



E-bonding: A refresher on what it is and the benefits

Presented to:
Project Owners & Municipalities
Presented on: February 20, 2020

Welcome!



Moderator:

Sharon Clark-Koufis

**Director of Membership &
Stakeholder Services**

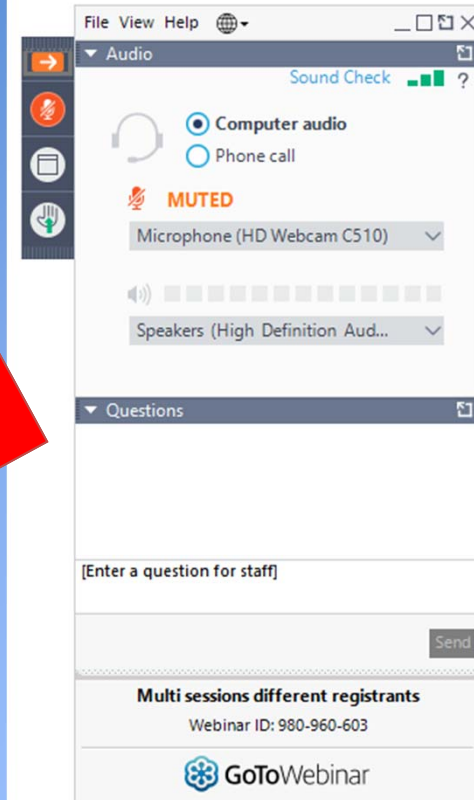
Presented in partnership by:



Questions Panel

**Type questions in
the “Questions”
panel and click
“Send”**

**Q&A will take place
at the end of the
webinar**



Agenda

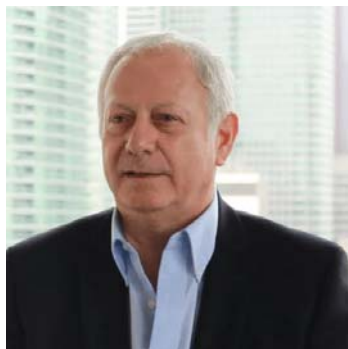
- Introduction
- What is an e-bond/digital bond?
- Overview of the process to get an e-bond
 - E-bond request
 - E-bond submission
 - E-bond verification
- MERX & E-tendering
- Q&A



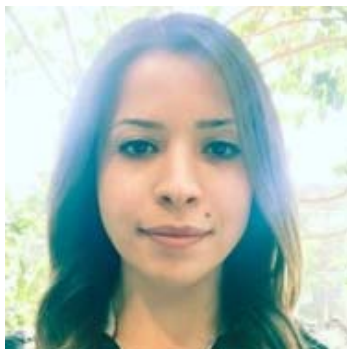
Presenters



Steve Ness
President
Surety Association of Canada



Lorice Haig
President & CEO
Xenex Enterprises Inc.



Marianne Eid
Client Onboarding Specialist
MERX



Isabelle Moroni
Marketing
Communications Manager
MERX



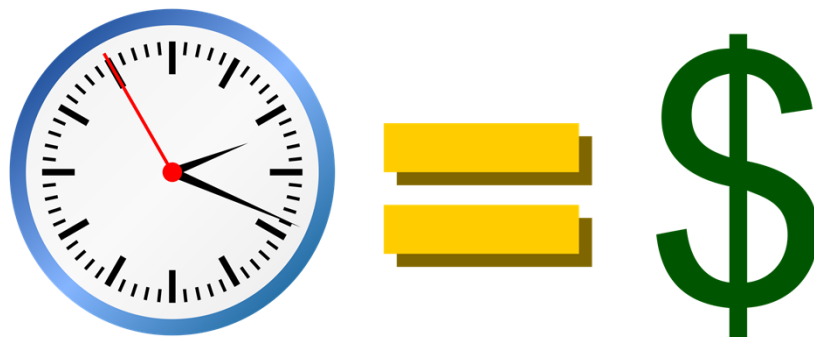
Steve Muxlow
President
Mobile Bonds Inc.

Surety Association of Canada Background

- **Surety Association of Canada (SAC) is the national trade advocacy association that represents the interests of the surety industry across Canada**
- **Members Include:**
 - Primary Surety Firms
 - Surety Reinsurers
 - Surety / Insurance Brokers
 - Other organizations that provide related and complementary services to the industry
- **SAC Members write approximately 97% of all surety premiums written in Canada**

Reasons for E-bonding

- **Saves time**
- **Decreases errors**
- **Saves cost**
- **It's green, paperless**
- **It's easy**



Our Role

- ➔ **Educate Stakeholders**
- ➔ **Provide Resources:**
 - ❖ **Position Paper (021): Bonds in a Digital World**
 - ❖ **Vendor Guide – Evaluates e-bonding providers**
 - ❖ **Quick Reference Chart of Requirements**
- ➔ **Facilitator:**
 - ❖ **Tender document language**

Visit SAC website at www.suretycanada.com

What is an E-bond?



**An electronic file with embedded digital certificate
creating a secure electronic document with
a uniquely identifiable fingerprint**

It must be verifiable by the owner and substantiate the following:



**The integrity of
the content**



**Digital
Signatures**



**Digital Seal
(if applicable)**



**Acknowledgement
of Intent**

What is an E-bond?



standard electronic
file format

- The bond must be able to be viewed, printed, saved and stored in a standard electronic file format (typically PDF).



- Verification may be completed by the owner at any time during the life of the bond.



- Verification of the results must provide a clear indication of a pass or fail.

A Digital Bond

Digital
Signatures

(R2012-03)
Page 1 of 1

Bid Bond

Bond No.: 111111111 Amount: \$ 10% of Tender Price

KNOW ALL PERSONS BY THESE PRESENTS, that, Fusion Pipe
as Principal, hereinafter called the Principal, and The Guarantee Company of North America
as Surety, hereinafter called the Surety, are, subject to the conditions hereinafter contained, held and
firmly bound unto DEFENCE CONSTRUCTION (1951) LIMITED as Obligor, hereinafter called the
Crown, in the amount of TEN PER CENT dollars (\$ 10% of Tender Price),
lawful money of Canada, for the payment of which sum, well and truly to be made, the Principal and the
Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and
severally, firmly by these presents.

SIGNED AND SEALED this 17th day of October, 20 17.
WHEREAS, the Principal has submitted a written tender to the Crown, dated the 18th
day of October, 20 18th, for New Building
and Office

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION are such that if:

(a) the Principal, should his tender be accepted within the period specified by the Crown, or, if no
period be specified, within thirty (30) days after closing date of the tender, does execute within a
period specified by the Crown, or, if no period be specified therein, within fourteen (14) days after
the prescribed forms are presented to him for signature, execute such further contractual
documents, if any, as may be required by the terms of the tender as accepted, and does furnish a
Performance Bond and a Labour and Material Payment Bond, each in the amount of 50% of the
Contract price and satisfactory to the Crown, or other security acceptable to the Crown, or

(b) the Principal does pay to the Crown the difference between the amount of the Principal's tender
and the amount of the Contract entered into by the Crown for the work, supplies and services which
were specified in the said tender, if the latter amount be in excess of the former,

then this obligation shall be void; otherwise it shall remain in full force and effect.

PROVIDED, HOWEVER, that the Surety and the Principal shall not be liable to the Crown for an amount
greater than the amount specified in this Bond.

PROVIDED FURTHER that the Surety shall not be subject to any suit or action unless such suit or action
is instituted and process therefore served upon the Surety at its Head Office in Canada, within twelve (12)
months from the date of this Bond.

IN TESTIMONY WHEREOF, the Principal has hereto set its hand and affixed its seal, and the Surety has
caused these presents to be sealed with its corporate seal duly attested by the signature of its authorized
signing authority, the day and year first above written.

SIGNED, SEALED AND DELIVERED in the presence of:

Test Principal
Principal

Test Broker
Witness

Test Broker
Surety

Corporate seal if applicable.

SEAL
2001
FUSION PIPE
INC.

SEAL
2001
THE GUARANTEE COMPANY OF NORTH AMERICA
INC.

Digital vs Electronic



A true e-bond must be digital in nature (i.e. a document which meets the described criteria in previous slides).

Bid Bond (R2012-03)
Page 1 of 1

Bond No.: 2487038-01 Amount: \$ 125,000.00

KNOW ALL PERSONS BY THESE PRESENTS, that Major Construction Company, as Principal, hereinafter called the Principal, and Surety, hereinafter called the Surety, are, subject to the conditions hereinafter contained, held and firmly bound unto DEFENCE CONSTRUCTION (1951) LIMITED as Obligee, hereinafter called the Crown, in the amount of ONE HUNDRED TWENTY FIVE THOUSAND (\$125,000.00) dollars (\$125,000.00), lawful money of Canada, for the payment of which sum, well and truly to be made, the Principal and the Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

SIGNED AND SEALED this 2nd day of July, 2012.

WHEREAS, the Principal has submitted a written tender to the Crown, dated the 2nd day of July, 2012, for Hospital for Children and Adults.

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION are such that if:

(a) the Principal, should the tender be accepted within the period specified by the Crown, or, if no period be specified, within thirty (30) days after closing date of the tender, does execute within a period specified by the Crown, or, if no period be specified, within fourteen (14) days after the prescribed form is presented to him for signature, execute such further contractual documents, if any, as may be required by the terms of the tender as accepted, and does furnish a Performance Bond and a Labour and Material Payment Bond, each in the amount of 50% of the Contract price and satisfactory to the Crown, or other security acceptable to the Crown, or

(b) the Principal does pay to the Crown the difference between the amount of the Principal's tender and the amount of the Contract entered into by the Crown for the work, supplies and services which were specified in the said tender, if the latter amount be in excess of the former, then this obligation shall be void; otherwise it shall remain in full force and effect.

PROVIDED, HOWEVER, that the Surety and the Principal shall not be liable to the Crown for an amount greater than the amount specified in this Bond.

PROVIDED FURTHER that the Surety shall not be subject to any suit or action unless such suit or action is instituted and process therefore served upon the Surety at its Head Office in Canada, within twelve (12) months from the date of this Bond.

IN TESTIMONY WHEREOF, the Principal has hereunto set its hand and affixed its seal, and the Surety has caused these presents to be sealed with its corporate seal duly attested by the signature of its authorized signing authority, the day and year first above written.

SIGNED, SEALED AND DELIVERED in the presence of:

Principal: Dean Smith

Witness: [Signature]

Surety: [Signature]

Scanned Bond

VS

Bid Bond (R2012-03)
Page 1 of 1

Bond No.: 2487038-01 Amount: \$ 125,000.00

KNOW ALL PERSONS BY THESE PRESENTS, that Major Construction Company, as Principal, hereinafter called the Principal, and Surety, hereinafter called the Surety, are, subject to the conditions hereinafter contained, held and firmly bound unto DEFENCE CONSTRUCTION (1951) LIMITED as Obligee, hereinafter called the Crown, in the amount of ONE HUNDRED TWENTY FIVE THOUSAND (\$125,000.00) dollars (\$125,000.00), lawful money of Canada, for the payment of which sum, well and truly to be made, the Principal and the Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

SIGNED AND SEALED this 2nd day of July, 2012.

WHEREAS, the Principal has submitted a written tender to the Crown, dated the 2nd day of July, 2012, for Hospital for Children and Adults.

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION are such that if:

(a) the Principal, should the tender be accepted within the period specified by the Crown, or, if no period be specified, within thirty (30) days after closing date of this tender, does execute within a period specified by the Crown, or, if no period be specified, within fourteen (14) days after the prescribed form is presented to him for signature, execute such further contractual documents, if any, as may be required by the terms of the tender as accepted, and does furnish a Performance Bond and a Labour and Material Payment Bond, each in the amount of 50% of the Contract price and satisfactory to the Crown, or other security acceptable to the Crown, or

(b) the Principal does pay to the Crown the difference between the amount of the Principal's tender and the amount of the Contract entered into by the Crown for the work, supplies and services which were specified in the said tender, if the latter amount be in excess of the former, then this obligation shall be void; otherwise it shall remain in full force and effect.

PROVIDED, HOWEVER, that the Surety and the Principal shall not be liable to the Crown for an amount greater than the amount specified in this Bond.

PROVIDED FURTHER that the Surety shall not be subject to any suit or action unless such suit or action is instituted and process therefore served upon the Surety at its Head Office in Canada, within twelve (12) months from the date of this Bond.

IN TESTIMONY WHEREOF, the Principal has hereunto set its hand and affixed its seal, and the Surety has caused these presents to be sealed with its corporate seal duly attested by the signature of its authorized signing authority, the day and year first above written.

SIGNED, SEALED AND DELIVERED in the presence of:

Signed electronically by: Dean Smith on 2012-07-02 10:00 AM

Principal: [Signature]

Witness: [Signature]

Surety: [Signature]

To verify authenticity, click on SignatureMaster™ website "Verify Document" link, enter Document Key: [Key] and CAE-7333847-4-01465346-C300-AED

Electronic Bond

An electronic bond can be confused for a scanned, signed & sealed paper bond document and /or signature or seal image.

In this case, the application of signatures and seals are unverifiable and therefore does not meet the test of a digital e-bond.

Digital vs Electronic

In **summary** an e-bond does not include:

(R2012-03)
Page 1 of 1

Bid Bond

Bond No.: 248938-09 Amount: \$ 125,000.00

KNOW ALL PERSONS BY THESE PRESENTS, that Major Construction Company as Principal, hereinafter called the Principal, and Surety Bond Company of Canada as Surety, hereinafter called the Surety, are, subject to the conditions hereinafter contained, held and firmly bound unto DEFENCE CONSTRUCTION (1951) LIMITED as Obligor, hereinafter called the Crown, in the amount of ONE HUNDRED TWENTY FIVE THOUSAND dollars (\$125,000.00), lawful money of Canada, for the payment of which sum, well and truly to be made, the Principal and the Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

SIGNED AND SEALED this 2nd day of July, 20 09.

WHEREAS, the Principal has submitted a written tender to the Crown, dated the 2nd day of July, 20 09, for Hospital for Children and Adults.

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION are such that if:

(a) the Principal, should his tender be accepted within the period specified by the Crown, or, if no period be specified, within thirty (30) days after closing date of the tender, does execute within a period specified by the Crown, or, if no period be specified therein, within fourteen (14) days after the prescribed forms are presented to him for signature, execute such further contractual documents, if any, as may be required by the terms of the tender as accepted, and does furnish a Performance Bond and a Labour and Material Payment Bond, each in the amount of 50% of the Contract price and satisfactory to the Crown, or other security acceptable to the Crown, or

(b) the Principal does pay to the Crown the difference between the amount of the Principal's tender and the amount of the Contract entered into by the Crown for the work, supplies and services which were specified in the said tender, if the latter amount be in excess of the former,

then this obligation shall be void; otherwise it shall remain in full force and effect.

PROVIDED, HOWEVER, that the Surety and the Principal shall not be liable to the Crown for an amount greater than the amount specified in this Bond.

PROVIDED FURTHER that the Surety shall not be subject to any suit or action unless such suit or action is instituted and process therefore served upon the Surety at its Head Office in Canada, within twelve (12) months from the date of this Bond.

IN TESTIMONY WHEREOF, the Principal has hereto set its hand and affixed its seal, and the Surety has caused these presents to be sealed with its corporate seal duly attested by the signature of its authorized signing authority, the day and year first above written.

SIGNED, SEALED AND DELIVERED in the presence of:

Principal

Witness

Surety

Note: Affix Corporate seal if applicable.

→ A scanned PDF of a bond.

→ A single bid bond used as a deposit for a specified period of tenders.

→ Any special encrypted numbering system attached to a bond.

Is this a Digital Bond?

(R2012-03)
Page 1 of 1

Bid Bond

Bond No.: 248920-09 Amount: \$ 125,000.00

KNOW ALL PERSONS BY THESE PRESENTS, that Major Construction Company
as Principal, hereinafter called the Principal, and Surety Bond Company of Canada
as Surety, hereinafter called the Surety, are, subject to the conditions hereinafter contained, held and
firmly bound unto DEFENCE CONSTRUCTION (1951) LIMITED as Obligor, hereinafter called the
Crown, in the amount of ONE HUNDRED TWENTY FIVE THOUSAND dollars (\$125,000.00),
lawful money of Canada, for the payment of which sum, well and truly to be made, the Principal and the
Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and
severally, firmly by these presents.

SIGNED AND SEALED this 2nd day of July, 2009
WHEREAS, the Principal has submitted a written tender to the Crown, dated the 2nd
day of July, 2009, for Hospital for Children and Adults

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION are such that it:

(a) the Principal, should his tender be accepted within the period specified by the Crown, or, if no
period be specified, within thirty (30) days after closing date of the tender, does execute within
period specified by the Crown, or, if no period be specified therein, within fourteen (14) days after
the prescribed forms are presented to him for signature, execute such further contractual
documents, if any, as may be required by the terms of the tender as accepted, and does furnish a
Performance Bond and a Labour and Material Payment Bond, each in the amount of 50% of the
Contract price and satisfactory to the Crown, or other security acceptable to the Crown, or

(b) the Principal does pay to the Crown the difference between the amount of the Principal's tender
and the amount of the Contract entered into by the Crown for the work, supplies and services which
were specified in the said tender, if the latter amount be in excess of the former,
then this obligation shall be void; otherwise it shall remain in full force and effect.

PROVIDED, HOWEVER, that the Surety and the Principal shall not be liable to the Crown for an amount
greater than the amount specified in this Bond.

PROVIDED FURTHER that the Surety shall not be subject to any suit or action unless such suit or action
is instituted and process therefor served upon the Surety at its Head Office in Canada, within twelve (12)
months from the date of this Bond.

IN TESTIMONY WHEREOF, the Principal has hereunto set its hand and affixed its seal, and the Surety has
caused these presents to be sealed with its corporate seal duly attested by the signature of its authorized
signing authority, the day and year first above written.

SIGNED, SEALED AND DELIVERED in the presence of:

[Signature]
Principal

[Signature]
Witness

[Signature]
Surety

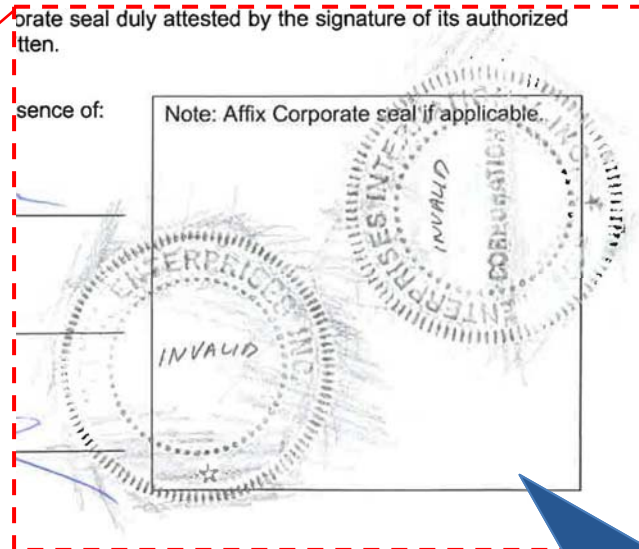
Note: Affix Corporate seal if applicable.

INVALID

Corporate seal duly attested by the signature of its authorized
Officer.

In the presence of:

Note: Affix Corporate seal if applicable.



Shaded Seals

Scanned Bond = Picture of Bond

(R2012-03)
Page 1 of 1

Bid Bond

Bond No.: 248930-89 Amount: \$ 125,000.00

KNOW ALL PERSONS BY THESE PRESENTS, that Major Construction Company as Principal, hereinafter called the Principal, and Surety Bond Company of Canada as Surety, hereinafter called the Surety, are, subject to the conditions hereinafter contained, held and firmly bound unto DEFENCE CONSTRUCTION (1991) LIMITED as Obligor, hereinafter called the Crown, in the amount of ONE HUNDRED TWENTY FIVE THOUSAND dollars (\$125,000.00), lawful money of Canada, for the payment of which sum, well and truly to be made, the Principal and the Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

SIGNED AND SEALED this 2nd day of July, 20 09

WHEREAS, the Principal has submitted a written tender to the Crown, dated the 2nd day of July, 20 09, for Hospital for Children and Adults

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION are such that if:

(a) the Principal, should his tender be accepted within the period specified by the Crown, or, if no period be specified, within thirty (30) days after closing date of the tender, does execute within a period specified by the Crown, or, if no period be specified therein, within fourteen (14) days after the prescribed forms are presented to him for signature, execute such further contractual documents, if any, as may be required by the terms of the tender as accepted, and does furnish a Performance Bond and a Labour and Material Payment Bond, each in the amount of 50% of the Contract price and satisfactory to the Crown, or other security acceptable to the Crown, or

(b) the Principal does pay to the Crown the difference between the amount of the Principal's tender and the amount of the Contract entered into by the Crown for the work, supplies and services which were specified in the said tender, if the latter amount be in excess of the former,

then this obligation shall be void; otherwise it shall remain in full force and effect.

PROVIDED, HOWEVER, that the Surety and the Principal shall not be liable to the Crown for an amount greater than the amount specified in this Bond.

PROVIDED FURTHER that the Surety shall not be subject to any suit or action unless such suit or action is instituted and process therefore served upon the Surety at its Head Office in Canada, within twelve (12) months from the date of this Bond.

IN TESTIMONY WHEREOF, the Principal has hereto set its hand and affixed its seal, and the Surety has caused these presents to be sealed with its corporate seal duly attested by the signature of its authorized signing authority, the day and year first above written.

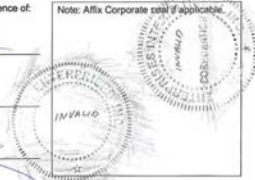
SIGNED, SEALED AND DELIVERED in the presence of:

Principal

Witness

Surety

Note: Affix Corporate seal if applicable.





Picture of Money

This is a Digital Bond

Bid Bond (R2012-03)
Page 1 of 1

Bond No: 248938-09 Amount: \$ 135,000.00

KNOW ALL PERSONS BY THESE PRESENTS, that Major Construction Company
as Principal, hereinafter called the Principal, and Surety Bonds Company of Canada
as Surety, hereinafter called the Surety, are, subject to the conditions hereinafter contained, held and
firmly bound unto DEFENCE CONSTRUCTION (1961) LIMITED as Obligor, hereinafter called the
Crown, in the amount of ONE HUNDRED THIRTY FIVE THOUSAND dollars (\$135,000.00),
the lawful money of Canada, for the payment of which sum, well and truly to be made, the Principal and the
Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and
severally, firmly by these presents.

SIGNED AND SEALED this 2nd day of July, 2016
WHEREAS, the Principal has submitted a written tender to the Crown, dated the 2nd day of July, 2016, for Hospital for Children and Adults

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION are such that if:

(a) the Principal, should his tender be accepted within the period specified by the Crown, or, if no period be specified, within thirty (30) days after closing date of the tender, does execute within a period specified by the Crown, or, if no period be specified thereon, within fourteen (14) days after the prescribed forms are presented to him for signature, execute such further contractual documents, if any, as may be required by the terms of the tender as accepted, and does furnish a Performance Bond and a Labour and Material Payment Bond, each in the amount of 50% of the Contract price and satisfactory to the Crown, or other security acceptable to the Crown, or

(b) the Principal does pay to the Crown the difference between the amount of the Principal's tender and the amount of the Contract entered into by the Crown for the work, supplies and services which were specified in the said tender, if the latter amount be in excess of the former,

then this obligation shall be void, otherwise it shall remain in full force and effect.

PROVIDED, HOWEVER, that the Surety and the Principal shall not be liable to the Crown for an amount greater than the amount specified in this Bond.

PROVIDED FURTHER, that the Surety shall not be subject to any suit or action unless such suit or action is instituted and process therefore served upon the Surety at its Head Office in Canada, within twelve (12) months from the date of this Bond.

IN TESTIMONY WHEREOF, the Principal has hereto set its hand and affixed its seal, and the Surety has caused its principals to execute with its corporate seal, and by the signature of its authorized signing authority, the day and year first above written.

SIGNED, SEALED AND DELIVERED in the presence of:

Signed electronically by
Dean Smith
on 2016-01-13 17:07:30 GMT
Principal

Witness
Signed electronically by
Mary Waitingale
on 2016-01-13 16:27:30 GMT
Surety

Test Carrier Inc.
SignatureMaster Test Seal
Invalid Seal No. 12345

Test Carrier Inc.
SignatureMaster Test Seal
Invalid Seal No. 12345

To verify hardcopy, click on SignatureMaster™ website "Verify Document" link, enter Document Key 00077730-C7768CAE-7333B4F

authority, the day and year first above written.

D, SEALED AND DELIVERED in the presence of:

Signed electronically by
Dean Smith
on 2016-01-13 17:07:30 GMT
Principal

Witness
Signed electronically by
Mary Waitingale
on 2016-01-13 16:27:30 GMT
Surety

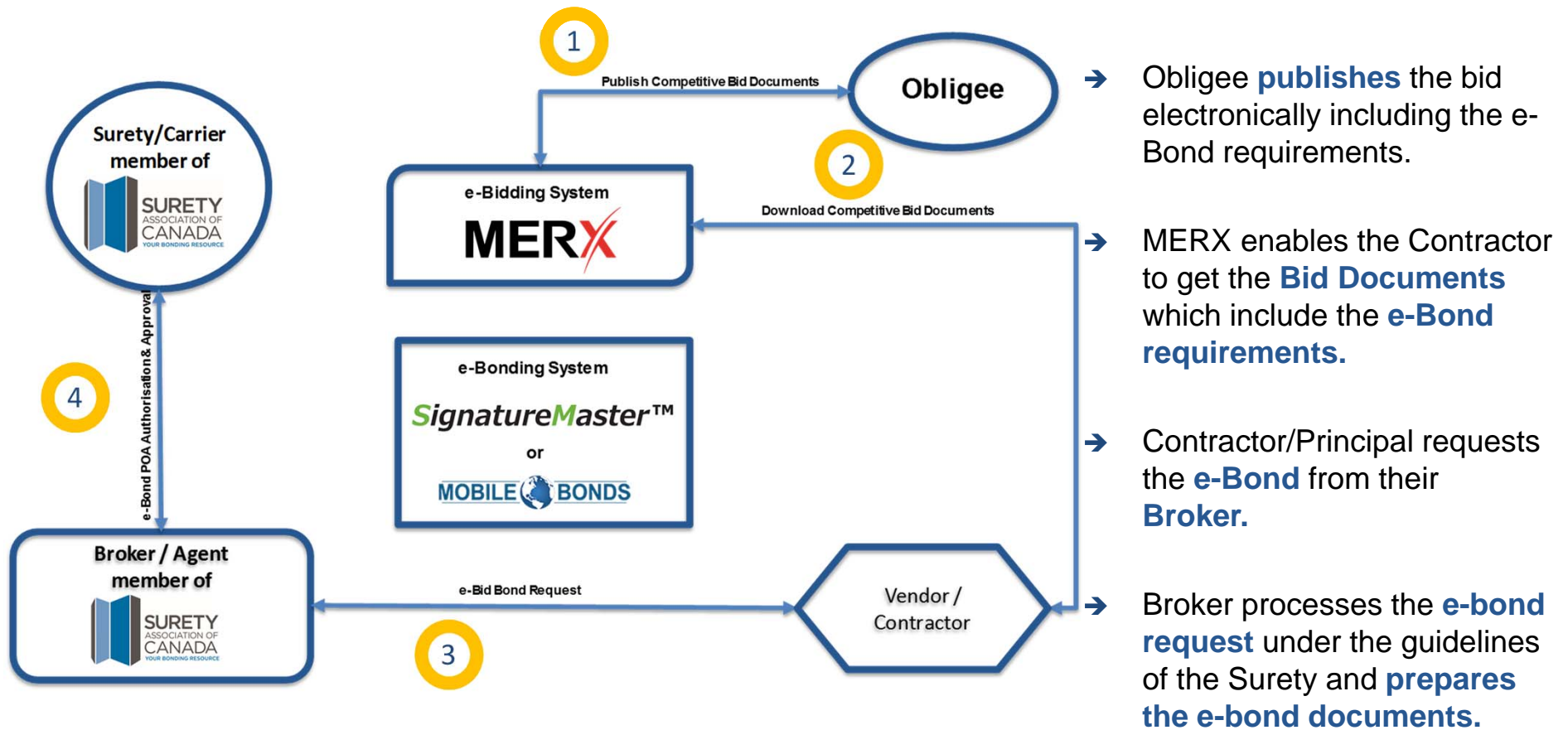
Test Carrier Inc.
SignatureMaster Test Seal
Invalid Seal No. 12345

Test Carrier Inc.
SignatureMaster Test Seal
Invalid Seal No. 12345

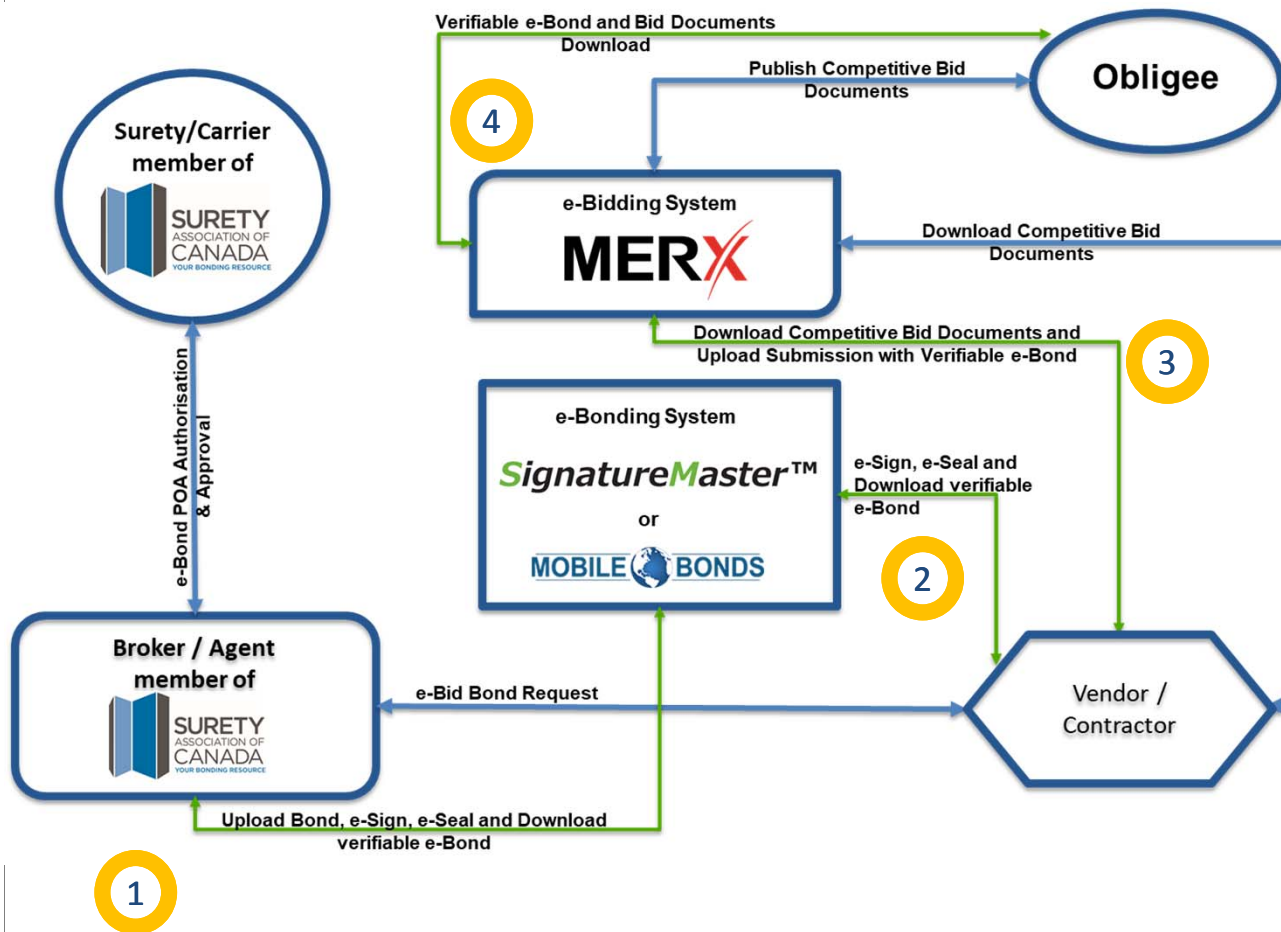
SignatureMaster™ website "Verify Document" link, enter Document Key 00077730-C7768CAE-7333B4F

Digital Signature
and Seals

e-Bond Request

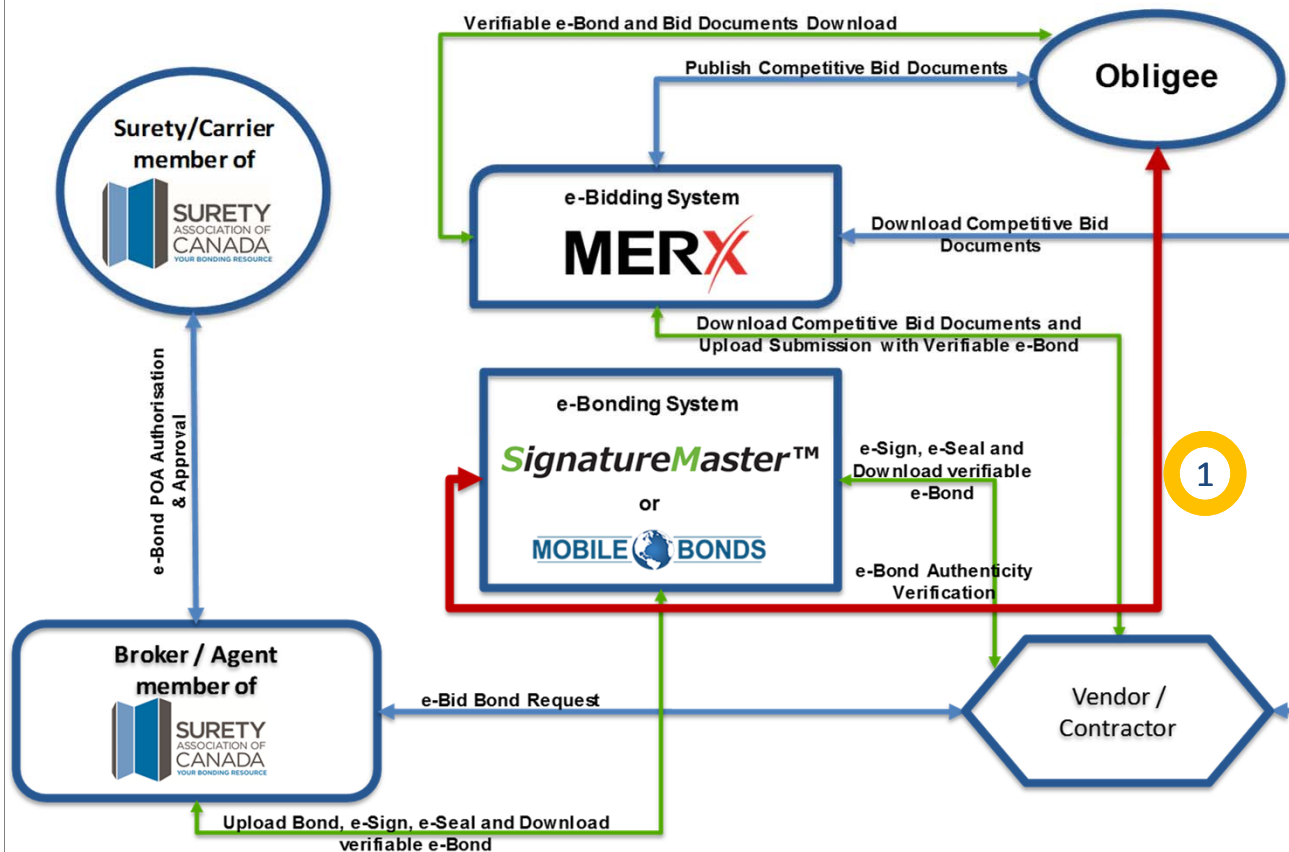


e-Bond Submission



- Broker prepares **the e-bond for electronic signing and sealing** as requested by obligees tender requirements.
- Broker, as the Surety's **attorney-in-fact (or Surety)**, **electronically signs and seals** the e-bond PDF(s).
- Contractor/Principal also **electronically signs and seals** the e-bond PDF(s).
- Contractor/Principal **downloads** the signed and sealed digital **e-bond documents** and uploads them to the MERX e-Bidding system with the other bid documents.

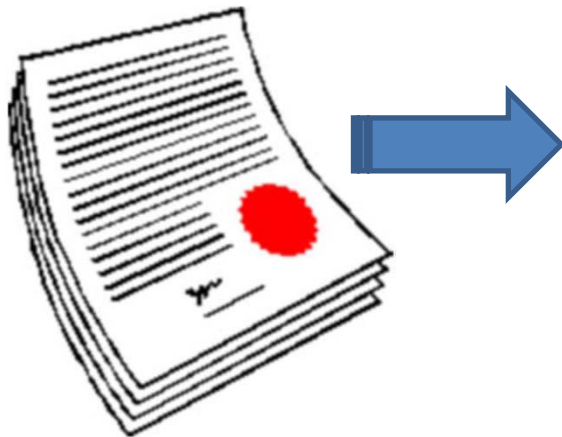
e-Bond Verification



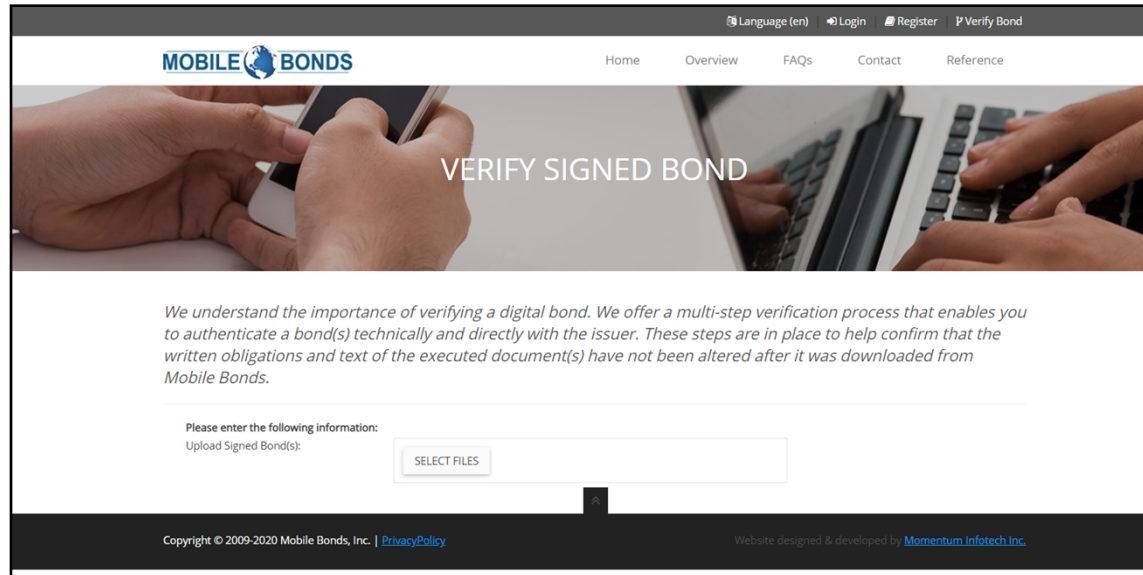
- After the bid closes, the Obligee tender review team **verifies** the validity of the **delivered e-bond**.
- Any person that has access to the **e-bond documents** and an **internet browser**, can verify the **validity of the e-bond** document electronic.

Example of Verification Process

Click Verification link in Bond to compare it to our file.



Verification Message



MOBILE BONDS

Home Overview FAQs Contact Reference

Language (en) Login Register Verify Bond

VERIFY SIGNED BOND

We understand the importance of verifying a digital bond. We offer a multi-step verification process that enables you to authenticate a bond(s) technically and directly with the issuer. These steps are in place to help confirm that the written obligations and text of the executed document(s) have not been altered after it was downloaded from Mobile Bonds.

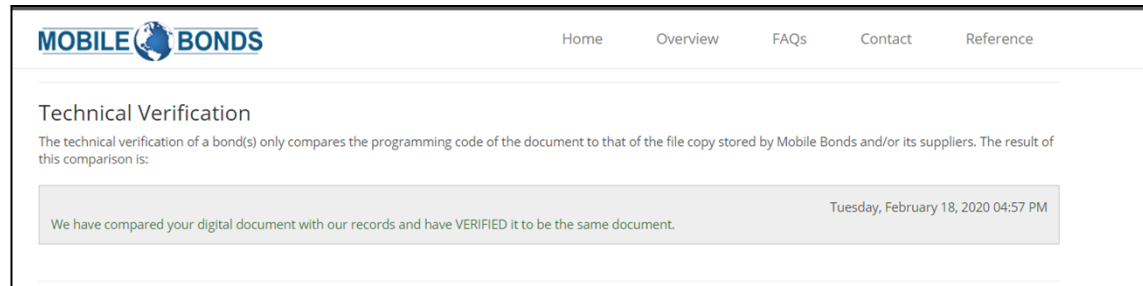
Please enter the following information:

Upload Signed Bond(s):

SELECT FILES

Copyright © 2009-2020 Mobile Bonds, Inc. | [Privacy Policy](#)

Website designed & developed by [Momentum Infotech Inc.](#)



MOBILE BONDS

Home Overview FAQs Contact Reference

Technical Verification

The technical verification of a bond(s) only compares the programming code of the document to that of the file copy stored by Mobile Bonds and/or its suppliers. The result of this comparison is:

We have compared your digital document with our records and have VERIFIED it to be the same document.

Tuesday, February 18, 2020 04:57 PM

Digital Content Verification Results

Valid e-bond

The screenshot shows the XENEX SIGNATUREMASTER™ Document Verification interface. The 'Verification' tab is active, and the 'Audit Trail' tab is also visible. The interface displays the following information:

- Original Document: CCDCBidBond
- Uploaded Document: CCDCBidBond_798.pdf
- Buttons: 'Choose File' and 'No file chosen' (disabled), 'Upload & Verify'.
- Message: 'Document authenticity confirmed. Content has not been altered. Signature(s) and Seal(s) are valid.' (in green text, flanked by thumbs-up icons).
- Footer: 'Privacy Statement | Terms of Use', 'Copyright © 2010-2016 Xenex Enterprises Inc.', and an 'Entrust' logo.

Compromised e-bond

The screenshot shows the XENEX SIGNATUREMASTER™ Document Verification interface. The 'Verification' tab is active, and the 'Comparison' tab is also visible. The interface displays the following information:

- Original Document: CCDCBidBond
- Uploaded Document: CCDCBidBond_798 (B2).pdf
- Buttons: 'Choose File' and 'No file chosen' (disabled), 'Upload & Verify'.
- Message: 'Document security has been compromised and content may have been altered. Please ensure the correct document has been uploaded. Click the Comparison tab to determine the cause of the verification failure.' (in red text, flanked by thumbs-down icons).
- Footer: 'Privacy Statement | Terms of Use', 'Copyright © 2010-2016 Xenex Enterprises Inc.', and an 'Entrust' logo.

Content integrity of scanned paper bond cannot be digitally verified, therefore document integrity cannot be guaranteed.

Set up for Digital Bonds

Vendor, broker and bonding company select an e-bond system such as Xenex Enterprises Inc. or Mobile Bonds



Vendors and Contractors

- **Setup your organization within the selected system**
- **Obtain a digital corporate seal**
- **Create relationships between vendor and broker/surety in the system**
- **Give yourself time to complete the setup**



Broker and Bonding Agency

- **Set up your organization**
- **Access bonding company's digital corporate seal**

Frequently Asked Question

→ **How long does it take to setup an account?**

→ Answer

- Less than 30 minutes.
- We recommend not waiting until the day before a bid; give yourself time to get familiar with the system; consider doing a test bond.



Frequently Asked Question

→ **What if a broker is not ready to offer e-bonds?**

→ Answer

- Please have the broker contact Xenex Enterprises Inc. or Mobile Bonds and we'll get them setup quickly.



Frequently Asked Question

→ **Can digital performance bonds be issued?**

→ Answer

- Yes.



MERX – Our E-Bid Submission Process

The E-Bid Submission process on MERX, whether or not a bond is required, is:

- A fast, highly secure and fully audited environment.
- Information can be revised up until the closing time and date.
- This is very common activity for buyer organizations.

Other information:

- **(For Vendors)** There is a \$32+tax fee requires to submit bids electronically.
- No geographical or weather-related disadvantages for one submission versus another.
- Submissions are less prone to error.
- In the same way as with paper submissions, bid access is restricted until the opportunity has closed.

MERX – Our E-Bid Submission Process

- E-Bonding configuration must be enabled in the project owners or Municipality organization configuration.
- User with proper role and privileges creates a solicitation on MERX with bond requirements.
- The electronic submission process allows the upload of the brokers, contractors or vendors electronic bond document.
- The brokers, contractors or vendors must acquire the Digital Bond as early in the process as possible.
- Use the resources of the Surety Association of Canada.
 - Their website contains lots of valuable reference information on the use of Digital Bonds (www.suretycanada.com).

MERX- Contact Us

PROJECT
OWNER
MUNICIPALITY
BUYER

At any time during the
MERX Solicitation Creation Process,
you can contact us at
1-888-738-3005 or buyers@merx.com
Monday to Friday, 7am to 8pm EST.



MERX- Contact Us

BROKER
CONTRACTOR
VENDOR

At any time during the
MERX Ebid Submission Process,
you can contact us at
1-800-964-MERX or merx@merx.com
Monday to Friday, 7am to 8pm EST.

Notice Creation on MERX

PROJECT
OWNER
MUNICIPALITY
BUYER

Create Solicitation

The 'Enable E-Bonding' configuration must be allowed in your MERX buyer account.

Step 1: Create the solicitation, complete all the required fields.

Notice

Categories

Documents & Items

Courtesy email

Preview

BASIC INFORMATION

Complete

Estimated Contract Value \$10,000.00
(CAD)

Location Canada, Ontario, Ottawa

Notice Type Construction

Notice Language English

Publication Method Open Project

Modify

Header

Reference Number 0000016889

Source ID PU.CO.Ont..690228

Issuing Organization MERX Buyer Account

Owner Organization

Project Type* RFP - Request for Proposal (Formal)

Project Number* 2020-987321-B

Title* SAMPLE RFP FOR SUPPLIER WEBINAR

Agreement Type Select options

Dates

Time Zone Eastern (US & Canada)

Closing Date* ☒ Specific Date 2020/03/20 02:00:00 PM ☐ EST/EDT

☐ Number of days

Notice Creation on MERX

PROJECT
OWNER
MUNICIPALITY
BUYER

Notice Tab

Step 2: Select the 'Require E-Bonding' to allow for electronic bonds. Enter the bond type and amount requirements.

BID SECURITY Optional

☒ Require E-Bonding

Bid Bond	<input type="text" value="10.00"/>	<input checked="" type="radio"/> % <input type="radio"/> \$	Performance Bond	<input type="text"/>	<input checked="" type="radio"/> % <input type="radio"/> \$
Maintenance Bond	<input type="text"/>	<input checked="" type="radio"/> % <input type="radio"/> \$	Surety Bond	<input type="text"/>	<input checked="" type="radio"/> % <input type="radio"/> \$
Labor and Materials Bond	<input type="text"/>	<input checked="" type="radio"/> % <input type="radio"/> \$	Payment Bond	<input type="text"/>	<input checked="" type="radio"/> % <input type="radio"/> \$

[Add a Bond](#)

Notice Creation on MERX

PROJECT
OWNER
MUNICIPALITY
BUYER

Submission Process

BID SUBMISSION PROCESS

Bid Submission Type* ☒ Electronic Bid Submission ☐ Physical Bid Submission ☐ Electronic or Physical Bid Submission

Pricing* ☐ Item Based ☒ Lump sum ☐ In attached document ☐ In Bid Questions ☐ No Pricing

Request Prompt Payment ☐ Yes ☒ No

Discount*

Number of Envelopes ☒ 1 ☐ 2

Pricing: Lump sum

Bid Documents List* ☒ Allow Bid Documents
☐ Specific Bid Document Structure
☐ Do Not Allow Bid Document

Bid Questions [Import Questions](#) [Download Template](#)

Additional Bidding Instructions

Characters: 0/1000

[Validate](#) [CANCEL](#) [APPLY](#) [SAVE & QUIT](#) [Next >>](#)

Step 3: Select the 'Electronic Bid Submission' type and structure your bid submission process accordingly.

Notice Creation on MERX

PROJECT
OWNER
MUNICIPALITY
BUYER

Publication

2020-987321-B - SAMPLE RFP FOR SUPPLIER WEBINAR (Draft)

[Notice](#) [Categories](#) [Documents & Items](#) [Courtesy email](#) [Preview](#)

[Print](#)

Notice [Categories](#)

Basic Information

Estimated Contract Value (CAD)	10,000.00 (Not shown to suppliers)	Publication Date	Manual publication
Reference Number	0000016689	Questions are submitted online	No
Issuing Organization	MERX Buyer Account	Closing Date	2020/03/20 02:00:00 PM EDT
Project type	RFP - Request for Proposal (Formal)	Bid Intent	Not Available
Project Number	2020-987321-B	Contact Information	
Title	SAMPLE RFP FOR SUPPLIER WEBINAR	Marianne Eid	
Source ID	PU.CO.Ont..690228	613-555-5555	
		anne.marie@iac.ca	

Details

Location Canada, Ontario, Ottawa

Description SAMPLE RFP FOR SUPPLIER WEBINAR, SEE ATTACHED DOCUMENTS.

Bid Security

Buyer Requires E-Bonding

- Bid Bond 10 %

Publish

Step 4: Preview the solicitation and click 'Publish'.

E-Bid Submission on MERX

BROKER
CONTRACTOR
VENDOR

Create Bid

Go through the 4-step bid submission process.

Step 1: Proposal

- Upload your document(s)
- Add total bid price (second tab, pricing).

MERX SOLICITATIONS REPORTS EN ?

CREATE BID

2020-987321 - SAMPLE RFP FOR SUPPLIER WEBINAR (JANUARY-MARCH)

Closing Date: 2020/04/10 03:00:00 PM EDT

BID NOT SUBMITTED
Bid Fee: \$32.00
58d 03h 37m left to bid

1- Proposal 2- Submission 3- Payment 4- Confirmation

Documents Pricing

BID DOCUMENTS - BID DOCUMENTS (OPTIONAL)

Documents defining the proposal

Drag & Drop or browse for your file

CREATE BID

2020-987321 - SAMPLE RFP FOR SUPPLIER WEBINAR (JANUARY-MARCH)

Closing Date: 2020/04/10 03:00:00 PM EDT

BID NOT SUBMITTED
Bid Fee: \$32.00
58d 03h 37m left to bid

1- Proposal 2- Submission 3- Payment 4- Confirmation

Documents Pricing

Total Bid Price* [20,000] CAD Corresponds to the base price, excluding taxes.

File

File	Size	Created	Status
Proposal.docx	404 Kb	2020/01/17 02:30:22 PM EST	Completed
Pricing.docx	404 Kb	2020/01/17 02:30:22 PM EST	Completed
Requirements.docx	404 Kb	2020/01/17 02:30:22 PM EST	Completed

Disclaimer

CANCEL SAVE & QUIT PREVIOUS NEXT

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E-Bid Submission on MERX

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Submission

Step 2: Submission

Click on the “Upload File” button to upload your Bid Bond document.

Bidder Compliance & Authentication

Enter Full Name & Password (used to login to account).

MERX SOLICITATIONS REPORTS EN ?

EDIT BID

2020-987321 - SAMPLE RFP FOR SUPPLIER WEBINAR (JANUARY-MARCH)

Closing Date: 2020/04/10 03:00:00 PM EDT

1- Proposal 2- Submission 3- Payment 4- Confirmation

Bid Security

E-Bonding

Sample Bid Bond.pdf

2020/01/17 03:10:38 PM EST Delete

Upload File

Bidder Compliance & Authentication

The Bidder agrees to submit and sign this Bid electronically and agrees that his/her bid is valid, authorized, and binding; and certifies that all required documentation has been completed.

Bidder represents and warrants that the person signing this Bid is an authorized agent who has fulfilled all requirements to possess actual authority to bind Bidder to each and every term, condition, article and obligation of this Bid and any resultant Contract.

I declare that the foregoing is true and correct

Our records show that you have not read all documents and amendments pertaining to this solicitation. Please make sure you have read all documents and amendments related to this solicitation as lack of doing so may render your bid non-compliant.

Bid Submitted By (Full Name)* Full Name

For security reasons please re-enter your password*

Please note that all bids are submitted in Canadian Dollars.

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CANCEL SAVE & QUIT PREVIOUS NEXT

E-Bid Submission on MERX

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Confirm

The screenshot shows the MERX 'CREATE BID' interface. At the top, there are tabs for 'SOLICITATIONS' and 'REPORTS'. The main heading is 'CREATE BID' for '2020-987321 - SAMPLE RFP FOR SUPPLIER WEBINAR (JANUARY-MARCH)'. The closing date is '2020/04/10 03:00:00 PM EDT'. A progress bar shows four steps: 1- Proposal, 2- Submission (active), 3- Payment, and 4- Confirmation. A notification on the right states 'BID NOT SUBMITTED' with a bid fee of \$32.00 and 58d 03h 32m left to bid. The 'Bid Security' section shows an uploaded 'Sample Bid Bond.pdf' with an upload date of 2020/02/12 10:24:59 AM EST and a 'Delete' link. The 'Bidder Compliance & Authentication' section contains a declaration and a warning: 'Our records show that you have not completed the required documentation for this solicitation. Please complete the required documentation before submitting your bid.' A 'BID SUBMISSION CONFIRMATION' dialog box is open, asking 'Submission will make the bid active and submit it to the solicitation owner. Are you sure you want to proceed?' with 'NO' and 'YES' buttons. Below the dialog, there is a password field and a note that all bids are submitted in Canadian Dollars. At the bottom, there are buttons for 'CANCEL', 'SAVE & QUIT', 'PREVIOUS', and 'NEXT'. A 'Disclaimer' link is also present.

Bid Submission Confirmation

Do you want to proceed? Click YES.

E-Bid Submission on MERX

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VENDOR

E-Bid Payment

Step 3: Payment

\$32+tax for the e-bid submission.

Enter payment details.

MERX SOLICITATIONS REPORTS EN ?

CREATE BID

2020-987321 - SAMPLE RFP FOR SUPPLIER WEBINAR (JANUARY-MARCH)

Closing Date: 2020/04/10 03:00:00 PM EDT

BID NOT SUBMITTED
Bid Fee: \$32.00
58d 03h 33m left to bid ?

1- Proposal 2- Submission **3- Payment** 4- Confirmation

Transaction Details

The following charges will be placed against your credit card immediately.

Bid Fee	\$32.00
HST	\$4.16
Total	\$36.16

Prices are in Canadian Dollars. All fees are non-refundable.

Payment

Credit Card Type

Card Number 545454*****5454

Card Holder's Name Canada inc.

[Use a New Credit Card](#)

CANCEL SAVE & QUIT PREVIOUS SUBMIT PAYMENT

[Disclaimer](#) Powered by Mediagrif **MEDIAGRIF**

E-Bid Submission on MERX

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VENDOR

Confirmation


Step 4: Confirmation

This is your confirmation of submission.


It includes your confirmation number for your records, the exact date and time to the second of your submission and your Bid Submission status.

MERXSOLICITATIONSREPORTSEN?

CREATE BID

2020-987321 - SAMPLE RFP FOR SUPPLIER WEBINAR (JANUARY-MARCH) **BID SUBMITTED**

Closing Date: 2020/04/10 03:00:00 PM EDT

1- Proposal 2- Submission 3- Payment **4- Confirmation** **Print**

Your bid for project "2020-987321 - Sample RFP for Supplier Webinar (January-March)" has officially been submitted.

Bid Submission Date: 2020/02/12 10:33:14 AM EST

Confirmation Number: 0000012846

You can [download a PDF version](#) of this confirmation for your records.

Take note that you can withdraw and modify your bid up until the solicitation's closing date set for 2020/04/10 03:00:00 PM EDT.

In the next minutes, you will receive an email with the following transaction details:

Bid Fee	\$32.00
HST	\$4.16
Total	\$36.16
Payment Date:	2020-02-12
Payment No:	METSMERX-PY438
Authorization Code:	208570

Credit Card Type MasterCard


Card Number

Card Holder's Name

This information will be used to process the charges below.

If you do not receive this email, or if you need assistance, please call MERX's Support Department at (800) 964-8379. We provide technical support for this online bidding system and are available Monday to Friday from 9:00 AM to 5:00 PM EST.

[Disclaimer](#)**BACK TO BID MANAGEMENT**


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Notice Creation on MERX

PROJECT
OWNER
MUNICIPALITY
BUYER

Bid Submissions

2020-987321 - SAMPLE RFP FOR SUPPLIER WEBINAR (Closed)

 [Actions](#)

[Preview](#) [Amendment](#) **[Bid Results](#)** [Award](#) [Audit](#)

[Expand All](#) [Collapse All](#)

Organization Name ▲	Org. Number	Submission Type	Bid Amount	Bid Rank
▶ Construction Brothers	690256	Electronic	\$15,000.00	1
▶ Power Construction	690254	Electronic	\$25,000.00	3
▶ Smith & Co	690226	Electronic	\$20,000.00	2

[<< Back to Solicitation List](#) [CANCEL](#) [SAVE](#)

Step 5: The buyer will be able to consult the Bid Results once the notice has closed.

Notice Creation on MERX

PROJECT
OWNER
MUNICIPALITY
BUYER

Bid Submission Download

2020-987321 - SAMPLE RFP FOR SUPPLIER WEBINAR (Closed)

Notes

Preview Amendment **Bid Results** Award Audit

Expand All Collapse All

Organization Name ▲	Org. Number	Submission Type	Bid Amount
▶ Construction Brothers	690253	Electronic	\$15,000
▶ Power Construction	690254	Electronic	\$25,000
▶ Smith & Co	690226	Electronic	\$20,000

<< Back to Solicitation

Actions

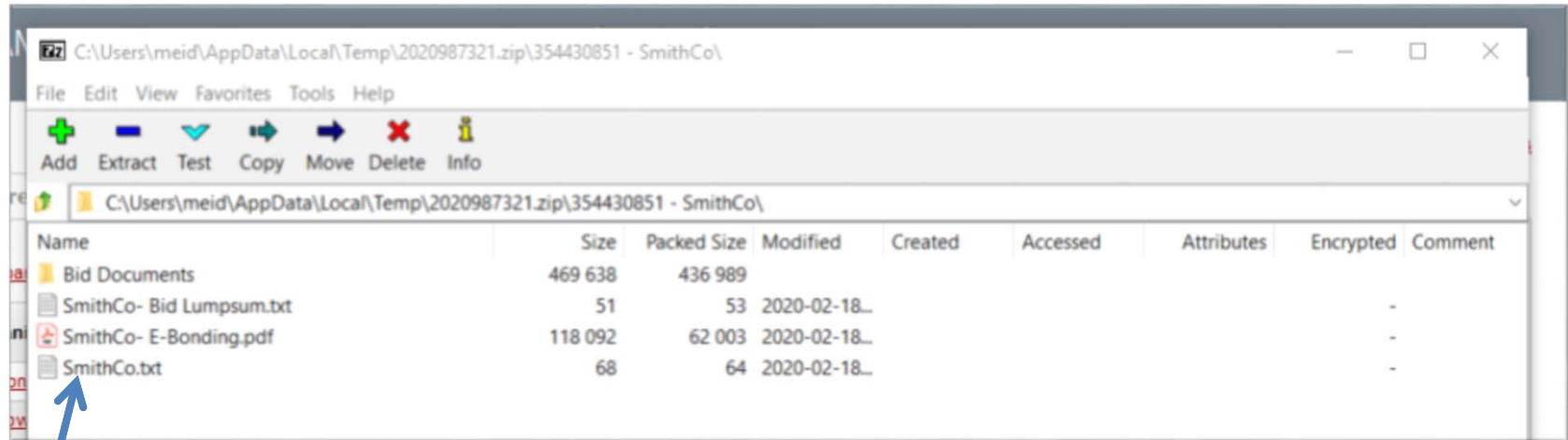
- Enable Bid Compliance
- Add Bidder
- Download All Bids
- Put Bidder on Hold
- Download All Bids
- Create communication
- Reopen
- Change Ownership
- View Task Assignments
- Clone Solicitation
- Download Solicitation Tender Report

Step 6: Click the 'Actions' gear and select 'Download All Bids'.

Notice Creation on MERX

PROJECT
OWNER
MUNICIPALITY
BUYER

E-Bond Document Download



A zip folder will open with a separate folders for each vendor submission.

Step 7: Click on the vendor's name and double click on the E-Bonding document.

Notice Creation on MERX

PROJECT
OWNER
MUNICIPALITY
BUYER

E-Bond Verification

Bond Name	CCDC Bid Bond
Bond Number	N/A
Obligation/Contract	test
Obligee	test
Principal	TEST PRINCIPAL
Broker	Test Broker 2
Surety	TEST SURETY
Issue Date	1/11/2015 7:39:37 PM
Mobile Bonds Reference	Bid Bond Request TEST Partnership
Verification ID	ba976d4d-f821-474f-8463-056f9a771740

[Click Here to Verify Bond](#)
[Download Verifiable Bond](#)
[Download Signature Audit Report](#)

The electronic bond document will open and is now ready for verification.

Step 8: Select 'Click Here to Verify Bond'.

More on MERX

BROKER
CONTRACTOR
VENDOR

Resources

Monthly Complimentary Webinar

Sign up for our next Complimentary MERX Supplier Webinar on general navigation and finding the opportunities that match your business offerings.

www.merx.com/events

Watch our tutorials

For more help with some of the functionality.

www.merx.com/tutorials

**Tutorials are available for Buyers once logged in, however, no tutorials for eBonds.*

The screenshot shows the MERX Business Resources website. The header includes the MERX logo, a Canadian flag, and the text 'BUSINESS RESOURCES'. Navigation tabs include 'CANADIAN PUBLIC TENDERS', 'AGENCIES, CROWN & PRIVATE CORPORATIONS', 'U.S. TENDERS', and 'PRIVATE CONSTRUCTION'. A secondary navigation bar contains links for 'Suppliers', 'Buyers', 'About the Service', 'About MERX', and 'Tutorial' (highlighted with an orange box). A 'NEED HELP?' section provides a phone number: 1-800-964-MERX (6379). Below the navigation, there are sections for 'ABOUT THE SERVICE' (with links to Supplier Services, Public Sector Buyers, Business Resources, and Glossary), 'TRADESHOWS & EVENTS' (with a sub-section 'Find MERX at these trade shows & events' and a list of upcoming events including ProcureCon Canada, CAUBO Annual Conference, SCMA National Conference, and Canadian Public Procurement Council (CPPC)), and 'LIVE WEBINARS' (with a sub-section 'Use MERX to help grow your business' and links to register for webinars and watch recordings). A 'MERX PROCUREMENT TRAINING' section is also visible at the bottom right.

Questions?



Contact Us!

Surety Association of Canada

(905) 677-1353

surety@suretycanada.com

www.suretycanada.com

MERX

Project Owner/Municipality/Buyer

1-888-738-3005

buyers@merx.com

Broker/Contractor/Vendor

1-800-964-6379

merx@merx.com

www.merx.com

Mobile Bonds

Steve Muxlow

(905) 717-8268

steve.muxlow@mobilebonds.com

www.mobilebonds.com

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Lorice Haig or Mary-Jane Jarvis

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www.xenex.ca

www.signaturemaster.com

