

Awarding an Event and Flipping to Contract

After you have selected the supplier(s) to offer a contract for the RFX, you are ready to award the event. After awarding the event, you can initiate contract creation from within an RFX even by flipping an event to a contact in CalUsource for one or more suppliers.

Instructions for Awarding an RFX

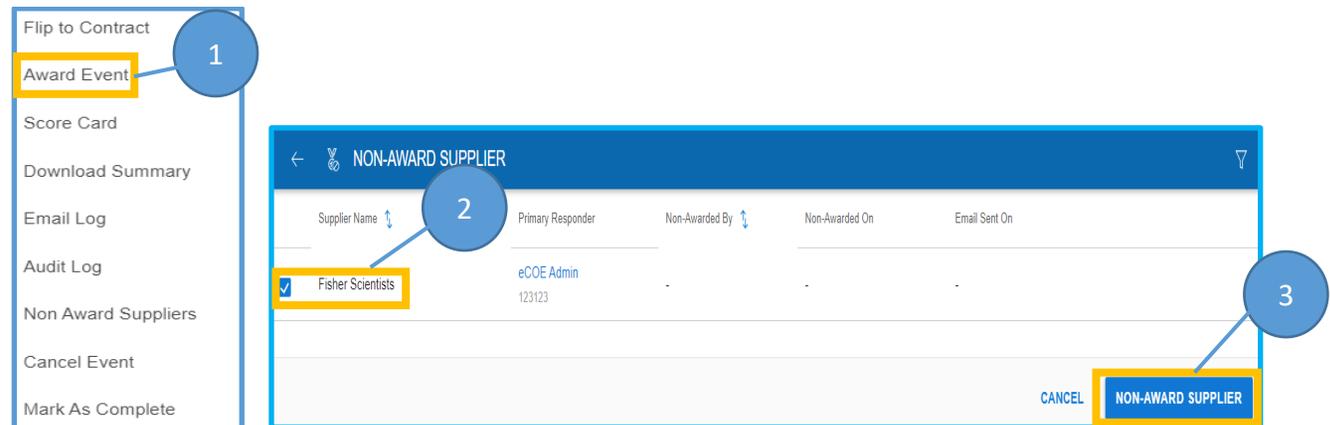
1. Click the **Actions** icon in the top corner and select **Award Event**.
2. Check the box next to the supplier(s) you wish to award.
3. Click the **AWARD SUPPLIER** button.
4. Select the reason for the award from the dropdown menu.
5. Provide additional details on the award by clicking the **Comments** icon, entering a comment and click **Done**. <Optional>
6. Click the **Attachment** icon to upload any supplemental documentation for the award. <Optional>
7. Click **Done**, and then **Yes** in the **Confirmation** popup to notify the awarded supplier(s) by email, and then click **Close**. (You will be able to customize the Award Event email.)
8. The Award icon will appear next to the Supplier(s) to whom you have awarded the event and 'Awarded' will appear in the blue bar.

The screenshot shows the 'UCAL1's WORKSPACE' interface for an 'AWARD EVENT'. It features a table with columns for 'Supplier Name', 'Award Status', and 'Updated By'. Two suppliers are listed: 'Red Raven Office Supplies' and 'Big Daddy Lawnmowers'. The 'Big Daddy Lawnmowers' row has a checked checkbox and a blue circle '2' next to it. A blue bar at the bottom right contains the 'AWARD SUPPLIER' button. A dropdown menu is open in the top right corner, showing options like 'Award Event', 'Score Card', 'Download Summary', and 'Email Log'. A blue circle '1' points to the menu icon. Below the table, there are sections for 'Reason' (with a dropdown menu), 'Comments' (with a comment icon), and 'Attachments' (with an attachment icon). Blue circles '4', '5', and '6' point to these respective icons. At the bottom, a confirmation popup shows 'CANCEL' and 'DONE' buttons, with a blue circle '7' pointing to the 'DONE' button. To the left, a blue bar contains the text '(AWARDED)' with a blue circle '8' pointing to it.

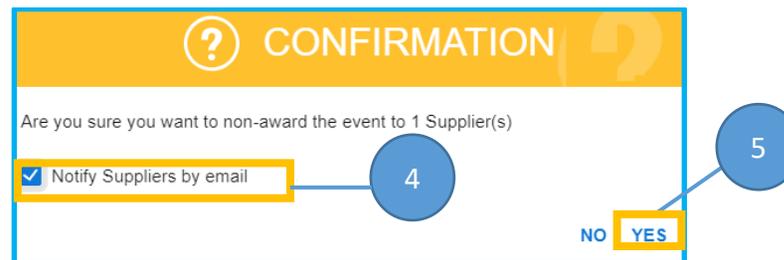
Instructions for Notifying Non-Awarded Suppliers

When you award a contract, only the awarded suppliers are notified (as described above). Follow these instructions to inform suppliers who were not awarded the contract that they have not been selected.

1. Select **Non Award Suppliers** from the **Action** menu.
2. On the **Non-Award Supplier** screen, select the suppliers you want to notify.
3. Click the **Non-Award Supplier** button.

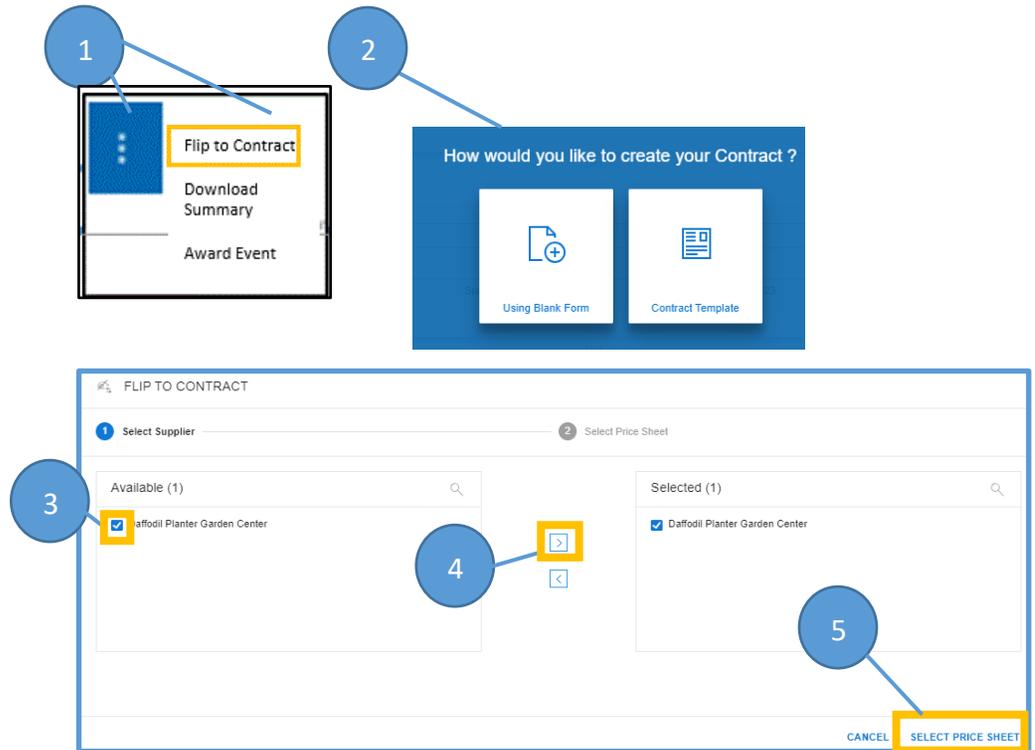


4. In the **Confirmation** popup, make sure **Notify Suppliers by email** is checked.
5. Click **Yes** to display the email template informing the non-awarded suppliers you selected in Step 2 that they have not been selected (not shown). You will be able to modify the email text. Click **Send** to send the email. Then click **Close** to re-display the RFx.



Instructions for Flipping an RFx to Contract

1. Click the **Actions** icon in the top corner and select **Flip to Contract**.
2. Select whether the contract will be created using a **Blank Form** or a **Contract Template**.
3. Check the box in the **Select Supplier** field next to the supplier(s) with whom you will be contracting. Check only one box to contract with a single supplier. Click multiple boxes if you are contracting with more than one supplier.
4. Click the right arrow to add them to the **Selected** column.
5. Click **Select Price Sheet**.
6. Check the box for the Price Sheet(s) you wish to apply. Then, click on the right arrow (as in Step #4) to move the supplier to the selected column and then click **DONE** and **OK** in the **Success** message. (Not shown.)

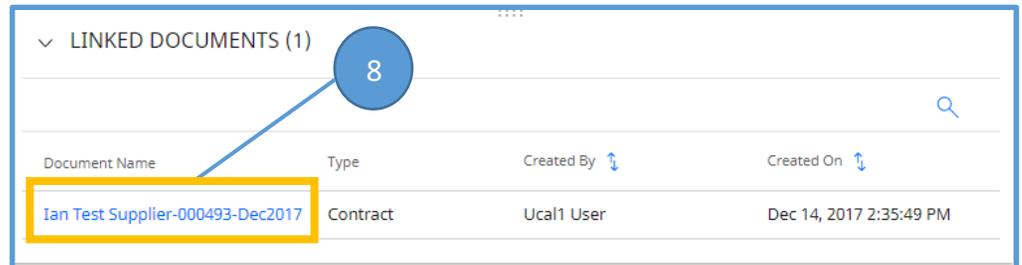
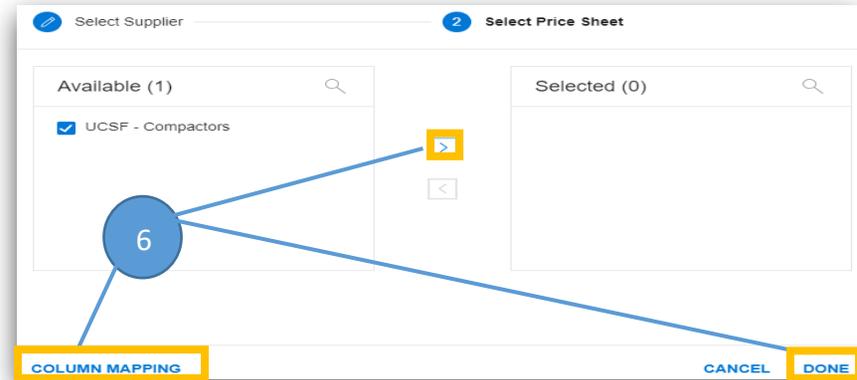


Note: If you receive an error message about mapping item names for all price sheets, click **Column Mapping** and map each item in the **Item Name** column to its corresponding column.

7. An Award icon will display next to the name of the awarded Supplier(s).



8. The **Linked Documents** section contains a hyperlink to the contract you just created. This section displays between the **Questionnaire** and **Attachments** sections in your RFX.



Tips

- Use the CalUsource Award feature even if you created the RFX outside of CalUsource. This stores the award information in the repository so it can be used for future reference.
- You can flip to contract once your event is closed or after evaluating responses. For example, when you want to negotiate with your shortlisted suppliers and want to start the contract process with each one.

Warning

- You are **NOT** able to Award an RFX until your Evaluation timeline is closed. If you are ready to award an RFX and do not see the **Award Event** option in the **Actions** dropdown menu, check to ensure your Evaluation timeline has closed. If not, simply edit the closing date to a date/time prior to the current date/time, and then check the **Actions** menu dropdown for **Award Event** again.