7. You can view the status of the Contract Award in the **Notice Task Summary** box. It also displays information on who created it, modified it or published it and when. Draft notices can be deleted by clicking the link in this box. Once the notice has been published, the link changes and you can then cancel the notice.

☺ Whenever you submit, delete, or cancel a notice your World Bank Task Team will be notified by e-mail.

Create an Consultant Awards Notice (QCBS, QBS, FCS, LCS)

1. Enter the required information in the **General Information section**. If there is consultant information already entered for this project, you will have a [Lookup] button. This button will input most of the General Information as well as the Awarded Consultant/Firm information (if the Form 384 has been submitted).

2. Chose the **Method of Selection** from the drop-down box.

3. Follow steps 3-7 of the ICB Contract Award to complete the notice.

Create an Small Contracts Awards Notice (CQS, DIR, SSS)

1. Enter the required information in the **General Information** section.

2. Chose the **Report Period** using the pop-up calendars.

3. Enter the required information in the **Disclosure Report Details** screen.

4. After completing the first contract award entry, click [Add Next Entry] and complete the required fields for the next entry. Repeat this step for all awardees.

☺ Each contract award entry is the result of separate bidding/consulting processes and the only connection is that they happened within the same time period, usually quarterly.
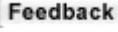
5. To save the notice as a draft and finish it later, click **Save as Draft**. To Save this notice and submit it to the Bank for review before publishing it, click **Save as Draft and Send to Bank**.

6. If the notice is completed and you would like to publish, click **Publish to External Sites**. This will submit the notice for publishing in *UN Development Business* and *dgMarket*.

View and Edit an Existing Notice

1. Under **Publishing** sub-tab, to view the notice, click on the description link.

2. To edit the notice, click the link 📝 in the Edit column next to the description.

3. The notice form opens up for editing, with the current Notice information populated.

4. After editing, select the option to **Save as Draft** or **Save as Draft and Send to Bank** or **Publish to External Sites** according to the desired status of the Notice.

Getting Help

1. For help on using Client Connection or to send us your suggestions, please click on the **Feedback** button [Feedback] in the upper right-hand corner or bottom left-hand corner of your Client Connection screen.

2. When you click on **Feedback**, you will be taken to a screen where you can enter your question or make any comments about Client Connection. You can also select a category to indicate which part of Client Connection you need help with.

3. When you submit your feedback, a message goes into an automated routing system. If you requested help, you will be contacted within 24 hours.

☺ **For policy questions, please contact your Task Team Leader**

Quick Reference Guide

Client Connection

This Quick Reference Guide will enable you to:

- Log into Client Connection
- Create a General Procurement Notice (GPN)
- Create a Specific Procurement Notice (SPNs, IFPs, EOIs)
- Create Contract Award Notices
- Edit & View Notices

Client Connection can assist borrower agencies in their procurement activities. Creating a procurement notice through Client Connection is a quick and standardized method for keeping the Bank informed and advertising your project in online marketplaces.

1. Use your web browser to navigate to http://clientconnection.worldbank.org and click **Login**

2. Enter your User ID and Password.

3. Click **Sign In**.

Access Procurement

1. From the **My Portfolio** page, use the **Select** or **Filter** tools to access your project. You will be directed to the **Project Overview Page**.

2. From the **Project Overview** page, click on the **Procurement Tab**.

3. You will be directed to the **Bids** page of Client Connection Procurement.

4. From the Bids page, click on **Publishing**.

☺ **Prior to creating an initial notice in this system, you should complete the contact information on the Borrower Team tab.**

Create a General Procurement Notice (GPN)

1. Under **Publishing** sub-tab, click the **Create Notice** button.

☺ **An overlay will appear where you can select they type of notice to be created. All procurement notice types can be created from the Publishing tab.**

2. Select **General Procurement Notice** from the drop down menu and click **Select**.
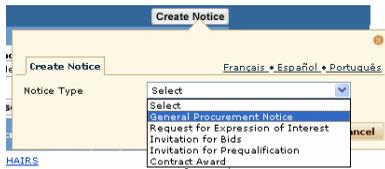
☺ **A form will open up. All fields with an asterisk are required.**

3. Select the language of the notice from the drop down menu.

4. To enter the category codes for the goods/works/ services to be procured, click **Add/Delete CPV Codes**.

5. A window will pop up. Search for the appropriate category code by entering a keyword in the Search on keyword/code field and clicking **Go**.

6. Select the appropriate category by clicking the category code. Your selection will be displayed in the **Selected Categories** box. Add as
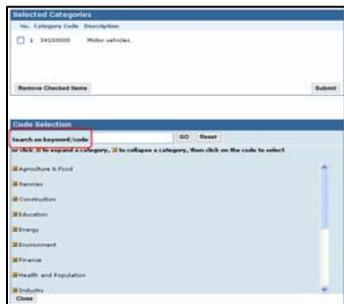
many codes as necessary. You can also remove codes from the **Selected Categories** box by checking the codes you would like to delete and clicking **Remove Checked Items**.

7. Once you have selected all the necessary codes, click **Submit**. Once clicked, the pop up window will close and the category codes will be imported in the GPN.

8. Enter the full official text of the notice in the field provided. Please use the World Bank standard template available on the World Bank's external website.

9. Enter the contact information for the notice in the fields provided. You can also click on **Choose Contact** and select the appropriate contact person, which will automatically fill out the form with that person's contact information.

10. To save the notice as a draft and finish it later, click **Save As Draft**. To Save this notice and submit it to the Bank for review before publishing it, click **Save as Draft and Send to Bank**.

11. To complete the notice, click **Publish to External Sites**.

ⓘ Please note that clicking **Publish to External Sites** submits the notice for publishing in *UN Development Business* and *dgMarket*. It also sends an email to the World Bank Task Team.

12. You can view the status of the GPN in the **GPN Notice Summary** box. It also displays information on who created it, modified it or published it and when.
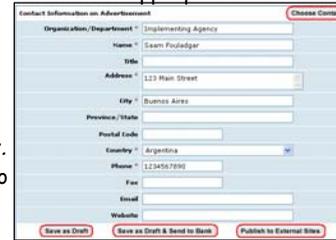
Create Specific Procurement Notices (SPN)

Specific Procurement Notices (SPNs) can be either Invitation for Bids, Invitation for Prequalification, or Requests for Expressions of Interest. From the **Publishing** sub-tab, click on the create notice button select the notice type. Depending on the type of notice selected, a listing of current bids will appear. If the Bid for which you need to publish a procurement notice is not listed, click the link and **a bid will be created along with the notice.**
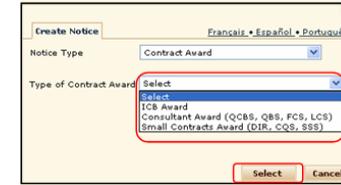
1. This will open up a form very similar to the GPN form. To publish the SPN, you will follow the same process as when publishing a GPN (steps 3 to 12
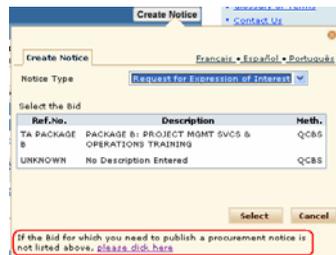
of **Create a General Procurement Notice**).

Create a Contract Award Notice

1. Under the **Publishing** sub-tab, click the **Create Notice** link.

2. After selecting the Notice Type, select the **Type of Contract Award** and click **Select**.

Create an ICB Awards Notice

1. Enter the required information in the **General Information section**. If the bid information is already entered for this project, you will have a **Lookup** button. This button will input most of the General Information as well as the Awarded Bidder information (if the Form 384 has been submitted).

2. Enter the required information in the **Bidder Details section**. The first **bidder** entry defaults with the **status** filled in as "Awarded Bidder." Please note that the bidder information can be input in any order as long as there is one awarded bidder, and at least one evaluated bidder.

☺ Evaluated Bid Price and Contract Price are in the evaluation currency (which is selected in the **General Information** screen).

3. After completing the first bidder detail entry, click **Add Next Entry** and complete the required fields for the next entry. Repeat this step for all bidders.

4. In the case of Rejected Bidders, there will be a drop down that lists various reasons for rejection.

5. After completing required fields, select the option to **Save as Draft** or **Save as Draft and Send to Bank** or **Publish to External Sites** according to the desired status of the Notice.