

COMeT RFQ Training Guide:

Link: <https://comet.ogs.ny.gov/>

Requesting Access to the System:

1. Every individual needing to access the portal to view or respond to RFQs must request access when first visiting the portal. This applies both to brand new users of the portal as well as to contractors that currently have portal access for contract modification submissions. New portal users should follow steps 2 and 3. Existing users can skip to step 4.
2. For **users that are new to the portal**, the first step is to register for a new account by visiting this [link](#) or by selecting Sign In from the portal website and selecting Register from the available tabs. Complete all fields and click Register.
3. Next you will be brought to your profile page. At minimum here, please complete your first and last name and hit Update at the bottom.
4. Select your name in the upper right corner of the screen. From the dropdown, choose Assign Roles. Your first and last name should be prefilled on this next page. Fill them in here if needed.
5. Select Request Portal Role. If you are with a company that directly holds a contract with the NYS OGS under this award, select Request Contractor Role in the new window. If your company is a reseller under a company holding a direct contract with the NYS OGS, select Request Reseller Role. If your company both holds a direct contract under this award with NYS OGS AND is a reseller under another company holding a direct contract, select both Request Contractor Role and Request Reseller Role. Once you select either Request Contractor Role or Request Reseller Role you will be prompted to identify your company. Select your company name by clicking the magnifying glass to the right of the Company Name field. Generally the easiest way to do this is to utilize the Search function from the new window that will open. Next select Submit for Approval. The role request will be sent to OGS for review. You can monitor the status of the request from this screen. An email will be received once your request has been approved.

Responding to Requests for Quotes:

1. When your company is included in the bidder pool for a Request for Quotes (RFQ), you will receive an email indicating that a new RFQ is available in the portal. Navigate to the [portal](#) and sign in.
2. Select Submitted RFQs in the top right menu.
3. In the next page, any open RFQ for which your company is included in the bidder pool will be listed under the My RFQs section. If you start to respond to an RFQ but need to save your response before submitting it, the draft response will appear under My RFQ Responses. To view any past bid submissions, click the blue hyperlinked My RFQ Draft Responses dropdown and select My Submitted RFQ Responses.

4. Under My RFQs, click the blue hyperlinked OGS RFQ Number to open the RFQ. This will allow you to view the RFQ, submit any questions you may have, view any updates to an RFQ, and submit a bid or no bid response.
 - The top section contains basic information on the RFQ and the Authorized User of the contract that issued it. Designated contacts will be listed here.
 - Below the designated contacts will be delivery instructions, the Lot the RFQ was issued for, due dates for questions and for bids, and information on the basis for award and other details.
 - The Financials section contains the desired SKUs and quantities for the RFQ. This particular area is for information only. When creating a bid response you will have the opportunity to make edits to the financial response and even add additional SKUs if needed.
 - Below the financials section are any documents the authorized user has attached to the RFQ.
 - Next down is the Questions & Answers section. If you would like to ask a question for an RFQ, simply click Create Question and enter your question in the window that appears. Please try and keep your company name out of any questions. In the Question grid will be any questions your own company has asked along with the answer once published. In the Other Questions and Answers grid will be any questions asked by other companies along with the published answers to those questions.
 - Below the questions is the RFQ Update Information section, which would contain any update notes from changes made to an RFQ after it has first been published. You will receive an email notification if any changes are made to an RFQ that you have been sent.
 - Next down is the RFQ Response section, covered in further detail in the next section.

5. Creating a Bid or No Bid Response:
 - a) In the RFQ Response section, select Create Bid RFQ Response in order to place a bid response for the RFQ. Select Create No Bid Response if you will not be submitting a bid.
 - b) If creating a no bid response, simply fill in the three fields to provide your contact details and reason for not bidding and click Submit.
 - c) If creating a bid response, start by completing your contact details, then click Save and Continue. The rest of your bid response may vary. Please review the below bullets:
 - If the RFQ issuer has identified SKUs and your bid will be for the exact not-to-exceed pricing for those same SKUs without any additional discount, no edit to the Financials section should be needed.
 - If the RFQ issuer has not identified SKUs, they have identified SKUs but did not include all of the SKUs you believe they need, and/or you plan to offer a

discount off the not-to-exceed pricing for one or more SKUs, click Add/Update Financials.

- To add new SKUs to your bid response, select Load Vendor's Approved Pricelist at the top of the next page after selecting the appropriate vendor in the dropdown. The vendor you select will either be your own company if you are responding as a direct contract holder, or it will be the contractor that you are responding as a reseller for. If you are a reseller under multiple contractors, it may be appropriate to bid with SKUs from more than one contractor's approved pricelist in some cases. Similarly, if you are both a direct contract holder AND a reseller under another direct contract holder, it may be appropriate to bid both with SKUs from your own approved pricelist and SKUs from the approved pricelist of a contractor you are a reseller under.
- After loading the approved pricelist, generally the easiest way to locate each SKU is to use the Search tool immediately above the pricelist. After locating each needed SKU, click on the SKU's row to highlight it, then click Add to Financial Worksheet. You may select multiple SKUs at once if they are on the same page by clicking each row to highlight it and clicking Add to Financial Worksheet. The default view for the approved pricelist will display 10 SKUs per page. This can be expanded to up to 100 SKUs per page by using the dropdown immediately above the left corner of the pricelist.
- Once all SKUs have been added to the Financial Worksheet, updates to pricing and quantities can be made. Scroll down to the Financial Worksheet section below. The number of SKUs appearing per page can also be edited here.
- To edit one SKU at a time, click the pencil icon at the right side of the SKU's row to begin editing. Changes can be made at this time to the Additional Product Discount %, Quantity, and Additional Discount \$\$ fields. The Additional Product Discount % and Additional Discount \$\$ fields can be used to provide either a discount percentage or a fixed dollar discount off of the not-to-exceed Net NYS Contract Price. The quantity field may need to be adjusted either if you have added new SKUs to the Financial Worksheet in the previous steps or if you believe the RFQ issuer has selected an incorrect quantity for one or more SKUs. After making edits to the SKU, you MUST click the Save icon on the right side of the row to lock in your changes.
- To edit multiple SKUs at once, click each row one by one to highlight them, then click Edit Multiple immediately above the Financial Worksheet grid. This will allow you to make any of the changes mentioned in the above step for multiple SKUs at once. When finished, be sure to click Save changes on the bottom right to lock in all changes.
- To remove a SKU from the Financial Worksheet, select the trashcan icon on the far right side of the SKU's row.
- When you are finished with any edits to the Financial Worksheet, click Back to RFQ at the very bottom of the page.

- At this time, any documents to be included in your bid must be uploaded by clicking Add files. An answer must be selected from the dropdown below the Documents setting to indicate whether you agree to all RFQ terms and conditions, whether you have included any supplementary terms and conditions, or listing a reason why you are not able to meet the RFQ terms and conditions. Lastly, to submit your bid you must change the Submission Option from Save as Draft to Submit RFQ Response, and click Submit at the very bottom. You may instead save your response as a draft for as long as needed.

Responding to Requests for Information:

1. When your company is included in the bidder pool for a Request for Information (RFI), you will receive an email indicating that a new RFI is available in the portal. Navigate to the [portal](#) and sign in.
2. Select Submitted Requests for Information in the top right menu.
3. All Requests for Information your company has been included in the distribution list for will be displayed here. If you have responded already to the RFI, the date you responded will be displayed in the Date Responded column. To respond to an RFI, click the blue dropdown arrow on the right side of the RFI row and select Edit from the dropdown.
4. Information contained in the RFI will be displayed here in the RFQ Information, RFQ Description, and Authorized User Contact Information sections. Any documents attached to the RFI will be included in the RFI Documents section.
5. To respond to the RFI, complete the OGS Contract No (this would either be your own contract number if you hold a direct contract and are responding on behalf of your own company or it will be the contract number of the direct contractor you are responding under as a reseller), Contact Name, Phone Number, and Email fields. Next, select Yes or No to indicate if your company is interested in participating in an RFQ resulting from this RFI. If you select Yes, you will be prompted to enter a brief description which will serve as your response to the RFI, as well as to attach any documents. If you select No, you will be prompted to indicate why you are not interested in responding to the RFI. After completing these sections as needed, click Submit at the bottom.