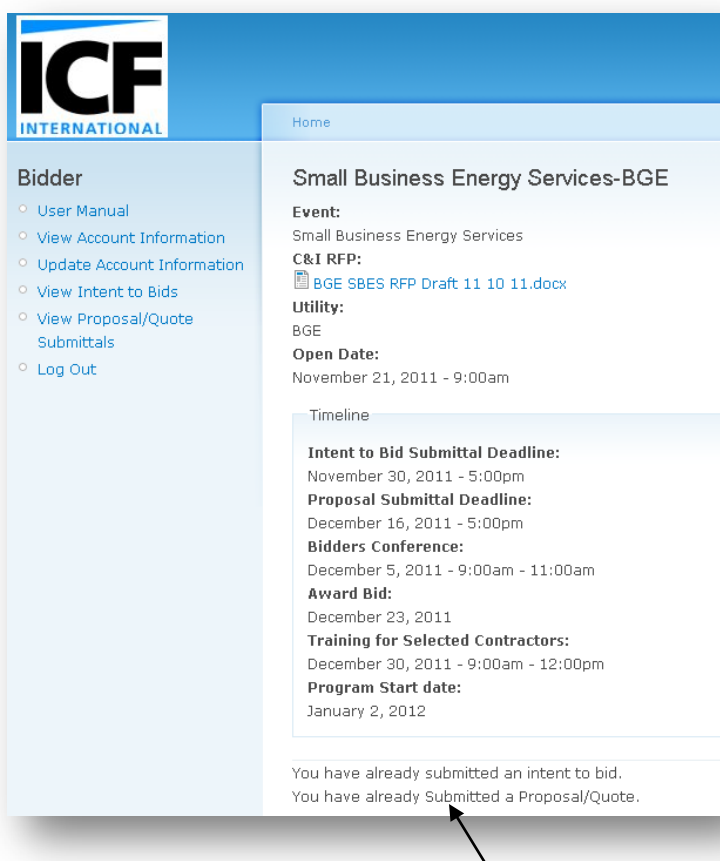
The event page will inform you if you've submitted a proposal/quote.

Proposal/Quote Submission – On-screen Confirmation
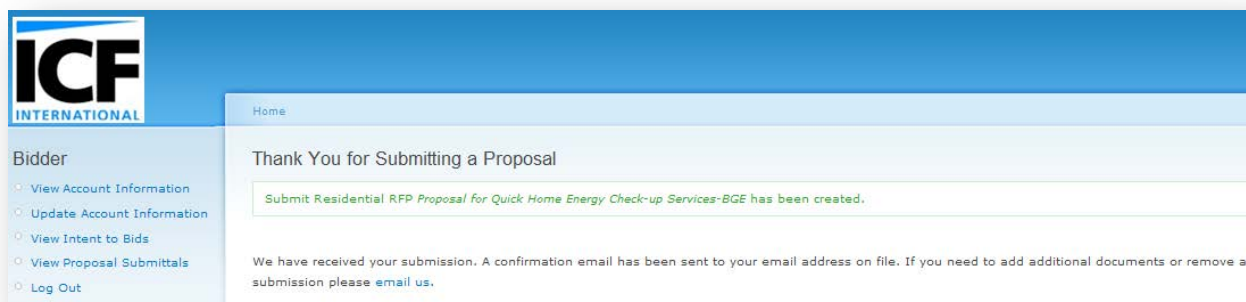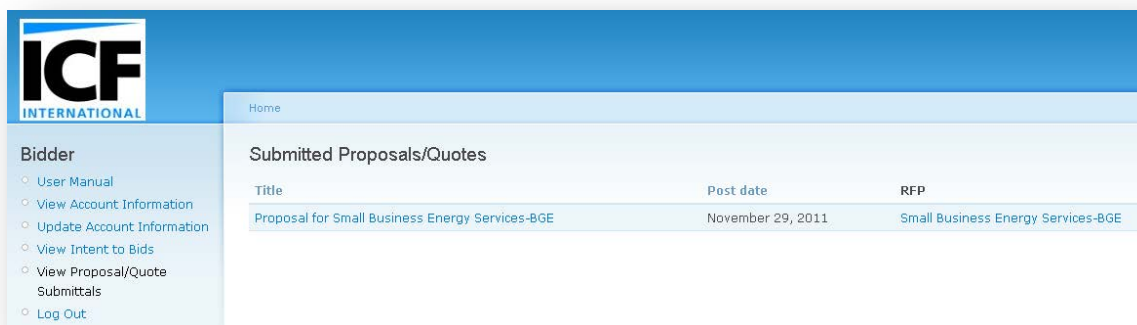
Proposal/Quote Submission - Email Confirmation

View Submitted Intent to Bids

If you submit intent to bids to multiple events your submissions will be summarized on the View Intent to Bids page.

View Submitted Proposals/Quotes

If you submit proposals to multiple events your submissions will be summarized on the View Proposal/Quote Submittals page.

Log Out
Please log out after every session to ensure account security.