

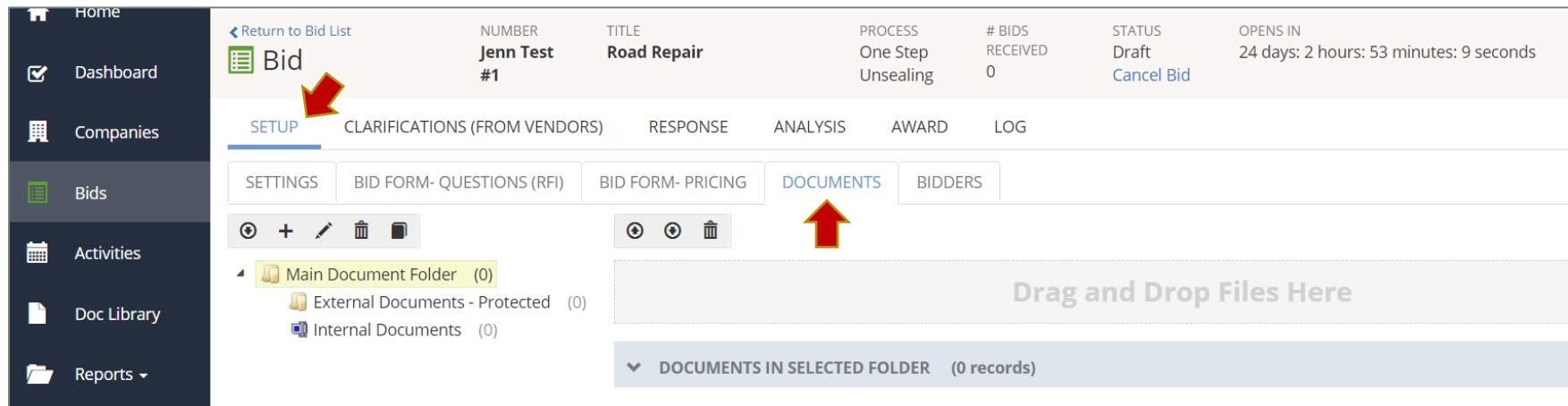
# ISSUING ADDENDA

*Addenda – A written change, addition, alteration, correction or revision to a bid, proposal or contract document.*

At times, changes in the scope of work to the initial solicitation may require issuance of addenda. There are two or three steps when issuing addenda on PennBid.

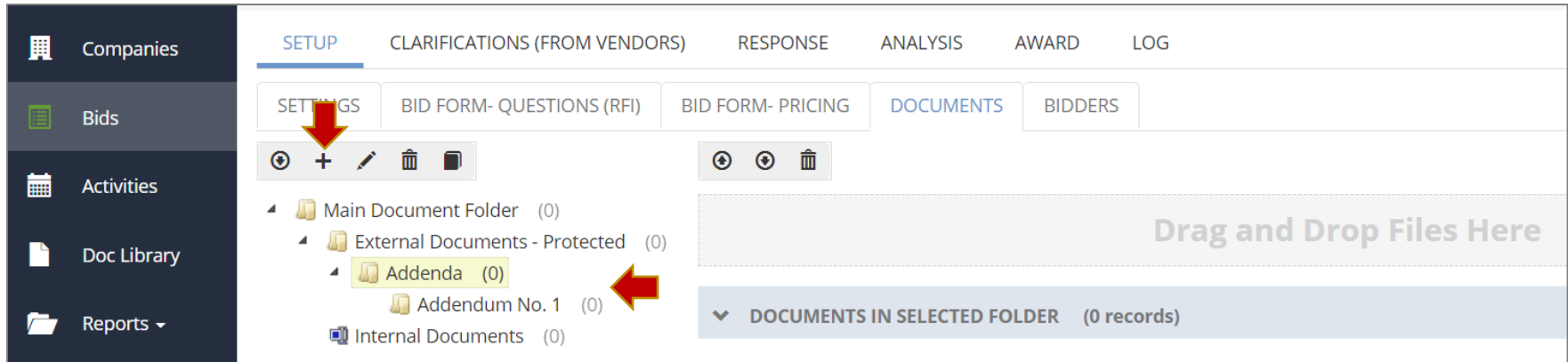
## Uploading Addenda Documents

To begin, find and open your solicitation, stay on the **Setup** tab and click the **Documents** tab on the lower toolbar.



The screenshot displays the PennBid interface for a bid titled "Road Repair". The interface is divided into a left sidebar and a main content area. The sidebar contains navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, and Reports. The main content area shows a table with bid details: NUMBER "Jenn Test #1", TITLE "Road Repair", PROCESS "One Step Unsealing", # BIDS RECEIVED "0", STATUS "Draft", and OPENS IN "24 days: 2 hours: 53 minutes: 9 seconds". Below the table, there are tabs for "SETUP", "CLARIFICATIONS (FROM VENDORS)", "RESPONSE", "ANALYSIS", "AWARD", and "LOG". The "SETUP" tab is active, and within it, there are sub-tabs for "SETTINGS", "BID FORM- QUESTIONS (RFI)", "BID FORM- PRICING", "DOCUMENTS", and "BIDDERS". The "DOCUMENTS" sub-tab is selected, showing a folder structure with "Main Document Folder (0)", "External Documents - Protected (0)", and "Internal Documents (0)". A red arrow points to the "DOCUMENTS" sub-tab, and another red arrow points to the "Main Document Folder" folder. Below the folder structure is a large area labeled "Drag and Drop Files Here" and a section for "DOCUMENTS IN SELECTED FOLDER (0 records)".

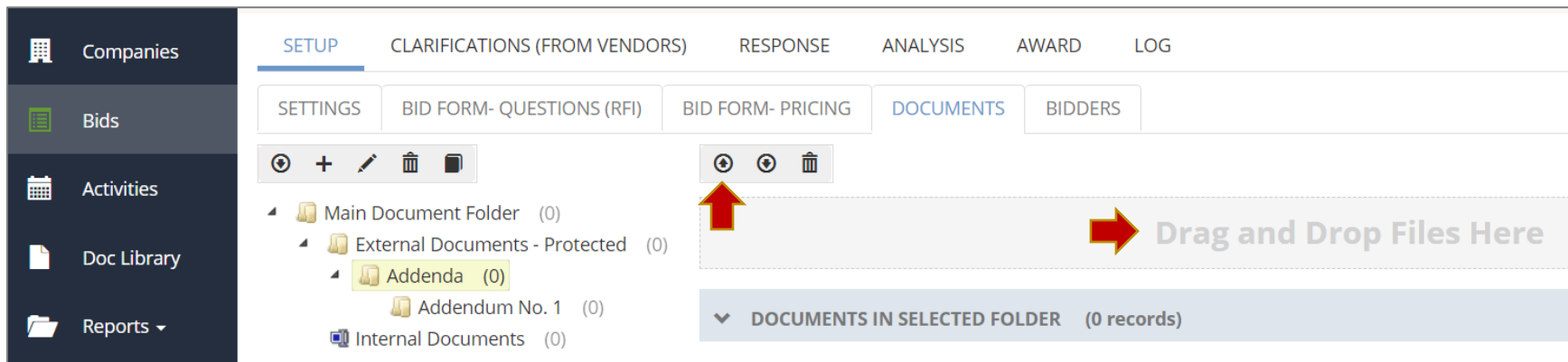
*Note:* You can add folders/sub-folders at any time. If you don't have a folder called "Addenda," you can create one by selecting the main folder you want to add the sub-folder, click the + icon and add/name the new folder.



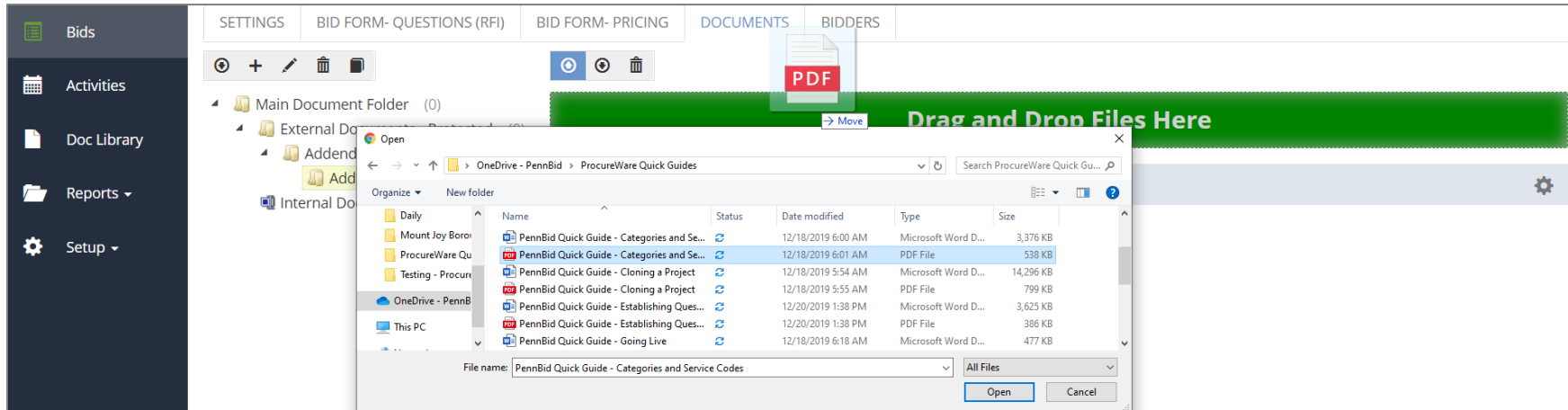
The screenshot shows the PENNBID interface with the 'DOCUMENTS' tab selected. The left sidebar contains 'Companies', 'Bids', 'Activities', 'Doc Library', and 'Reports'. The top navigation bar includes 'SETUP', 'CLARIFICATIONS (FROM VENDORS)', 'RESPONSE', 'ANALYSIS', 'AWARD', and 'LOG'. Below the navigation bar are tabs for 'SETTINGS', 'BID FORM- QUESTIONS (RFI)', 'BID FORM- PRICING', 'DOCUMENTS', and 'BIDDERS'. The 'DOCUMENTS' tab is active, showing a document tree on the left with folders: 'Main Document Folder (0)', 'External Documents - Protected (0)', 'Addenda (0)', 'Addendum No. 1 (0)', and 'Internal Documents (0)'. A red arrow points to the 'Addenda' folder. To the right is a 'Drag and Drop Files Here' area and a 'DOCUMENTS IN SELECTED FOLDER (0 records)' section. A toolbar with icons for upload, add, edit, delete, and refresh is visible above the document tree.

*Note:* We recommend you create a separate folder for each issued addendum to allow Bidders the ability to differentiate between each addendum/document.

To upload your document(s) related to the addendum (plans/specs, answered questions, new documents, etc.) either click the “Upload Files” icon or “Drag & Drop” your files into the drop box.



This screenshot is similar to the previous one but highlights the upload options. A red arrow points to the 'Upload Files' icon (a circle with a plus sign) in the toolbar above the document tree. Another red arrow points to the 'Drag and Drop Files Here' area on the right side of the interface.



Note: If using the “Drag and Drop” function, the bar needs to turn (and remain) green when dropping your document(s).



## Modifying the Solicitation

Once the addenda documents are uploaded, adjust the solicitation as needed.

The **Setup** tab contains the sub-tab “Settings” for adjusting the Due Date, Due Time and/or the Clarification Deadline and the sub-tabs “Bid Form- Questions (RFIs)” and “Bid Form- Pricing” for adding/deleting/modifying the bid form or RFIs.

The screenshot shows the PennBid web application interface. On the left is a dark sidebar with navigation options: Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area is titled 'SETUP' and contains sub-tabs: CLARIFICATIONS (FROM VENDORS), RESPONSE, ANALYSIS, AWARD, LOG, SETTINGS, BID FORM- QUESTIONS (RFI), BID FORM- PRICING, DOCUMENTS, and BIDDERS. The 'SETTINGS' sub-tab is active, showing instructions for Quick-Start guides and User Videos. Below the instructions is a table with columns for NUMBER, STATUS, TITLE, CLARIFICATION NOTICE, and VENDOR SERVICE AREA VIEW. The table contains one row with the following data: NUMBER: Jenn Test #1, STATUS: Draft, TITLE: Road Repair, CLARIFICATION NOTICE: No, and VENDOR SERVICE AREA VIEW: Yes. To the right of the table are buttons for Clone, Delete, and Edit. A red arrow points to the 'Edit' button.

NUMBER	STATUS	TITLE	CLARIFICATION NOTICE	VENDOR SERVICE AREA VIEW
Jenn Test #1	Draft	Road Repair	No	Yes

*Note:* You are unable to pull the bid due date/time in once the project is live.



When editing the Pricing Form, select the line item you wish to modify and click the “pencil” icon on the right. A box will pop up and you can make changes on screen. Click “Save” and the bid form will update.

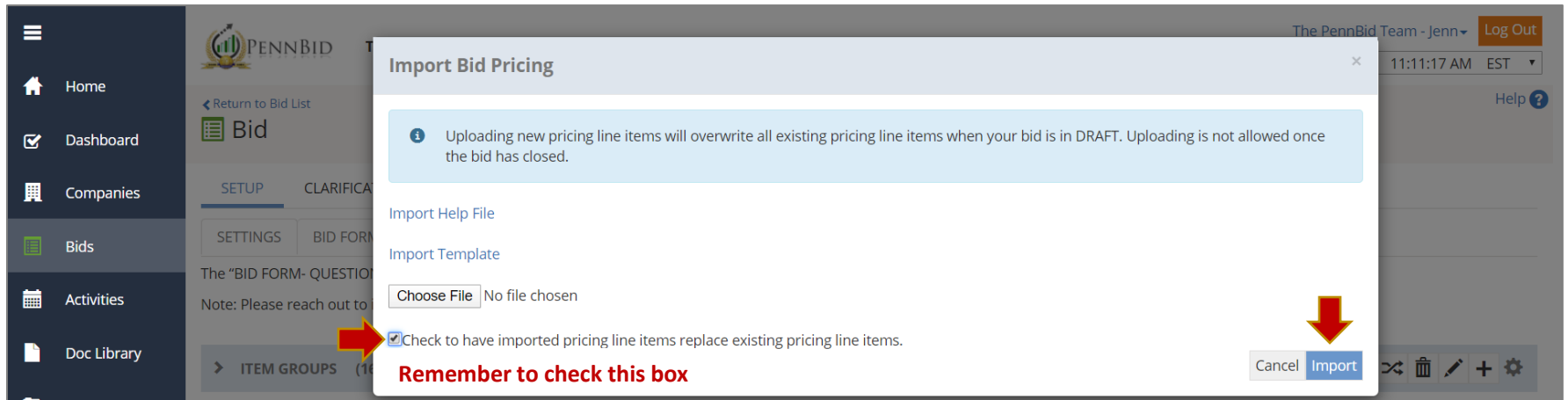
The screenshot displays the PENNBID web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area shows a 'PricingLineItem' modal form. The form contains the following fields and options:

- ITEM GROUP: 2020 Schedule of Prices
- UNIT OF MEASURE: SF
- ALLOW NO BID:
- CATEGORY: Please choose one
- QUANTITY: 4,385.00
- ALLOW ALT ITEM:
- REFERENCE NUMBER: 1
- UNIT PRICE ESTIMATE: \$
- ALLOW COMMENT:
- DESCRIPTION: 2020 Sidewalk Removal and disposal, Sidewalk Ins
- ALLOWANCE ITEM:
- INTERNAL ONLY:
- TYPE: Base

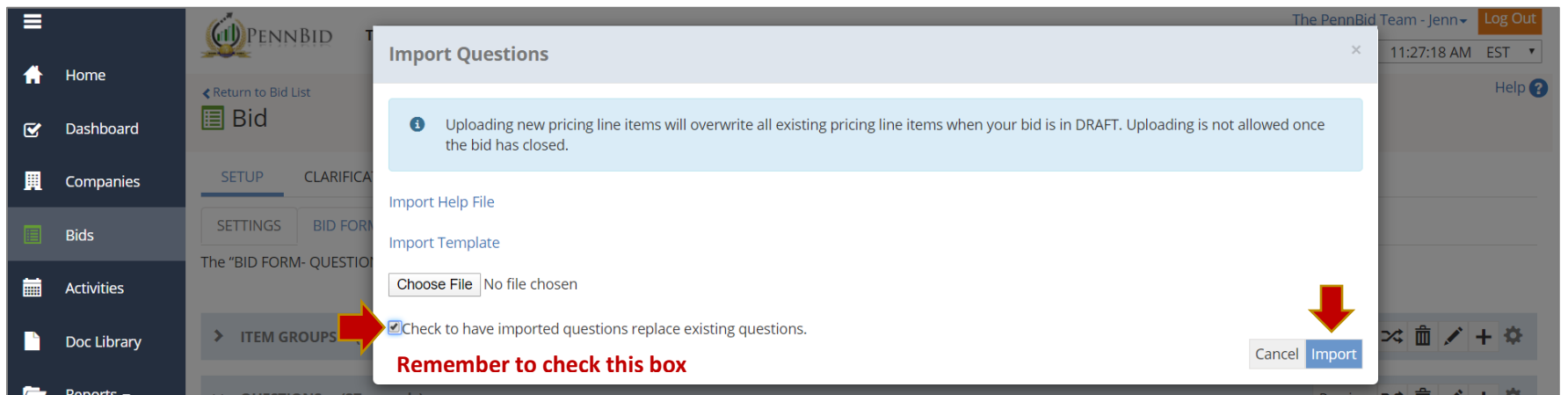
At the top right of the modal are 'Cancel' and 'Save' buttons. A red arrow points to the 'Save' button. In the background, a table lists pricing line items, with a red arrow pointing to the first item (ID 1) and another red arrow pointing to a pencil icon in the right-hand toolbar.



If using an updated bid template, click the “Gear” icon, “Choose File” and “Import.” It’s very important to remember to check the “Check to have imported pricing line items replace existing line items” box. If you don’t, the updated pricing form will add to the existing pricing form. This will result in double line items.



To edit the RFIs, use the same process as editing the Bid Form. Remember to check the replacement box.



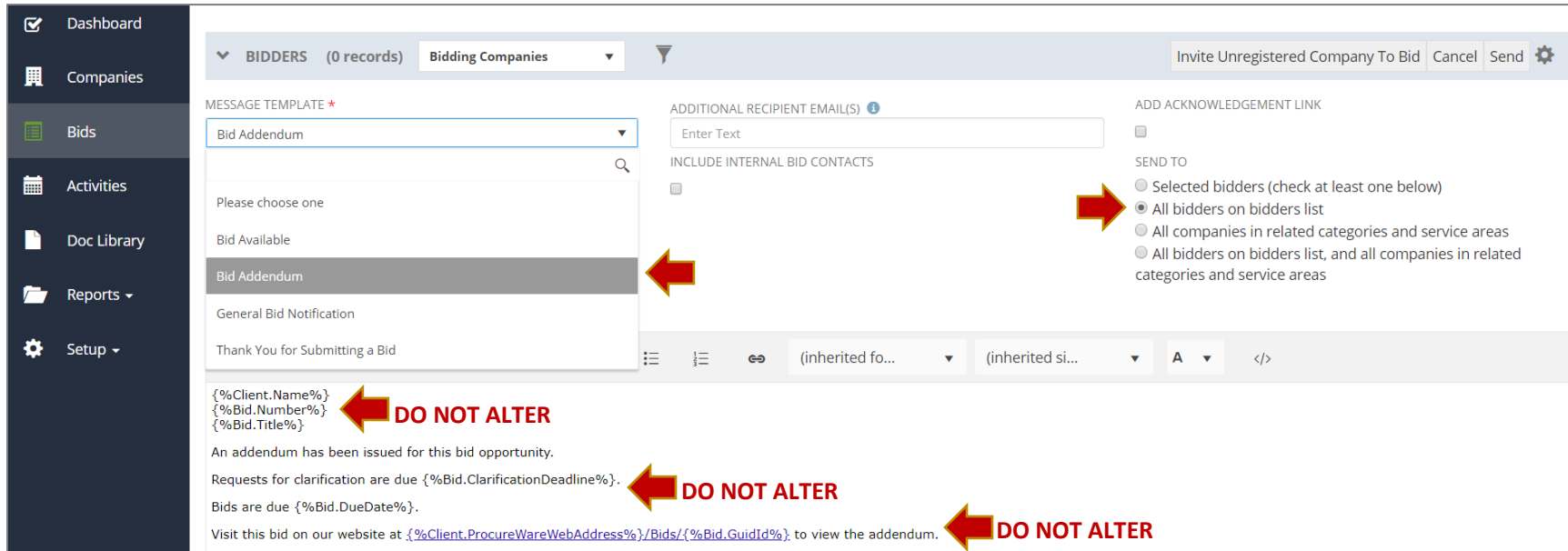


## Notifying Bidders

Once all addendum documents have been added and the bid form and RFIs have been updated, the next step is notifying the Bidders. To notify the Bidders, click the **Bidders** tab on the lower toolbar (one tab to the right of **Documents**). Click the “Notify” button.

The screenshot displays the PennBid software interface. At the top, there is a navigation bar with tabs for SETTINGS, BID FORM- QUESTIONS (RFI), BID FORM- PRICING, DOCUMENTS, and BIDDERS. A red arrow points to the BIDDERS tab. Below the navigation bar, a warning message reads: "WARNING - Do NOT alter any replacement tags {%text%} on the notification templates. These are automatically populated by the system as part of sending your notification." The main content area shows a table header for BIDDERS with 0 records. The table has columns for NAME, BIDDING STATUS, and COMPANY STATUS. Below the table, there are filters for BID ACTIVITY, including None, Downloaded Document, Clarification Request, Submitted Bid, System Unsubmit, Vendor Unsubmit, Bid Withdrawn, Registered, and Attended. On the right side of the table, there is a toolbar with buttons for Invite Unregistered Company To Bid, a plus sign, a trash icon, a pencil icon, a Notify button (highlighted with a red arrow), and a settings gear icon.

Once you click “Notify,” a new section will populate on screen. Click the “Message Template” dropdown and select “Bid Addendum.” Under the “Send To” section, select “All Bidders on the bidders list.”



Dashboard

Companies

Bids

Activities

Doc Library

Reports

Setup

BIDDERS (0 records) Bidding Companies

Invite Unregistered Company To Bid Cancel Send

MESSAGE TEMPLATE \*

Bid Addendum

Please choose one

Bid Available

**Bid Addendum**

General Bid Notification

Thank You for Submitting a Bid

ADDITIONAL RECIPIENT EMAIL(S)

Enter Text

INCLUDE INTERNAL BID CONTACTS

ADD ACKNOWLEDGEMENT LINK

SEND TO

- Selected bidders (check at least one below)
- All bidders on bidders list**
- All companies in related categories and service areas
- All bidders on bidders list, and all companies in related categories and service areas

{Client.Name%}

{Bid.Number%}

{Bid.Title%}

**DO NOT ALTER**

An addendum has been issued for this bid opportunity.

Requests for clarification are due {Bid.ClarityDeadline%}.

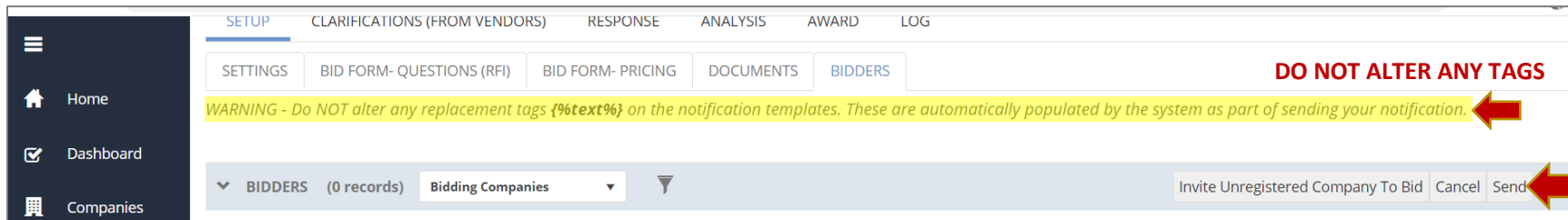
**DO NOT ALTER**

Bids are due {Bid.DueDate%}.

Visit this bid on our website at {Client.ProcureWareWebAddress%}/Bids/{Bid.GuidId%} to view the addendum.

**DO NOT ALTER**

Note: A template with tags will pre-populate text in several additional fields. DO NOT alter any of the replacement tags. These contain specific information about your project.



Home

Dashboard

Companies

SETUP CLARIFICATIONS (FROM VENDORS) RESPONSE ANALYSIS AWARD LOG

SETTINGS BID FORM- QUESTIONS (RFI) BID FORM- PRICING DOCUMENTS **BIDDERS**

**DO NOT ALTER ANY TAGS**

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

BIDDERS (0 records) Bidding Companies

Invite Unregistered Company To Bid Cancel Send

After selecting the template and recipients, click the “Send” button.





A box will appear with the message recipients, their email address and their company name.

The following users will receive this notification upon send. Scroll to bottom of page and click Send.

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

Cancel Send

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

Click “Send” at the bottom of the page. (If the list is longer, you need to scroll to the bottom to click “Send”) Once the notification is sent, you will see a confirmation message on screen.

BIDDERS (2 records) Bidding Companies

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

✓ The notification has been sent.



In order to verify that the notification was sent, click the **Log** tab on the top toolbar. Details about the notification, including a copy of the message, delivery verification, send count and more, will be visible for review.

The screenshot shows the PennBid web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, and Reports. The main content area has a top toolbar with a 'Log' tab highlighted by a red arrow. Below the toolbar are tabs for 'MESSAGE BATCHES', 'OUTBOUND MESSAGES', 'INBOUND MESSAGES', 'DOCUMENTS', and 'AUDIT'. The 'MESSAGE BATCH LOG' section shows 2 records in a table.

SUBJECT	CREATED	SENDER	SENT COUNT	BOUNCE COUNT	NOTIFICATION TYPE
Test Site Only Bid Jenn Test #1 Addendum	12/31/2019 7:22 AM	jenn@pennbid.net	5	0	All

If you have any questions regarding document uploads, modifying items on the “Setup” page or adjusting the bid form and/or RFIs, please contact our office for assistance.