

# Important Information about the online Consultant Management System (CMS)

***Must read to ensure smooth transactions using the system!***

## **General:**

- As with any online transactional system, internet connectivity and speed are essential. Please make sure your connection and speed can sustain ongoing transactions and updates to the screens.
- Review Quick Reference Guides (QRG) located at the right side of the CMS home page and view training videos to familiarize yourself with the system prior to working in the system. QRGs might have answers to your questions.
- Do not use the Back button of your browser to return to a previous screen. This is likely to result in an “expired page” and all updates may not be seen.

## **Registration:**

- Encourage your associate/ JV partners to register in CMS if they have not done so already.

## **Responding to Invitation and Accessing RFP templates:**

- If you decide to submit a proposal, confirm by answering “yes” in the **Response to Invitation** section under the RFP tab. RFP forms and templates will only become available after you respond “Yes”.
- Consider selecting an RFP representative to be in charge of the Requests for Proposals and the only one who can edit proposal details. Specify the RFP representative in the **Response to Invitation** section of the **Requests for Proposals** tab.

The screenshot shows the 'Response to Invitation' form. It includes radio buttons for 'Still reviewing the Request for Proposal', 'Yes, we will submit a proposal', and 'Yes, we will submit a proposal with another firm(s) as a Joint Venture or as a lead firm'. Below this is an 'Associations' section with a table for adding consultants. The table has columns for CMS Number, Consultant, Acronym, Country, Joint Venture, and Delete. Below the table is a dropdown for 'Reason for not submitting' and a checkbox for 'Include in notifications'. At the bottom, there is a section for designating a person to create the proposal, with a dropdown for Name and a text area for Designation and Email. A tip at the bottom right states: 'TIP If different from your Primary Contact, you may select any of the Contacts that you have defined in your profile registration. We will create a new CMS account if necessary and send you an e-mail notification.'

CMS Number	Consultant	Acronym	Country	Joint Venture	Delete
No results found.					

## **Reviewing RFP, requesting clarifications:**

- Contact the ADB officer identified on the RFP Data Sheet through CMS messaging for clarification on RFP documents. The Technical support group will not be able to respond to clarification requests about RFP text.

**Preparing Proposals:**

- For the QBS selection method, a firm is required to submit both Technical and Financial Proposals upon online submission, just like other selection methods. Financial proposals of all firms will remain encrypted. Only the first ranked technical firm will be required to submit substantiation documents to supplement Financial Proposals.

**Submitting Proposals:**

- Do not wait until the last day to submit your proposal. CMS is not a simple “drop-box” which can be used at the last minute as significant validations for technical, financial proposals and tender data sheets are built within the system. As such, you will need to complete the electronic forms and templates. We estimate that submitting a proposal will take at least three hours, provided all information is correct, available and passes the system validations.
- If the system specifies an “error”, you will be prevented from submitting the proposal.
- If the system specifies a “warning”, you will be able to proceed with the submission of the tender by either explaining the inconsistency or entering required information.
- Do not forget to click on **Verify and Submit**.
- In case of any discrepancy between the financial proposal submitted online (through filling in online tables) and any proposal submitted by adding attachments, the financial proposal submitted online prevails.

**Addressing technical concerns:**

- If you have concerns regarding CMS forms, connectivity, error and warning messages, please address them to [cmshelp@adb.org](mailto:cmshelp@adb.org). Include screenshots to show your problem. To create a screenshot, press ‘Fn’ and Insert PrtSc, then paste it to email as an image. Your enquiries will be attended to within normal ADB working hours: Monday-Friday, 8.00- 17.00, Manila Time (GMT + 8). ADB cannot guarantee technical support on the submission deadline date.

We hope these tips have been helpful.

CMS Team