

Public Purchase – Creating a Bid

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Public Purchase – Creating a Bid

Creating a Bid – To get started you will want to click on the “New Bid” tab on your tool bar. Choose the template that fits your bid.



Bid Notification – Is the most basic form of e-Procurement. Our system notifies your vendors, posts your bids online and allows vendors to download your bid packet. The system also tracks vendors notified, vendors who view, vendors who download documents and allows vendors to ask questions, however bids are **mailed** in.

Basic Bid – This is the next step in e-Procurement and allows vendors to respond online by downloading your bid packet and uploading their bid documents through the website **electronically or mailing** them in if the vendor chooses. This can significantly cut costs for the vendors in responding to your bids.

Line Item Bids – This is the **complete electronic response**. This requires vendors to enter their price into our system electronically. While it can take a little longer in creating these bids you can save a considerable amount of time after the bids close in the tabulation features our system offers.

Quick Quotes – These bids are defined per agency according to each agency’s requirements. They are designed for a quick turn around, vendors can submit pricing information within an open or sealed bid format.

Reverse Auction – Reverse auctions are open bids that work well for easily definable commodities such as paper, gravel, salt, etc. They do not work well for everything but can save an agency a considerable amount of money on many items. These bids are open and the vendors compete to offer the lowest prices.

Bid Notification – The bid responses are **mailed** back into the agency.

Basic Bid -These bid responses can a **electronic and or mailed** into the agency.

Start with choosing a **“Bid type”** and entering a **“Bid number.”**

The image shows a web form with a dropdown menu labeled "Bid type". The menu is open, showing a list of options: RFP, RA, RFB, RFI, RFP, and RFQ. The first "RFP" option is selected. To the right of the dropdown is a text input field labeled "Bid #".

Choose the **Starting date** for the bid.

When a box is checked it means **YES**.

Example: **Yes**, I want to use the Auto Release. Meaning at listed day and time the bid is going to be automatically released.

The image shows a form section titled "Start date (US/Central)". It includes a "Date" field with "Aug 24, 2009", a "Time" field with "7:00am", and a checkbox labeled "Auto Release" which is checked. A red arrow points down to the checkbox.

No, I do not want to use the Auto Release. I will go in and release the bid myself.

The image shows a form section titled "Start date (US/Central)". It includes empty "Date" and "Time" fields, and an unchecked checkbox labeled "Auto Release". A red arrow points up to the checkbox.

Description – You may already have a description written up for the bid. You can copy and paste that information in or enter in a description for the bid.

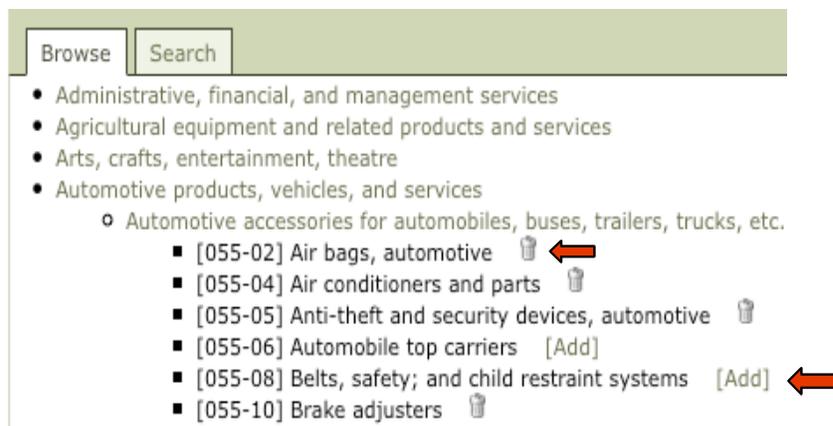
Classification Codes – Is a key part of the bid. This is how your vendors are going to be notified of the bid. Click on **“[Add Classifications].”** Browse to look at all categories. Once you have found the category click on it.

The image shows a menu with two tabs: "Browse" and "Search". The "Browse" tab is active, and a red arrow points to it. Below the tabs is a list of classification categories, each preceded by a bullet point. A red arrow points to the first category: "Administrative, financial, and management services".

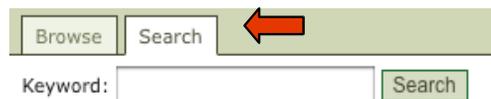
This will open to a sub category. Find what you are looking for, **click** on that category.



Now, you can go into detail on what you need. Click on “[Add]” at the end of each item that you want in the bid. If you don't want the item that you click on, use the “Trash can.” This will remove the item from the bid.



If you know the code number you are wanting, click on “Search” and enter in the code number or a key word description.



Your suspended vendors will NOT receive bid notification emails whether it was sent by invitation or classification match.

Prequalified Bidders -Clicking the box will indicate that all bidders must prequalify before they can respond to this bid.

Prequalified Bidders

Only prequalified bidders can bid.

Restricted Access – This is a private bid. When using this feature you WILL NOT use classification codes. You will invite or notify selected vendors by using the vendor icon found in the on the home page once this bid is saved. Only those selected vendors will be able to view this bid.

Soliciting Department – This will allow you to attach the soliciting bid to a department. To set this up please contact your Public Purchase representative.

Soliciting Department

Department

- Public Works
- Central Purchasing

Contacts – click on “Add Contact” to see a list of all your users for Purchase. Here you will be able to add contacts to the bid.

Contacts [Add Contact] 

	Main	Release	Prequalification Request	Question Posted
John Smith	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Find the new contact, click on “Select” this will add the new contact to the bid.

Select	Username	First Name
 [Select]	bobbieboy	Robert
[Select]	demo	John

Choose what you want the contacts to do within the bid. If you choose the wrong contact use the “Trash can” next to the name, and the contact will be deleted from the bid.

	Main	Release	Prequalification Request	Question Posted
John Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Robert Wright 	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Bid Bonds – If a bid bond is not required for this bid type skip over this section. If a bond is

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required for the bid, **click** on the **Enable Bid Bonds for this bid box**. Select your response value. Enter in the amount or the percentage needed, **do not use decimal points** when entering in a value. **Click** on the **box** if a vendor must provide their bid bond information before responding to the bid. You can have your bonds submitted in three different ways: Electronic, Scanned and Uploaded or Mailed in. You will need to specify this in your bid details.

Bid Bonds

Enable Bid Bonds for this bid

Bond value specified as: Percentage of bid Fixed dollar amount

Bond value:

Vendor must provide bid bond information before responding to bid

Delivery Details – Enter in all of the delivery information for your items. Including date, time and place for delivery. If items are to be delivered to different location list the item and where.

Pre-Bid Conference – Put in the date,time and location for the conference. Add any notes. Indicate by **clicking** on the **box** if vendor attendance is required for the conference. Upload any documents by **clicking** on “**Upload files**” **this** will allow you to upload any type of document. Any files upload within the Pre-bid section will be attached for the pre-bid conference information.

Conference Date

Date Time

Location

Notes

B I U ABC ↶

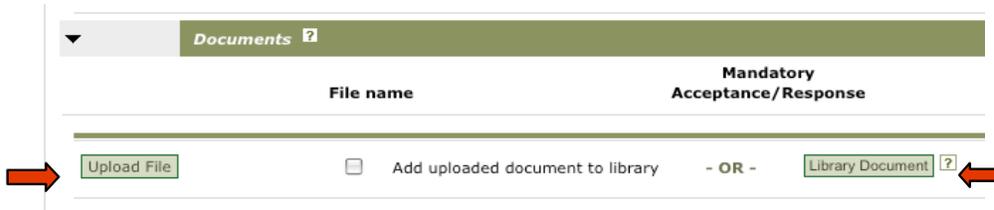
Attendance required

Vendor attendance is required

Attachments

Documents - These documents will be for the bid its self. **Click** on “**Upload File**” this will allow you to

upload any type of file. Or you can use the “Library Document” where stored documents and forms are held in the system for quick accesses to documents and forms.



If it is mandatory for the vendors to accept your documents or fill out forms click the “Box” next to the document. The Vendors will be able to clearly see that this is mandatory. If you do not need that document in the bid click on the “Trash can.”



Once you have entered in all the information. Click on “Save” at the bottom of the bid.



After saving your bid you will be able to see the bid on the home page under Tasks. Here the bid will stay until released. Once released it will be moved down to Active.

Line Item Bid – is a complete electronic response.

Fill in the information start with choosing a “Bid type” and “Bid number.”

Bid type

RFP

RA

RFB

RFI

RFP

RFQ

Bid #

When a box is checked it means **YES**.

Example Yes, I want to use the Auto Release, meaning at listed day and time the bid is going to be released.

★ Start date (US/Central)

Date Time **Auto Release**

No, I do not want to use the Auto Release. You will want to leave this blank.

Start date (US/Central)

Date Time **Auto Release**

Title and Description – Enter in the name and description for the bid. You can copy and paste that description.

Classification Codes – Is a key part of the bid. This is how your vendors are going to be notified of the bid. Click on “[Add Classifications].” Browse to look at all categories. Once you have found the category click on it.

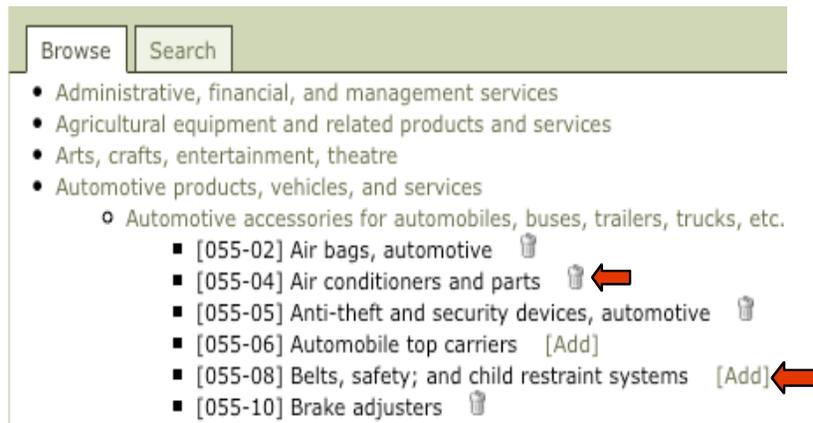
Browse **Search**

- Administrative, financial, and management services
- Agricultural equipment and related products and services
- Arts, crafts, entertainment, theatre
- Automotive products, vehicles, and services
- Building equipment, supplies, and services
- Clothing, textiles, laundry equipment, and supplies
- Communication equipment and services
- Computers, software, supplies, and services
- Food, equipment, and related services
- Furnishings and related services

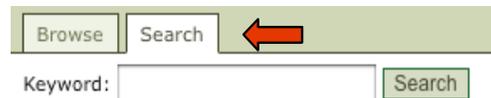
This will open to a sub category. Find what you are looking for, **click** on that category.



Now, you can go into detail on what you need. Click on “[Add]” at the end of each item that you want in the bid. If you don't want the item you click on in the bid click the “Trash can”. This will remove the item from the bid.

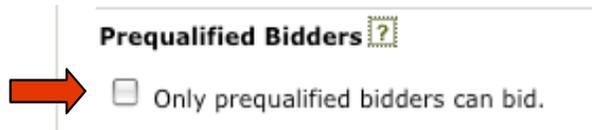


If you know the code number you are wanting, click on “Search” and enter in the code number or a key word description.



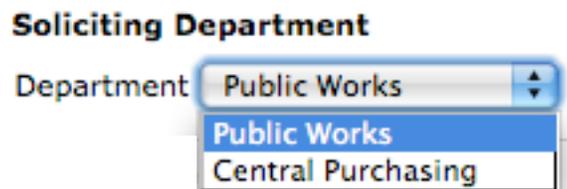
Your suspended vendors will NOT receive bid notification emails whether it was sent by invitation or classification match.

Prequalified Bidders -Clicking the box will indicate that all bidders must prequalify before they can respond to this bid.



Restricted Access – This is a private bid. When using this feature you WILL NOT use classification codes. You will invite or notify selected vendors by using the vendor icon found in the on the home page once this bid is saved. Only those selected vendors will be able to view this bid.

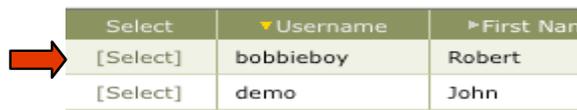
Soliciting Department – This will allow you to attach the soliciting bid to a department. To set this up please contact your Public Purchase representative.



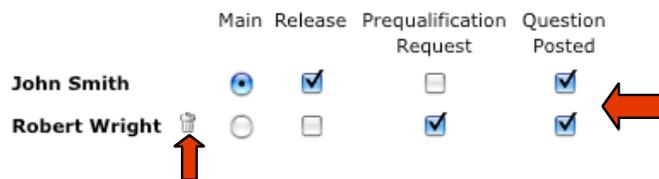
Contacts – click on “Add Contact” to see a list of all your users for Purchase. Here you will be able to add contacts to the bid.



Find the new contact, click on “Select” this will add the new contact to the bid.



Choose what you want the contacts to do within the bid. If you choose the wrong contact use the “Trash can” next to the name.



Bid Bonds – If a bid bond is not required for this bid type skip over this section. If a bond is required for the bid, **click** on the **Enable Bid Bonds for this bid box**. Select your response value. Enter in the amount or the percentage needed, **do not use decimal points** when entering in a value. **Click** on the **box** if a vendor must provide their bid bond information before responding to the bid. You can have your bonds submitted in three different ways: Electronic, Scanned and Uploaded or Mailed in. You will need to specify this in your bid details.

Bid Bonds

 Enable Bid Bonds for this bid

Bond value specified as: Percentage of bid Fixed dollar amount

Bond value:

Vendor must provide bid bond information before responding to bid

Zero Offers - Will allow the vendor to enter in a zero price for items. By **clicking** on the **box** with will turn on this feature

Zero Offers

 Allow Zero Unit price on line items

Delivery Details – Enter in all of the delivery information for your items. Including date, time and place for delivery. If items are to be delivered to different location list the item and where.

Pre-Bid Conference – Put in the date,time and location for the conference. Add your notes. Indicate by **clicking** on the box if vendor attendance is required. Upload any documents by clicking on **“Upload files”** this will allow you to upload any type of file. Any files upload within the Pre-bid section will be attached for the pre-bid conference information.

Conference Date

Date Time

Location

Notes

Attendance required

Vendor attendance is required

Attachments

Item - When creating a Line Item bid. You have two different ways of entering in the item information. **1: Enter in the information.**  When ready to add the next item **click** on **“Add Item”**

Code

Name

Description

B *I* U ABC ↺ ↻ ↷ ☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷

Quantity Unit

Brand
 Allow alternate



2: You can use the Excel **template** by, **click** on **Download Excel Items Template**, on the right hand side of the item section. You will be able to enter as many items as you need. Make sure every field has an entry or it will not upload to the bid. You can enter as much or little information you need in the Description field.

“Upload Excel Items File”. This will put all your items in the bid. Once you’ve found the correct Excel document, **click** on **open** or **save** depending on your browser.

When the vendors download the Excel document they will only be able to enter in their information, and will not be able to change the parameters.

 [Download Excel Items Template] [Upload Excel Items File]

Documents - These documents will be for the bid its self. **Click** on **“Upload File”** this will allow you to upload any type of file. Or you can use the **“Library Document”** where stored documents and forms are held in the system for quick accesses to documents and forms.

Documents 	
File name	Mandatory Acceptance/Response
<div style="border: 1px solid #ccc; padding: 5px;"> <input type="button" value="Upload File"/> <input type="checkbox"/> Add uploaded document to library </div>	- OR - <input type="button" value="Library Document"/> 

If it is mandatory for the vendors to accept your documents or fill out forms **click** the **“Box”** next to the

document. The Vendors will be able to clearly see that this is mandatory. If you do not need that document in the bid **click** on the “Trash can.”

File name	Mandatory Acceptance/Response
 City of Midway Bid Terms and Conditions.pdf [download] (City of Midway Bid Terms and Conditions)	<input checked="" type="checkbox"/>
 resident.pdf [download]	<input type="checkbox"/>

Once you have entered in all the information. **Click** on “Save” at the bottom of the bid.



After **saving** your bid you will be able to see the bid on the home page under **Tasks**. Here the bid will stay until released. Once released it will be moved down to **Active**.

Quick Quotes – designed for a quick turn around, vendors can submit pricing information within an open or sealed bid format.

Starting by entering in the “**Bid Number.**”

Bid type

Bid #



Enter in the Date you want the bid to be released. Indicate by **clicking** on the “**Auto Release**” box if you want to system to release the bid.

When a box is checked it means **YES**.

Example: **Yes**, I want to use the Auto Release, meaning at listed day and time the bid is going to be released.

Start date (US/Central)

Date Time **Auto Release**



Choose when you want the **auction to actually start**. This can be a different date form when the bid is released.

Auction Start date (US/Central)

 Auction starts on specific date
 Auction starts when bid is released
Date Time

Enter in when the bid is to **end**.

End date (US/Central)

Date Time

Title and Description – Name your bid and enter a description for it. You can copy and paste that description if you already have one or write the description in.

Classification Codes – Is a key part of the bid. This is how your vendors are going to be notified of the bid. Click on “[Add Classifications].” Browse to look at all categories. Once you have found the category click on it.

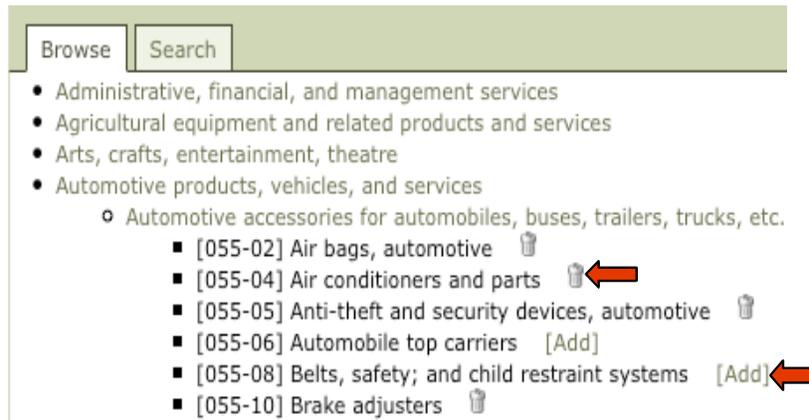


- Administrative, financial, and management services
- Agricultural equipment and related products and services
- Arts, crafts, entertainment, theatre
-  • Automotive products, vehicles, and services
- Building equipment, supplies, and services
- Clothing, textiles, laundry equipment, and supplies
- Communication equipment and services
- Computers, software, supplies, and services
- Food, equipment, and related services
- Furnishings and related services

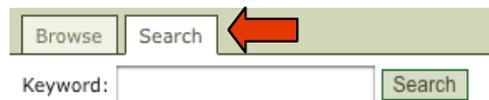
This will open to a sub-category. Find what you are looking for, **click** on that category.

- Administrative, financial, and management services
- Agricultural equipment and related products and service
- Arts, crafts, entertainment, theatre
- Automotive products, vehicles, and services
 -  Automotive and trailer equipment and parts
 - Automotive and trailer bodies, body accessories,

Now, you can go into detail on what you need. Click on “[Add]” at the end of each item that you want in the bid. If you don't want the item you click on in the bid click the “Trash can”. This will remove the item from the bid.

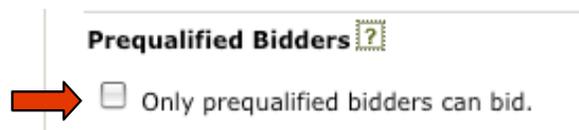


If you know the code number you are wanting, click on “Search,” and enter the code number or a keyword description.



Your suspended vendors will NOT receive bid notification emails whether it was sent by invitation or classification match.

Prequalified Bidders – Clicking the box will indicate that all bidders must prequalify before they can respond to this bid.



Restricted Access – This is a private bid. When using this feature you WILL NOT use classification codes. You will invite or notify selected vendors by using the vendor icon found in the on the home page once this bid is saved. Only those selected vendors will be able to view this bid.

Reverse Auction Rules – A negative number can be entered if the item price is going off of an index or table. Click on the box if you want to use this feature.

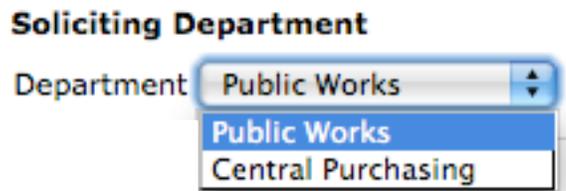
With a Reverse Auction if a vendor puts in a bid at the very last minute, the auction will be extended for 3 minutes. This can go on as long as a lower bid price has been entered. If a higher price is entered it will NOT extend the auction.

Reverse Auction Rules

Allow Negative Numbers

Auction extension is NOT allowed.

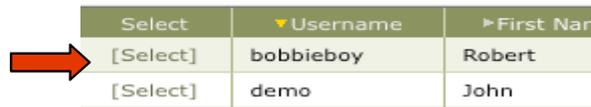
Soliciting Department – This will allow you to attach the soliciting bid to a department. To set this up please contact your Public Purchase representative.



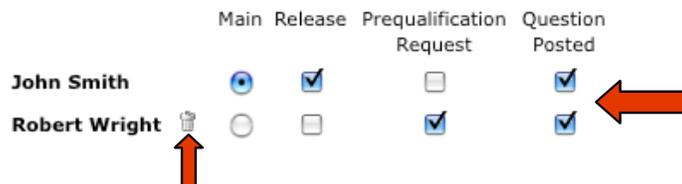
Contacts – click on “Add Contact” to see a list of all your users for Purchase. Here you will be able to add contacts to the bid.



Find the new contact, click on “Select” this will add the new contact to the bid.



Choose what you want the contacts to do within the bid. If you choose the wrong contact use the “Trash can” next to the name.



Bid Bonds – If a bid bond is not required for this bid type skip over this section. If a bond is required for the bid, click on the **Enable Bid Bonds for this bid box**. Select your response value. Enter in the amount or the percentage needed, **do not use decimal points** when entering in a value. Click on

the **box** if a vendor must provide their bid bond information before responding to the bid. You can have

your bonds submitted in three different ways: Electronic, Scanned and Uploaded or Mailed in. You will need to specify this in your bid details.

Bid Bonds

Enable Bid Bonds for this bid

Bond value specified as: Percentage of bid Fixed dollar amount

Bond value:

Vendor must provide bid bond information before responding to bid

Delivery Details – Enter in all of the delivery information for your items. Including date, time and place for delivery. If items are to be delivered to different location list the item and where.

[Add Delivery Information](#) ?

Pre-Bid Conference – Put in the date,time and location for the conference. Add your notes. Indicate by **clicking** on the box if vendor attendance is required. Upload any documents by clicking on **“Upload files”** this will allow you to upload any type of file. Any files upload within the Pre-bid section will be attached for the pre-bid conference information.

Conference Date

Date Time

Location

Notes

B I U ABC ↺

Attendance required

Vendor attendance is required

Attachments

[Upload File](#)

Item - Fill in the detailed information for the item you are wanting. If you are going to allow alternate brands for this item, **click** on the **box** next to **Allow alternate**

Code

Name

Description

B *I* U ABC | ↶ ↷ ↵ ☰

Quantity **Unit**

Brand Allow alternate

Documents - These documents will be for the bid its self. Click on **“Upload File”** this will take you to your system and allow you to upload any type of document. Or you can use the **“Library Document”**.

Documents ?

File name	Mandatory Acceptance/Response
<input type="button" value="Upload File"/>	<input type="checkbox"/> Add uploaded document to library - OR - <input type="button" value="Library Document"/>

If it is mandatory for the vendors to accept your documents or fill out forms **click** the **“Box”** next to the document. The Vendors will be able to clearly see that this is mandatory. If you no longer need that document in the bid **click** on the **“Trash can.”**

Documents ?

File name	Mandatory Acceptance/Response
City of Midway Bid Terms and Conditions.pdf [download] (City of Midway Bid Terms and Conditions)	<input checked="" type="checkbox"/>
resident.pdf [download]	<input type="checkbox"/>

Once you have entered in the information click on “Save” at the bottom of the bid.



After saving your bid you will be able to see the bid on the home page under **Tasks**. Here the bid will stay until released. Once released it will be moved down to **Active**.

Reverse Auction – These are open bids where vendors compete to offer the lowest prices.

Start by entering in the Bid number.

Bid type

RA

Bid #

Enter in the Date you want the bid to be released. Indicate by **clicking** on the “Auto Release” box if you want to system to release the bid.

When a box is checked it means **YES**.

Example: **Yes**, I want to use the Auto Release, meaning at listed day and time the bid is going to be released.

Start date (US/Central)

Date Time **Auto Release**

Choose when you want the auction to **actuality start**, this can be a different date form when the bid is released.

Auction Start date (US/Central)

Auction starts when bid is released

Auction starts on specific date

Date Time

Enter the end date for the bid.

End date (US/Central)

 Date Time

Title and Description – Name your bid and enter a description for the bid. You can copy and paste that description if you already have one or write the description in.

Classification Codes – This is how your vendors are going to be notified. Click on “[Add Classifications]” Browse to look at all categories.

 Browse Search

- Administrative, financial, and management services
- Agricultural equipment and related products and services
- Arts, crafts, entertainment, theatre
-  • Automotive products, vehicles, and services
- Building equipment, supplies, and services
- Clothing, textiles, laundry equipment, and supplies
- Communication equipment and services
- Computers, software, supplies, and services
- Food, equipment, and related services
- Furnishings and related services

This will open to a sub category. Find what you are looking for, **click** on that category.

Browse Search

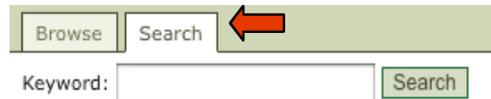
- Administrative, financial, and management services
- Agricultural equipment and related products and service
- Arts, crafts, entertainment, theatre
- Automotive products, vehicles, and services
 -  ◦ Automotive accessories for automobiles, buses, t
 - Automotive and trailer equipment and parts
 - Automotive and trailer bodies, body accessories,

Now, you can go into detail on what you need. **Click** on “[Add]” at the end of each item that you want in the bid. If you don't want the item you click on in the bid **click** the “Trash can”. This will remove the item from the bid.

Browse Search

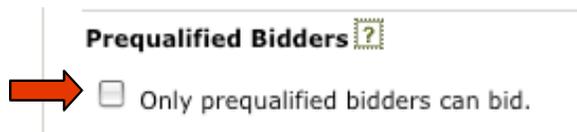
- Administrative, financial, and management services
- Agricultural equipment and related products and services
- Arts, crafts, entertainment, theatre
- Automotive products, vehicles, and services
 - Automotive accessories for automobiles, buses, trailers, trucks, etc.
 - [055-02] Air bags, automotive 
 - [055-04] Air conditioners and parts 
 - [055-05] Anti-theft and security devices, automotive 
 - [055-06] Automobile top carriers [Add]
 - [055-08] Belts, safety; and child restraint systems [Add]
 - [055-10] Brake adjusters 

If you know what classification number **click** on “Search” and enter in the code number or a key word description.



Your suspended vendors will NOT receive bid notification emails whether it was sent by invitation or classification match.

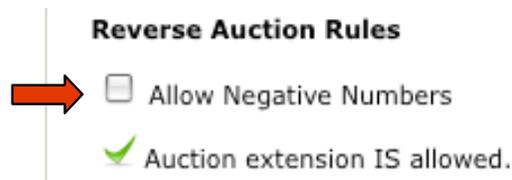
Prequalified Bidders - Clicking the box will indicate that all bidders **must be** prequalify before they can respond to this bid.



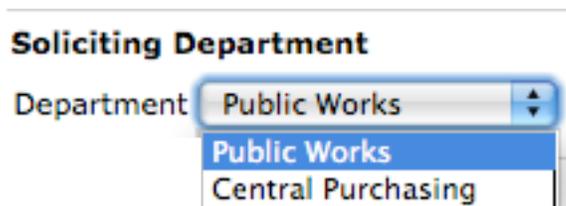
Restricted Access – This is a private bid. When using this feature you WILL NOT use classification codes. You will invite or notify selected vendors by using the vendor icon found in the on the home page once this bid is saved. Only those selected vendors will be able to view this bid.

Reverse Auction Rules - A negative number can be entered if the item price is going off of an index or table. Click on the box if you want to use this feature.

With a Reverse Auction if a vendor puts in a bid at the very last minute, the auction will be extended for 3 minutes. This can go on as long as a lower bid price has been entered. If a higher price is entered it will NOT extend the auction.



Soliciting Department – This will allow you to attach the soliciting bid to a department. To set this up please contact your Public Purchase representative.



Contacts – click on “Add Contact” to see a list of all your users for Purchase. You will be able to add contacts for the bid.



Click on what you want the contacts to do within the bid.



Bid Bonds – If a bid bond is not required for this bid type skip over this section. If a bond is required for the bid, **click** on the **Enable Bid Bonds for this bid box**. Select your response value. Enter in the amount or the percentage needed, **do not use decimal points** when entering in a value. **Click** on the **box** if a vendor must provide their bid bond information before responding to the bid. You can have your bonds submitted in three different ways: Electronic, Scanned and Uploaded or Mailed in. You will need to specify this in your bid details.

Bid Bonds

Enable Bid Bonds for this bid

Bond value specified as: Percentage of bid Fixed dollar amount

Bond value:

Vendor must provide bid bond information before responding to bid

Delivery Details – Enter in all of the delivery information for your items including date of delivery time and place.



Pre-Bid Conference – Put in the date,time and location for the conference. Add your notes. Indicate by **clicking** on the box if **vendor attendance is required**. Upload any documents by clicking on “Upload

files” this will allow you to upload any type of file. Any files upload within the Pre-bid section will be attached for the pre-bid conference information.

Conference Date
Date Time

Location

Notes

B I U ABC ↺

Attendance required
 Vendor attendance is required

Attachments

Item - Fill in the detailed information for the item you are wanting. If you are going to allow alternate brads for this item, click on the box next to “Allow alternate”.

Code

Name

Description

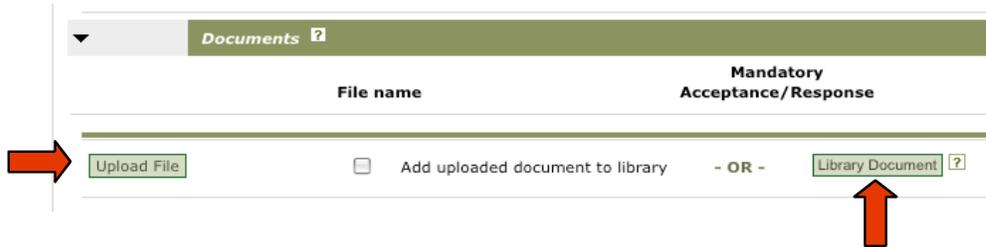
B I U ABC ↺ ↻ 📎 ☰

Quantity **Unit**

Brand
 Allow alternate

Documents - These documents will be for the bid. Click on “Upload File” this will take you to your

system and allow you to upload any type of document. Or you can use the “Library Document”.



If it is mandatory for the vendors to accept your documents or fill out forms click the “Box” next to the document. The Vendors will be able to clearly see that this is mandatory. If you no longer need that document in the bid click on the “Trash can”.



Once you have entered in all the information Click on “Save” at the bottom of the bid.



After saving your bid you will be able to see the bid on the home page under Tasks. Here the bid will stay until released. Once released it will be moved down to Active.