Port of Tacoma Request for Proposal # 82948
Addendum #2

Date 7/24/2018

The following is additional information regarding **RFP 82948** titled **Microsoft Dynamics 365 CRM Email Marketing Solution** released on 7/16/2018. **The due date and time for responses remains as 8/6/2018 @ 2:00PM PST**. This addendum includes both questions from prospective bidders and the Port's answers, and revisions to the RFP. This addendum is hereby made part of the RFP and therefore, the information contained herein shall be taken into consideration when preparing and submitting a bid.

Item #	Date Received	Date Answered	Vendor's Question	Port's Answer	ITB Revisions
1	7/17/18	7/18/18	Whether companies from Outside USA can apply for this? (like, from India or Canada)	Firms outside the United States may propose if they can meet the requirements of the RFP.	
2	7/17/18	7/18/18	Whether we need to come over there for meetings?	Meetings and training can be done remotely via phone/web.	
3	7/17/18	7/18/18	Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)	Assuming the submitter can meet the requirements of the work, home office location is negotiable.	
4	7/17/18	7/18/18	Can we submit the proposals via email?	See instructions in RFP 82948, Attachment A on page 8, Submittal of Proposal	
5	7/17/18	7/18/18	We are an Italian company we do not have any tax number in the US and on page 10 I see the checklist and taxpayer id number, so my question is in order to participate should we apply through an American partner?	To do business in the US, a foreign business must obtain a TIN or EIN number and pay taxes on income generated in the US. For more details on the international business consult the IRS website https://www.irs.gov/businesses/international-business . Whether you submit a proposal as a foreign business or partner with a US business is a business decision.	
6	7/18/18	7/18/18	Is re-platforming your current Content Management System within the scope of this project?	"No. The solution must work with Microsoft Dynamics 365 CRM."	
7	7/18/18	7/18/18	Could we submit the proposal without any references?	See page 5 of the RFP section Final Evaluation Phase, 3.	

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8	7/20/18	7/24/18	It would be helpful for us to understand a little more about your Dynamics environment and Dynamics CRM size (number of records). To clarify, we define a record as a unique name and email address. What is the size of your Dynamics CRM? Are there records not stored in Dynamics, stored in another database, that you plan to market to as well?	Active Accounts: 12,143 Total Active Contacts: 24,916 Active Contacts with email address: 18,767 All contacts we intend to use are within Dynamics CRM.	
9	7/20/18	7/24/18	What MS Dynamics version? Online or On-Premise?	See Attachment G of RFP	
10	7/20/18	7/24/18	Internet Facing Deployment (IFD) configured?	No	
11	7/20/18	7/24/18	Active Directory Federation Services (ADFS) configured?	Yes	
12	7/20/18	7/24/18	Do you leverage multiple Active Directory domain controllers for MS Dynamics authentication?	Yes	
13	7/20/18	7/24/18	Do you desire to sync multiple MS Dynamics organizations into a single instance?	We have one Production and one Test instance of Dynamics 365 CRM. Both should have the email marketing solution integrated but should be kept as separate instances.	
14	7/20/18	7/24/18	Do you have a test MS Dynamics environment?	Yes.	
15	7/20/18	7/24/18	Select the standard Entities that you are currently using? __Lead __Contact Account __Opportunity	We use Contacts and Accounts but are not currently using Leads or Opportunities for marketing purposes.	

16	7/20/18	7/24/18	Select the standard Entities that are updated via any custom workflows or 3rd party Solutions: __Lead __Contact __Account __Opportunity	Account and Contact records	
17	7/20/18	7/24/18	Will the sync be uni-directional or bi-directional?	We assume that activities performed using the email marketing solution (such as sending emails) would be visible in CRM so CRM has a full picture of interaction with the Accounts and Contacts. If the email marketing solution maintains contact information outside of CRM then CRM should be the source of record for those contacts and the contact information would only need to sync one-way (from CRM to the email marketing solution).	
18	7/20/18	7/24/18	Do you run any reoccurring (i.e. daily) workflows that update all leads or contacts?	Yes. Weekly for a subset of Contacts.	
19	7/20/18	7/24/18	Do you leverage any de-duplication rules for leads or contacts?	Yes, for Contacts.	
20	7/20/18	7/24/18	Do you have any custom entities that hold data valuable to the marketing team?	No.	
21	7/20/18	7/24/18	Do you leverage any middleware solutions (i.e. Scribe, Sitecore, SSIS)? If so, which one and which systems	Yes. Azure Logic App to synchronize information for some Contacts from Azure Active Directory.	

			does it connect?		
22	7/20/18	7/24/18	Do you plan on syncing all contacts or a partial data set as part of implementation?	All Active Contacts	