

# MANAGING BID EVENTS

*Bid Events – Meetings such as Pre-Bid Meetings, Site Visits, or similar, that occur during the bidding period.*

## Adding Events

To Add an event to your project, go to the [SETTINGS/SETUP](#) tab and scroll down to the “**BID EVENTS**” section (directly below the STATE/COUNTY and CATEGORIES selectors). Click on the “+” button to create a new event:

CODE	TITLE	FULLTITLE
Luzerne Co, PA	Pennsylvania Pennsylvania > Luzerne Co, PA Luzerne Co, PA	
912	CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENANCE AND REPAIR SERVICES)	0 NIGP Classifications > 912 CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENANCE AND REPAIR SERVICES)
913	CONSTRUCTION SERVICES, HEAVY (INCL. MAINTENANCE AND REPAIR SERVICES)	0 NIGP Classifications > 913 CONSTRUCTION SERVICES, HEAVY (INCL. MAINTENANCE AND REPAIR SERVICES)
914	CONSTRUCTION SERVICES, TRADE (NEW CONSTRUCTION)	0 NIGP Classifications > 914 CONSTRUCTION SERVICES, TRADE (NEW CONSTRUCTION)
91422	ELECTRICIAN	0 NIGP Classifications > 91422 ELECTRICIAN
968	PUBLIC WORKS AND RELATED SERVICES	0 NIGP Classifications > 968 PUBLIC WORKS AND RELATED SERVICES

▼ BID EVENTS (0 records)		🗑️	✎	+	⚙️		
▼ ACTIVITIES (3 records)		🗑️	✎	+	⚙️		
<input type="checkbox"/>	SUBJECT	DESCRIPTION	START	END	COMMENTS	ASSIGNED CONTACTS	COMPANY DISPLAY
<input type="checkbox"/>	Due Date	The Bid's Due Date	1/3/2023 9:36 AM	1/3/2023 9:36 AM		Topic Link	Yes







**Note:** You **do not** need to create events for Clarification Deadlines or Bid Due Dates, as they are managed by way of the primary settings for the project.



This will open the event management grid, where you can establish:

- The event TITLE
- LOCATION (Physical address if in person, or Web meeting link, if virtual)
- Event START/END Date & Time
- A DESCRIPTION or more details about the event
- If event is mandatory, click the box for ATTENDANCE REQUIRED TO BID

▼ BID EVENTS (0 records) Save And Copy ✓ ⚙

TITLE * 	EVENT END DATE * 	EXTERNALLY VISIBLE
<input type="text" value="Enter Text"/>	<input type="text" value="Select"/>	<input checked="" type="checkbox"/>
LOCATION 	MAX ATTENDEES	ATTENDANCE REQUIRED TO BID 
<input type="text" value="Enter Text"/>	<input type="text" value="Enter a number"/>	<input type="checkbox"/>
REGISTRATION CUTOFF DATE	ATTACHED FILE ⓘ	CANCELLED
<input type="text" value="Select"/>	<input type="button" value="Choose File"/> No file chosen	<input type="checkbox"/>
EVENT START DATE * 	FILE DESCRIPTION ⓘ	
<input type="text" value="Select"/>	<input type="text" value="Enter Text"/>	
DESCRIPTION * 		
<input type="text" value="Enter Text"/>		



SEND ALERTS



## Alerts


If desired, you can choose to have the system send a reminder for the event by clicking on the box next to “SEND ALERTS.” This will open the Alerts management grid, where you can choose the units (Hours or Days), and the number of hours or days prior.


You can select multiple reminders by comma delineating different values. You can also choose who receives reminders (Bid Contacts, Registered Attendees, or other specified email addresses).


EVENT START DATE \*  
Select  

FILE DESCRIPTION ⓘ  
Enter Text

DESCRIPTION \*  
Enter Text

SEND ALERTS 

NUMBER OF UNITS OF TIME ⓘ \*   
2.3

UNIT OF TIME ⓘ \*   
Days

NOTIFY BID CONTACTS

NOTIFY REGISTERED ATTENDEES

ADDITIONAL EMAIL RECIPIENT(S) ⓘ  
Enter Text





## Event Registration



At times, you may wish for bidders to register in advance of an event. To enable this feature, simply assign a REGISTRATION CUTOFF DATE. This will enable the registration feature from the bidders view of the project.

Cancel Save


**TITLE \***  
Mandatory Site Visit


**LOCATION**  
Newtown Campus at the Boiler House

**REGISTRATION CUTOFF DATE**  

**EVENT END DATE \***  
11/16/2021 11:00 AM  

**MAX ATTENDEES**  
Enter a number



**ATTACHED FILE**   
**Choose File** No file chosen

**FILE DESCRIPTION**   
Enter Text

**EXTERNALLY VISIBLE**

**ATTENDANCE REQUIRED TO BID**

**CANCELLED**

select  

DECEMBER 2021

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11

November 16, 2021, at 10:00am at the Newtown Campus at the Boiler House. Contractors that do not attend the mandatory onsite meeting will be d

When you have completed choosing your event details, click the SAVE icon (“✓”). The event will now show up in your project, and the event dates will auto-populate within your bid calendar. You can create as many events as desired.



## Editing/Deleting Events

To edit or delete an event, simply hover your mouse over the desired event. Two icons will appear next to the TITLE column:

- To EDIT, click on the Pencil icon
- To DELETE, click on the Garbage Can

▼ BID EVENTS (1 record)							
<input type="checkbox"/>	TITLE	DESCRIPTION	LOCATION	EVENT START DATE	EVENT END DATE	VIEW EVENT REGISTRANTS	ATTENDANCE REQUIF
<input type="checkbox"/>	Mandatory Site Visit	There will be a mandatory site visit on November 16, 2021, at 10:00am at the Newtown Campus at the Boiler House. Contractors that do not attend the mandatory onsite meeting will be disqualified from the bid.	Newtown Campus at the Boiler House	11/16/2021 10:00 AM	11/16/2021 11:00 AM	<a href="#">View Registrants</a>	Yes



## Viewing/Managing Event Registrants

When managing your project, you may need to manage certain aspects, such as viewing which bidders have registered, or possibly recording which bidders have attended the event. To do so, click on the [View Registrants](#) button within the VIEW EVENT REGISTRANTS column:

BID EVENTS (1 record)									
TITLE	DESCRIPTION	LOCATION	EVENT START DATE	EVENT END DATE	VIEW EVENT REGISTRANTS	ATTENDANCE REQUIRE...	ATTACHED FILE	REGISTRATIO	
<input type="checkbox"/> Mandatory Site Visit	There will be a mandatory site visit on November 16, 2021, at 10:00am at the Newtown Campus at the Boiler House. Contractors that do not attend the mandatory onsite meeting will be disqualified from the bid.	Newtown Campus at the Boiler House	11/16/2021 10:00 AM	11/16/2021 11:00 AM	<a href="#">View Registrants</a>	Yes			



This will open the list of registered bidders, showing related particulars, including how many attendees, and when they registered.



In the scenario of a mandatory pre-bid meeting, you can record which bidders attended. To do so, hover your mouse over the desired bidder line, which will cause the EDIT/DELETE icons to appear. Click on the EDIT button (pencil).

### BID EVENT

TITLE	EVENT END DATE	ATTENDANCE REQUIRED TO BID
Mandatory Site Visit	11/16/2021 11:00 AM	Yes
REGISTRATION CUTOFF DATE	MAX ATTENDEES	CANCELLED
		No
EVENT START DATE	EXTERNALLY VISIBLE	
11/16/2021 10:00 AM	Yes	

REGISTERED COMPANIES (8 records) + Notify


<input type="checkbox"/>	COMPANY NAME	NUMBER ATTENDING	NUM ATTENDED	DATE REGISTERED	ATTACHED FILE	FILE DESCRIPTION
<input type="checkbox"/>	McCloskey Mechanical	1	1	11/4/2021 11:31 AM		
<input type="checkbox"/>	John Meehan and Son	2	1	11/4/2021 1:44 PM		
<input type="checkbox"/>	AGH Mechanical Inc	1	1	11/4/2021 3:36 PM		



This will open a grid where you can indicate how many people attended. You do this within the NUM ATTENDED field, and when finished, click Save.

### Event Registrant ×

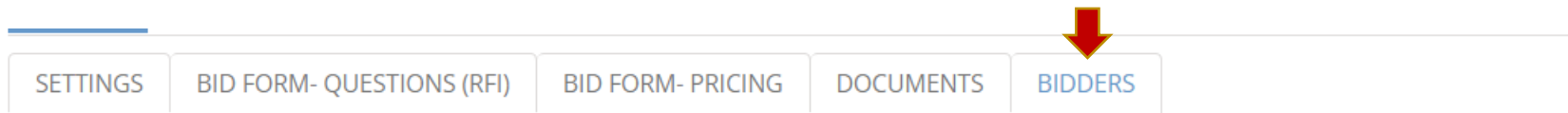
Cancel Save

NUMBER ATTENDING *	DATE REGISTERED	FILE DESCRIPTION ⓘ
<input type="text" value="1"/>	11/4/2021 11:31 AM	<input type="text" value="Enter Text"/>
NUM ATTENDED * 	ATTACHED FILE ⓘ	
<input type="text" value="1"/>	<span>Choose File</span> No file chosen	





When you have finished indicating which bidders attended the event, this becomes a filterable element within the **BIDDERS** tab. This is especially useful when evaluating bids as you can exclude bidders who didn't participate in mandatory events from evaluation.



*WARNING - Do NOT alter any replacement tags **{%text%}** on the notification templates. These are automatically populated by the*

**BIDDERS** (6 records) Bidding Companies

Filtered by: Bid Activity **X** Company Status **X**

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






**COMPANY STATUS**  
 Active  Inactive

<input type="checkbox"/>	NAME	BID ACTIVITY	CITY	STATE/PROVINCE/TERRITORY	DATE SUBMITTED	INTENT TO BID	SU
<input type="checkbox"/>	AGH Mechanical Inc		Churchville	Pennsylvania			
<input type="checkbox"/>	cderitis@madseninc.com		Broomall	Pennsylvania		Will Bid	
<input type="checkbox"/>	Gaudelli Bros Inc		Millville	New Jersey		Will Bid	
<input type="checkbox"/>	John Mehan and Son		Philadelphia	Pennsylvania		Will Bid	



To exclude bidders from the evaluation process, such as those who failed to attend a mandatory pre-bid meeting, hover your mouse over the desired bidder, and click on the EDIT button (pencil) that appears.

None  Downloaded Document  Clarification Request  Active  Inactive  
 Submitted Bid  System Unsubmit  
 Vendor Unsubmit  Bid Withdrawn  Registered  
 Attended

<input type="checkbox"/>	NAME	BID ACTIVITY	CITY	STATE/PROVINCE/TERRITORY	DATE SUBMITTED	INTENT TO BID	SUBMIT NAME	SUBMIT CONFIRMATION N...	ORIGINAL DATE
<input type="checkbox"/>	AGH Mechanical Inc	  	Churchville	Pennsylvania					
<input type="checkbox"/>	cdertis@madseninc.com		Broomall	Pennsylvania		Will Bid			
<input type="checkbox"/>	Gaudelli Bros Inc		Millville	New Jersey		Will Bid			

This will open a grid where you can check the box “EXCLUDE FROM EVALUATION.” Then click SAVE.

**Bidding Company View** ×

**EXCLUDE FROM EVALUATION**

**OPT OUT OF NOTIFICATION**

INTERNAL COMMENT

EXTERNAL COMMENTS

COMPANY  
AGH Mechanical Inc

BID ACTIVITY  
Downloaded Document, Registered, Attended

Cancel Save

**IMPORTANT:** Excluding bidders from evaluation does not delete or edit their bid in any way. It simply removes their information from view when in the ANALYSIS tab. Their information can easily be reincorporated by reversing the above steps.