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STATE OF IOWA

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ANNETTE DUNN
CHIEF INFORMATION OFFICER

October 22, 2021

To: All Potential Bidders
From: Steve Dawson, Issuing Officer
Subject: RFB #0921-185-01 – Web Portal Upgrade

Amendment Two

Please amend the subject RFB to reflect the change to the timeline for submitting questions for clarification and for the state to provide answers to the timely received questions. This Amendment Two shall supersede, modify and/or change all requirements to the contrary in the RFP and associated documents.

Questions and Responses begin on the next page.

RFB #0921-185-01

ABD Portal Upgrade - Agency Responses

	Section Number (i.e. 1.2.1)	Page Number	Section Text Requiring Clarification	Specific Question / Request	Agency Response
1	General Request			We request that a demonstration of the existing system be held so all vendors, especially those that do not have access to the existing Web Portal, may see the system that is to be hosted and enhanced. As part of the demonstration, we recommend that the presenter review the desired system enhancements. Providing information about the current system will lead to less project risk and benefit the Agency.	With the time frame available to the Agency, we will not be able to accommodate this request within the scope of this RFB.
2	General Request			If a demonstration can not be arranged, or in addition to the demonstration, please provide a username and login for an existing test system so all interested vendors may review the existing Web Portal.	With the time frame available to the Agency, we will not be able to accommodate this request within the scope of this RFB.
62	4.1.1	12		States customer adds items "as they do today". Assuming the state of Iowa owns the IP rights to the current software, would it be possible to see a demonstration of this product if we are being asked to recreate the same features and process flow in the new product	The Agency does not wish to replace its current product. This RFB is to select a bidder to enhance the existing portal, not to replace it.
3	General Questions			What vendor developed the current version of the Web Portal? What other vendors participated in development of past versions of the Web Portal? What vendor currently support the Web Portal? What vendors support the other system components (JDA, Dynamics, WMS, others).	Island Technologies (https://www.islandtechnologies.net/)
4	General Questions			What are all of the technologies (including version numbers) currently used by the Portal components? Including the following: 1.Hosting Service Provider 2.Server Specifications 3.Front End Framework 4.Development Technologies 5.Platform Information 6.Integrations (APIs and Other) 7.Database System 8.Commercial off the Shelf Systems 9.Authentication Component Details 10.Background Services 11.Job Schedulers	PHP, SQL Server, Vendor Specific Hosting and APIs
5	General Questions			Does the Agency own a license to all of the components of the Web Portal, and does this license allow the Agency to enhance the system code?	No, the core code is not owned by the agency.
6	General Questions			Does the Agency have physical custody of the currently used code base? If yes, where does this reside?	No
7	General Questions			What are all of the system integrations supporting the existing Web Portal?	The code interacts with via database link to the Microsoft Dynamics AX 2012 environment (SQL Server 2014 Backend). Code sends orders to Microsoft Dynamics AX 2012 via SFTP. Code will need to interact similarly with Microsoft Dynamics 365 in 2022.
8	General Questions			What are all of the changes that need to be made to the system integrations?	See Section 4 of the RFB for this information.

9	General Questions			Please provide the system documentation intended for system users. Specifically, user manual/instructions for all user roles.	https://shop.iowaabd.com/faq.php
10	General Questions			Please provide the system technical documentation.	That information is proprietary to the current vendor.
11	General Questions			What is the name, version and function of the specific MS Dynamics Application and JDA Application.	Connections are via SFTP and SQL Server database link. Exact software versions are not a limiting factor and can change during the length of the contract awarded by this bid.
12	General Questions			What are the current fees paid by the Division for hosting and supporting the Portal? Please provide the detailed fee structure for both hosting services and support.	That information is proprietary to the current vendor.
13	4.1	12	4.1 Develop Editable Shopping Cart Mechanic for Current ABD Shop Portal	Please describe in detail the Current Order Entry process and the desired future state Order Entry process that must be attained by the system enhancement project.	Customers currently add and remove products from their shopping cart. After reaching a $1,000 minimum purchase amount they are able to place their order. Once placed this order cannot be modified. The future state we desire is that customers would be able to edit their order, maintaining the $1,000 minimum, up to a specified cutoff time unique to the each customer.
14	4.1	12	4.1 Develop Editable Shopping Cart Mechanic for Current ABD Shop Portal	What are all of the limitations of the existing system that should be addressed by this project scope?	See Section 4 of the RFB for this information.
15	4.1	12	4.1 Develop Editable Shopping Cart Mechanic for Current ABD Shop Portal	What is the meaning of the term "Cart Mechanic"? Does this enhancement item mean that orders placed using Cart Order Entry system should be editable through the Web Portal?	Correct, cart mechanic is like any other online shopping portal. Orders can be edited before being placed but ABD requests that in the future orders be editable between being placed and being fulfilled.
16	4.1	12	4.1 Develop Editable Shopping Cart Mechanic for Current ABD Shop Portal	Does the current system support taking the new orders but not support the process of users editing an order once it has been placed?	Correct, the current process does not allow customers to edit an order after being placed. This is the primary request of this bid.
17	4.1	12	4.1 Develop Editable Shopping Cart Mechanic for Current ABD Shop Portal	Is the objective to use the same code components (i.e. framework, tools, technologies, platform) and enhance the system to support additional functionality, or Is there a need for additional sets of components to enhance the user processes?	Yes, enhance the current system.
18	4.1.1	12	4.1.1 The customer adds items to their shopping cart as they do today.	What are the specific rules associated with reserving or relieving inventory that is added to or removed from the shopping cart? Does this enhancement related only to the editing of the cart - for example a customer adds products to the existing cart then modifies the cart?	Currently, orders can be edited before being placed but ABD requests that in the future orders be editable between being placed and being fulfilled. Reservation does not happen until after the order has been transmitted to the AX system, so orders still in the portal will not impact reservation.
19	4.1.2	12	4.1.1 The customer adds items to their shopping cart as they do today.	What are the specific rules associated with reserving or relieving inventory during the checkout process?	Portal inventory levels based on view of inventory from Microsoft Dynamics system on 15 minute refresh. Items in cart are reserved against view inventory level until order is placed or session timeout is reached.

20	4.1.1.1	12	4.1.1.1 The basket management is dynamic until submission (with an option for admin set timeouts) and asynchronously checks against inventory levels to prevent orders on stocked out items and must accommodate different units of sales on a single product (case, bottle, split) at different prices respectively.	What does the term "dynamic" mean in this context? Please provide additional detail and some examples.	Dynamic means the customer can add and remove items from the basket/cart.
21	4.1.1.2	12	4.1.1.1 The basket management is dynamic until submission (with an option for admin set timeouts) and asynchronously checks against inventory levels to prevent orders on stocked out items and must accommodate different units of sales on a single product (case, bottle, split) at different prices respectively.	What are the existing and future state pricing tiers? Please provide the current state and future state pricing matrix.	Pricing matrix is not relevant to ability to answer bid. Pricing is variable and can be changed by the agency at any time. Ordering is based on whole case and individual bottle pricing per product.
22	4.1.1.3	12	4.1.1.1 The basket management is dynamic until submission (with an option for admin set timeouts) and asynchronously checks against inventory levels to prevent orders on stocked out items and must accommodate different units of sales on a single product (case, bottle, split) at different prices respectively.	Are there volume discount that may impact the pricing of an item based on the total of the order? If so please provide the details.	Volume discounts are not calculated during order placement. This is handled after fulfillment outside of the ordering portal.
23	4.1.1.4	12	4.1.1.1 The basket management is dynamic until submission (with an option for admin set timeouts) and asynchronously checks against inventory levels to prevent orders on stocked out items and must accommodate different units of sales on a single product (case, bottle, split) at different prices respectively.	How does the current system calculate prices? What is the data source for price calculations? Is the Dynamics system involved in order pricing? Is there an API call that exists to retrieve the pricing for a specific item for a specific unit of measure? What is the pricing process?	Prices are entered by vendors and ABD staff into the current portal and stored both in the portal database and Microsoft Dynamics environment.
24	4.1.1.5	12	4.1.1.1 The basket management is dynamic until submission (with an option for admin set timeouts) and asynchronously checks against inventory levels to prevent orders on stocked out items and must accommodate different units of sales on a single product (case, bottle, split) at different prices respectively.	How long a user can be in Cart and hold inventory from other customer orders? What is the current Admin set timeout for checking against inventory levels?	This is a variable amount which can be changed. Current inventory levels are checked at 15 minute intervals.
25	4.1.1.2	12	4.1.1.2 Items are currently added either directly, by fast-key, or Excel sheet upload.	Are there log tables that capture the data from the Excel file before uploading the order info into the system?	Yes
26	4.1.1.3	12	4.1.1.2 Items are currently added either directly, by fast-key, or Excel sheet upload.	Please provide a sample upload file.	CSV Template: CODE # Num Cases Num Bottles 11111 2 1 22222 4 3
27	4.1.1.4	12	4.1.1.2 Items are currently added either directly, by fast-key, or Excel sheet upload.	If the upload of the Excel file fails, is the reservation of inventory destroyed or is it maintained for the existing order? Please provide details and examples.	Failed upload does not reserve products. Customer must upload file again.
28	4.1.1.5	12	4.1.1.2 Items are currently added either directly, by fast-key, or Excel sheet upload.	If an Excel sheet contains errors, is the full file rejected or is just a portion of the file rejected?	Entire file is rejected until errors are corrected.
29	4.1.1.6	12	4.1.1.2 Items are currently added either directly, by fast-key, or Excel sheet upload.	How are users informed If an Excel sheet contains errors or requires changes?	Customer is notified immediately of error rows and product numbers to be corrected.

30	4.1.1.7	12	4.1.1.2 Items are currently added either directly, by fast-key, or Excel sheet upload.	What are all of the "fast-keys" that may be used for the purpose of keying in the data?	Five digit product code and number of cases or bottles to be ordered.
31	4.1.2	12	4.1.2 They submit their cart as an order, similar to today.	Please include this process in a system demonstration or share an example using screenshots.	Process described above in row 18.
32	4.1.2.1	12	4.1.2.1 Order goes into a new holding area in Dynamics Warehouse, not the sales orders table yet.	What does "new holding area in Dynamics Warehouse" mean? Is this a warehouse site location the Microsoft Dynamics AX system?	New order location in Dynamics allowing for the edit of placed orders before fulfillment of orders. This is to be developed by ABD's dynamics partner and integrated with shop portal changes.
33	4.1.2.2	12	4.1.2.1 Order goes into a new holding area in Dynamics Warehouse, not the sales orders table yet.	Do items in this new holding area increase the allocated inventory in the system? Do items in this new holding area decrease the available units of an inventory item?	Orders placed into holding area will decrease available inventory. Items removed from orders in holding area will increase available inventory.
34	4.1.2.3	12	4.1.2.3 Shopping cart remains open in Shop Portal until an ABD defined date and time based on the customer delivery date.	What functions are executed (or flags updated) when the Cart is "Closed"? What are all of the processes being run or executed when the Cart Close event occurs?	This is proprietary to the Dynamics environment and will be shared with winning vendor.
35	4.1.2.4	12	4.1.2.4 The customer is able to make changes to the shopping cart and changes are saved and communicated back to Dynamics Warehouse.	What order status(es) must exist in order for a customer to modify, add to, or delete an order (remove all quantities). In other words, what statuses are allowed for editing of an order? For example, a possible status and rule is: If the payment status of an order is "PROCESSED", the order may not be deleted from the system by using the Web Portal.	Orders should be editable until Dynamics notfies the portal that the order has been fulfilled. After this the customer has to work with the ABD return process which is outside the scope of this cart process.
36	4.1.2.5	12	4.1.2.4 The customer is able to make changes to the shopping cart and changes are saved and communicated back to Dynamics Warehouse.	What are the rules relating to a situation when at the time of editing an existing order, some of the previously available items have become unavailable? In this scenario, does the system prevent the user from placing an order until the quantities are reduced to the "newly" available inventory numbers?	Unavailable items should be removed from the cart and the customer should be notified via email the specific products no longer available. This should be completed as soon as the items are not available to allow the user more time to edit their cart.
37	4.1.2.4.1	12	4.1.2.4.1 Order must stay above the minimum dollar threshold.	How is the minimum threshold calculated? Please provide details. If the order does not meet the minimum threshold, does the order get deleted from the system at the time of submission by removing all of the reservation of allocated inventory?	$1,000 is the minimum for initial orders. The order is not deleted in the system If the total order is not at the $1,000 minimum, the order cannot be completed by the user.
38	4.1.2.4.3	12	4.1.2.4.3 Customer reconfirms shopping cart and changes are saved to Dynamics Warehouse.	Does this reconfirmation create a "New" order in the system, or does it modify an existing order?	Edits existing order.
39	4.1.2.5	12	4.1.2.5 If a product stock level hits zero in Dynamics then a notice is sent to the Shop Portal and passed on to the customer letting them know a product on their order is out of stock.	Is this a background service that runs and monitors the inventory in the Dynamics Warehouse (site location) to identify orders which cannot be allocated to inventory? If no, then how does this work?	Yes, this is a background process.
	4.1.2.6	12	4.1.2.5 If a product stock level hits zero in Dynamics then a notice is sent to the Shop Portal and passed on to the customer letting them know a product on their order is out of stock.	How does the customer get notified? Is there an email message being sent out? Does the Customer has to log into the site to review the status of an order? What notification framework is in place (email, texts)?	Email Notification from the portal. SMS would be a nice future notification.
40	4.1.2.6	12	4.1.2.5 If a product stock level hits zero in Dynamics then a notice is sent to the Shop Portal and passed on to the customer letting them know a product on their order is out of stock.	What are the rules regarding shipping partial orders if some of the items can be fulfilled? How does this impact product cost and shipping cost computations?	Partial orders are fulfilled and delivered to customers. This does not affect product costs or shipping costs.

41	4.1.2.5.1	12	4.1.2.5.1 Recommend alternate products	What are the detailed steps and logic used to identify "recommended alternate products"? Is the logic order based, customer based, location based, or based on other variables?	To be defined by ABD and winning vendor.
42	4.1.2.5.2	12	4.1.2.5.1 Recommend alternate products	Is the system to show only recommended products that have Current Available Inventory of greater than the minimum quantity allowed for ordering? If not, what are the rules associated with inventory availability that should be applied in order to determine what should be displayed as recommended alternate products?	Should only show available products in same category as out of stock product.
43	4.1.2.5.2	12	4.1.2.5.2 Remind the customer of their order cutoff date and time.	Is there a background service that runs and monitors cut off time for a customer order? If not, then how is this handled?\n\nHow does the customer get notified? Is there an email message being sent out or does a Customer have to log into the site to review the status of an order? What notification framework is in place (email, texts)?	Yes, customer order cutoff is defined by Dynamics and available to the customer via the portal. Notification is a new process to be defined by ABD and winning vendor.
44	4.1.2.5.3	12	4.1.2.5.2 Remind the customer of their order cutoff date and time.	What are the rules associated with handling cases where the customer has started an edit before the cut off time, but the order is not submitted by the cutoff time?	New process to be defined by ABD and winning vendor.
45	4.1.2.6	12	4.1.2.6 Any special order or HA orders handled by ABD get added into the shopping cart.	What does item this mean? What is HA? Please provide specifics.	Special Orders and Highly Allocated Orders have special rules associated with them today. ABD and winning vendor will create a new process to incorporate these orders into the regular orders to be sent to Microsoft Dynamics for fulfillment.
46	4.1.2.6.1	12	4.1.2.6.1 Do not let the customer remove those products from the cart.	What does this mean? Please provide details.	Special Order and Highly Allocated Orders cannot be removed from orders because they are placed by customers through special processes. Details will be shared with winning vendor.
47	4.2	12	4.2 On ABD defined cutoff time the order is finalized, moved out of the Dynamics holding area, sent to the Salesorder table, and then sent to JDA (Ruan). The time period between hitting the Salesorder table and going to JDA needs to be as short as possible.	How do the orders get submitted to JDA (for example, is this an API call)? What options are available to shorten the time to submit orders into JDA system (for example: use a different type of an API)?	Orders are sent to JDA from Microsoft Dynamics via SFTP. The control of time is between Shop Portal and Microsoft Dynamics and the customer's order cutoff time.
48	4.2	12	4.2 On ABD defined cutoff time the order is finalized, moved out of the Dynamics holding area, sent to the Salesorder table, and then sent to JDA (Ruan). The time period between hitting the Salesorder table and going to JDA needs to be as short as possible.	Does the order get deleted from the Dynamics holding area after it's been sent to Sales Order table?	Yes
49	4.3	12	4.3 Shop Portal sends notice to the customer that the order has been finalized and provides a list of all items that are included in the order. This does not replace the current invoice process.	Is this an email notification to the customer? What other notification channels are used by IAB for all user types?	Email Notification from the portal. SMS would be a nice future notification.
50	4.4	13	4.4 Migrate Shop Portal site to updated server hosting environment with monthly costs broken down:	What is necessitating "updating" of the current hosting environment? What aspects of the current hosting environment need to be updated and what is the status of the hosting environment attributes that need to be "updated"? Are there currently performance issues that are being attributed to the hosting environment?	ABD does not host the current portal and expects bidders to provide a proposed server hosting environment and cost breakdown. ABD requests bidders to provide hosting recommendation based on the bidder's experience.
51	4.5.2	13	4.5.2 Update PHP Plugins	Please identify and provide details about all of the PHP plugins that are currently used and identify those that require updating.	PHP version 5.4.16\njQuery version 1.8.1\nBootstrap version 2.1.1

52	4.5.3	13	4.5.3 Accessibility Update to WCAG 2.1 Level AA	What portions of the system are currently WCAG 2.1 Level AA compliant? What portions of the system must be enhanced as part of the scope of this project in order to be WCAG 2.1 Level AA compliant?	WCAG 2.1 AA is a goal for all ABD sites.
53	4.5.4	13	4.5.4 PCI Compliance Standards	Is the system currently PCI compliant? If no, then what system deficiencies exist that must be addressed as part of the scope of this project in order to be PCI compliant?	Payment is handled after delivery and PCI does not apply to orders.
54	4.5.5	13	4.5.5 jQuery Update to 3.x	What is the current version of jQuery?	jQuery version 1.8.1
55	4.5.6	13	4.5.6 Bootstrap Update to 5.x	What is the current version of Bootstrap?	Bootstrap version 2.1.1
56	4.6	13	4.6 Work with ABD and OCIO staff to design Shop Portal 2.0 to integrate with the new Microsoft Dynamics 365 warehouse system.	What is the schedule for this item?	Microsoft Dynamics 365 goes live Q1 2022. Enhancements to shop portal will go live following Dynamics 365 launch.
57	4.6	13	4.6 Work with ABD and OCIO staff to design Shop Portal 2.0 to integrate with the new Microsoft Dynamics 365 warehouse system.	What vendor is implementing the new Microsoft Dynamics 365 warehouse system?	Blue Horseshoe Solutions, Inc.
58	4.6	13	4.6 Work with ABD and OCIO staff to design Shop Portal 2.0 to integrate with the new Microsoft Dynamics 365 warehouse system.	What system is being replaced by the new Microsoft Dynamics 365 warehouse system?	Microsoft Dynamics AX 2012
59	4.6	13	4.6 Work with ABD and OCIO staff to design Shop Portal 2.0 to integrate with the new Microsoft Dynamics 365 warehouse system.	Microsoft does not have a product called "Microsoft Dynamics 365 warehouse system." What specific Microsoft product is being implemented and what is the version number that is being implemented? What modules of the product are being implemented?	Microsoft Dynamics 365 Finance and Operations
60	5.2	14	Bid	How will a vendor be determined? Is this strictly based on price, or are there other scored variables that will be considered? If there are other scored variables, what weights will be given to the price and other scored variables?	This is a Request for Bids, so the Responsible Bidder (as defined in the RFB documents) with the lowest bid will be selected.
61	5.2	14	Bid	The RFB refers to "maintenance costs". What are the work/support items that are included as "maintenance costs"?	Hourly rate charged by the bidder for work to fix or enhance the shop portal following the launch of Shop Portal 2.0.
63	4.1.1.2	12		May we see an example of the excel sheet format?	CSV Template: CODE # Num Cases Num Bottles 11111 2 1 22222 4 3
64	4.2			What is JDA (Ruan)?	Ruan Transportation is ABD's trucking and warehouse partner. JDA is their warehouse management system that communicates with the ABD Microsoft Dynamics WMS.
65	4.2			Please clarify… are we finished once we move data to the Salesorder table or will our solution also need to replace the existing process that transmits data from Salesorder to JDA?	Process is finished once Microsoft Dynamics moves order from new sales holding area to Salesorder table. Microsoft Dynamics transmits sales orders to JDA.
66	4.3			"Shop Portal sends notice to the customer", what is the method of notification? Email, SMS, displayed within the portal itself?	Email Notification from the portal. SMS would be a nice future notification.

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67	4.4			Is there access to current server sizing or performance statistics that we can review? Having some sense of server traffic and load will help us size the systems and provide a more accurate cost estimate.	ABD serves approximately 2,000 customers. We handle on average 350 orders per day. Average order amount is $4,400. Average daily volume is over $1,000,000. Traffic is 94% desktop based, 6% mobile. We currently handle 2,700 active products.
68	4.5			Is it required to stick with a PHP solution or could we entertain an Angular or other front-end route? There are very specific components called out that need to be upgraded (jQuery, Bootstrap, etc.) – upgrading these elements will likely have an impact to other areas of the portal that are not part of the bid. The bid is really focused on the shopping cart. We are assuming this site also has authentication and access control, product lookup features, user profile maintenance, etc. If we upgrade the components we would need to ensure these other components still functioned	PHP is the current platform and requested upgrade path. Bidders are allowed to propose alternate solutions as part of their bid. It is correct that the site currently has "authentication and access control, product lookup features, user profile maintenance".
69	4.5			What is the current version for the site components that are needing upgraded?	PHP version 5.4.16 jQuery version 1.8.1 Bootstrap version 2.1.1
70	4.6			Is UI/UX already designed or will there need to be UI/UX design services provided?	Current UI/UX exists but modification can be recommended by bidders.
71	General			If the portal's primary function is not payment but involves payment, does that count as valid experience?	Shopping cart mechanics from other ordering sites counts as relevant experience. Payment functionality alone is not relevant experience as payment is not handled by the portal.
72	General			Will the incumbent be bidding on this proposal?	Anyone may bid on this RFB; however, we do not know who will bid on it, including the current vendor.
74				Does the shop only include spirits? Is there a need to add products with lower alcohol content?	The state is the sole wholesaler for liquor/spirits. Other alcoholic beverages, such as beer and wine, are distributed by the private sector in the state of Iowa.
75				Can you provide a temporary license and login to check customer experience?	No
76				Are Order confirmation and shipping notifications covered as part of this RFP?	Yes
78				How do HA (Highly allocated) and MA (Monthly allocated) products become assigned to a cart?	Currently they are not assigned to a cart. This is a requested change as part of this bid and to be defined by ABD and winning bidder.
79				Does the current software have any limitations when connecting to and exchanging data with Microsoft Dynamics 365 Warehouse?	Current software communicates via database links and SFTP with Microsoft Dynamics AX 2012. ABD is interested in pursuing enhanced communication abilities with Microsoft Dynamics 365.
80				Are there any specific design requirements for Shop Portal 2.0 - such as making it mobile responsive so that you can do away with the mobile site completely?	Mobile responsive Shop Portal 2.0 is nice to have but not specifically required.
81				Do you need to have the site translated to another language?	No

82				What payment gateway does the site currently use?	Payment is handled outside shop portal after order fulfillment.
83				Is it possible to see a flow chart of the front end and back-end process?	No
84				Do you have a re-ordering process?	Yes, https://shop.iowaabd.com/faq.php#q21
85				Would you be open to using an industry-standard PHP eCommerce / ordering platform to replace this software?	Bidders are allowed to propose an alternative platform.
86				What are your current hosting requirements?	Production and Test/Backup environments. Hosted in cloud facility outside State of Iowa controlled data center.
87				Do MA products also need to be restricted from cart removal?	ABD deals in Special Order and Highly Allocated. Monthly Allocated are not handled through a special process.
88				Are you looking to upgrade https://shop.iowaabd.com/ portal only?	Yes
89				How many new templates need to be designed as a part of the project?	TBD between ABD and winning bidder.
90				Do you have a style guide or brand standards that the developer would be required to follow? If not, do you expect us to create a style guide as a part of the project?	Yes, ABD will provide current style guide to winning bidder.
91				What is the budget for this project?	Bidders are encouraged to provide their best price.