

How to Create and Manage Your Firm's Solicitation(s)

Firms Wishing to Submit a Solicitation:

- 1) After you log in, hover over "Contract Compliance" on the menu and choose "Solicitation Form" from the list.
- 2) Read the information and disclosures, and then click "Start or Manage a Solicitation Form".
- 3) Read the short acknowledgement about the Solicitation Form and click
- 4) Select your firm from the dropdown. You can only view firms that you are given access to as a Solicitation Form contact by the firm's primary or secondary contact or if you are the primary/secondary contact yourself. See the [AZ UTRACS User Manual](#) or [Quick Tips for Gaining Access](#) for more information.
- 5) Once you select your firm, three buttons appear for you to choose from, "Create a New Solicitation", "Continue an In-Process Solicitation" or "Open a Submitted Solicitation". **
 - a. To create a "New" Solicitation, click "Create a New Solicitation" and begin to type in the name or description of the project in the dropdown that appears to select the appropriate project.
 - i. Once the project is selected, a system message will appear. Click
 - ii. Once you click the first half of the Solicitation Form, the "Solicitation Details", will open up. This section contains information about the project for the Solicitation recipients. Fill out the mandatory asterisked (*) sections and any optional information, then select the Project County/Countries.
 - iii. Click and **read the information on the helpful tips**. Once you click the rest of the form will open. For more detailed instructions, watch the [instructional video](#) or see the [User Manual](#).
 - iv. Select criteria and create a result set for each type of work that you want to solicit bids/proposals for.
 - v. Type a custom message to the recipients.
 - vi. Choose from one of the buttons at the bottom of the form:
 1. "Save" will save the form. This is helpful so you can exit and return to the solicitation at a later time.
 2. "Submit for Approval" will submit the solicitation to AZ UTRACS Support for review and approval.
Please note! Once a Solicitation is approved, it cannot be recalled.
 3. "Preview" will show you an example of the email that the recipient firms will receive.
 4. "Delete" will delete the solicitation.
 - b. To continue an "In-Process" Solicitation, select "Continue an In-Process Solicitation" and choose the project from the dropdown.
 - c. To review, copy, download the list of recipients (approved solicitations only), or resend the confirmation email for a previously submitted Solicitation, select "Open a Submitted Solicitation"
 - i. *To review a previously submitted Solicitation*, choose the project from the dropdown.
 - ii. *To copy one of your previous Solicitation to a new Solicitation*, scroll to the bottom, click "Copy Into New Solicitation", click on the project that you would like to copy to, and select "Initiate Copy".
 - iii. *To download a list of the recipients*, scroll to the bottom and click "Export Recipients"
 - iv. *To resend the confirmation email to yourself*, scroll to the bottom and click "Resend Email".

Recipient Firms Wishing to Update Solicitations Received or Opt Out of Solicitations:

- 1) To update the type of solicitations that your firm receives, you should update your firm profile to reflect your current capabilities. See the [Quick Tips for Completing your Registration](#) for more information.
- 2) To opt out of receiving solicitations you should go to your firm profile and update the preferences for each contact under the "Firm Contact Information" section.

Solicitation Email Preference:
 Active (Opt In) Opt Out

**You will be able to see a Solicitation Form in any status created by anyone in your firm. The information will be displayed as follows: Project Number, Project Description, Solicitation Status, Email Address, Date/Time of Last Update.

Tips and Guides

- [FAQ's](#)
- [Quick Tips to gaining access to AZ UTRACS](#)
- [Quick Tips for completing your Registration](#)
- [Quick Tips for completing your Bidders/Proposers List](#)

System Requests

- [Request System Access \(New Users\)](#)
- [Resend UTRACS Activation Email](#)
- [Forgot UTRACS Password?](#)