



# **CONFIDENTIAL**

## **Informal Tendering System**

### **Buyers Guide**

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## Informal Tendering

**Note:** Refer to CSD for the last information

### 1. How to access the CSD RFQ Functionality

- Please note that you must be given access as a RFQ distributor, authoriser, cataloguer or escalator to able to perform these tasks.
- Navigate to the CSD portal. [Log in - Central Supplier Database Application](#)
- Navigate to the 'Links' tab and select 'OCPO'

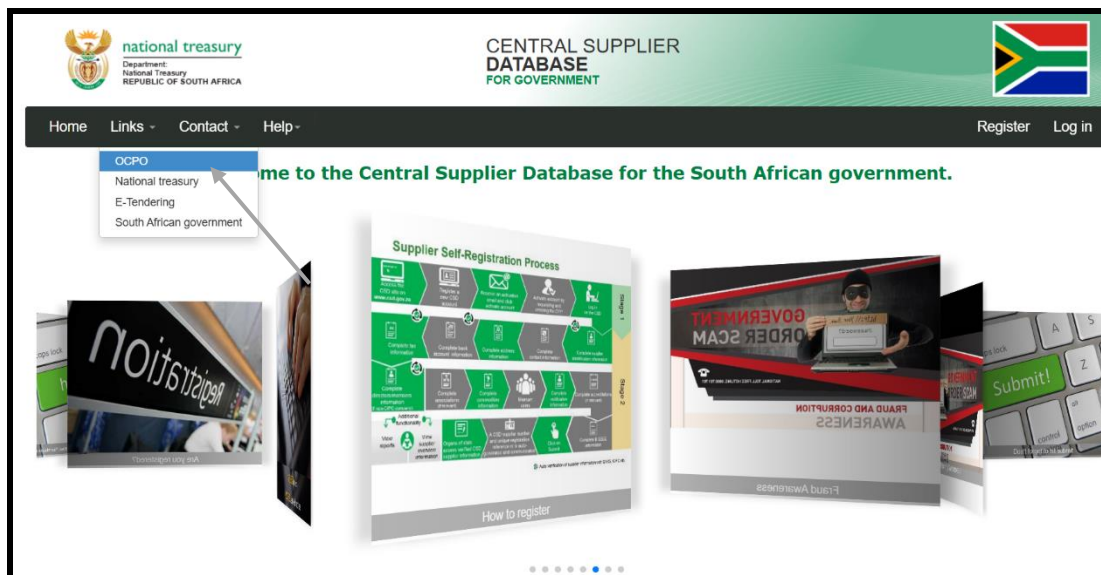


Figure 1

- Go to the Buyers' Area and click Training informational Videos

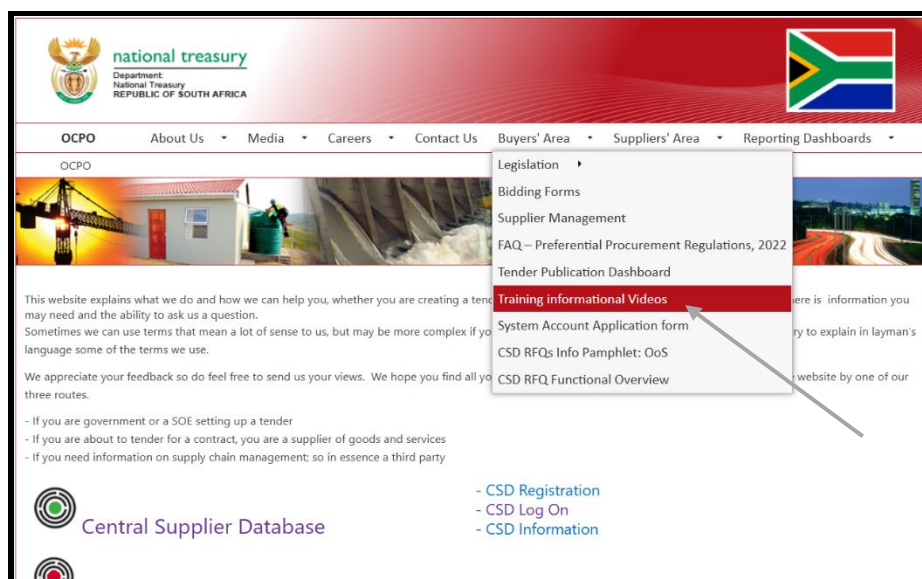


Figure 2

- Select the relevant year. You will then access the relevant video link



Figure 3

**These are the videos available as at the time of publication of this guide:**

- 1.1 How to create an RFQ
- 1.2 How to view an existing RFQ
- 1.3 How to edit an existing RFQ
- 1.4 How to cancel an existing RFQ
- 1.5 How to award an RFQ
- 1.6 Reports offered by CSD for RFQs
- 1.7 Most invited supplier
- 1.8 Offered communication for created RFQ

## 2. How to download the tender information to Enterprise informal evaluation

- Once the tender closing date has been reached, you will have to create a folder in OpenText (Evaluations >> Informal tender >> xxBuyer) for the Tender number.
- Download the tender documents received per supplier into the tender number folder.
- The documents are now ready for evaluation

### 3. How to sort the Tenders in preparation for evaluation

- The buyer will create sub folders in the enquiry number folder for each evaluation category e.g. Technical, Commercial, SHEQ and Financial if applicable.

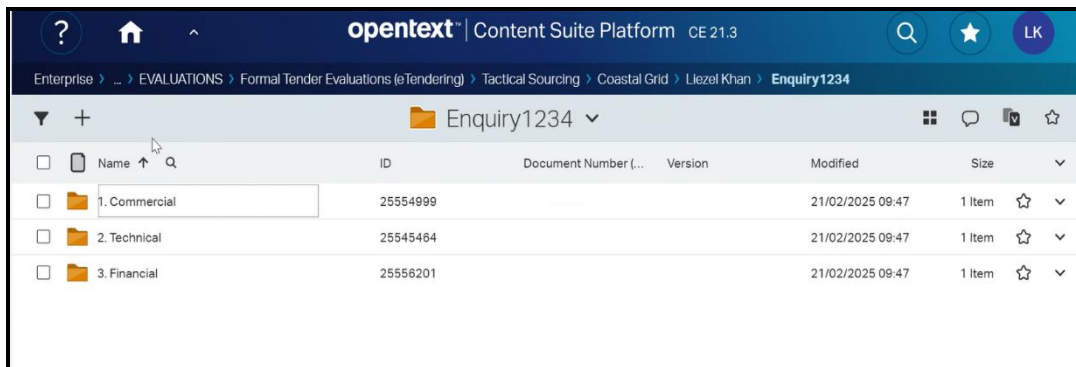


Figure 4

- The buyer must copy **all** the tender submissions to each sub folder if separating the folders per subcategory e.g. Technical, Commercial, SHEQ and Financial
- Once the information has been copied to each sub folder, the buyer will then delete the category that is not applicable to that sub folder. e.g. delete the Financial, Technical etc folders per supplier that is in the Commercial folder.
- Please note that this is done in order to facilitate easier access control for the buyers.

### 4. Notifications to Evaluator

#### 4.1 Notify that tenders are ready

- Send an email to the evaluators notifying them that tender files have been uploaded on OpenText and are ready for evaluation. See example below

Good morning, Evaluators

The documentation for tender [xxx] is ready and available for evaluation.

Kindly use the link below to access the folder. **Please ensure that you view the tender documents in 'Classic view' in OpenText.**

XXXXX

Please note:

- Documents should not be downloaded, printed or duplicated in any form.
- Please ensure that you view the tender documents in 'Classic view'.** Please liaise accordingly should you need assistance on how to access this view.
- Access will only be granted for a limited time period and will be revoked at the end of each business day that evaluations are ongoing. You will be required to re-request access thereafter

Regards

## 4.2 Access to evaluator to the virtual evaluation room

- Evaluators are given read-only' access to their respective folders. See figure 4 below
- Once evaluation is completed access to the folders must be taken away and the folder must be moved to OpenText documentation management for record keeping/filing.

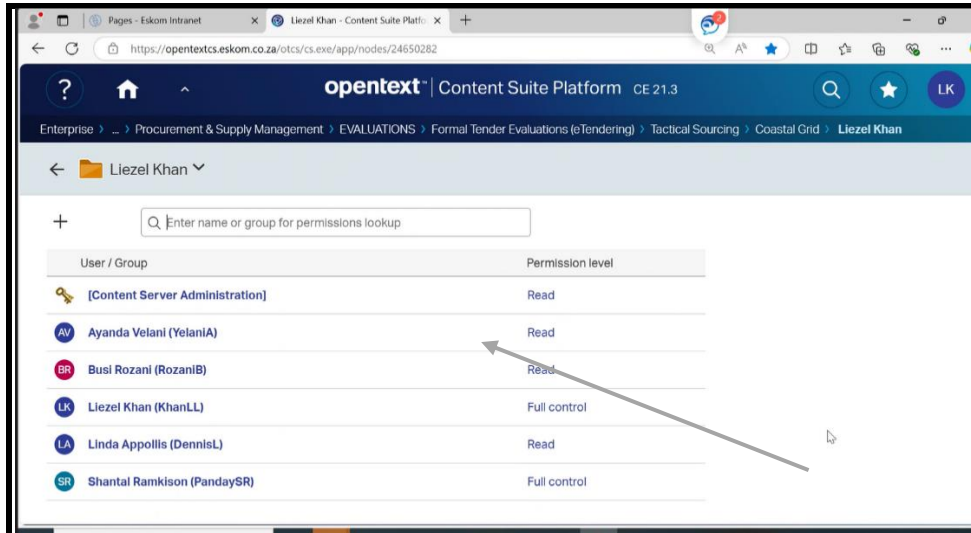


Figure 5

## 4.3. Viewing a file in classic view

- The Evaluator should access the tender file in “classic view “and this will allow for the pulled audit report to reflect the evaluator as having read the file and not “downloaded”.
- Click on the Profile Menu button
- Select Classic View

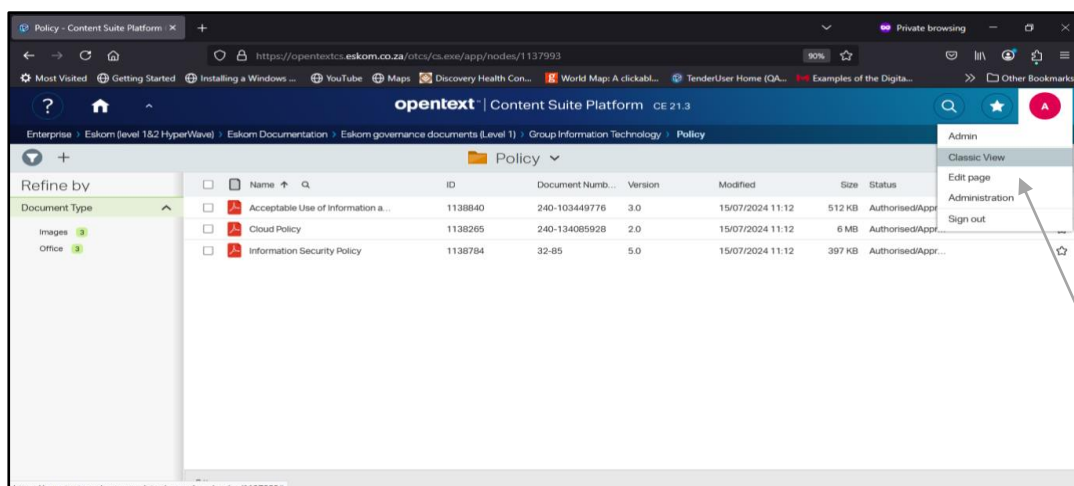


Figure 6

- Click the drop-down menu button next to the file name

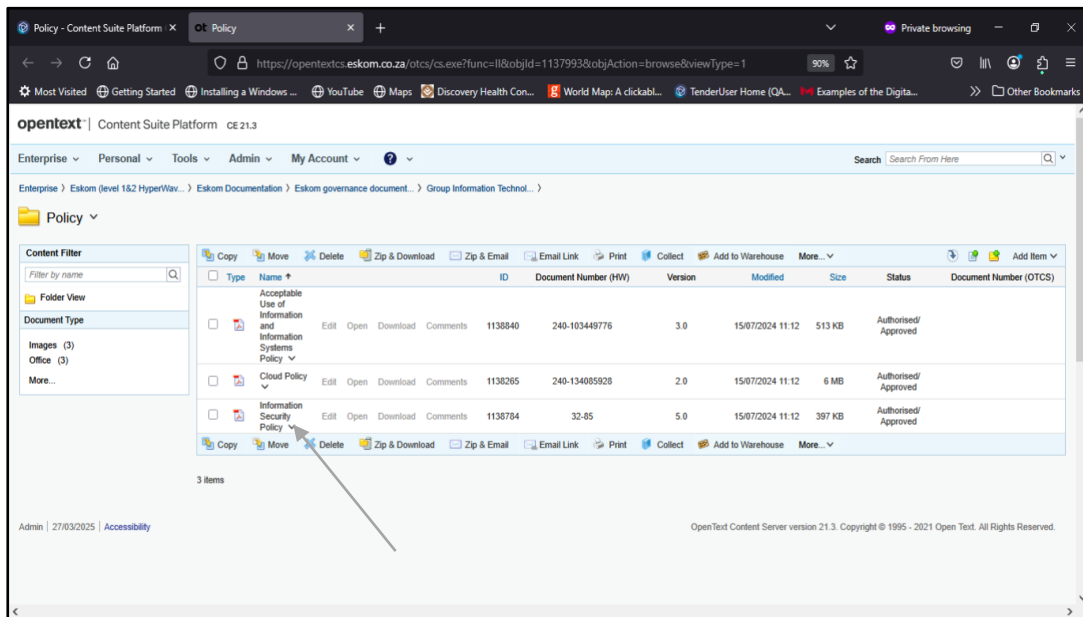


Figure 7

- Select View as Web Page

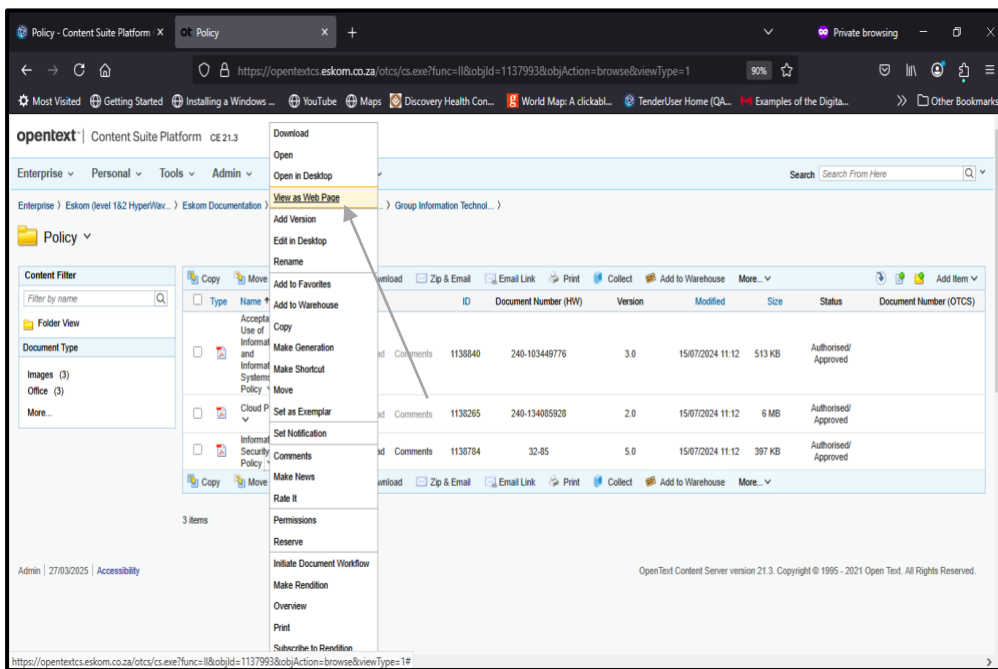


Figure 8

- The file is displayed



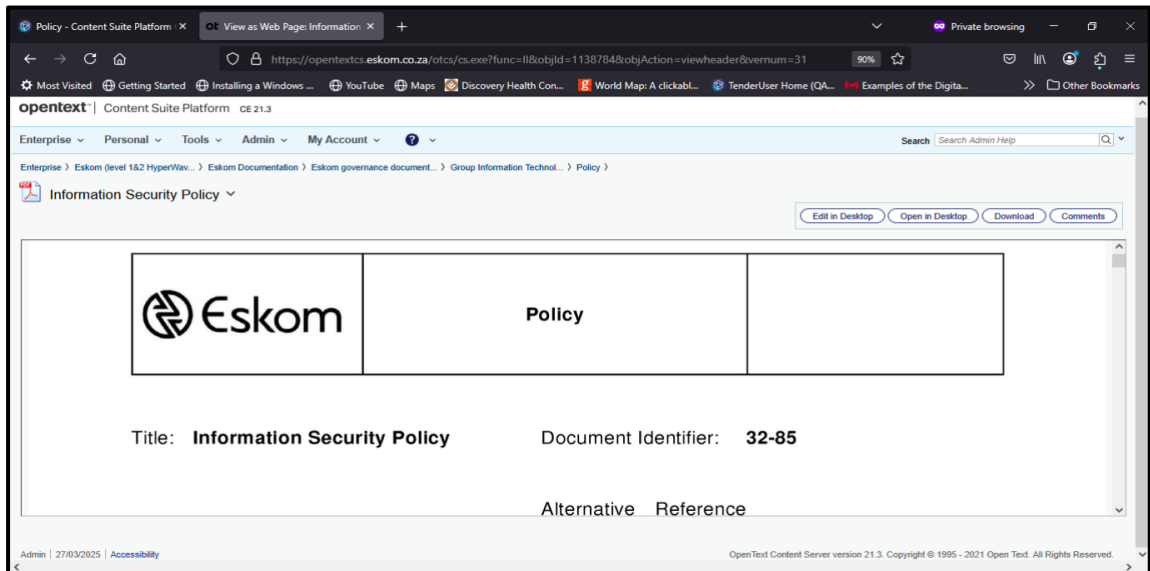


Figure 9

## 5. Virtual evaluation room rules

- Evaluations can only be done on an Eskom site
- Only yourself (buyer) and the procurement manager must have full access to the OpenText folders.
- Documents should not be downloaded, printed or duplicated in any form

## 6. How to draw the audit report for OpenText

- Navigate to the evaluations folder on OpenText
- Click the Audit report folder

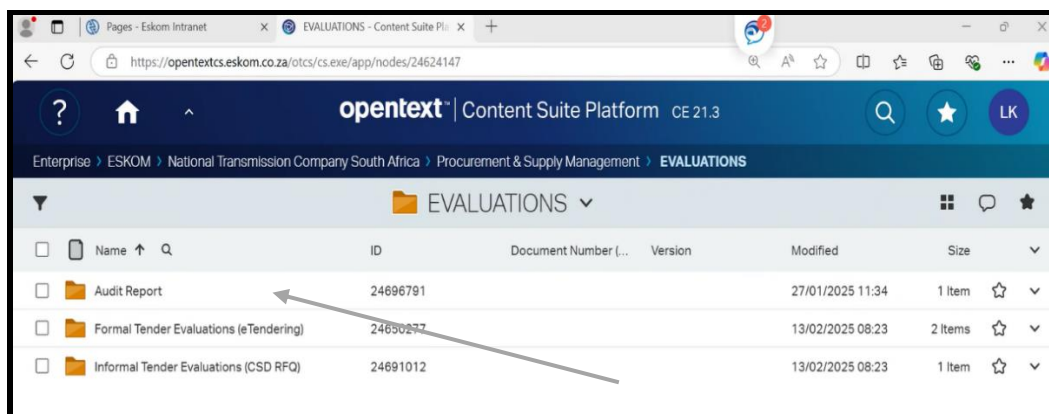


Figure 10

- Open the Audit WebReport folder



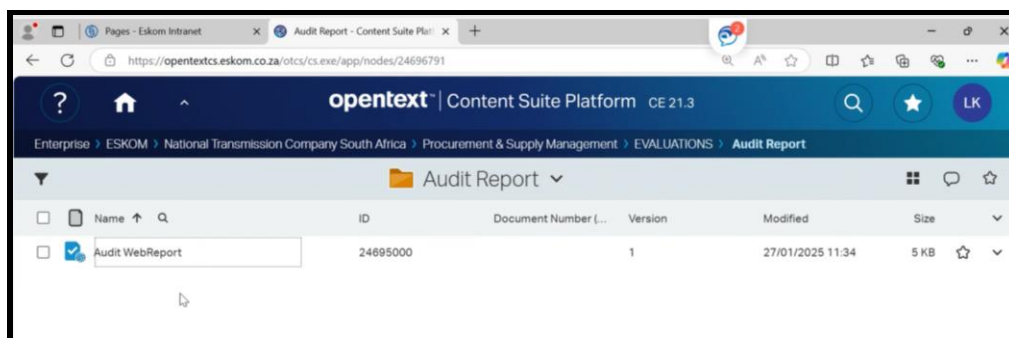


Figure 11

- Fill in the enquiry number and generate the report

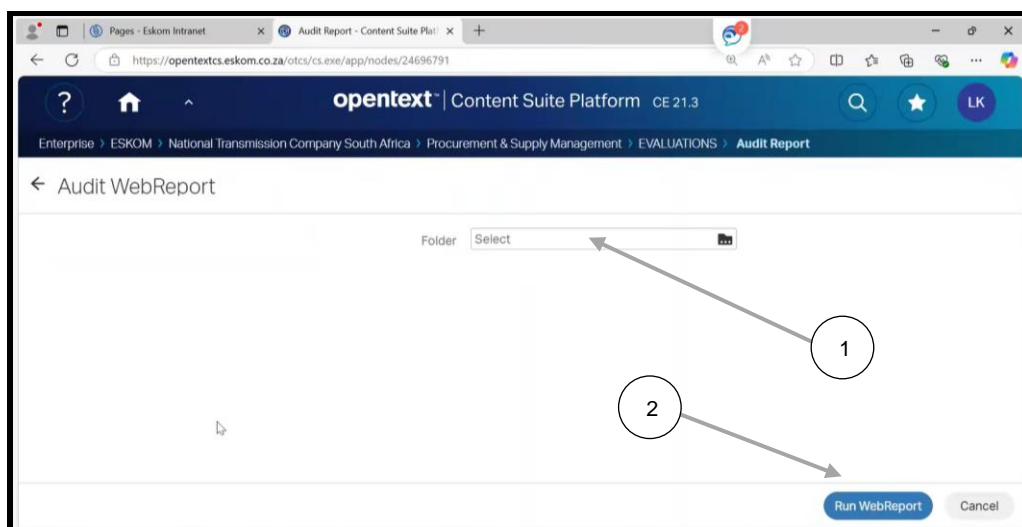


Figure 12

## 6. Document Management

- After evaluation, documents are moved from the Enterprise evaluation folder to OpenText document management for record keeping.
- These are the platforms on which the documents will be managed:
  - CSD
  - OpenText

## 7. Stakeholder engagement

RFQ invitations are sent directly to suppliers through the CSD RFQ Functionality System. In order for suppliers to be able to receive and respond to RFQ's they need to ensure that following is correct/ updated on CSD:

- All goods and services provided to Eskom updated with the correct United Nations Standard Product and Services Codes (UNSPSC) Segment/ Family/Class or Commodity.
- Up-to-date contact details.
- A current proof of address.

- Bidder information is correct as only bidder can submit RFQ's
- Registered for the correct location you can supply goods and services for.

## 8 CSD Notices

On a daily basis, you must access the CSD notices and check for updates and system downtimes

- Log in on CSD using your credentials

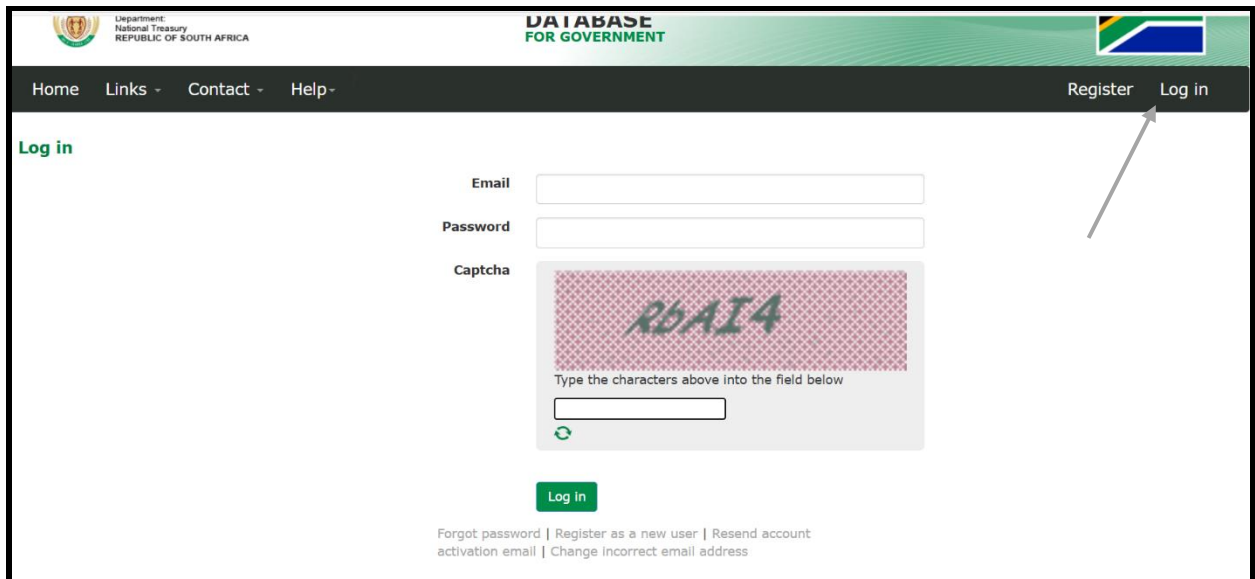


Figure 13

- Open the 'News' and 'Updates' folders and check for new notices

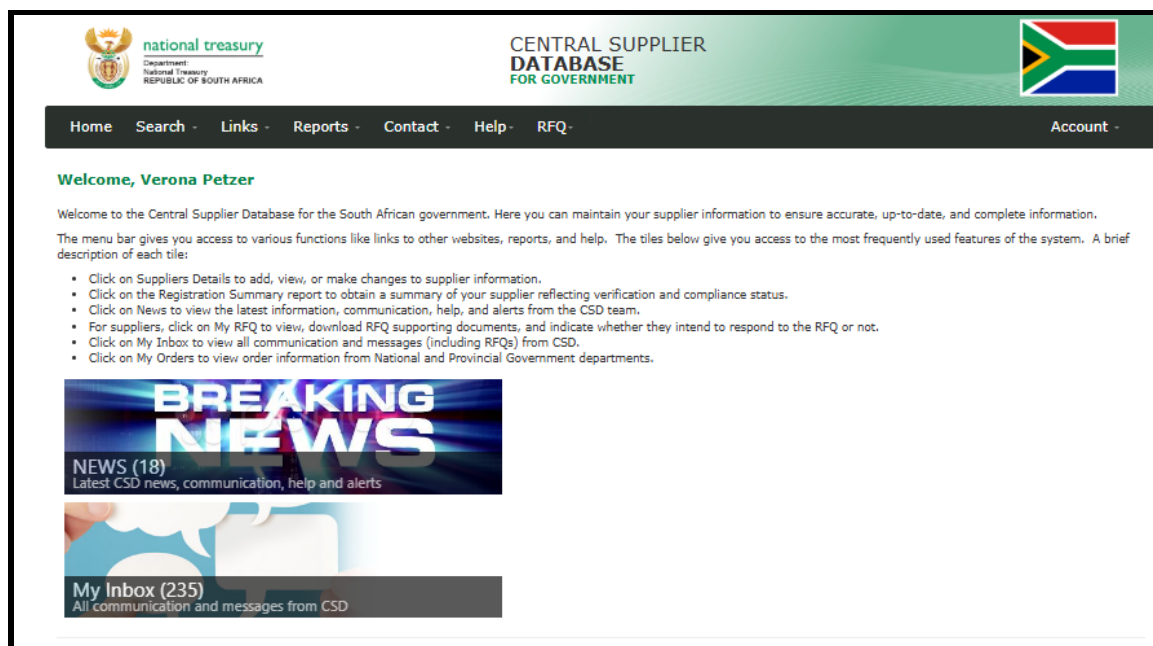


Figure 14

## 9 FAQs

No	System glitches or technical issues	Solution of way forward
1	Cannot login or move to the next button	Use Google chrome or edge to access the site
2	Cannot add documents	Remove special characters in enquiry number general information text box
3	I cannot search for supplier	Selection/search criteria were not met by supplier e.g. tax compliant- always set criteria against supplier report
4	Could not add supplier to search	The supplier might be registered as a public company and one of the directors is a government employee
5	CSD keeps on selecting same suppliers even if the commodity is not the same	It depends on the delivery location specified in the search. If you limit the search to a small area like a city or suburbs, you will most likely get the same suppliers. If you widen your search to a province or district level, you will get more suppliers as you are casting your 'net'/search over a wider area.
6	How many documents can supplier submit on CSD and what is the size limited	15 PDF documents, 50mg per document
7	I have moved the tender folders to my evaluation space but I cannot delete the folder in the tender office space?	<p>Send an email to the tender office requesting them to delete the folder for you. See the example below</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>Good day xxx,</p> <p>Please note that I have moved the folders from the tender office folder to my evaluation room, however, I do not have access to the parent folder, so I am unable to delete the empty tender folder in the tender office space. Please delete this folder.</p> <p>Thank you.</p> </div>

## 10 Organ of State – Frequently Asked Questions (FAQs)

These are FAQs from the CSD site accessible as follows:

- Login to your account
- Navigate to 'News'

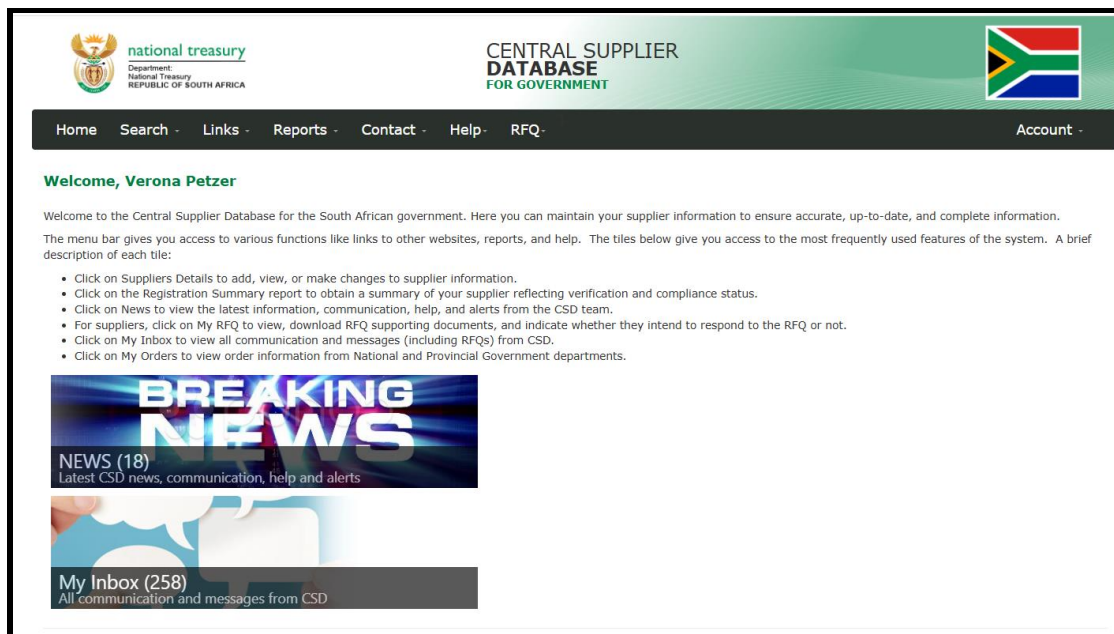


Figure 15

- Click on 'FAQ' then click on 'Organ of State FAQs'

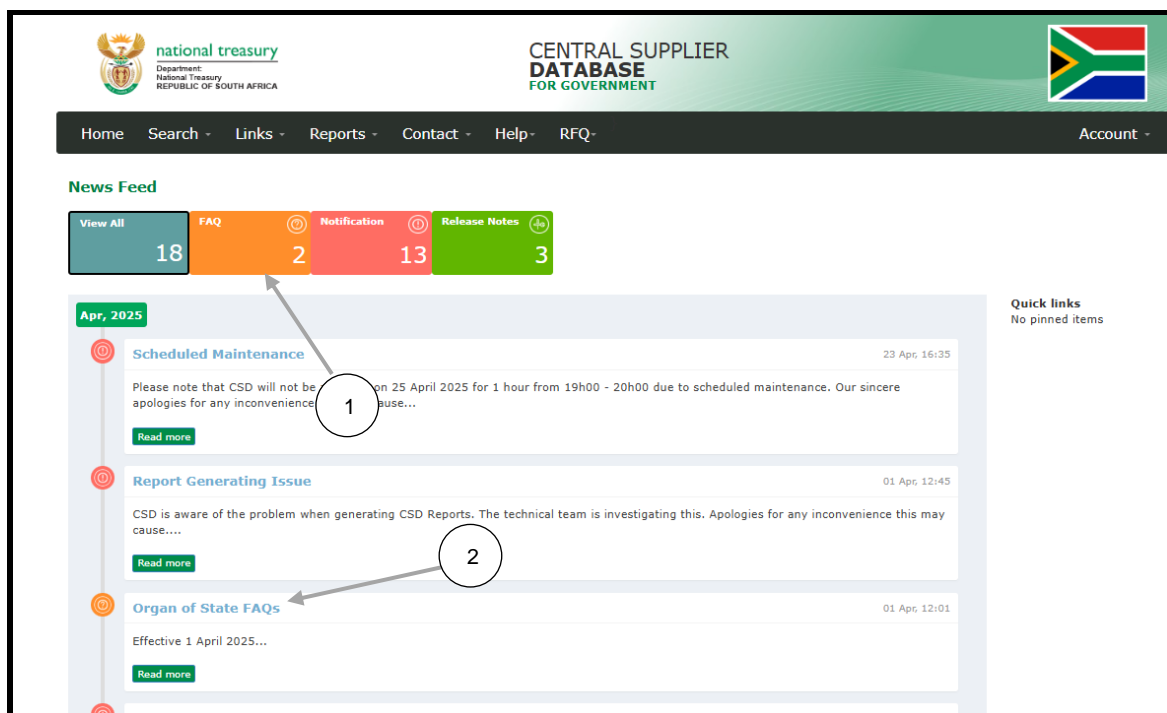


Figure 16

Check the web site for the latest information. These are the answers available on the site as at the time of publish of this document:

## **Roles, Access & Setup and Training Material**

### **1. How do I know which RFQ role in my SCM department should apply for?**

Visit [How can an Organ of State obtain access to RFQ Functionality](#) to understand the different RFQ roles and their responsibilities.

### **2. We have a small SCM department. Can one person have more than one RFQ role?**

Yes, but RFQ Distributor and RFQ Authoriser must be different users. However, roles like RFQ Support, Cataloguer, and Escalation Overview can be added to the same person.

### **3. Who can create an RFQ?**

Only an SCM practitioner with the RFQ Distributor role can create an RFQ.

### **4. I need guidance on the RFQ functionality (e.g., creating or editing an RFQ).**

Visit the OCPO video

guide: [http://ocpo.treasury.gov.za/Buyers\\_Area/Pages/Videos2025.aspx](http://ocpo.treasury.gov.za/Buyers_Area/Pages/Videos2025.aspx) For support, email: [csdoos.support@treasury.gov.za](mailto:csdoos.support@treasury.gov.za).

### **5. I need help choosing the correct commodity.**

Use the UNSPSC search tool via the “Find Commodities” option under the Supplier Search menu.

### **6. What is the difference between 'Any Local Address' and 'Preferred Local Address'?**

- 'Any Local Address' returns suppliers with matching delivery locations in any registered physical address.
- 'Preferred Local Address' limits search to a supplier's designated preferred delivery location.

### **7. Should suppliers email us their quotations?**

No. All submissions must be captured on the CSD by the supplier. Email submissions are not valid.

### **8. Who receives the supplier's RFQ invitation?**

Only the Bid Office Contact linked to the supplier's CSD profile receives the invitation email.

**9. Do both the RFQ Distributor and Authoriser receive email notifications?**

Only the RFQ Authoriser receives email notifications stating that a new RFQ awaits their authorisation.

**10. Will everything eventually be managed on CSD?**

Not entirely. eTenders, eSubmission, and CSD serve different purposes. If inviting multiple suppliers, CSD is recommended for transparency and supplier tracking.

**11. What if the same suppliers appear in every RFQ search?**

Broaden your search criteria. Try selecting a larger geographic area such as district or province level.

**12. What are RFQ filters and additional filters?**

Filters include Commodities, Locations, Accreditation Body, Enterprise Type, and Category of Persons. Expand the accordion in the supplier search panel to apply them. The RFQ filters enable the selection of suppliers who meet specific procurement goals or demographic criteria.

**13. What is the Edit RFQ Functionality?**

The Edit RFQ screen allows RFQ Distributors to:

- Update invited suppliers
- Maintain quotation line items
- Upload or remove supporting documents
- Save changes, submit RFQ, or cancel edits

**14. What if the CSD system is down?**

If CSD is temporarily unavailable, wait and try again after some time. Ensure you've checked your internet connection and browser compatibility. For extended downtime, contact the CSD support team. Avoid issuing RFQs or closing dates too close to system maintenance windows.

**15. What if a supplier's profile or information is out of date?**

Suppliers are responsible for maintaining up-to-date information on their profiles. If information is outdated (e.g., tax status, address, ownership), the supplier may not be invited to RFQs or may be disqualified. Encourage suppliers to submit changes and re-verify under the Overview tab.

**16. What does CSD verify and what doesn't it verify?**

CSD verifies:



- Tax compliance status (via SARS)
- Banking details (with banks)
- Government employee status (against DPSA records)
- Restricted supplier and director status
- Ownership and B-BBEE information (from CIPC if linked)
- Proof of address (based on submission, not live location)

CSD does NOT verify:

- The supplier's capacity to deliver
- Prices or quotations
- Quality of goods/services
- Policy compliance (this remains the responsibility of the Organs of State)

#### **17. Can CSD advise us on procurement policies?**

No. CSD is a system tool and does not provide policy guidance. Always refer to your institution's governance frameworks, SCM policy, and National Treasury regulations for procurement rules and specifications.

#### **18. How do I link item codes under Manage Item Details?**

Go to Manage Item Details under your RFQ setup. Use the Search Commodity function to find and link the appropriate UNSPSC code for each item. This helps ensure alignment with supplier profiles and improves targeting.

#### **19. What are the new enhancements from the effective 01 April 2025 release?**

- RFQ Detail Report now includes Procurement Goals.
- New Quotation Administrative and Quotation Price Reports available.
- Deadline for Clarification Questions added to RFQ create/edit screens.
- Manage Invitation List and Quotation Items accessible via pop-ups.
- Additional filters (Category of Person, Enterprise Type) added.
- Preferential Points default to 80/20.
- RFQ Distributors can add 'Other' Procurement Goals.
- Enhanced document upload options and tooltips.
- Quotations viewable after RFQ closes.
- Dropdowns for adding/removing suppliers expanded.

- New RFQ Cataloguer role allows linking of item codes to commodities.

## **20. How do I use the new Quotation Reports?**

Navigate to the RFQ list screen and select Edit or View. Scroll down to access the links to generate the *Quotation Administrative Report* or *Quotation Price Report*. These reports help evaluate supplier responses.

## **21. What's new in the document upload functionality?**

RFQ Distributors can now upload up to 15 PDF documents (max 100MB each), select document type (MBD, SBD, functional spec, other), and name custom types. Uploaded docs are visible during authorisation and viewing.

## **22. What is the new RFQ Create process?**

The RFQ creation process is simplified into two steps: Create RFQ → Edit RFQ. Previously it was a four-step process. Click *Save* to move from Create to Edit.

## **23. What is the RFQ Cataloguer role?**

A new role introduced to manage item details master data. Navigate to *Manage Item Details* to create, edit, or upload bulk items via template. This streamlines commodity and item linkage.

## 11 Frequently Asked Questions (FAQs) by suppliers

These are resolutions that will assist you with questions that suppliers may have on CSD. Check the website for the latest information

### CSD Registration & Profile Management

#### **Is it free to register on the CSD?**

Yes, registration on the Central Supplier Database (CSD) is completely free.

#### **Which browser should I use to access the CSD?**

Use the latest version of Google Chrome or Microsoft Edge for the best performance.

#### **What should I do if I'm experiencing issues on the CSD platform?**

First, check that your internet connection is stable. Many performance issues are caused by poor connectivity. If problems persist, try using a different browser (Chrome or Edge), clear your cache, or contact CSD support for assistance.

#### **What is the importance of the “Supplier Identification” tab?**

This tab controls rules around banking, tax, and B-BBEE compliance. Keep it up to date.

#### **What addresses must I include in my profile?**

You must add at least one physical and postal address. Upload valid proof of address for each physical address to avoid deactivation.

#### **Can I use my relative's address if my business doesn't operate there?**

No. You must only use addresses where your business actually operates. Using a relative's or unrelated location may result in deactivation or disqualification. Government may verify physical presence, and documents must reflect accurate operational addresses with the suppliers information.

#### **What if my business details change (banking, tax, contacts)?**

Update the details and on the Overview tab and submit the changes. A request (R-) number indicates updates are pending.

#### **I made changes to my supplier profile but still see an R-number – what does this mean?**

An R-number means your updates have not yet been submitted. To finalise the changes:

1. Log in to your CSD profile
2. Go to the **Overview tab**
3. Click **Submit**. Until you do, your updates won't reflect to government departments or appear in CSD searches.

**What happens if I don't respond to RFQs?**

After 5 unanswered invitations, the relevant commodity may be removed from your profile. It is better to respond with no than no response.

**What happens if I don't update my profile regularly?**

Your profile may become inactive. For example, over 600,000 supplier addresses were deactivated due to missing proof of address.

**What happens if I don't keep my information up to date for RFQs?**

If your profile information (such as contact details, tax status, banking details, or proof of address) is outdated or non-compliant, you may not receive RFQs or be disqualified from responding. Government departments rely on up-to-date supplier profiles for communication, verification, and awarding of RFQs.

**Why am I not being invited to RFQs?**

You might not be receiving RFQ invitations because your profile is incomplete, out of date, or non-compliant. Ensure that:

- Your profile is active and submitted
- You have selected relevant commodities and delivery locations
- Your contact details, especially your Bid Office Contact, are valid
- All required documentation (e.g. proof of address, tax compliance, bank details) is uploaded and up to date Remember: government departments only invite suppliers who meet the minimum requirements and are fully compliant on the CSD.

Also note: Since the introduction of CSD, buyers may now access a larger pool of suppliers. If you were previously the preferred or only supplier for a specific commodity, your profile now competes with others nationally. Some buyers may invite unqualified suppliers due to selection filters, lack of verification, or limited internal oversight. Stay compliant and visible and continue to follow up with relevant departments if you're concerned.

**What information do I need to keep updated on CSD?**

- Commodities
- Delivery locations
- Proof of physical address
- Beneficial ownership (via CIPC)
- Contact details (especially Bid Office Contact)
- Certification documents
- Tax compliance

**Should I update the demographic information of my business owners?**

Yes. Always ensure the **demographic details of your business owners** (race, gender, age group) are current on CSD and CIPC. This affects how your business is evaluated in terms of **preferential procurement points** and can improve your competitiveness.

**How do I make sure my profile updates are saved?**

Always go to the Overview tab and click Submit after making changes.

**Can I add multiple addresses and contacts?**

Yes. You may add several physical addresses (each with valid proof of address).

**What if my Bid Office Contact resigns?**

Update your CSD profile immediately to reflect the change. The Bid Office Contact must be an active CSD user, currently employed by your business.

**How often should I log into CSD to check for updates?**

Log in at least **once a week** to monitor messages, RFQs, and system notifications. Regular access helps you stay compliant and competitive.

**Is there a limit to the number of commodities I can select?**

No hard limit but only select **commodities you can realistically deliver**. Over-selecting can harm your credibility or result in removals and deactivation of supplier profile if you fail to respond.

**What happens if I upload the wrong or unreadable document?**

It may result in your profile or RFQ submission being marked **non-compliant**. Always verify document clarity and correctness before uploading.

**RFQs (Request for Quotations)****Where do I find RFQ invitations?**

In your email inbox and the My Inbox section on CSD. Check it regularly.

**Can CSD send me a link to view an RFQ?**

No. CSD will never send links. Log in directly at <https://secure.csd.gov.za>.

**How do I respond to a CSD RFQ?**

Navigate to My RFQs on the CSD, locate the relevant RFQ, click Open Quotation, and complete the required fields and documents.

**What are valid RFQ statuses?**

- Open: RFQ is active and accepting submissions
- Closed: Submission deadline has passed
- Awarded / Not Awarded / Cancelled: Final outcome has been determined

**What does "Quotation Not Submitted" mean?**

You did not submit your quotation before the deadline. Drafts will not be considered.

**Should I wait until the last minute to submit my quotation?**

No. Avoid submitting your quotation at the last minute. While the system allows submission up to the closing time, delays in internet connectivity or document uploads may cause your response to be incomplete or late. CSD will not reveal any pricing information of any

supplier until the RFQ is officially closed for evaluation, so early submission does not disadvantage you.

### **How do I verify if a CSD RFQ is valid?**

#### **Log onto CSD, on the homepage navigate to:**

- My Inbox: Check for official invitation emails and status updates.
- MyRFQ: View all RFQs you've been invited to and monitor their status.
- My Orders: Track legitimate purchase orders issued by National and Provincial departments.

If unsure, verify the RFQ by contacting the Organ of State directly via official channels listed on their website.

### **What if I want to offer services outside my province?**

You can, but only if:

- The commodity's delivery location reflects it
- You have the capacity to deliver there (government site visits may occur)

### **What if I don't respond to RFQs for certain commodities?**

That commodity may be removed from your profile. Only select what you can realistically supply.

### **Why is my certificate not showing up in search results?**

It may be expired. Ensure all certificates are valid and up to date.

### **How are suppliers found on CSD?**

Buyers search by:

- Commodity types
- Delivery locations
- Ownership categories (e.g., women, youth)
- Compliance status (tax, PoA, certificates)

## **Quotation Submission & Compliance**

### **How do I submit a quotation?**

After opening the RFQ on the CSD:

- Complete all unit prices, ensure you include VAT if you are a VAT vendor
- Upload mandatory documents (PDFs only, max 50MB each)
- Click Submit or Save as Draft if you're not ready

### **On the CSD what is checked before submission (Compliance Checks)?**

The system reviews:

- Tax status
- Government employee flags
- Restricted supplier/director status
- Proof of address
- Ownership (must total 100%)

- Bank verification
- B-BBEE validity

You cannot submit if flagged red in the government employee, restricted supplier, proof of address and ownership indicators. Use Re-Verify Supplier to update statuses.

**What are the badge colours for compliance checks?**

- Green: Compliant
- Amber: Needs attention
- Red: Non-compliant or blocked

**Communication with Organs of State (OoS)****Can I ask questions about an RFQ?**

Yes. Use the Messages icon in MyRFQ to:

- View answered questions
- Ask new questions (min. 2 characters)
- Track responses from OoS

**What is shown in the Messages section?**

- RFQ Number and Title
- Closing date of the RFQ
- Clarification deadline
- Answered Questions (expandable, with unread notification badge)
- My Questions and their response status
- Provide a Question form to submit queries

**Fraud Prevention & RFQ Authenticity****How can I tell if an RFQ is fake?**

Watch for:

- Suspicious links (CSD never sends them)
- Specific brands being requested
- Disclosed budgets
- Personal or non-gov email domains

**How else can I verify an RFQ?**

- Use My Inbox, MyRFQ, My Orders
- Visit the Organ of State's official website
- Contact their Supply Chain office directly

**Documentation & Certification****Can I see who won the RFQ?**

No. You will only receive a notification if your submission is Not Awarded. Final results are handled by the Organ of State.



**Will other suppliers see my quotation before the RFQ closes?**

No. CSD hides all pricing and quote data until the RFQ officially closes for evaluation.

**Can I update my RFQ submission after submitting it?**

Yes, but only before the RFQ closes. After the deadline, your submission is final.

**How do I know which documents are mandatory for an RFQ?**

Check the returnables section in the RFQ view. Only PDF files of 100MB and below are accepted.

**How will I know if I've been awarded the RFQ?**

If the RFQ is awarded to you, the system will send an automatic award notification email once the RFQ validity date is reached. Ensure your contact details are correct and keep an eye on your inbox.

**What documents must I upload?**

- Proof of address
- Verified banking details
- SARS tax reference number(s)
- Valid B-BBEE certificate (if applicable)
- Military veteran/disability certificates (if applicable)
- Beneficial ownership info via CIPC

**Do I need to declare ownership anywhere else?**

Yes. CIPC requires all companies to update beneficial ownership for compliance.

**Staying Informed & Getting Help****How do I stay informed about CSD updates?**

Check the Breaking News section on the CSD landing page. It contains:

- System enhancements
- Policy changes
- Release notes

**Where can I get help if I'm struggling with CSD?**

Contact:

- Email: [csd@treasury.gov.za](mailto:csd@treasury.gov.za)
- Call Centre: 012 406 9222
- Visit: <http://ocpo.treasury.gov.za> for training informational videos under the suppliers' area.

Always ensure your supplier profile is current and compliant to maximise your visibility and eligibility for government opportunities.