

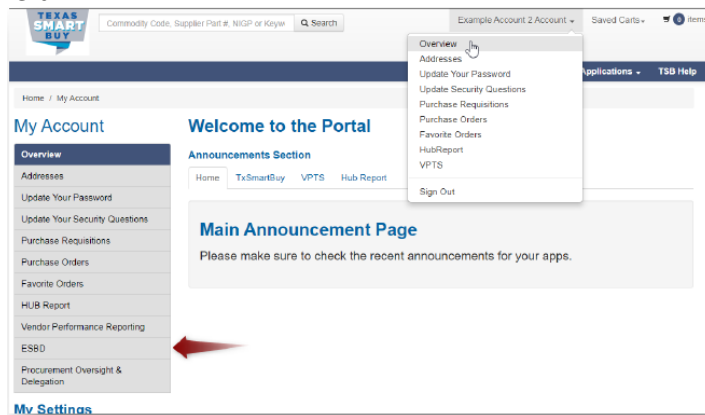
# Creating a Pre-Solicitation Posting (Notice of Intent to Procure)

POD and CAT review can run concurrently with the 60-day Pre-Solicitation Notice.

## Signing in

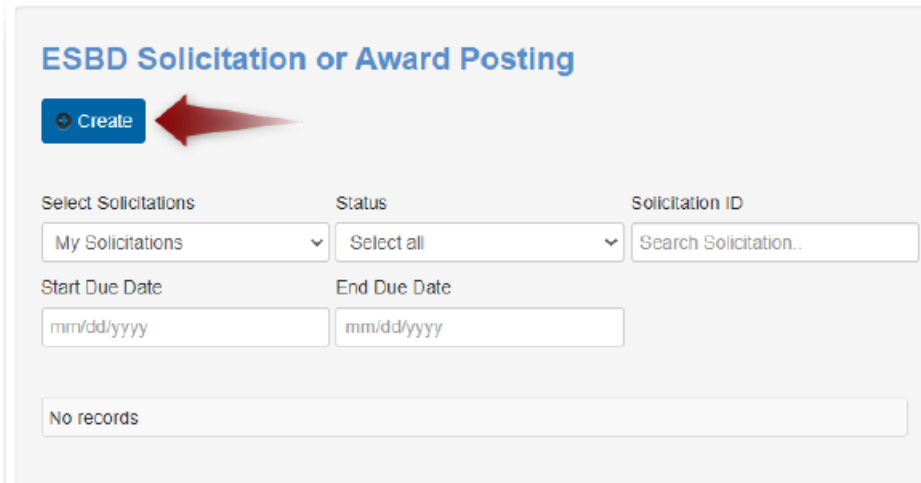
1. Using one of the preferred web browsers, go to **TxSmartBuy.com** to login to your account and access the ESD application from the **My Account** menu. If you need assistance with your login, please contact either your superuser or the SPD Outreach Team at [ESBDSupport@cpa.texas.gov](mailto:ESBDSupport@cpa.texas.gov) or 512-463-3034 option 1.

2. Once logged in, locate the **My Account** screen. If you have previously signed in, you can get to the **My Account** screen by clicking on the account name menu link and selecting **Overview**. Select the **ESBD** application on the left.



## Creating a Pre-Solicitation

- To begin, select the **Create** button located at the top-left of the screen, then choose **Pre-Solicitation Notice** and **Continue**

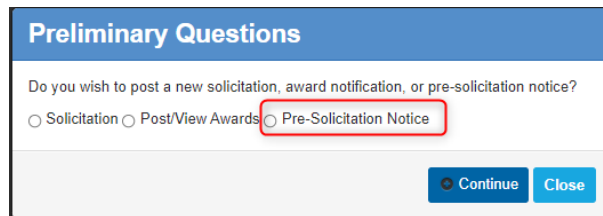


**ESBD Solicitation or Award Posting**

Select Solicitations: My Solicitations  
Status: Select all  
Solicitation ID: Search Solicitation..

Start Due Date: mm/dd/yyyy  
End Due Date: mm/dd/yyyy

No records



**Preliminary Questions**

Do you wish to post a new solicitation, award notification, or pre-solicitation notice?

Solicitation  Post/View Awards  Pre-Solicitation Notice

## Pre-Solicitation Form

4. Required fields are marked with an asterisk. Field descriptions are located on the next page.

ESBD Create Pre-Solicitation Notice

Step 1: Create Pre-Solicitation Step 2: Add NIGP Class/Item Codes Step 3: Upload Pre-Solicitation Document

Next

Create Pre-Solicitation Notice

\*Contact Name:  
Erin Bennett

\*Contact Number:  
(512) 123-4567

\*Contact Email:  
erin.bennett@cpa.texas.gov

Agency/Texas SmartBuy Member Number:  
304

\*Pre-Solicitation ID:  
Note: System prefixes "Pre-" to the ID

\*Posting Requirements:  
60-Day Pre-Solicitation Notice

\*Notice Posting Date:  
10/28/2021

\*Expiration Date:  
12/28/2021

\*Title(Headline):

\*Description:

File Edit View Format

Paragraph B I

POWERED BY TINY

Next

### Field Descriptions

**Contact Name, Number, and Email:** Enter point of contact information in these three fields. The system prepopulates the values to profile information.

**Agency/Texas SmartBuy Number:** This box will display the Agency or Texas SmartBuy Member number tied to the user's account and is not editable.

Agency/Texas SmartBuy Member Number:

54321

**Pre-Solicitation ID:** This field may only contain alphanumeric characters with exceptions for these characters (this will allow you to use the same solicitation number when you submit to POD or post your solicitation):

- dash (-)
- underscore (\_)
- period (.)

Example:

*good:* 304T-20-745.A1

*bad:* IFB#304T-20-745.A1 — The # symbol cannot be used in this field.

Pre-Solicitation IDs must be unique as they are used as identifiers by the application and in the record URL. Enter

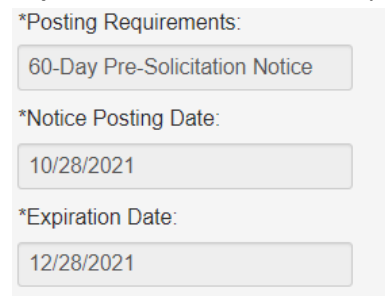
your Solicitation ID when you save the record and the system will append “Pre” to the beginning your solicitation number.

Example: You enter 304T-20-745.A1, record will be saved as Pre-304T-20-745.A1

**Posting Requirements:** Will be defaulted to 60 Day Pre-Solicitation Notice.

**Notice Posting Date:** Will default to the current day. If you save without posting and come back on another day the date will be updated to the date you publish (approve) your posting.

**Expiration Date:** will be 61 days after your Posting Date.



\*Posting Requirements:  
60-Day Pre-Solicitation Notice

\*Notice Posting Date:  
10/28/2021

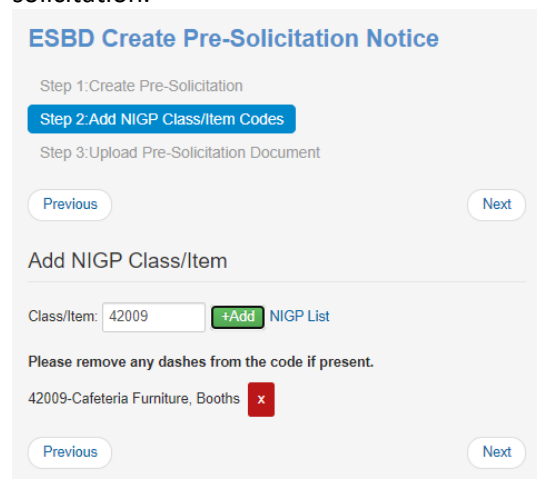
\*Expiration Date:  
12/28/2021

**Title (Headline):** This field is the Pre-Solicitation Title and will show as a clickable link in ESBD search results to open the pre-solicitation details page.

**Description:** The Pre-Solicitation Description will be displayed when the record headline is selected from one of the listings. The field allows for formatted text to be entered. There is not a template as to *what* needs to be in the description, however this is a high-level summary of the solicitation. The Description Field should not exceed 2,500 words. Once you complete all required fields click **Next**.

5. Adding NIGP Class/Item Codes-This step requires you to assign NIGP codes to the solicitation. Locate the appropriate [NIGP class/item code\(s\) for the product\(s\) or service\(s\)](#). To add an NIGP code, enter the five-digit class and item code combo into the **Class/Item** field and select the **Add** button. Do not enter the dash in the five-digit code. As you enter your class and item code, you will notice a type-ahead feature.

There must be at least one NIGP code associated to the solicitation. Multiple NIGP codes can be added to the solicitation by repeating the previous step. Selecting the red X next to an added code will remove it from the solicitation.



**ESBD Create Pre-Solicitation Notice**

Step 1: Create Pre-Solicitation  
**Step 2: Add NIGP Class/Item Codes**  
Step 3: Upload Pre-Solicitation Document

Previous Next

Add NIGP Class/Item

Class/Item: 42009 **+Add** NIGP List

Please remove any dashes from the code if present.

42009-Cafeteria Furniture, Booths **x**

Previous Next

6. To upload Solicitation Documents click **Upload Files**. You are not required to upload any files, but you can upload as many as is necessary, when done click Review Pre-Solicitation

**ESBD Create Pre-Solicitation Notice**

Step 1: Create Pre-Solicitation   Step 2: Add NIGP Class/Item Codes   **Step 3: Upload Pre-Solicitation Document**

Upload Pre-Solicitation Document

**Upload Files**

**Record Attachments**

#	Name	Description
1		

**Review Pre Solicitation**

## Pre-Solicitation Details

### Pre-Solicitation Notice

Print

Status: New

Contact Name: Erin Bennett

Contact Number: 512-123-4567

Contact Email: erin.bennett@cpa.texas.gov

Pre-Solicitation ID: Pre-304T-20-745.A1

Pre-Solicitation Title: Testing Pre-Sol

Agency/Texas SmartBuy Member Number: 304

Posting Requirements: 60-Day Pre-solicitation notice

Notice Posting Date: 10/29/2021

Expiration Date: 12/29/2021

Pre-Solicitation Description:

Testing testing testing

Class/Item Code: 42009-Cafeteria Furniture, Booths

**Upload Files**

**Record Attachments**

#	Name	Description
1		

1 Approve Pre Solicitation

2 Modify Pre Solicitation

3 Cancel Pre Solicitation

- 1) **Approve Pre-Solicitation-** Select **Approve Pre-Solicitation** once you are ready to publish your posting. If you started your posting at an earlier date, your posting date will be updated to today and your expiration will be updated to 61 days later.
- 2) **Modify Pre-Solicitation-** If you need to update any of your notice information or you want to save the notice to post at a later date you can select **Modify Pre-Solicitation**. *Once your notice is posted the only field that can be modified is the contact information.*
- 3) **Cancel Pre-Solicitation-** This selection will change the status for the notice to canceled and will not be posted to the public.

## Viewing Notices

### My Account

Select **ESBD** under **My Account** to view your notices.

#### My Account

<b>Overview</b>
Addresses
Update Your Password
Update Your Security Questions
Purchase Requisitions
Purchase Orders
Favorite Orders
HUB Report
Vendor Performance Reporting
<b>ESBD</b>
Procurement Oversight & Delegation

#### Wel

#### Annou

Home

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You can use the search filters to find your notices.

### ESBD Solicitation or Award Posting

[Create](#)

Select Solicitations:

Status:

Solicitation ID:

Start Due Date:

End Due Date:

ID	Title	Due Date	Status
<a href="#">Pre-304T-20-745.A1</a>	Testing Pre-Sol	12/ 29/ 2021	New

Saved notices will have the status of **New**

When you are ready to post your notice, select the ID for the notice and select Approve which will change the status to Posted.

### Public Search Pre-Solicitation Notices

The public search page can be found on [Texas SmartBuy](#) by selecting **View ESBD Postings** under the SPD Applications navigation menu.

Bid Postings Contracts **SPD Applications** Help

**COVID-19 Purchasing Information for Vendors**

The State of Texas is seeking critical equipment and capacity for medical providers, such as personal protective equipment (PPE), alternate care sites, and infection-control products.

- VPTS
- TPPD Reporting
- View ESBID Postings**
- Look Up
- Purchase History

Users can alternatively navigate directly to the search page by entering [www.txsmartbuy.com/esbd](http://www.txsmartbuy.com/esbd) into the URL.

When the ESBID search page loads, ensure that **Solicitations** is selected.

**Electronic State Business Daily Search**

View any solicitation by selecting or entering a field below. Sign in is NOT required.  
For instructions on submitting bid responses, please review the posting entity's solicitation and attached bid documents.

Solicitations **Awards No Solicitation**

Agency/Texas SmartBuy Member Name <input type="text"/>	Agency/Texas SmartBuy Member Number <input type="text"/>	Date Range <input type="text" value="--"/>
Status <input type="text" value="Posted"/>	NIGP Class/Item <input type="text"/>	Start Date <input type="text" value="mm/dd/yyyy"/>
Keyword Search <input type="text"/>	Solicitation ID <input type="text"/>	End Date <input type="text" value="mm/dd/yyyy"/>

Include Pre Solicitation Notices

Pre-Solicitation Notices are by default not shown. To include Pre-Solicitation Notices in search results be sure to check **Include Pre-Solicitation Notices**.

**Tip:** Since the system prepends "Pre-" for all Pre-Solicitation Notices, the text "Pre-" for Solicitation ID can be used to filter for records that contain "Pre-". Other combination of filters can be used to further refine the search. For example, the sourcing entity.