

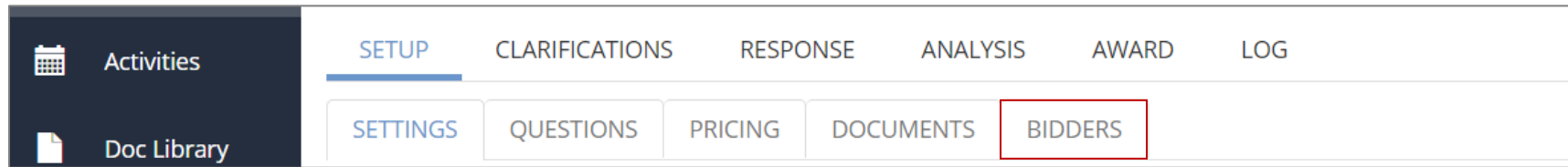
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# VIEWING & MANAGING YOUR BIDDERS LIST

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*Bidders List – The list of vendors who added themselves to the plan holders list by downloading a document, asking a question or verifying their intent to bid.*

Within a project, the Bidders tab is located on the bottom set of tabs and is to the right of the Documents tab. This is below the Setup tab.



## Viewing the Bidders List

To see which companies have been added to the bidders list, click on the **Bidders** tab and scroll down.

Companies

Bids

Activities

Doc Library

Reports

Setup

SETUP CLARIFICATIONS RESPONSE ANALYSIS AWARD LOG

SETTINGS QUESTIONS PRICING DOCUMENTS **BIDDERS**

WARNING - Do NOT alter any replacement tags **{%text%}** on the notification templates. These are automatically filled-in by the system as part of sending your notification.

▼ BIDDERS (2 records) Bidding Companies

Invite Unregistered Company To Bid + 🗑️ ✎️ Notify ⚙️

NAME: Enter Text

BIDDING STATUS:  Active  Inactive

COMPANY STATUS:  Active  Inactive

BID ACTIVITY:  None  Downloaded Document  Clarification Request  Submitted Bid  System Unsubmit  Vendor Unsubmit  Bid Withdrawn  Registered  Attended

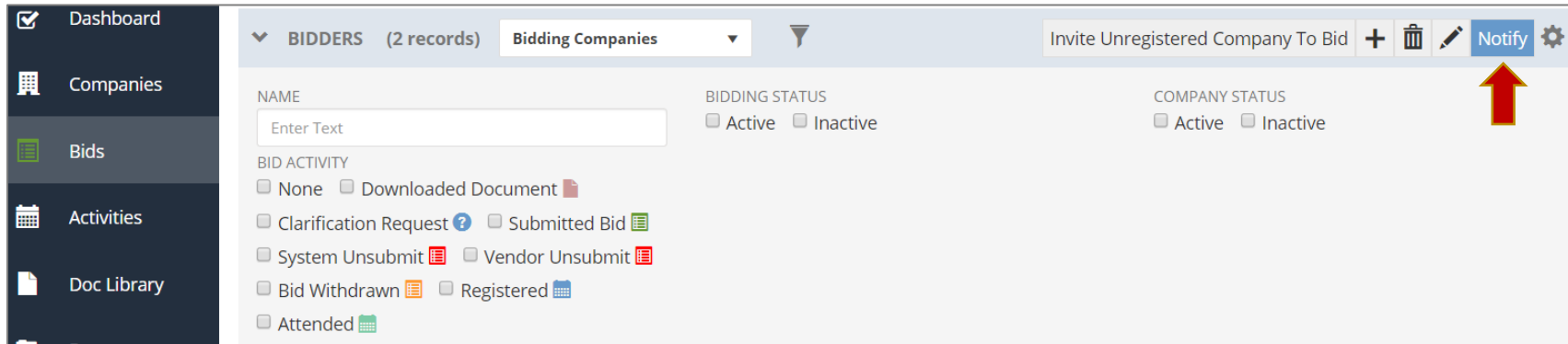
NAME	INTENT TO BID NOTES	INTENT TO BID SAVED ...	BID ACTIVITY	COMPANY STATUS	OPT OUT OF NOTIFICA...	REGISTRATION STATUS	CITY	STATE/PROVINCE/TERF
Kitten Construction - PennBid QA Account		12/10/2019 9:34 AM		Active	No	Complete		Pennsylvania
Tinker Creek		11/19/2019 6:01 PM		Active	No	Complete		Pennsylvania

You will see the company name along with their company information and preferences. The system also tracks all bid activity on each project. The icons indicate bid activity.

To sort by bid activity, bidding status or company status, check the box next to the desired preferences. The system will return all relevant entries.

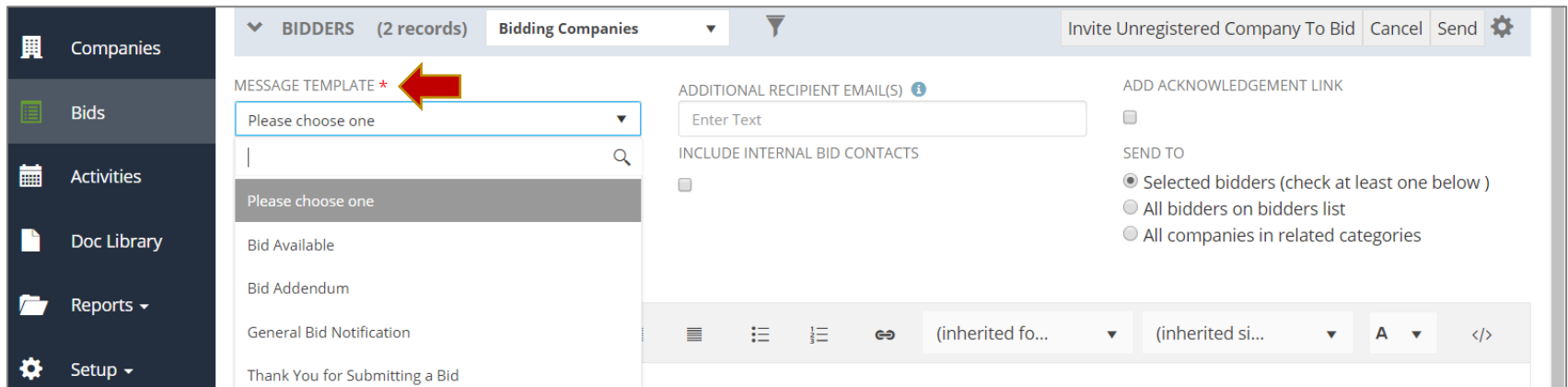
## Communicating with Bidders

If you need to notify the bidders, typically when an addendum is issued, click the “Notify” button.



Select the appropriate Message Template from the drop-down menu. Once you select, text will populate in the Subject line and in the Message Text field.

*Note:* Do not alter or replace any tags {%text%} on the notification templates. These are automatically populated by the system to send your project notification.

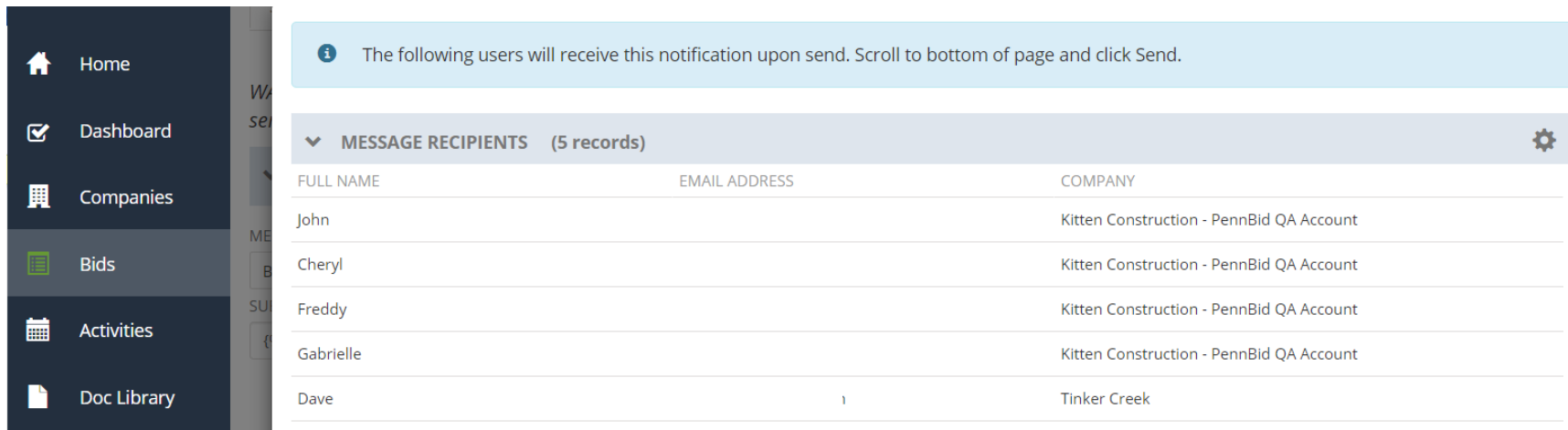


There are three “Send To” options. For notifying one bidder or a selected group of bidders, click the “Selected bidders” option and then check the bidders you wish to notify. To send a message to all bidders, like when issuing addenda, click the “All bidders on bidders list” option. To send an invitation to bid, click the “All companies in related categories” option.

*Note:* PennBid will send the invitation to bid automatically following bid opening. If you send the invitation, our office will not send the invitation to bid out.

The screenshot shows the PennBid notification configuration interface. On the left is a dark sidebar with navigation items: Dashboard, Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area has a warning at the top: "WARNING - Do NOT alter any replacement tags {%text%} on the notification templates. These are automatically filled-in by the system as part of sending your notification." Below the warning is a header for "BIDDERS (2 records)" with a dropdown menu set to "Bidding Companies" and buttons for "Invite Unregistered Company To Bid", "Cancel", "Send", and a settings gear. The configuration fields include: "MESSAGE TEMPLATE" (set to "Bid Addendum"), "SUBJECT" (set to "{%Client.Name%} Bid {%Bid.Number%} Addendum"), "ADDITIONAL RECIPIENT EMAIL(S)" (input field with "Enter Text"), "INCLUDE INTERNAL BID CONTACTS" (checkbox), and "ADD ACKNOWLEDGEMENT LINK" (checkbox). The "SEND TO" section has three radio button options: "Selected bidders (check at least one below)", "All bidders on bidders list" (which is selected), and "All companies in related categories". A red arrow points to the "SEND TO" section. Below these fields is a "MESSAGE TEXT" editor with a rich text toolbar and a text area containing the following template text: "{%Client.Name%}\n{%Bid.Number%}\n{%Bid.Title%}\n\nAn addendum has been issued for this bid opportunity.\n\nRequests for clarification are due {%Bid.ClarificationDeadline%}.\n\nBids are due {%Bid.DueDate%}.\n\nVisit this bid on our website at {%-Client.ProcureWareWebAddress%}/Bids/{%-Bid.GuidId%} to view the addendum."

Once all fields have been populated, click the “Send” button. The system will generate a pop up to verify that the correct message recipients were chosen. If you made an error, click “Cancel.” If everything looks good, click “Send.”

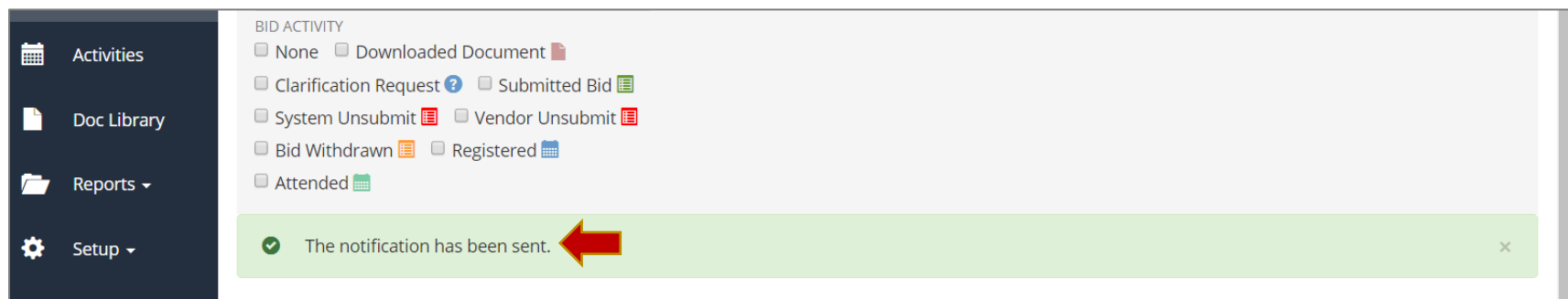


The screenshot shows a sidebar on the left with navigation options: Home, Dashboard, Companies, Bids, Activities, and Doc Library. The main content area features a light blue information banner at the top stating: "The following users will receive this notification upon send. Scroll to bottom of page and click Send." Below this is a table titled "MESSAGE RECIPIENTS (5 records)" with a settings gear icon on the right. The table has three columns: "FULL NAME", "EMAIL ADDRESS", and "COMPANY".

FULL NAME	EMAIL ADDRESS	COMPANY
John		Kitten Construction - PennBid QA Account
Cheryl		Kitten Construction - PennBid QA Account
Freddy		Kitten Construction - PennBid QA Account
Gabrielle		Kitten Construction - PennBid QA Account
Dave		Tinker Creek

*Note:* Full names and email addresses will also populate. They have been removed for this guide.

Once you send the notification, you will receive a confirmation message.



The screenshot shows the same sidebar as the previous image. The main content area displays a "BID ACTIVITY" section with several filterable categories: None, Downloaded Document, Clarification Request, Submitted Bid, System Unsubmit, Vendor Unsubmit, Bid Withdrawn, Registered, and Attended. At the bottom, a green confirmation banner with a checkmark icon and a close button (x) reads: "The notification has been sent." A red arrow points to this message.