



HOW TO: POST BID RESULTS, EXPORT SUBMISSIONS AND AWARD, SEND REGRET AND AWARD LETTERS

Mini Guide

When setting up your Bid, in Bid Details, you must decide which option you would like to use for your pricing:

Unseal Submission and Price: Manual
 Automatic

- **Manual** – The values (pricing) will be sealed. You will need to manually unseal the bid submission and price.
- **Automatic** – The pricing will automatically display in the Submissions and Award tab.

If you want the system to automatically post the Bidder's List (without pricing), when setting up your bid, select **"Show Bids Submitted – Show to Public"** – you will still need to follow the steps below to display Prices:

Show Bids Submitted: Show to Public
 Hide from Public

1. Navigate to **"Bids"**.



2. Set the Status to **"Closed"** and search for your bid.

Search

Search the *Bids* in the application:

Search Criteria

Keyword(s):

Status:

[Show Advanced Search \[+\]](#)

Search Results

Bid Name	Bid Status	Published Date	Bid Closing Date	Days Left
T2015-90 - Garbage and Recycling	Closed	Tue Jun 28, 2016 12:00 PM	Fri Jan 6, 2017 12:00 PM	0
C2015-22 - Cambridge Waste Management Facility: Compliance Monitoring and Annual Reporting	Closed	Tue Nov 24, 2015 12:00 PM	Thu Jan 5, 2017 12:00 PM	0
2012-172 - Translation, Interpretation & American Sign Language Services	Closed	Mon May 9, 2016 12:00 PM	Fri Dec 30, 2016 12:00 PM	0
T2015-204 - Landscape Planting at Various Locations, Township of Woolwich, City of Kitchener, City of Waterloo and the City of Cambridge	Closed	Mon Nov 9, 2015 12:00 PM	Fri Dec 30, 2016 12:00 PM	0
2015-201 - Reconstruction of Dome Avenue	Closed	Mon Dec 19, 2016 12:00 PM	Fri Dec 30, 2016 12:00 PM	0
DK-006-2016 - Request for Supplier Qualification for General, Electrical, Mechanical, Masonry, Millwork and Flat Roofing Contractors	Closed	Thu Jul 7, 2016 12:00 PM	Fri Dec 30, 2016 12:00 PM	0
PP16-18 - Renovation of Room D1129 at the Kawartha Trades Technology Center	Closed	Wed Nov 23, 2016 9:30 AM	Tue Dec 20, 2016 12:00 PM	0

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3. Click **Edit** to open the selected bid.





4. In the **Bid Details** Tab, you will notice the status has automatically changed to **Closed**:

Bid Detail

Use the following form to manage the *Bid* details:

Fields with  icon are visible to public when bid is made public.

	Number	Name	
 Title:	<input type="text" value="T2015-90"/>	<input type="text" value="Garbage and Recycling"/>	*
 Status:	<input type="text" value="Closed"/>		*
Type:	<input type="text" value="Tender"/>		*

HOW TO POST BID RESULTS

5. Navigate to the “Award” Tab:



6. Under the “Submissions” Heading, the submitted bidders are listed with their pricing (if pricing tables were part of the e-bid). If you are not doing E-Bidding, you will need to input the submitted bidders in the “Search” tab:

Submissions

2015-138 - Supply of Four Wheel Drive 3/4 Ton Pick-Up Truck
Bid Status: Closed

Vendor Name (Contact)	Display Value	Value/Notes	Compliant Bid	Submission Status	Unseal Price	Unseal Submission	Rating	Status	# Contracts
eSolutonsGroup Ltd Carden, Alison Truck Submission Manage Results	<input type="checkbox"/>	\$80,100.00	Yes	Submitted Tue Aug 30, 2016 9:25:34 AM	Yes	Yes	Good	Not Classified	Total: 4 Evaluated: 1

Search for Vendor ...

Display Value – If checked the pricing will be publically displayed. If there are pricing tables in the bid, it will automatically get pulled into the “Value/Notes” field. If there are no pricing tables, this field will be blank.

Value/Notes – Double click to edit. You are able to override the data in this field (ex. Listing out option years and their values, showing pricing for different parts etc.).

Red corner – Appears when you make any changes. They will only be applied once you click “Save”.

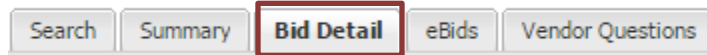
7. Click “Save” after making your changes:



8. In the Submitted section, you also have the ability to pull different reports and send emails to the Submitted Bidders:

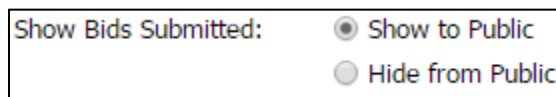


9. Go to the “**Bid Detail**” tab:



10. If you hadn’t selected “Show Bids Submitted – Show to Public” when setting up your bid, to show the results, follow the steps below:

11. If you would like to display Submitted Bids, select “**Show to Public**”. Note: this will display all the bidders who submitted. It will only show the value if you check the “**Display Value**” box in the “**Submissions and Award**” tab.



12. After these changes have been made, click “**Save**”:

13. To view the public site and what is displayed, click “**View Online**”

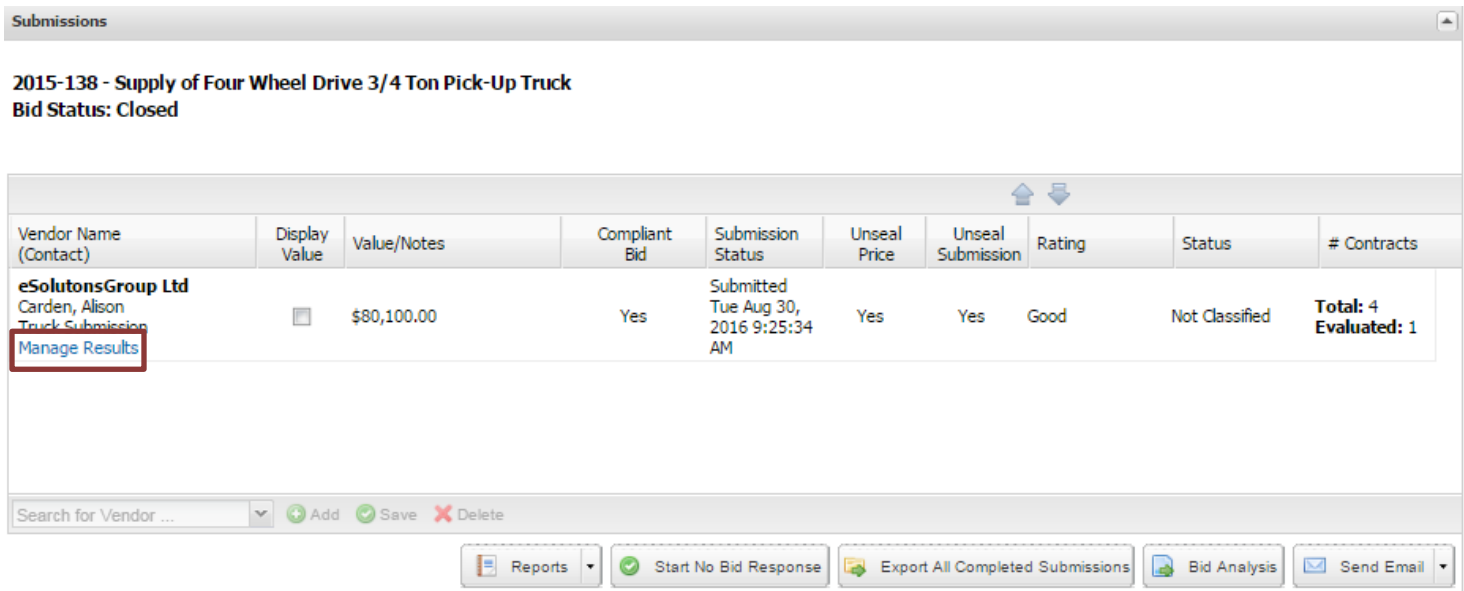


HOW TO EXPORT COMPLETED SUBMISSIONS

14. To export Submissions, navigate to the “Submissions” Tab:



15. To view the bid submissions individually without exporting the files to your own computer, click on “Manage Results”:



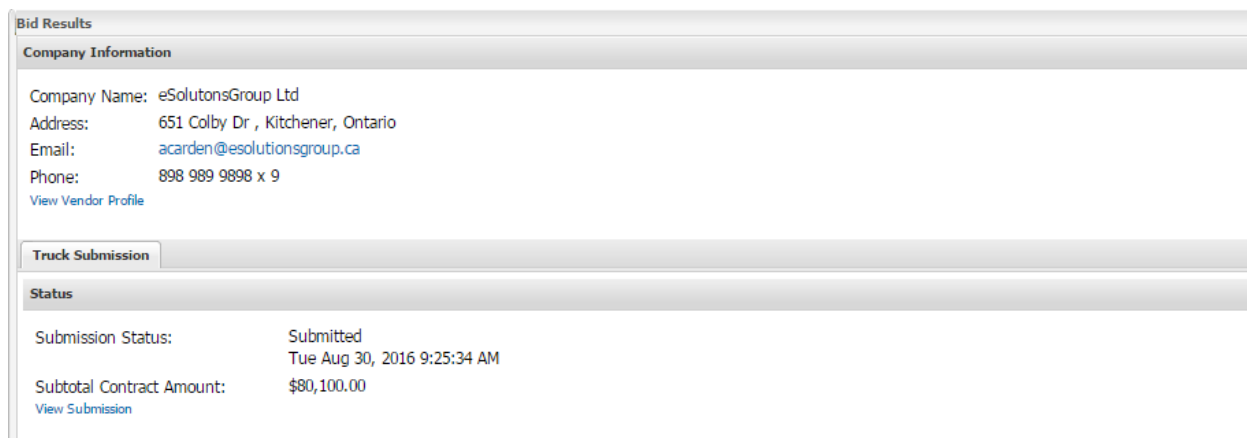
Submissions

2015-138 - Supply of Four Wheel Drive 3/4 Ton Pick-Up Truck
Bid Status: Closed

Vendor Name (Contact)	Display Value	Value/Notes	Compliant Bid	Submission Status	Unseal Price	Unseal Submission	Rating	Status	# Contracts
eSolutonsGroup Ltd Carden, Alison Truck Submission Manage Results	<input type="checkbox"/>	\$80,100.00	Yes	Submitted Tue Aug 30, 2016 9:25:34 AM	Yes	Yes	Good	Not Classified	Total: 4 Evaluated: 1

Search for Vendor ...

16. This will open a window where you will see Submission Details:



Bid Results

Company Information

Company Name: eSolutonsGroup Ltd
Address: 651 Colby Dr , Kitchener, Ontario
Email: acarden@esolutionsgroup.ca
Phone: 898 989 9898 x 9
[View Vendor Profile](#)

Truck Submission

Status

Submission Status: Submitted
Tue Aug 30, 2016 9:25:34 AM
Subtotal Contract Amount: \$80,100.00
[View Submission](#)

17. Click on “View Submission”

View Submission

20160-08018 -

Status: **Closed**
Closing Date: Sunday August 21, 2016 12:00:00 PM
Question Deadline: Tuesday August 09, 2016 12:00:00 PM

Vendor Details

Company Name: Company A
Address: 123 fake street, Fake City Fake Province
Contact: First2 Last2
Email: demo2@qa.esolutionsgroup.ca
Phone: 123-123-1234

Submission Details -

Submitted On: Friday August 19, 2016 09:26:33 AM
Submitted By: First2 Last2
Email: demo2@qa.esolutionsgroup.ca
IP Address: 172.16.90.24

Bid Bond

[Close](#)

18. Scroll down and you are given the option to view all document uploads and the completed submission PDF. Click on the file to open:

Bid Bond

Has not been viewed.

Agreement to Bond

Has not been viewed.

Completed Submission

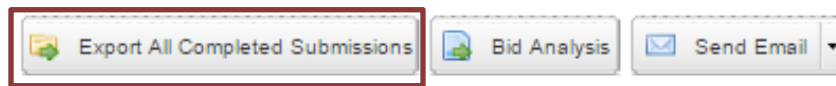
Has not been viewed.

Export All Bid Documents

19. Close the Window by clicking "**Close**"

20. In the “**Submissions and Award**” Tab, you have three options in this tab:

- a. Export all Submissions – all files will download in a Zipped File:



- b. Export Bid Analysis:



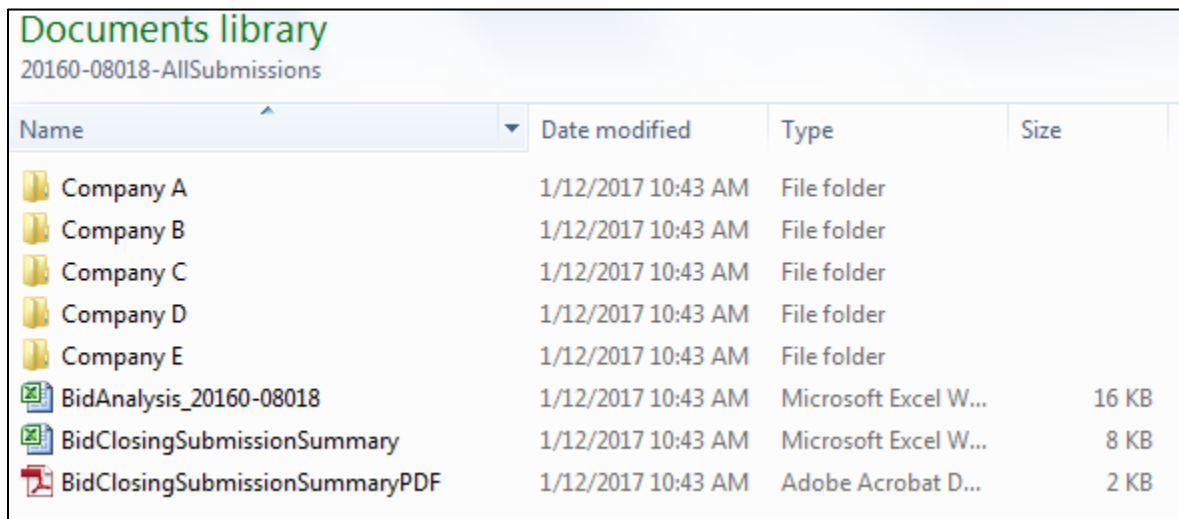
- c. Send Emails:



21. Click “**Export All Submissions**” to download all the submissions.

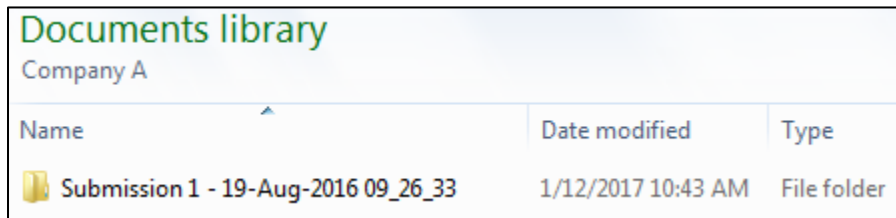
22. The Zipped File will open in a new window.


23. Copy all the files in the zipped folder and paste into a new folder in your computer.



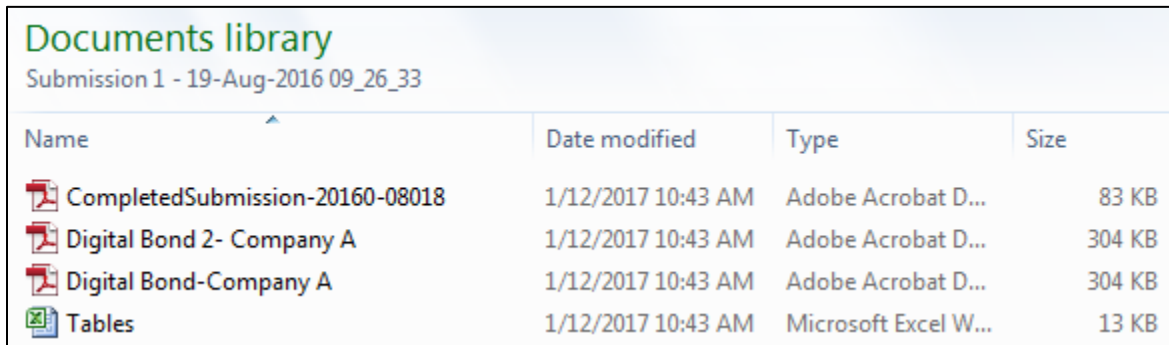
Name	Date modified	Type	Size
Company A	1/12/2017 10:43 AM	File folder	
Company B	1/12/2017 10:43 AM	File folder	
Company C	1/12/2017 10:43 AM	File folder	
Company D	1/12/2017 10:43 AM	File folder	
Company E	1/12/2017 10:43 AM	File folder	
BidAnalysis_20160-08018	1/12/2017 10:43 AM	Microsoft Excel W...	16 KB
BidClosingSubmissionSummary	1/12/2017 10:43 AM	Microsoft Excel W...	8 KB
BidClosingSubmissionSummaryPDF	1/12/2017 10:43 AM	Adobe Acrobat D...	2 KB





24. To view individual submissions, double click on the bidder's name which will open their submission folder:



Documents library		
Company A		
Name	Date modified	Type
 Submission 1 - 19-Aug-2016 09_26_33	1/12/2017 10:43 AM	File folder

25. Double Click on the folder to access all the documents; including: Completed Submission, any mandatory document uploads and Excel “**Tables**” Report:



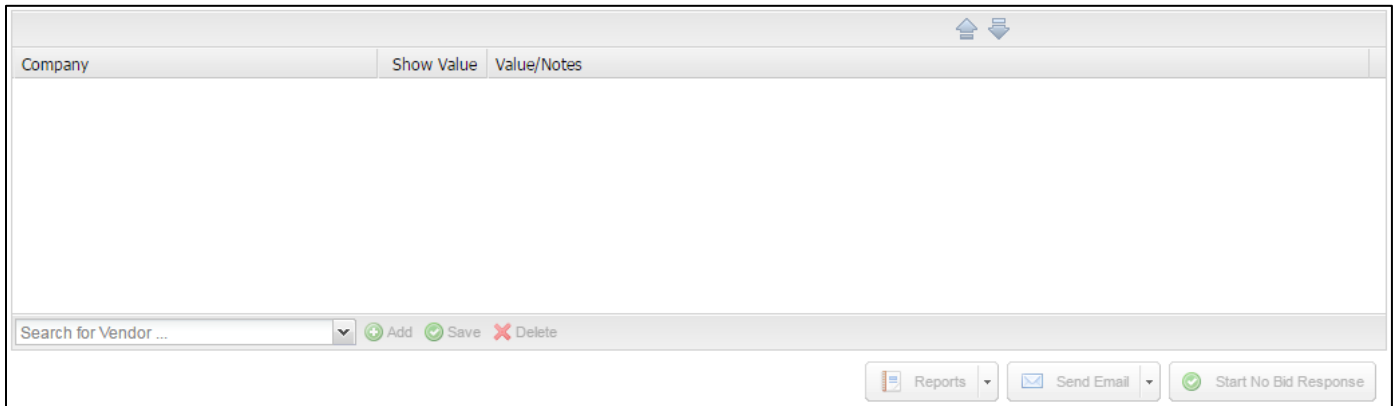
Documents library			
Submission 1 - 19-Aug-2016 09_26_33			
Name	Date modified	Type	Size
 CompletedSubmission-20160-08018	1/12/2017 10:43 AM	Adobe Acrobat D...	83 KB
 Digital Bond 2- Company A	1/12/2017 10:43 AM	Adobe Acrobat D...	304 KB
 Digital Bond-Company A	1/12/2017 10:43 AM	Adobe Acrobat D...	304 KB
 Tables	1/12/2017 10:43 AM	Microsoft Excel W...	13 KB

HOW TO AWARD

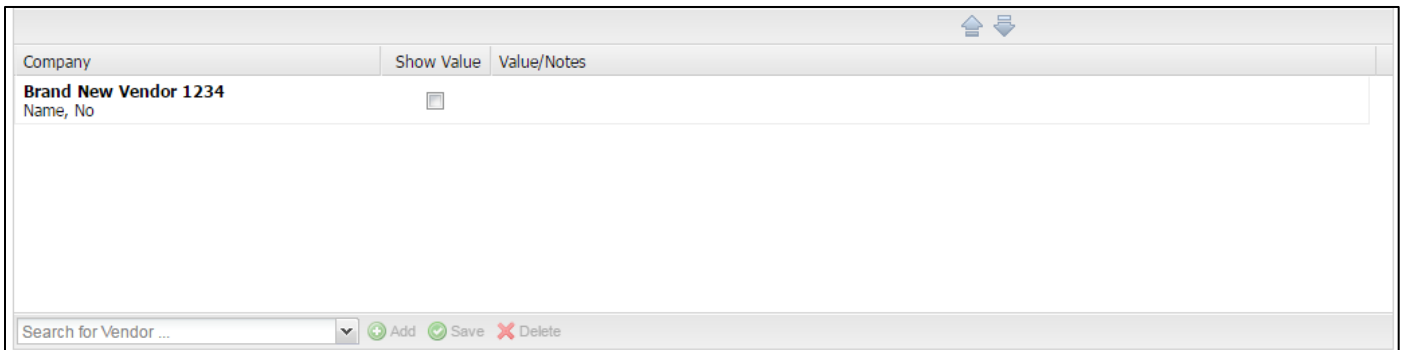
26. To award a bid, navigate to the “**Submissions and Award**” Tab:



27. Below the “**Submissions**” section is the “**Award**” Section:



28. Enter the Awarded Vendor in the Search field and click “**Add**”:



29. You will need to enter the Value/Notes (if required) and select whether it should be shown to the public by clicking “**Show Value**”.

Company	Show Value	Value/Notes
Brand New Vendor 1234 Name, No	<input checked="" type="checkbox"/>	\$100,000

30. Click “**Save**”:



31. Navigate to the “**Bid Detail**” tab:



32. Change Status to “**Awarded**”:

A dropdown menu with the label "Status:" on the left. The selected value is "Awarded". A small downward arrow is on the right side of the dropdown, and a red asterisk is visible at the far right end of the menu.

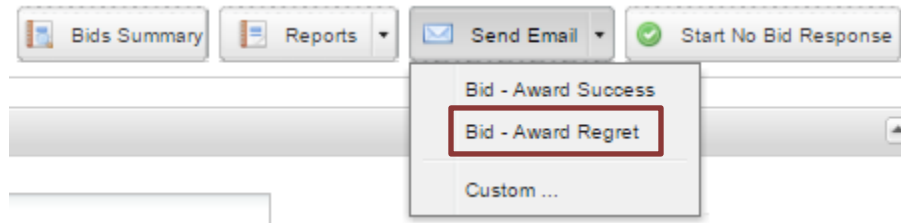
33. Click “**Save**”

34. To view the public page, click “**View Online**”

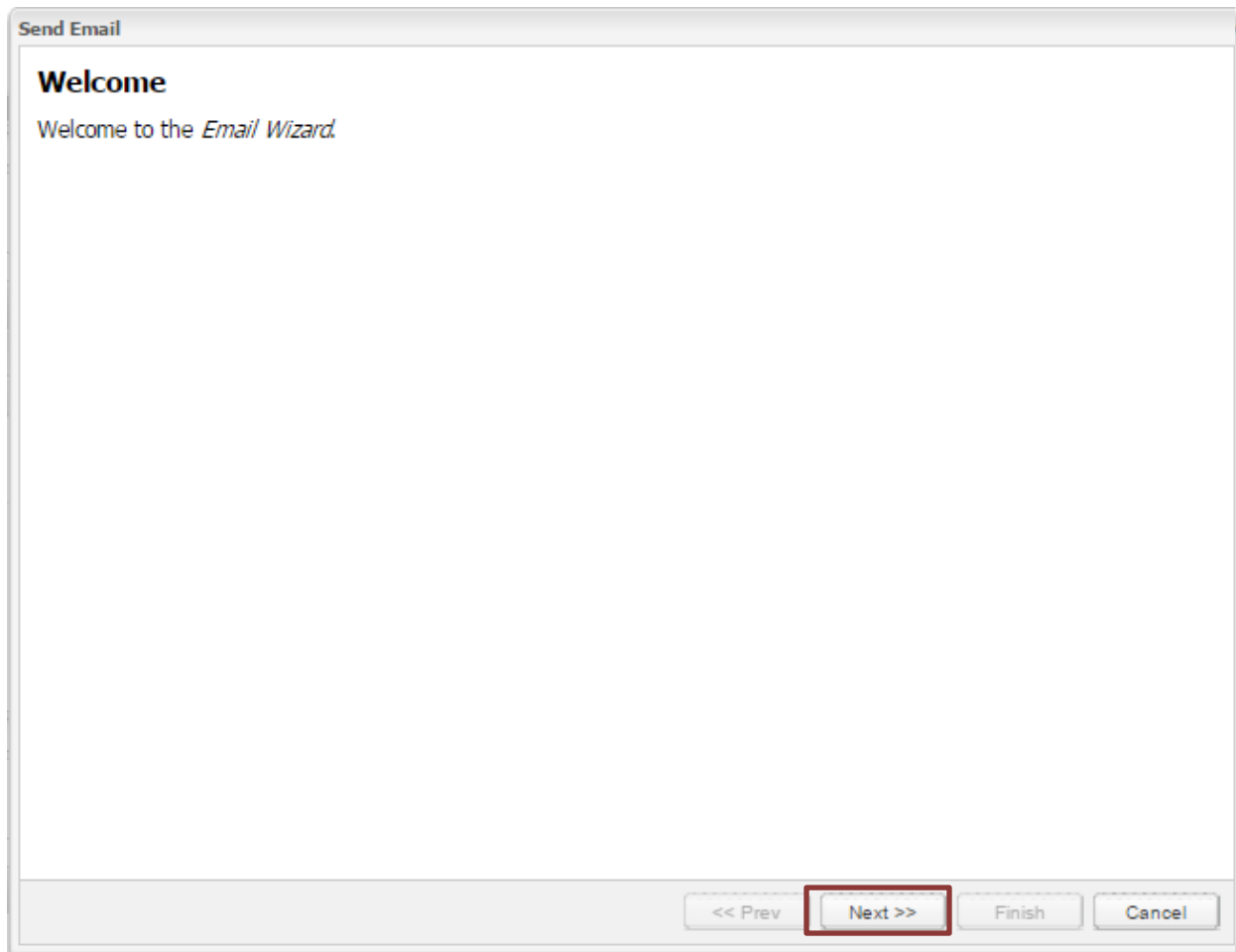


HOW TO SEND REGRET LETTERS

1. Indicate who the awarded vendor is in the awarded section (see previous section).
2. Click “Send E-mail” – “Award Regret”:



3. The E-mail Wizard will appear, click “Next”



4. Choose your template (to set up templates, go to the Configuration tab):

Send Email

Compose Email

Step 1 of 5

Please select which email you would like to deliver:

Template: [Bid Regret Letter] x v

Sender: Bid Regret Letter

CC: [] BCC: []

Attachment: [] Browse...

Include Team Members:

Subject: []

Body: [Rich Text Editor]

<< Prev Next >> Finish Cancel

5. The template will auto populate certain fields in the template:

Send Email

Compose Email

Step 1 of 5

Please select which email you would like to deliver:

Template: Bid Regret Letter x v

Sender: noreply@bidsandtenders.ca Reply-to: []

CC: [] BCC: []

Attachment: [] Browse...

Include Team Members:

Subject: Notice of Results for #TenderNumber# - #TenderName#

Body: [Rich Text Editor]

RE: #TenderNumber# - #TenderName#

This is to advise that the above bid opportunity has been awarded. Please visit:

[https://\[insertclientbidsaddress\]/Module/Tenders/en/Tender/Detail/#TenderID#](https://[insertclientbidsaddress]/Module/Tenders/en/Tender/Detail/#TenderID#)
to view the result details.

<< Prev Next >> Finish Cancel

You have the ability to add an attachment by clicking “Browse”. Note: you can only add one file in this area. You can merge your files together into one document OR compress the files into a zipped folder.

You have the ability to override any of the pre-populated text. All tokens (ex. #TenderNumber#) will be populated by the system when the e-mail goes out, so you do not need to enter any information in there.

6. Click “Next” to continue.

7. The next screen will display the contacts that the e-mail will go to. The system will know who the unsuccessful bidders are. Click “Next” to continue. To remove a contact from the e-mail, click on the contact and click on “Remove Contact”:

Send Email

Contact(s)

Step 2 of 5

Please note the application has automatically determined which *Contacts* should receive the email notification.

Company	Contact
<input type="checkbox"/> Company ^	
<input type="checkbox"/> eSolutions Group zLts	Wood, Christine
<input type="checkbox"/> Wood & Company	Wood, Chris

Page 1 of 1 | Displaying 1 - 2 of 2

8. Select the time and date for when the email should be sent out:

Send Email

Schedule Email

Step 3 of 5

Use the following *Date* field to schedule when the email notifications should be delivered:

Date:

<< Prev **Next >>** Finish Cancel

9. Click "Finish" to send out the e-mail:

Send Email

Confirmation

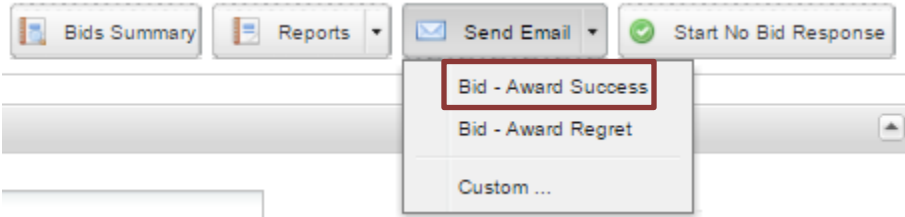
Step 4 of 5

Click the **Finish** button to confirm and deliver email notification(s).

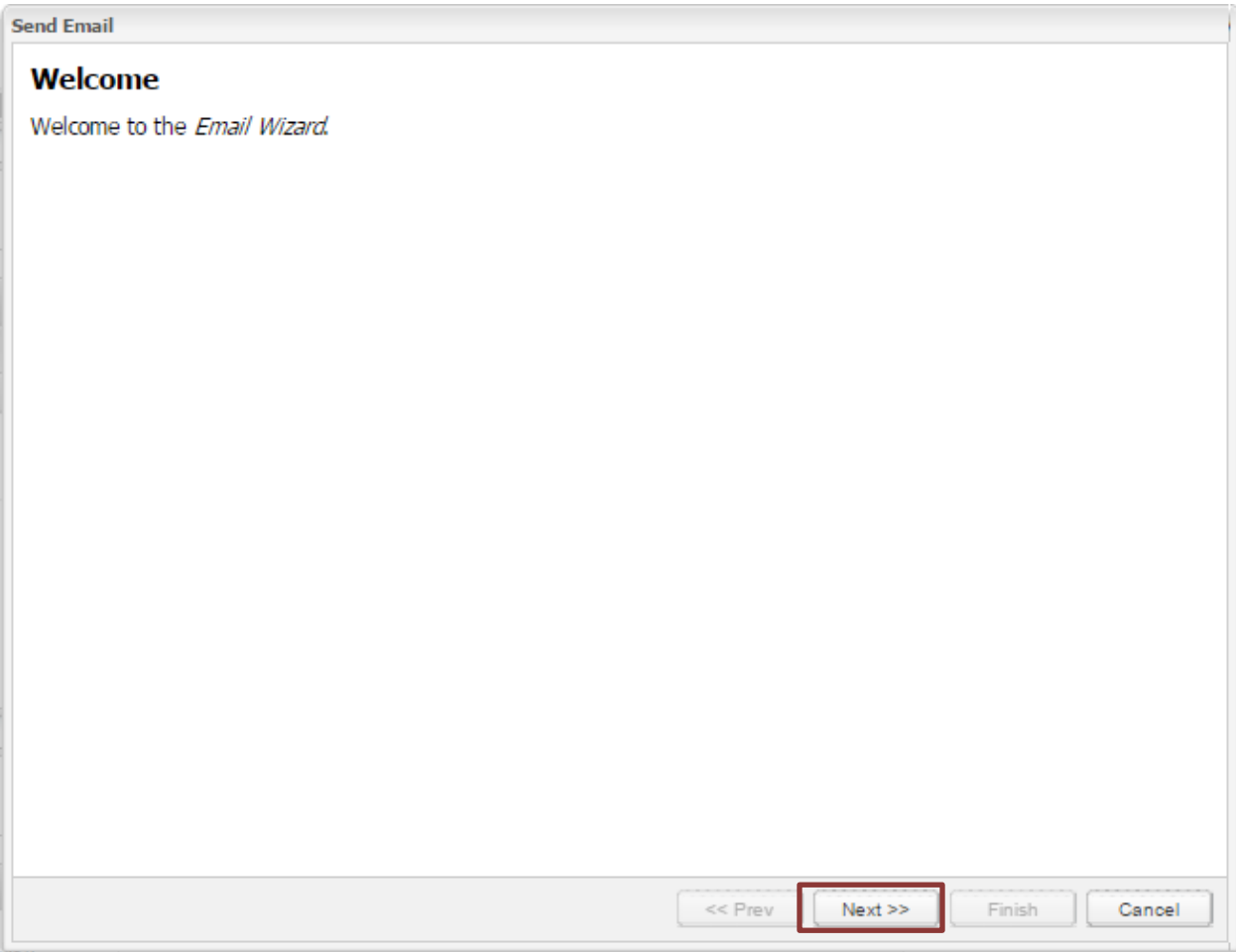
<< Prev Next >> **Finish** Cancel

HOW TO SEND OUT AWARD LETTERS - BIDS MODULE

- 1. Indicate who the awarded vendor is in the awarded section (see previous section).
- 2. Click “Send E-mail” – “Bid - Award Success”:



- 3. The E-mail Wizard will appear, click “Next”



4. Choose your template (this can be set up in the Configuration Tab). Once the template is selected, certain fields will populate – you can override any of the fields:

The screenshot shows a 'Send Email' window with the following details:

- Title:** Send Email
- Section:** Compose Email
- Step:** Step 1 of 5
- Instruction:** Please select which email you would like to deliver:
- Template:** Bid Award Letter (highlighted with a red box)
- Sender:** noreply@bidsandtenders.ca
- Reply-to:** (empty)
- CC:** (empty)
- BCC:** (empty)
- Attachment:** (empty) with a 'Browse...' button
- Include Team Members:**
- Subject:** Notice of Award for #TenderNumber# - #TenderName#
- Body:** A rich text editor with a toolbar. The content includes:
 - ATTN: #FirstName# #LastName#
 - RE: #TenderName# - #TenderNumber#
 - Please be advised that your company has been awarded the above noted contract subject to all the requirements of the bid opportunity. Please see the attached award notice for further details. Results can be viewed on our
- Navigation:** Buttons for '<< Prev', 'Next >>' (highlighted with a red box), 'Finish', and 'Cancel'.

You have the ability to add an attachment (ex. Award Letter) by clicking “**Browse**”. Note: you can only add one file in this area. You can merge your files together into one document OR compress the files into a zipped folder.

5. Click “**Next**” to continue.
6. This screen will display who the e-mail will go to. The awarded vendor will be populated in this area because they have been identified in the Awarded Section (if they have numerous contacts associated with that company profile, they will be displayed as well). To remove a contact from the e-mail, click on the contact and click on “**Remove Contact**”. Click “**Next**” to continue.

Send Email

Contact(s)

Step 2 of 5

Please note the application has automatically determined which *Contacts* should receive the email notification.

Contacts	
Company	Contact
<input type="checkbox"/> Company	
<input type="checkbox"/> eSolutionsGroup	Tran, David

Page 1 of 1 | Displaying 1 - 1 of 1

7. Select the time and date for when the email should be sent out:

Send Email

Schedule Email

Step 3 of 5

Use the following *Date* field to schedule when the email notifications should be delivered:

Date: