

# ePROCUREMENT TENDER PORTAL WORKFLOW

## FIRM PARTICIPATION GUIDE

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## 1. REGISTRATION PHASE

### 1.1 Initial Registration Process

#### Step 1: Access Portal

- Navigate to eProcurement portal URL
- Click on "New Vendor Registration"
- Select appropriate registration category (Manufacturer/Trader/Service Provider)

#### Step 2: Basic Information Entry

- Enter company name as per registration certificate
- Provide valid email ID (will be username)
- Create strong password (minimum 8 characters with special characters)
- Enter registered mobile number for OTP verification
- Complete CAPTCHA verification

#### Step 3: Email & Mobile Verification

- Check email for verification link
- Click verification link within 24 hours

- Enter OTP received on mobile
- Confirm successful verification

## **1.2 Company Profile Creation**

### **Step 1: Legal Information**

- Company registration number
- Date of incorporation
- Type of organization (Proprietorship/Partnership/Pvt Ltd/Public Ltd)
- Registered office address
- Communication address
- Contact person details

### **Step 2: Tax Registration Details**

- PAN number with upload of PAN card
- GST registration number for each state
- Upload GST certificates
- Professional tax registration (if applicable)
- Other tax registrations

### **Step 3: Business Information**

- Nature of business
- Product/Service categories (select multiple as applicable)
- Annual turnover for last 3 years
- Number of employees
- Manufacturing/Service facilities details
- Quality certifications held

## **1.3 Document Upload Requirements**

### **Mandatory Documents:**

#### **1. Company Registration Certificate**

- Incorporation certificate
- Partnership deed (if partnership)

- Memorandum & Articles of Association (for companies)

## **2. Tax Documents**

- PAN card
- GST registration certificates
- Tax exemption certificates (if any)

## **3. Financial Documents**

- Audited balance sheets (last 3 years)
- Profit & loss statements
- CA certificate for turnover
- Bank solvency certificate

## **4. Authorization Documents**

- Board resolution for authorized signatory
- Power of attorney (if applicable)
- Authorized signatory ID proof

## **5. Technical Documents**

- ISO certificates
- Product certifications
- License certificates
- MSME/NSIC/Startup certificate

# **1.4 Digital Signature Certificate (DSC) Integration**

## **Step 1: DSC Procurement**

- Obtain Class 3 DSC from authorized CA
- Ensure DSC is in the name of authorized signatory
- Validity should be minimum 1 year

## **Step 2: DSC Registration**

- Install DSC drivers
- Register DSC on portal
- Map DSC with user ID
- Test DSC functionality

### **Step 3: DSC Validation**

- System validates DSC
- Confirmation message received
- DSC details displayed in profile

## **1.5 Profile Verification & Approval**

### **Step 1: Self-Declaration**

- Accept terms and conditions
- Declare information accuracy
- Submit undertaking
- Initial submission

### **Step 2: Admin Verification**

- Portal admin reviews documents
- Verification of authenticity
- Query raised if discrepancies found
- Response to queries within timeline

### **Step 3: Approval Process**

- Final verification completed
  - Approval/Rejection communicated
  - Vendor code generated
  - Welcome email sent
  - Profile activated for bidding
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## **2. TENDER DISCOVERY PHASE**

### **2.1 Tender Search Process**

#### **Step 1: Login to Portal**

- Enter username (email)
- Enter password
- Complete CAPTCHA

- Two-factor authentication (if enabled)

## **Step 2: Navigate to Tender Search**

- Click "Search Tenders" menu
- Select search criteria:
  - Tender category
  - Department/Organization
  - Location (state/district)
  - Tender value range
  - Publishing date range
  - Closing date range

## **Step 3: Advanced Search Options**

- Keyword search in tender title
- Tender reference number
- Product/Service code
- Tender type (Open/Limited/Single)
- Tender stage (Live/Archived)

## **2.2 Tender Analysis & Review**

### **Step 1: View Tender List**

- Review search results
- Sort by closing date/value/department
- Check tender status
- Note important dates

### **Step 2: Tender Details Review**

- Click on tender title
- Review basic information:
  - Tender reference number
  - Publishing date & time
  - Bid submission end date
  - Bid opening date

- Pre-bid meeting details

### **Step 3: Critical Information Check**

- Tender value/EMD amount
- Tender fee
- Work description
- Eligibility criteria
- Technical specifications
- Evaluation methodology

## **2.3 Document Download Process**

### **Step 1: Access Tender Documents**

- Click "Download Documents"
- List of available documents displayed
- Check document titles and sizes

### **Step 2: Download All Documents**

- Tender notice
- Detailed NIT (Notice Inviting Tender)
- Technical specifications
- BOQ/Price schedule
- Terms & conditions (commercial)
- Terms & conditions (technical)
- Draft contract/agreement
- Annexures and formats

### **Step 3: Document Organization**

- Create tender-specific folder
- Save all documents systematically
- Check for corrigendum regularly
- Download amended documents if any

## **2.4 Fee Payment Process**

### **Step 1: Check Fee Requirements**

- Tender document fee amount
- EMD (Earnest Money Deposit) amount
- Processing fee (if any)
- Check exemptions (MSME/NSIC/Startup)

### **Step 2: Payment Gateway Process**

- Select payment mode:
  - Net banking
  - Credit/Debit card
  - NEFT/RTGS (offline mode)
- Enter payment details
- Complete OTP verification
- Submit payment

### **Step 3: Payment Confirmation**

- Transaction reference number generated
  - Payment receipt downloaded
  - Auto-update in tender status
  - Email confirmation received
- 

## **3. BID PREPARATION PHASE**

### **3.1 Eligibility Assessment**

#### **Step 1: Qualification Criteria Review**

- Experience requirements:
  - Years in business
  - Similar work experience
  - Number of projects completed
  - Value of projects executed

#### **Step 2: Financial Criteria Check**

- Annual turnover requirement

- Net worth criteria
- Profit/loss status
- Working capital availability

### **Step 3: Technical Criteria Verification**

- Technical manpower availability
- Equipment/infrastructure
- Quality certifications required
- Production capacity (if applicable)

### **Step 4: Document Availability Check**

- All experience certificates available
- Financial documents updated
- Technical compliance documents
- Legal compliance certificates

## **3.2 Technical Bid Preparation**

### **Step 1: Technical Proposal Structure**

- Executive summary
- Understanding of scope
- Methodology and approach
- Work plan and timeline
- Key personnel deployment
- Equipment deployment plan
- Quality assurance plan
- HSE (Health, Safety, Environment) plan

### **Step 2: Supporting Documents Compilation**

- Company profile (as per format)
- Experience certificates
- Client testimonials
- Work completion certificates



- Performance certificates
- Technical team CVs
- Equipment list with proof
- Subcontractor details (if any)

### **Step 3: Compliance Matrix Preparation**

- Clause-by-clause compliance
- Deviations highlighted
- Alternative proposals (if permitted)
- Technical clarifications

## **3.3 Financial Bid Preparation**

### **Step 1: Price Calculation**

- Download BOQ/Price schedule
- Understand pricing format:
  - Item rate contract
  - Lump sum contract
  - Percentage rate contract
- Calculate base costs
- Add overheads and profit
- Consider market rates

### **Step 2: Tax & Duties Calculation**

- GST calculation as applicable
- Custom duties (if imports involved)
- Other statutory levies
- Price variation clause understanding

### **Step 3: Final Price Formulation**

- Total project cost
- Payment terms consideration
- Discount strategy (if any)
- Price competitiveness check

- Final review and approval

## **3.4 Document Preparation Standards**

### **Step 1: Document Formatting**

- Follow prescribed formats strictly
- Page numbering mandatory
- Index/table of contents
- Clear section divisions
- Authorized signatory signature on all pages

### **Step 2: File Preparation**

- PDF format for all documents
- File size limits compliance
- File naming convention
- Compression if required
- Password protection (if specified)

### **Step 3: Digital Signature Application**

- Sign individual documents
  - Sign consolidated PDF
  - Verify signature visibility
  - Check signature validity
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## **4. BID SUBMISSION PHASE**

### **4.1 Online Bid Creation**

#### **Step 1: Navigate to My Bids**

- Login to portal
- Go to "My Workspace"
- Click "Create New Bid"
- Select relevant tender

#### **Step 2: Bid Cover Selection**

- Single cover (technical + financial together)
- Two cover (technical and financial separate)
- Three cover (eligibility, technical, financial)
- Four cover (additional qualification cover)

### **Step 3: Form Filling Process**

- General bid details
- Undertakings and declarations
- Technical specifications compliance
- Commercial terms acceptance
- Deviations/exceptions listing

## **4.2 Document Upload Process**

### **Step 1: Technical Document Upload**

- Select technical cover
- Browse and select files:
  - Technical proposal
  - Experience documents
  - Qualification documents
  - Compliance matrix
  - Supporting certificates
- Upload progress monitoring
- Successful upload confirmation

### **Step 2: Financial Document Upload**

- Select financial cover
- Upload price bid:
  - Filled BOQ
  - Price breakup
  - Commercial terms
- Verify upload completion

### **Step 3: Additional Uploads**

- EMD proof
- Tender fee proof
- Scanned copies of originals
- Any clarification documents

## **4.3 Bid Encryption & Submission**

### **Step 1: Bid Review**

- Check all sections completed
- Verify all mandatory documents uploaded
- Review declarations
- Check technical compliance
- Verify price accuracy

### **Step 2: Bid Encryption Process**

- Click "Encrypt Bid"
- System encrypts using public key
- Encryption certificate generated
- Save encryption receipt

### **Step 3: Final Submission**

- Click "Submit Bid"
- Enter DSC PIN
- Digital signature applied
- Final confirmation prompt
- Confirm submission

### **Step 4: Post-Submission**

- Bid submission receipt generated
- Unique bid reference number
- Download and save receipt
- Email confirmation received
- Print hard copy for records

## 4.4 Bid Modification Process

### Allowed Modifications:

- Before bid submission deadline
- Unlimited modifications permitted
- Previous version overwritten
- Fresh encryption required

### Modification Steps:

- Login and go to "Submitted Bids"
  - Click "Modify Bid"
  - Make necessary changes
  - Re-upload documents if needed
  - Encrypt and resubmit
  - New receipt generated
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## 5. BID OPENING & EVALUATION PHASE

### 5.1 Technical Bid Opening

#### Step 1: Opening Schedule

- Check bid opening date/time
- Login before scheduled time
- Navigate to "Bid Opening" section
- Join online opening (if public)

#### Step 2: Opening Process

- Authorized officer initiates
- System decrypts technical bids
- Bidder list displayed
- Basic compliance checked
- Opening report generated

#### Step 3: Initial Scrutiny

- EMD verification
- Tender fee verification
- Document presence check
- Prima facie eligibility
- Scrutiny report published

## **5.2 Technical Evaluation Process**

### **Step 1: Detailed Evaluation**

- Technical committee review
- Clause-by-clause compliance
- Experience verification
- Qualification assessment
- Site visit (if applicable)

### **Step 2: Clarification Process**

- Clarifications sought (if any)
- Response timeline given
- Submit clarification online
- Additional documents (if asked)

### **Step 3: Technical Qualification**

- Technical score calculation
- Minimum score requirement
- Qualified/Disqualified status
- Evaluation report preparation
- Result publication

## **5.3 Financial Bid Opening**

### **Step 1: Qualified Bidders Only**

- Technical qualification verified
- Financial opening date notified
- Login for financial opening

- Public opening process

### **Step 2: Price Revelation**

- Bid prices displayed
- Bidder-wise comparison
- L1, L2, L3 positions
- Price reasonableness check

### **Step 3: Final Evaluation**

- Combined technical-financial score (if QCBS)
- Lowest price determination (if L1)
- Conditional items review
- Final ranking preparation

## **5.4 Reverse Auction (If Applicable)**

### **Step 1: RA Notification**

- Eligible bidders notified
- RA date and time
- Starting price (L1 price)
- Decrement value
- Duration of auction

### **Step 2: RA Participation**

- Login during RA window
- Current L1 price visible
- Submit reduced price
- Multiple iterations allowed
- Auto-extension if last-minute bid

### **Step 3: RA Closure**

- Final L1 determined
- RA report generated
- Price finalization

- Confirmation required
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## **6. CONTRACT AWARD PHASE**

### **6.1 Letter of Award (LOA) Process**

#### **Step 1: LOA Issuance**

- Successful bidder notification
- LOA uploaded on portal
- Download LOA
- Review terms and conditions
- Acceptance timeline noted

#### **Step 2: LOA Acceptance**

- Submit acceptance online
- Upload signed copy
- Confirm all terms
- No deviations at this stage

#### **Step 3: Performance Security**

- Calculate PBG amount (usually 3-10%)
- Obtain from approved bank
- Upload PBG copy
- Original to be submitted physically
- EMD refund process initiated

### **6.2 Contract/Agreement Signing**

#### **Step 1: Agreement Preparation**

- Draft agreement shared
- Review all clauses
- Seek clarifications if any
- Legal vetting (internal)

#### **Step 2: Agreement Execution**



- Sign on all pages
- Stamp duty payment
- Notarization (if required)
- Witness signatures
- Date of commencement noted

### **Step 3: Document Submission**

- Signed agreement copy
- Performance bank guarantee
- Insurance policies
- Advance payment guarantee (if advance sought)
- Other securities

## **6.3 Work Order/Purchase Order**

### **Step 1: Order Receipt**

- Formal WO/PO issued
- Download from portal
- Review scope clearly
- Delivery schedule noted
- Payment terms verified

### **Step 2: Order Acknowledgment**

- Acknowledge receipt
- Confirm acceptance
- Mobilization plan submission
- Key personnel nomination
- Contact points establishment

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## **7. POST-AWARD MANAGEMENT**

### **7.1 Contract Execution Monitoring**

#### **Step 1: Milestone Tracking**

- Login to contract management
- Update progress regularly
- Upload progress photos
- Submit milestone reports
- Seek timeline extensions if needed

## **Step 2: Quality Compliance**

- Third-party inspection coordination
- Test certificates upload
- Quality assurance documentation
- Client approval obtaining
- Non-conformity resolution

## **7.2 Invoice & Payment Management**

### **Step 1: Invoice Preparation**

- Milestone completion verification
- Invoice as per contract terms
- Supporting documents attachment
- GST compliance ensured
- Deductions incorporated

### **Step 2: Invoice Submission**

- Upload on vendor portal
- Physical submission if required
- Acknowledgment obtained
- Payment tracking
- Follow-up mechanism

### **Step 3: Payment Receipt**

- Payment notification received
- Verify amount correctness
- TDS certificate collection
- GST returns filing

- Reconciliation with books

## **7.3 Contract Closure**

### **Step 1: Completion Certificate**

- Work completion intimation
- Joint inspection request
- Snag list resolution
- Final completion certificate
- Upload on portal

### **Step 2: Final Settlement**

- Final bill preparation
- Retention money claim
- Performance security release
- Final payment receipt
- No-claim certificate

### **Step 3: Performance Rating**

- Vendor rating received
  - Review and feedback
  - Dispute if any discrepancy
  - Rating improvement plan
  - Future reference value
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## **8. COMPLIANCE & DOCUMENTATION**

### **8.1 Statutory Compliance**

#### **Regular Updates Required:**

- GST returns filing proof
- Tax payment certificates
- License renewals
- Insurance renewals

- Statutory audit reports

#### **Portal Compliance:**

- Profile updates quarterly
- Document validity monitoring
- New certification uploads
- Change intimations
- Blacklisting check

## **8.2 Record Management**

#### **Electronic Records:**

- All tender documents
- Bid submission proofs
- Communication trails
- Contract documents
- Payment records

#### **Physical Records:**

- Original agreements
- Bank guarantees
- Insurance policies
- Statutory certificates
- Legal documents

## **8.3 Best Practices & Tips**

#### **Do's:**

- Regular portal access
- Email monitoring
- Document backup
- Timeline adherence
- Proactive communication

#### **Don'ts:**

- Last-minute submission
  - Incomplete documentation
  - DSC expiry oversight
  - Informal communications
  - Deadline missing
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## APPENDICES

### Appendix A: Common Errors & Solutions

#### 1. DSC Not Working

- Clear browser cache
- Update Java
- Check DSC validity
- Re-register DSC

#### 2. Upload Failures

- Check file size
- Verify file format
- Ensure proper naming
- Check internet speed

#### 3. Payment Issues

- Verify account balance
- Check transaction limits
- Try alternate payment mode
- Contact bank if needed

### Appendix B: Helpdesk Contacts

- **Technical Support:** [Helpdesk number]
- **Email Support:** [Support email]
- **Working Hours:** 9:00 AM to 6:00 PM
- **Emergency Support:** [Emergency contact]

### Appendix C: Glossary of Terms

- **EMD:** Earnest Money Deposit

- **PBG:** Performance Bank Guarantee
  - **BOQ:** Bill of Quantities
  - **NIT:** Notice Inviting Tender
  - **LOA:** Letter of Award
  - **DSC:** Digital Signature Certificate
  - **QCBS:** Quality and Cost Based Selection
  - **L1:** Lowest Bidder
  - **RA:** Reverse Auction
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**Document Version:** 1.0

**Last Updated:** [Date]

**Next Review:** [Date]

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**Disclaimer:** This workflow is for guidance purposes. Always refer to specific tender documents and portal guidelines for accurate requirements.