



## Important Information for Bidders

### Transition to Electronic Bidding with BidLocker

The City of Tualatin has transitioned from paper bidding to electronic bid submission through BidLocker. This handout describes key procedural changes to assist you in preparing your bids.

### Proposal Submission Components

Your proposal form will now consist of two distinct components:

1. **Signed Proposal Form:**
  - Complete, sign, and scan this document as a PDF.
  - This form certifies your intent to contract and compliance with all relevant bidding requirements.
2. **Electronic Line-Item Pricing:**
  - All bid pricing must now be entered directly into BidLocker's electronic bid schedule.
  - The "Schedule of Unit Price Bids" included in your bid documents is for informational purposes only. Do not enter pricing on this form; instead, submit pricing electronically through BidLocker.

### Required Document Uploads

The following documents must be scanned as PDFs and uploaded to your BidLocker submission:

- ❑ Signed Proposal Form
- ❑ Bid Security (Proposal Bond or Certified Check / Letter of Credit)
- ❑ Resident Bidder Certification
- ❑ Non-Collusion Declaration
- ❑ First-Tier Subcontractor Disclosure Form (must be submitted electronically via BidLocker no later than two working hours after the bid closing – see next page for instructions).

### Bid Security Submission Details

- **Bid Bonds:**
  - You may submit a scanned or digitally issued proposal bond through BidLocker. If using this method, the original physical bond (if not digitally issued) must be delivered to the City within five (5) business days after the bid closing deadline.
- **Certified Checks / Letters of Credit:**
  - Bidders opting to use certified checks or letters of credit as security must deliver them separately, in person, to the City offices. **Checks must be physically received before the bid submission deadline.** Late submissions of checks or letters of credit will not be accepted. In addition, you must also upload a completed Bid Bond Guarantee – Forfeiture Form through BidLocker at the time of bid submission.

## First-Tier Subcontractor Disclosure Form Details

This document is submitted separately from the Signed Proposal Form, Bid Security, Resident Bidder Certification, and Non-Collusion Declaration. After submitting those documents, you will see the following notification:

This solicitation has one or more additional stages after you have completed your initial submission. Please refer to the original [solicitation page](#) for any information you might need for these additional steps.

Please note that if these next stages require vendor approval from the agency, you won't be able to access them until the agency has selected their approved vendors for the next stage.

[Review Bid and Additional Stages](#)

After clicking the “Review Bid and Additional Stages” button, scroll down to the “Additional Stages” section and click “Begin Additional Documentation Request”:

**Your Submitted Documents**

File	File Size
There are no uploaded files.	

[Begin Additional Documentation Request](#)

Click “Select files,” upload your First-Tier Disclosure Form, and then click “Complete Additional Documentation.”

**Upload files for bid submission**

There is no limit on document sizes for uploads, and no limit on your total document upload.

[Select files...](#)

File	File Size
There are no uploaded files.	

When you've uploaded all of the documents you need for this step of the bid process, use the "Complete additional documentation" button to return to your bid review page.

[Complete additional documentation](#)

[Return to Bid Review](#)

[Return to Vendor Dashboard](#)

## Preliminary Bid Results

The City will no longer conduct public bid openings. Instead, preliminary bid results will be promptly published on the BidLocker solicitation page after the submission deadline.

## Additional Help / Suggestions

Complete instructions for using BidLocker are provided in the official BidLocker Vendor Guide, which is attached for your convenience. For further assistance, or to offer suggestions on how we can improve our process, please contact the City's Procurement & Contracts Administrator, Richard Contreras, at [rcontreras@tualatin.gov](mailto:rcontreras@tualatin.gov) or (503) 691-3080.



# Agency User's Guide

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# 1 Introduction

Bid Locker is a secure e-procurement and bid submission platform. It works through your web browser to let you post solicitations for your agency, issue awards, access your vendor database, send broadcast notices, and do other related tasks to managing the public procurement process. You don't need any additional software to use Bid Locker, only a web browser.

## 1.1 Overview

Bid Locker functionality is grouped into several main areas:

- Solicitations,
- Vendor Tools,
- Email Tools,
- And other miscellaneous tools.

In this manual, we'll cover the Bid Locker functionality as grouped into these areas.

*Please note:* Several features within Bid Locker are only available to your agency's administrator account. Every agency has at least one administrator account, and can have more than one administrator. The administrator can do a few things that non-administrative users can't do, but in ordinary use there is no difference between these types of users — it's not uncommon for an agency to set every user as an administrative account, and there is little risk in doing so. Please feel free to talk with us if you have questions about this.

## 1.2 Some Notes on Bid Locker

Bid Locker is built to simplify your workflow, and it's also built to simplify bidding processes for your prospective vendors. We're going to take a look at a few ways that Bid Locker simplifies things for people on both sides of the procurement process.

### 1.2.1 Notes on Agency Operation

For agency buyers, you'll discover that Bid Locker's workflow is designed to be streamlined — to make everyday tasks straightforward, while still making uncommon tasks possible (and, if we can, to make them easy to perform as well.)

When we at Equity Hub prepare an agency's Bid Locker profile, we set a variety of defaults for how the platform works. Most of these can be changed via the Bid Locker Settings menu. If you find a workflow issue that you cannot change a setting for, one that's built in or whose setting isn't available, please let us know and we'll do our best to incorporate your request into a future upgrade.

We love user feedback, and one of our business goals is to make the best possible e-procurement platform for your uses, so don't hesitate to reach out.

### 1.2.2 Notes on Vendor Operation

One important design feature to simplify procurement for vendors, within the Bid Locker platform, is that we only request that they make a profile *once* on Bid Locker. They can work with as many agencies as use Bid Locker, but they can do so using the same profile.

When vendors opt to work with a new agency, they can do so by "sharing" their profile with you — until they've done so, you as a buyer are unable to access their profile and cannot see their business data. Once they have shared their profile with you, they're now a part of your vendor database and you can access their business information, bid history (with your agency), and so on.

As an agency, you can also configure additional questions to ask vendors, for inclusion in their profile with you, and their answers to the questions are never available to other agencies.

If a vendor ever chooses to unshare their profile with you, you won't lose access to any of the business data that you had available during the period they were sharing their profile with you. **Your history with them is always preserved**, even if you cannot see future changes to their profile. And should they share their profile again, you would once again gain access to their business data.

We've built Bid Locker this way to ensure that, while you will always have access to the information you need, vendors can choose to maintain control over their business data as they need to, and won't be subject to unrequested contact if, for example, their business changes direction and they leave the government contracting space.

### 1.2.3 Some Notes on Equity Hub

As a company, we're driven by three goals:

- Cost consciousness,
- Building better software both for buyers and for vendors,
- And supporting equity programs and improving purchasing equity.

These three principle motivate our design decisions and our company operation. As mentioned above, if you have feature requests or ideas how our platform could better support your needs, please never hesitate to reach out.

At Equity Hub, we also have a long-term roadmap to guide future feature development, and supporting purchasing equity is a part of every step of our plan. If you have an equity program now, please don't hesitate to ask how we can better support it. And if you're thinking of beginning one, we'd like you to know that we're ready to support your equity goals.

## 1.3 Your Agency Landing Page

Your agency has a public-facing landing page. This is where your vendors can find your solicitations, access your file library, see your contact information, and submit responses to your contracting opportunities. This landing page has a URL that you'll want to share with your prospective vendors in the various ways you usually share such information, e.g. linking from your purchasing website, inclusion on your printed promotional materials, and so on. This landing page is your vendors' entry point to your solicitations and bid opportunities on the Bid Locker platform.

Every landing page looks something like this:



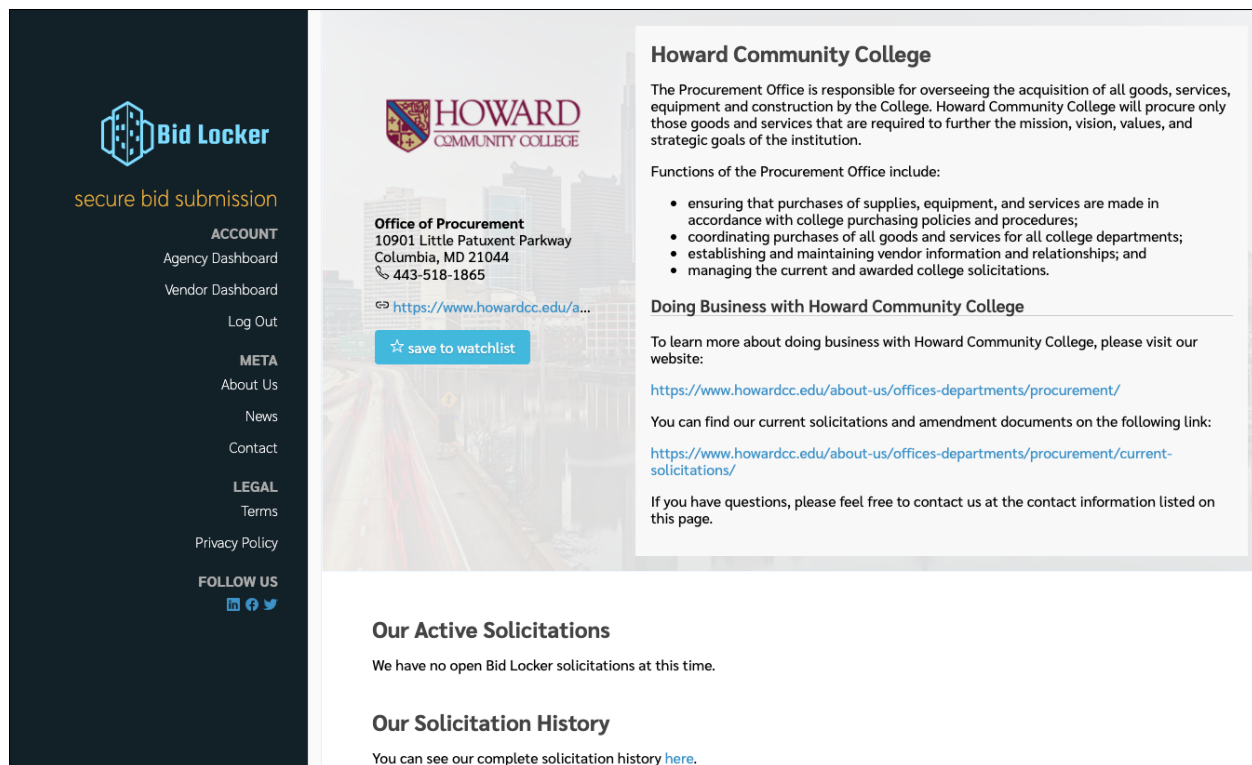


Figure 1: Logging In

Every Bid Locker agency landing page has a URL that looks something like this:

<https://bidlocker.us/a/equityhub>

Your agency's URL will look like this — in this example, we've used the Equity Hub demonstration account (the *equityhub* part of the URL), but yours will be different.

You can always find your agency's landing page, e.g. when preparing promotional materials, at the bottom of your agency dashboard:

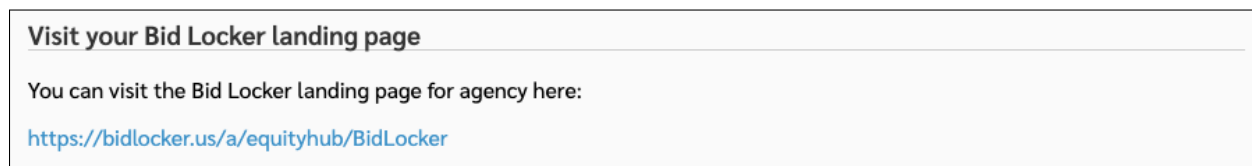


Figure 2: Landing Page URL

## 1.4 Logging In

You will need an agency staff account to log in. If you don't have one yet, you can ask your agency's administrative user to set up an account for you. Once they've set up your account, you'll receive an email with your login and password information.

Once you have your login and password information, visit Bid Locker in your browser: <https://bidlocker.us>  
Click the "Log In" link in the left-hand column, as shown below:



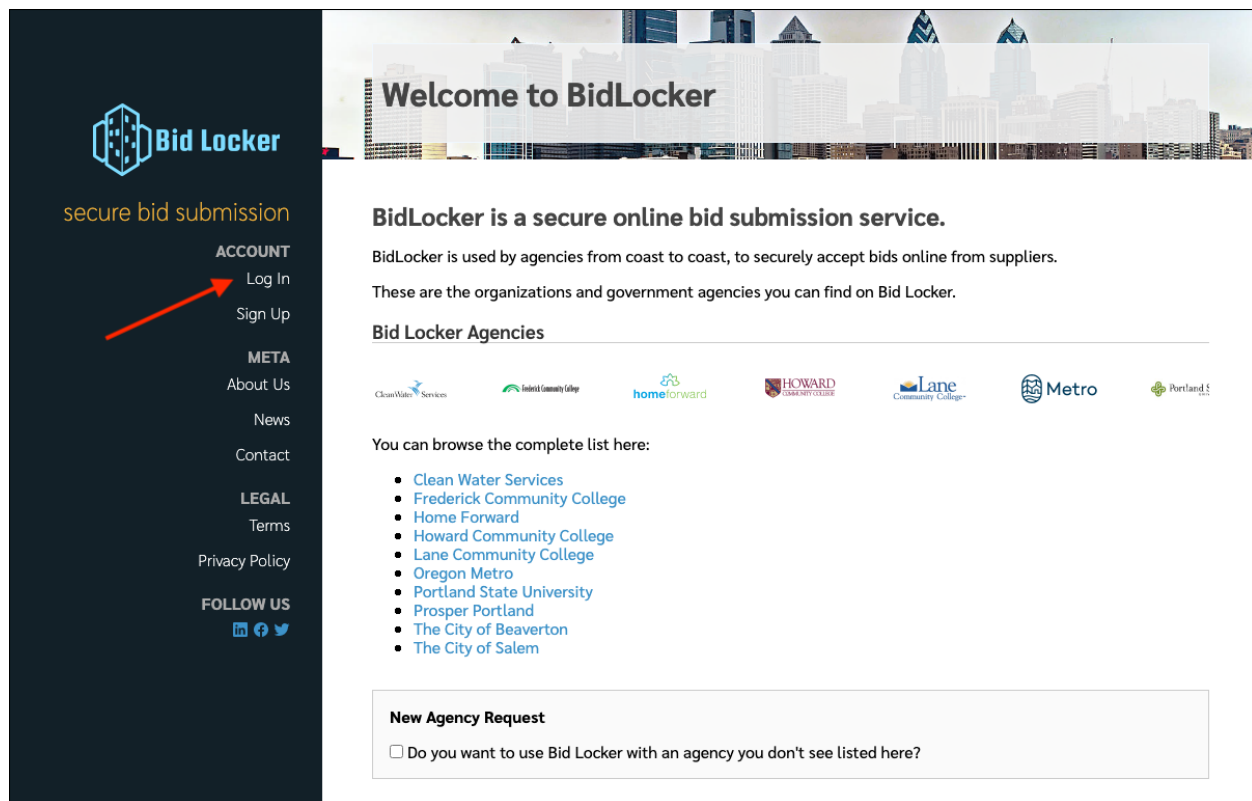


Figure 3: Logging In

You'll be taken to the secure Bid Locker login. Use the email address and password (or Google account) you previously used when setting up your profile, and fill in the login information. If you've used the correct email address and password, you'll be logged in.

## 1.5 Resetting Your Password

If you've forgotten your password, click the "Don't remember your password?" link on the login screen, as shown below:

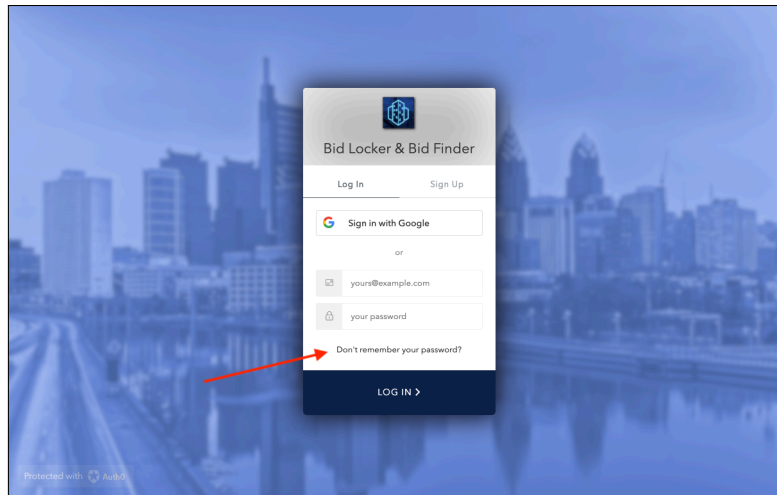


Figure 4: Logging In

Enter your email address, and a password reset link will be emailed to you.

## 1.6 Managing Your Login Account

To change your login email address or password, you can use the “My Account” link on the top navigation menu of your agency dashboard. You’ll see a page like this:

**DASHBOARD** Solicitations Vendor Tools Email Tools File Library My Profile Activity Log My Account Agency Se

## Equity Hub

Logged in as: Jane Staff

### Your Account

This is your agency user account.

#### About You

Your display name is what appears on solicitation QA submissions and, in some cases, appears as the solicitation contact information.

Your Name  \*required

Your Email Address  \*required

#### Reset Password

To change your password, use this form. Leave it blank to leave your password unchanged.

Password

Confirm

[Update Account](#) [Cancel](#)

Figure 5: My Account

You can update your login email and password separately, or at the same time. When you change your login email or password, the change becomes effective immediately. You'll remain logged in — you won't have to log in, but the next time you do, be sure to use your new login email and password.

## 1.7 Your Profile

You can access your agency staff profile with the "My Profile" link in the top navigation menu of your agency dashboard. Your profile contains your contact information and several display options and user-specific options for your Bid Locker account, and looks something like this:

**DASHBOARD** Solicitations Vendor Tools Email Tools File Library My Profile Activity Log My Account Agency Settings Log out

## Equity Hub

Logged in as: Jane Staff

### Your Profile

This is your agency user profile.

#### Your Contact Information

This is your contact information, which may be displayed publicly, e.g. on solicitation listings or in emails, depending on your agency's settings.

Contact Name  \* required

Address  \* required

Address 2

City  \* required

State  \* required

Country  \* required

Zip Code/Postal Code  \* required

Phone Number  \* required

Email Address  \* required

#### Your Email Signature

Figure 6: My Profile

Your contact information may be visible to the public in different vendor-facing parts of the Bid Locker system, for example, specific solicitations may show your name and email address depending on your agency's Bid Locker configuration.

### 1.7.1 Email Signature, Display, and User-Specific Options

You can write an email signature for optional inclusion on emails you send out via Bid Locker. Several email features within the Bid Locker platform will give you an option to attach an email signature, and this is where you can define it:

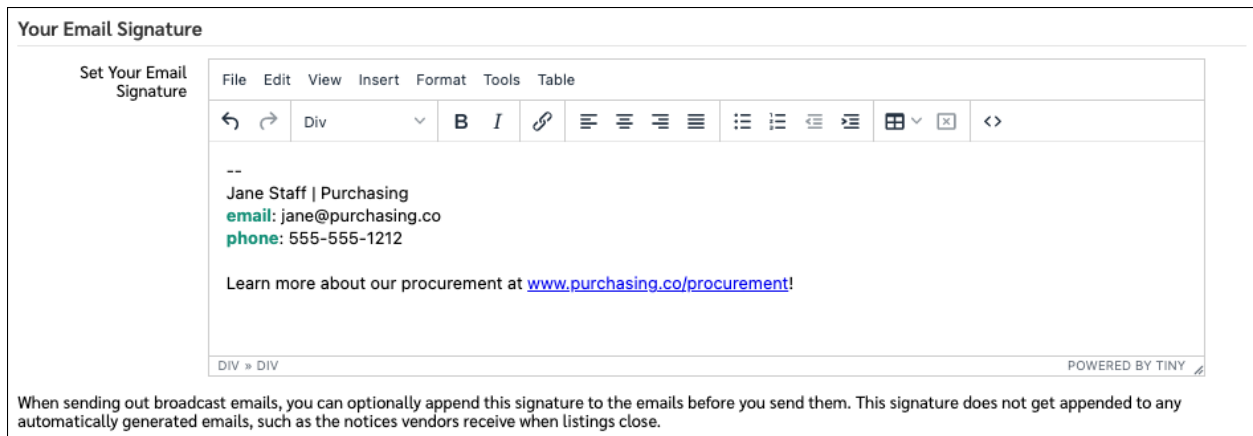


Figure 7: Email Signature Setup

You can set some display options and system settings specific to your user account, to help make your preferred workflow easier.

Under the section labeled **Your Display Options**, you can find the following options:

- Show the solicitation email log on the solicitation editor page?
- Use 24-hour time on date/time dropdowns?

These options affect your dashboard display, and are customizable for you. When you adjust these options, they won't affect any solicitation data, nor the options for anyone else.

Under the section labeled **Your Bid Options**, you'll find the following options:

- rename bid attachments in downloaded .ZIP files to a numerical sequence,
- affix the upload timestamp to the uploaded secondary documentation filename.

The first of these will rename whatever files each individual vendor has uploaded as part of their bid packet, from the original names to a simple numerical sequence. Since some vendors upload very long, descriptive filenames, some computer desktops make it difficult to read or differentiate between the filenames — if the names themselves are not important, but the contents are, this can make those files easier to work with.

The second option adds a timestamp for when the vendor uploaded secondary documentation, to the filename of the document as they uploaded it — but this only applies to secondary documentation uploads (as described in more detail in the secondary documentation section.)

Under the section labeled **\*\*Your Dashboard Options\***, you'll find the following option:

- preferred landing page

This lets you select a specific landing page when you click the "Agency Dashboard" link in the left-hand nav. If you always want to go directly to one of the specified pages, instead of the agency dashboard, you can choose one of the other pages and the left-hand nav link will take you there directly.

## 2 Managing Solicitations

Within the Bid Locker platform, you can post new solicitations, post notices, post addenda to existing solicitations, withdraw solicitations as necessary, and issue awards and run virtual public openings once your solicitations have closed.

Throughout the entire process, you can also communicate with vendors —potential vendors for a new solicitation, vendors who have expressed interest, and so on.

In this section, we'll go over creating solicitations, and the options and possible features that Bid Locker offers to support more complicated workflows.

*Please note:* there are no limits on the number of solicitations you can make, e.g. you can create as many solicitations in draft mode as needed, without concern that you'll run into platform limits.

### Solicitation Filters

On your solicitation listing page, you'll see an option labeled **[filter listings]**. Opening this option gives you a listing filter panel, where you can filter your listing display by a variety of listing options. Your filter settings are saved, so you can select the listing filters that work best for you and keep those active as you revisit the solicitation listing page.

### 2.1 Creating a Solicitation

To create a solicitation, start by clicking the "Solicitations" link in the top navigation menu. This puts you in the Solicitations module. There, you'll see at the top of the page a pair of buttons:

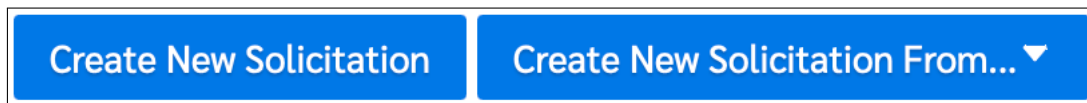


Figure 8: Creating a Solicitation

When you click the **Create New Solicitation** button, you'll begin the process of setting up a new solicitation. At this point, Bid Locker won't save anything to your agency database, so you can click it to see what happens without concern that you'll be committing to any work.

You can also create a new solicitation from an existing solicitation, as a time-saving measure if you're reposting a job or project that you've already posted. Click the **Create New Solicitation From...** button, and this will open a panel with a listing of all of your current and solicitations. You can select any solicitation to use as a base for your new solicitation.

*Please note:* in general, Bid Locker won't save anything to your agency database without your knowledge, i.e. without you telling it to save or update something, so you can generally click on buttons without creating new documents or disrupting your work in other ways.

Once you've clicked this button, you'll see the Bid Locker solicitation setup page, which will look something like this:

DASHBOARD

Solicitations

Vendor Tools

Email Tools

File Library

My Profile

Activity Log

My Account

Agency Se

Equity Hub

Logged in as: Jane Staff

Setting up a Bid Locker Solicitation

Create or edit your bid locker solicitation listing here. You can change any of this later.

Basic Information

Every solicitation needs a title. Project number and description are optional.

Solicitation Title

Project Number

This is a required field.

Description

File

Edit

View

Insert

Format

Tools

Table

↶


↷


Paragraph


▼


**B**


*I*































































































































































































































































Figure 9: The Solicitation Setup Page

Next, we'll go over which fields are required, and which are optional.

### 2.1.1 Required Fields

There is only one field that is always required for a Bid Locker solicitation:

- Title

Only the title field is always required, and it must be unique across all of your solicitations. If, for example, you set up a solicitation titled “Back Lot Repaving,” even just saved as a draft, and tried to create a second solicitation titled “Back Lot Repaving,” the Bid Locker platform will warn you that the title is in use. You’ll have to pick a new name for your second solicitation.

### 2.1.2 Optional Fields

The rest of the fields on the solicitation setup page are optional, though in ordinary use you are almost certain to fill in most of them:

- Project Number



- Business Unit
- Description
- Publication Date
- Close Date
- Listing Type
- File Attachments
- Categories and Departments
- Price Range
- Equity Goals
- Pre-Bid Conference
- Commodity Codes
- Document Tags
- Special Instructions
- Contact Information
- Vendor Bid Options, including:
  - Bid Requirements
  - Supplementary Documentation Submission
  - Submitted Document Types
  - Auxiliary Forms
- Invitation-Only Solicitation
- Email Notifications

We'll go over each of these in detail now. *Please note: most of these fields are configurable, and can be enabled or disabled for your agency's typical usage. If you'd like to use one of these fields but don't see it in your solicitation editor, please get in touch with us and we'll make sure it's enabled for you.*

**Project Number:** The project number can be related to your project, it can be a per-solicitation number that you want to list for your own uses, it can be any short text you want to include. This is visible on the vendor-facing solicitation details page, so it should be business-friendly and should not disclose any private information, but beyond that, how you use it is up to you. (As an example, some of our agencies do put their internal-use project numbers here, and others simply make this a unique identifier for each solicitation. Others don't use the field at all.)

**Business Unit:** This is an optional field you can use to include the business unit this project is associated with.

**Description:** This is the solicitation short description, an abbreviated form of the information you're likely spelling out in detail in your bid documents. This is also visible on the vendor-facing solicitation details page, and whatever you put here is also indexed into our vendor solicitation search system.

**Custom Fields:** If you'd like to display some additional information on the public-facing solicitation page, you can add as many custom display fields as needed here. These can be saved as a template and reused, as well.

**Publication Date:** This is the date when your solicitation goes "live" and its documents are available for download. If you leave the publication date blank, the solicitation will go live immediately and vendors will start receiving notifications that it's been listed among your agency's solicitations. If you publish a solicitation and set the publication date to some time in the future, vendors may still see it in your solicitation listings, indicated as "published" but not yet live.

**Close Date:** This is the date by which solicitations are due. After this date, vendors will not be able to submit bids or express interest. After this date, you'll also be available to see the vendor submissions; before this date, you cannot see what vendors have submitted, only that they have submitted something. If you leave this date blank, the solicitation will never close — you may want, for example, to post a notice with no close date, so that it remains visible as a notice in your solicitations list indefinitely. Ordinarily, however, you won't publish regular solicitations without a close date; you'd never be able to access any submissions if the solicitation never closes, with the exception described in the following section.

**On-Call:** Checking this sets the solicitation to a special type — with these, you can access vendor submissions at any time. You'd typically leave these solicitations up for a long period of time, with the intent to build a portfolio of vendors for a specific task or type of work. This checkbox lets you post these solicitations like any other, but the restrictions on accessing vendor submissions are lifted, and you can download them while the solicitation is still active.

**Estimated Date:** This is an optional where you can specify an estimated year and quarter for the project, as a quick guide for vendors to understand your expectations regarding the contract timeline.

**Listing Type:** Here, you can assign a solicitation type to your listing, from the listing types you've selected on the Agency Settings module. In general, the solicitation types work largely the same way, though some solicitation types allow you to set up line-item bidding for vendors, and others disable bid submission entirely.

**File Attachments:** These are the bid documents you'll attach to the solicitation. There are no limits on file size, and no limits on the number of attachments you add to any solicitation. There is a settings option to require that vendors express interest in the solicitation before downloading these, so if that's something you would like to enable, you may do so in the Bid Locker Settings module. These are also indexed in our vendor solicitation search system.

**Categories and Departments:** You can define your own categories and departments, and then you can assign each solicitation to a category and to a department. With the option enabled to allow multiple categories assigned to a solicitation, you can select more than one category to assign to the solicitation. Both categories and departments are optional, and both are visible on the vendor-facing solicitation details page.

**Commodity Codes:** If you've enabled one of the commodity code sets in your Settings module, you can add as many relevant commodity codes here. These will be visible on the vendor-facing solicitation details page, and if you send out email notifications for this solicitation, you can use commodity codes as a matching tool to send to vendors in your database who have also selected these commodity codes.

**Document Tags:** If you've enabled document tags in your Settings module, you can also add as many relevant document tags here as you like. These are visible on the vendor-facing solicitation details page, and if you send out email notifications for this solicitations, you can use document tags as a matching tool to send to vendors in your database who have also selected these document tags. *Please note:* document tags are intended as an alternate way to issue vendor notifications for solicitations, since vendors sometimes struggle with appropriate commodity code selection.

**Pre-Bid Conference:** If your solicitation is going to have a pre-bid conference, you can put its details here. This is visible on the vendor-facing solicitation details page. If you add your pre-bid conference date via the date field, we'll generate a calendar invitation that vendors can download and add to their calendars. If you enable pre-bid conference registration, vendors can register their attendance, and you can see a list of registrants on the Solicitation Activity page. When pre-bid conference registration is enabled, you can also set a separate registration cutoff date, after which vendors can no longer register as attendees (i.e. in case you want to prevent people from registering the day before.) You can also optionally allow vendors to download the pre-bid conference attendee list, and can set the visibility of the attendee list — this allows you to keep the list hidden from vendors until it is fully updated.

**Special Instructions:** If this solicitation has special instructions that you would like to add for vendors, you can put those instructions in the Special Instructions field. They'll appear on the public solicitation page in a highlighted section.

**Contact Information:** By default, Bid Locker will display standard contact information on the vendor-facing solicitation details page. In the Settings module, you can configure the standard contact to be either: agency-wide contact information, or the contact information for the staffer who listed the solicitation. If this solicitation needs special contact information listed, information that isn't either of the standard options, you can include that contact information here.

**Technical Contact:** If you would like to specify a separate contact person to answer technical questions

about the solicitation, you can provide their contact information here. They'll be listed as the technical contact on the public-facing details page.

**Price Range:** If you have a ballpark figure for the price of a project, you can add it here. This may be useful in helping vendors assess whether to submit a response to a solicitation, e.g. if you list a project with a ballpark cost of \$400,000, then a vendor whose business only has the capacity to act on a \$100,000 project can see this and recognize that it is not a suitable project for their business at this time.

**Equity Goals:** If your project has equity goals or targets that you've established for this project, you can enter those here to inform vendors of these targets.

### 2.1.3 Vendor Submission Options

Bid Locker includes several additional options for vendor submissions, described here.

**2.1.3.1 Bid Requirements** Bid Requirements, referred to in some solicitation platforms as attestations or affirmations, are requirements that you can specify for the overall solicitation. As an example, you may require a signature page to be included. In this case, you can define a bid requirement for "Signature Page," and when your vendors are submitting their responses, they will be asked to check a box indicating that they've included a signature page.

For each bid requirement, you can select either a checkbox or a text-entry field, and the vendor will be prompted either to check the box or fill in the field for their submission.

You can define as many bid requirements as you like, and vendors will be presented with a checkbox for each bid requirement that they must check off, to indicate that they've satisfied the requirement.

**Bid Requirements**

If you need to specify requirements on the bid, e.g. a requirement that the vendor include a tax or licensing document in their bid submission, you can define those here. Each requirement will appear as a checkbox confirmation the vendor must click when they submit their bid.

For example, if you need vendors to submit a drug certification form and a signature page, you can add two requirements, "Drug Certification Form" and "Signature Page."

Requirement	
Signature Page	Remove
Licensing Documents	Remove


[Add Requirement](#) 

Figure 10: Bid Requirements

**2.1.3.1.1 Bid Requirement Templates** If you have the **Advanced Templating** module enabled, you'll also have the option to save a set of bid requirements as a reusable template. You can then load a set of requirements from a template as a time-saving convenience.

You can review and remove any unneeded templates in the "Bid Templates" section of your agency settings menu.

**2.1.3.2 Multi-Stage Solicitations and Additional Vendor Documentation** If you are setting up a solicitation that has multiple stages, or you need to request additional documentation from vendors (e.g. a

disclosure form they must submit to be considered responsive), you can do so by enabling additional bid stages.

**Additional Vendor Bid Submission**

If you need to add one or more additional stages to this solicitation (e.g. a multi-stage solicitation or requesting additional documentation from all participating vendors), you can enable that here.

☒ Enable additional bid stages?

**Additional Submission Title**

First-Tier Subcontractor Disclosure

This is a required field.

**Additional Stage Type**

Additional Documentation Request

**Solicitation Type for Stage**

*Please note:* You can set a different solicitation type for this stage if needed. If left empty, this solicitation stage will use the original solicitation type.

**Additional Submissions Due**

12/31/25 19:00

You can leave the due date empty if you're unsure of when this next stage will be completed. You can set or change the due date on the **Bids** page for this solicitation once it's active.

☒ Is vendor submission required for this stage?

If checked, vendors who do not submit something to this stage will be marked as disqualified.

**Description**

↶ ↷ Paragraph B I 🔗 ...

P

POWERED BY TINY

Remove This Additional Bid Stage

Figure 11: Multi-Stage Solicitations

Each additional bid stage has several options. The additional stage title is required, but all other fields are optional and can be set or omitted as needed.

**Additional Stage Type:** This is a descriptive field to let vendors know what stage of the bidding process this stage is.

**Solicitation Type for Stage:** This is also a descriptive field, that you can use if your multi-stage solicitation has several different stage types. For example, you may have a solicitation where the first stage is an RFI, followed by some demos, and then separate financial and technical proposals. In this example, you can set the overall solicitation type as an RFI (in the Listing Type field for the solicitation, as seen above), and then you can set up a second and third stages as RFPs. The vendor will see that the initial solicitation is an RFI, while the subsequent financial and technical stages are RFPs.

**Additional Submissions Due:** This sets a due date for each additional stage. You can leave this blank, and assign a due date later in the **Bids & Bid Stages** menu. To learn more about this, please see the Bids & Bid Stages section.

**Is vendor approval required for this stage?** When checked, you must manually select vendors for approval for this stage. When left unchecked, all vendors who participated in the initial stage can proceed.

**Is vendor submission required for this stage?** When checked, any vendor who submits something for this stage will be considered responsive, while any vendor who does not submit something for this stage will be considered non-responsive.

**Description:** A short text description to give any additional information about this solicitation stage.

**Solicitation Documents for this Stage:** An optional place to upload solicitation documents that are only available to vendors who have access to this bid stage.

**2.1.3.2.1 Examples of Additional Bid Stages** As an example, suppose your solicitation is open to all interested vendors, but to be considered as responsive, each vendor must upload a first-tier subcontractor disclosure form. In this case, you can set up the additional bid stage as an “Additional Documentation Request” and check the box to indicate vendor submission is required. Vendors who submit a bid or proposal, but don’t follow up on the additional documentation request will be considered non-responsive.

**2.1.3.3 Bid Document Types** For some solicitations, you may find it useful to separate out the types of documents vendors are submitting, e.g. you may want to request that they upload their proposal and fee schedule as two separate documents. This is especially common in situations where you don’t want evaluators to see vendors’ fee schedules.

Bid Document Types let you define upload types for vendors, so that when they’re uploading their documents, they can indicate which type of upload each document is. Then, when you’re downloading vendor responses, you can include and exclude specific types of documents (e.g. “download only proposals, exclude fee schedules”), which will allow you to send vendor submissions to evaluators without risk of them seeing the fee schedules.

**Submitted Document Types**

If you need to open documents at different times, e.g. to review proposal documents separately from submitted fee schedules, you can define a set of submission document types here.

For example, you can indicate that vendors must upload their proposal separately from their fee schedule by specifying two document types, "Proposal" and "Fee Schedule." The vendor can then indicate the document type for each document they submit.

Document Type	Required?	Require for Group?	
<input type="text" value="Proposal"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="button" value="Remove"/>
<input type="text" value="Fee Schedule"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="button" value="Remove"/>
<input type="text" value="Sample Materials (A)"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="text" value="SA"/>	<input type="button" value="Remove"/>
<input type="text" value="Sample Materials (B)"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="text" value="SA"/>	<input type="button" value="Remove"/>

Figure 12: Bid Document Types

If you have the sealed documents feature enabled, you can also set an allowed date and time for each document type. This enforces a lock on the given document type, ensuring you can’t download it before the date and time have passed.

**2.1.3.3.1 Vendor Document Type Templates** If you have the **Advanced Templating** module enabled, you’ll also have the option to save a set of vendor document types as a reusable template. You can then load a set of document types from a template as a time-saving convenience.

You can review and remove any unneeded templates in the “Bid Templates” section of your agency settings menu.

**2.1.3.3.2 Bid Document Type Requirements** In addition to defining document types for vendors to use when uploading their response documents, you can also set requirements in a couple of ways. You can mark a document as required, and each vendor must include at least one document of this type when uploading their response documents. You can also define a requirement group, where if anything is uploaded for a type within that group, a document must be uploaded for every type in that group.

In the example image, the group SA is set as a requirement group, but neither document is marked as strictly required; a vendor can omit all of the sample materials in this example, but if they upload *Sample Materials (A)*, then they **must** upload *Sample Materials (B)* as well.

**2.1.3.4 Fillable Solicitation Forms** If you have created any auxiliary forms in the **Fillable Solicitation Forms** section of the Agency Settings, you can affix those to this solicitation here. When vendors go through the bid submission process, they'll be given an opportunity to complete the forms that you've added to this solicitation. Their responses will be saved and stored as part of their bid or proposal submission.

## **2.1.4 Additional Solicitation Options**

Depending on your agency's settings, you may have a number of additional solicitation options, described here.

**2.1.4.1 Allowing or Disallowing Bid Submission** If your agency has per-solicitation bid submission controls, here you have an option to allow or disallow submission on a specific solicitation. This button is normally checked by default, but if for some reason you need to disable submission for this solicitation, you can do so here.

**2.1.4.2 Setting the Solicitation Visibility Controls** Some solicitations and documents may contain sensitive information that you would like to limit access to. By changing the visibility of a given solicitation, you can allow it to be open (visible) to everyone, restricted only to logged-in vendors, or restricted to vendors whose access you will manually approve. If you choose a restricted solicitation requiring manual approval, you'll receive an email when a vendor requests access, and you can review/approve access on the **listing activity** page.

**2.1.4.3 Per-Solicitation Q&A Controls** If you have the per-solicitation Q&A option enabled, you can either enable or disable vendor Q&A for a given solicitation here.

**2.1.4.4 Disabling Interested Parties and Planholders** If you have enabled per-solicitation controls for interested parties and planholders, you can disable either of those using the checkboxes here. As with the bid submission control above, these checkboxes only affect the solicitation you're editing.

**2.1.4.5 Allowed Bidders** If you have the **bid submission control** feature enabled, here you can find some tools to restrict which vendors can submit a response to this solicitation.

**Is bid submission restricted...?** If you check this box, then only people who have expressed interest or have placed themselves on the planholders list (i.e. by downloading one or more documents) will be allowed to submit a response.

**Lock the interested parties for this solicitation?** When checked, the interested parties list for this solicitation will be frozen, and vendors will neither be able to add themselves nor remove themselves from it.

**Lock the planholders list for this solicitation?** When checked, the planholders list for this solicitation will be frozen, and any vendors who download documents will not be added to the solicitation's planholders list.

**2.1.4.6 Solicitation Notice Delegation** If you have the Delegation module enabled, here you will also have an option to add delegated users to a solicitation. These users will receive any notices published related to the solicitation, and can access the bids (when they're available for download.) This can be helpful when making sure a contract manager or project manager is receiving any notices about bid submissions from vendors. You can select as many delegated recipients as you like [here](#).

### **2.1.5 Attaching Bid Documents**

You can attach as many bid document as you need to any Bid Locker solicitation. There are no file size limits, either. To attach bid documents, click the "Select files..." button and select the documents to attach. Once they're uploaded, they're automatically affixed to the solicitation.

By default, vendors will be able to download these on the vendor-facing solicitation details page, without any need to log in or perform any actions. If you'd prefer, you can change this on the Agency Settings module, by changing the "Allow anonymous download of bid documents?" option.

If you disable anonymous download, vendors will be required to be logged in, they will be required to have shared their profile with you, and they will be required to express interest in the solicitation before they can access your bid documents.

### **2.1.6 Email Notifications**

When preparing your solicitation, you have the option to send out an email notification of its publication to vendors in your vendor database. Under the Email Notifications section, you'll see a variety of options:



### Email Notifications

You can send a notification email about this solicitation when it goes live. This will not send any emails as long as the listing is in "draft" or "published" status, but once it's in the "open" status, your notification email will go out to everyone you select here.

If a vendor is on more than one list that you select below, they'll only receive one copy of the email.

☒ Send to vendors with matching commodity codes.

**Distribution lists:**

☐ User: All Registered Vendors  
☐ User: Internal Custom List  
☐ User: All Plan Centers

**Custom List (One Per Line):**

**Selected Vendors:**

Search vendors:

Preview Recipient List

Reset Recipient List

**Preview List of Recipients**

Vendor
There are no selected vendors yet.

Figure 13: Email Notifications

The default option uses commodity code matching and tag matching, to notify the vendors in your database whose commodity codes and profile tags match the codes and tags you've supplied with the solicitation.

You can also send a notification to one or more of your agency's distribution lists (see the section on "Email Distribution Lists" for information on how to set these up.) For each distribution list you select, every recipient on the list will be included in the notification.

You can also enter email addresses manually in the area labeled "Custom List." Each email address you enter manually here will be included in the solicitation's email notification.

Finally, you can search through your vendor database and choose vendors for inclusion in the solicitation's notification list, by using the "Search vendors" box. As you type in this box, Bid Locker will search your vendor database and produce an auto-complete menu of relevant vendors that you can add to the solicitation's notification distribution.

As you select and add vendors, you can use "Preview Recipient List" at any time to examine your vendor recipient list. If you need to clear the recipient list entirely and start over, you can use the "Reset Recipient List" button.

### 2.1.7 Invitation-Only Solicitations

You can make solicitation an invitation-only solicitation by checking the box marked “Is invitation-only?” in the Invitations section of the solicitation setup page. Once a solicitation is invitation-only, it will not be visible on your public-facing site. Only vendors who have an invitation to the solicitation will be able to see it and submit responses.

**Invitations** ☺

You can make this an invitation-only solicitation. If it's set as an invitation-only solicitation, then it will only be visible to vendors who have been invited, and only when they're logged in. It won't appear in search results, and it won't be visible to anyone but the invited, logged-in vendors.

☒ Is invitation-only?

Search Vendors:

Invited Vendors:		
Drywall Plus	noemail@bidfinder.info	Remove
A1 Construction	jcraig@a1construction.com	Remove

**Custom List (One Per Line):**

jjohnson@expertframing.com  
frank@franksgeneralcontracting.com  
r.odgen@expertconstruction.com

Figure 14: Invitation-Only Solicitations

When setting up invitations, you can invite both vendors who are already in your vendor database and people who aren't in your vendor database. To invite vendors who are already in your vendor database, begin typing their name or business name in the “Search Vendors:” box. You'll see an autocomplete prompt appear below the box, with any matching vendors that Bid Locker can find. Click on the autocomplete for the desired vendor and you'll see them added to the invited vendors list.

To invite people by email address, type their email address into the “Search Vendors:” box. Bid Locker will not find any vendors to autocomplete, but if you hit the “enter” key, you'll see the email address you've entered added to the invited vendors list.

You can also add as many invitees into the **Custom List** text field, one email address per line. There is no limit to the number of invitees you can include in the custom list. If any of the email addresses you add to the custom list are already vendors registered with you, Bid Locker will automatically correlate those email addresses to the vendors' profiles, and they'll be moved from the custom list text field into the table. *This does not affect vendors' ability to see or participate in this solicitation.*

Everyone on your invited vendors list will receive an email when you publish the solicitation, and the potential vendors who you've invited by email will receive a special email address with instructions on setting up their vendor profile. As long as they set up their profile with the same email address that you've invited them to, their profile will automatically be joined to the invitation list for this solicitation. (The email instructions emphasize this, with the hope of minimizing vendor confusion and data entry errors.)

*Please note:* if you make a solicitation invitation-only, the general email notifications functionality will be disabled for this solicitation, and the invited vendors will be the ones to receive all the relevant notices for

the solicitation.

### 2.1.8 Line-Item Bidding

To activate line-item bidding for a solicitation, check the box in the “Line-Item Bidding” section labeled “Use line-item bidding for this solicitation?”

You’ll see the line item setup section expand, and there you can set up the line items that vendors may bid on. When a solicitation has line-item bidding enabled, vendors will see a line item response grid on their bid submission screen, and can populate the line items with their appropriate responses.

They can still upload additional documentation, as well. All of the other solicitation options remain available (e.g. bid requirements, supplementary documentation, and so on.)

*Please note:* when a solicitation has line-item bidding enabled, you’ll also see bid tabulation options in the “View Bids” module for that specific solicitation. Also, when you download bid responses for a solicitation with line-item bidding enabled, each vendor’s line item responses will be included as a .CSV file in the bid download, and any other documents they submit will be included in the **/Attachments** folder within the bid download.

**2.1.8.1 Standard Line-Item Editor** You can have as few or as many line items as your solicitation calls for. If you’re using the standard line item editor, you’ll see the options for setting up line-items similar to this:

Line-Item Bidding ☯

☒ Use line-item bidding for this solicitation?

When using line-item bidding for a solicitation, vendors will be required to enter in a value (a unit-cost, a minimum quantity offered, an hourly fee, etc) for each line-item you define.

This also enables automatic bid tabulation for the solicitation, which you will be able to access via the **Bids & Bid Stages** page when the solicitation has closed. Each vendor's line-item responses will also be stored as a .CSV file in their bid archive.

Usage Notes:

- If you leave **Quantity** blank, the line-item will be summed as a single unit.

Item No	Item	Unit of Measure	Quantity	Required	
A1	Cable (Fiber)	Ft	4000.00	<input checked="" type="checkbox"/>	Remove ☰
A2	Cable (Coax)	Ft	6000.00	<input checked="" type="checkbox"/>	Remove ☰
B1	Concrete	Cu Yds	400.00	<input checked="" type="checkbox"/>	Remove ☰
B2	Aggregate (Separated)	Cu Yds	200.00	<input checked="" type="checkbox"/>	Remove ☰
B3	Piping 2" (Steel)	Ft	1500.00	<input type="checkbox"/>	Remove ☰
E1	Environmental Eval			<input checked="" type="checkbox"/>	Remove ☰
L2	Estimated Paperwork	Sheets	4.00	<input type="checkbox"/>	Remove ☰

☯ Add Line Item

● Clear Items

☯ Add from CSV

⚙️ Populate for Lump Sum

\* When uploading a CSV file of items, please make sure that your columns are named: Item No, Items, Unit of Measure, Quantity, Required

You can download a sample CSV file [here](#). If you omit the Required column, everything will be required by default.

Figure 15: Line-Item Bidding, Standard Editor

The “Item” field is required, while other fields are optional. If the line item is marked as required, vendors must submit a value for that line item. You can also use the **Populate for Lump Sum** option to automatically insert a single lump-sum line item.

**2.1.8.1.1 CSV Upload for Standard Editor** You can also upload a .CSV file with your line item definitions. Your CSV file may have the following columns:

- Item No, Items, Unit of Measure, Quantity, Required

Only the **Items** field is required, and the rest will be treated as empty if you omit them. There is a sample CSV file available for download, which contains all of the possible options. You can use this as a guide.

**2.1.8.2 Advanced Line-Item Editor** If you have the advanced line item editor enabled, there are many more options available to prepare and format the line item form:

Line-Item Bidding

☒ Use line-item bidding for this solicitation?

When using line-item bidding for a solicitation, vendors will be required to enter in a value (a unit-cost, a minimum quantity offered, an hourly fee, etc) for each line-item you define.

This also enables automatic bid tabulation for the solicitation, which you will be able to access via the **Bids & Bid Stages** page when the solicitation has closed. Each vendor's line-item responses will also be stored as a .CSV file in their bid archive.

**Usage Notes:**

- The **Cost** checkbox will indicate that the vendor is supplying a unit cost for this line-item
- The **Min. Qty** checkbox will ask the vendor to supply a minimum quantity for the line-item (e.g. minimum number of pamphlets they may print in an order.)
- If you leave **Quantity** blank, the line-item will be summed as a single unit.
- Only line items that request either a cost, an hourly estimate, or a fixed-value cost will be summed up in the bid tabulation.

Item No	Item	Test	Unit of Measure	Quantity	Cost	Min. Qty	Required	
A1	Cable (Fiber)		Ft	4000.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
A2	Cable (Coax)		Ft	6000.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
B3	Piping 2" (Steel)		Ft	1500.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Remove
Header: Reviews Remove								
E1	Environmental Eval				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
Table Break Remove								
Header: Labor Remove								
Hourly:	L1	Estimated Hourly Labor			<input checked="" type="checkbox"/>			Remove
Fixed Cost Value:	FCV1	Fixed Cost Value 1		Amount: 4000.00	<input type="checkbox"/>			Remove

Add Line Item
Add Hourly Quote
Add Fixed-Value Item
Add Spacer
Add Divider
Add Header
Add Table Break
Clear Items

Add from CSV
Populate for Lump Sum

Figure 16: Line-Item Bidding, Advanced Editor

The following line-item options are now available:

- Add Line Item
- Add Hourly Quote
- Add Fixed-Value Item
- Add Spacer
- Add Divider
- Add Header
- Add Table Break

Line items are the standard option, and for these you can request either a per-item cost (with the **Cost** checkbox), a minimum deliverable quantity (with the **Min. Qty** checkbox), or both. Hourly quote items will request an hourly fee and estimated hours. Fixed-value items will allow you to add a sum to the quote that the vendor cannot change.

Spacers, dividers, headers, and table breaks format the line item table. The first three options insert a row into the table that can visually separate sections, while the last one begins a new table for subsequent line items.

Additionally, with the advanced line-item editor, you can add up to three extra columns for additional annotations on a given line item.

**2.1.8.2.1 CSV Upload for Advanced Editor** You can also upload a .CSV file with your line item definitions. Your CSV file may have the following columns:

- Row Type, Item No, Items, Item Notes 1, Item Notes 2, Item Notes 3, Unit of Measure, Quantity, Has Cost, Has Minimum Qty, Required

Only the **Row Type** and **Items** fields are required, and the rest will be treated as empty if you omit them. There is a sample CSV file available for download, which contains all of the possible options. You can use this as a guide.

## 2.2 Updating Solicitations

You may need to update a solicitation for a variety of reasons, e.g. changing the close date, adding new bid documents or addenda, or even just fixing typos. Because of this, Bid Locker lets you update each solicitation as a revision — where no changes are tracked and no vendors are notified of the changes — or as an update with changes tracked, optionally generating an addendum.



Figure 17: Updating Solicitations

### 2.2.1 Saving as a Revision

When you save a solicitation as a revision, any changes you make are saved and the solicitation is updated, but the changes are not recorded and no vendors are notified of the changes you've made.

You may want to use this, for example, to fix a typo in a solicitation name or description (e.g. "Back-log Pvaing" should be "Back-lot Paving.") If the changes you make to a solicitation are substantial, and you do want vendors to be aware of those changes, you should save your changes as an addendum.

### 2.2.2 Saving as an Update with Notifications

When you save a solicitation as an update, Bid Locker will track changes across a number of key fields and record any changes you make. This is one of two important distinctions between saving as a revision and saving as an update. The other difference is that saving as an update allows you to notify relevant vendors of the updates you've made to the solicitation.

These are the fields that Bid Locker checks for changes:

- Title
- Description
- Publication Date
- Close Date
- Pre-bid Conference
- Price Range
- Contact Information
- Technical Contact

- Attached Files — any changes are noted

If you change any of these fields, the change is automatically recorded and becomes visible on the vendor-facing solicitation details as a solicitation change. When you save the changes to your solicitation as an update, every vendor who was originally notified will also get an email notification letting them know that the solicitation has been changed.

**2.2.2.1 Save and Notify (No Addendum)** This option tracks changes and can optionally send an email notification vendors but do not record the changes as an addendum, and does not include any option to generate a PDF addendum.

**2.2.2.2 Saving and Notify (Addendum)** This option also tracks changes and can optionally send an email notification to vendors, but also allows you to save the update as an addendum. All of the key fields are still tracked for changes, but with the PDF Generation module enabled, you can also have an addendum automatically generated that describes the changes made to the solicitation.

If you'd like to generate a PDF addendum automatically, make sure the "Generate PDF Addendum?" box is checked and verify the suggested filename for the addendum.

*Please note:* vendors can choose to opt out of notifications for a solicitation, e.g. a vendor who receives the initial notification and is confident that they won't be participating in that solicitation. Vendors who opt out of those notices will not get notified of changes to those solicitations, but this only applies to the solicitations that they've opted out of without any other solicitation activity.

### 2.2.3 Reopening a Closed Solicitation

When a solicitation is closed, you can still make changes to the solicitation. You'll see a couple of notes on the solicitation editor that the solicitation is closed, and you won't be able to modify the publication or close dates of the solicitation. Any changes you make will alter the solicitation, but you won't be able to set it to the "open" status unless you have admin access or have been granted "reopen" access by your site administrator.

If, however, you need to update some attached documents while the solicitation is closed, you can still update them and email relevant vendors.

## 2.3 Viewing Submitted Bids

When a solicitation has closed, and you're ready to review the vendor submissions, you can access those by clicking the "View Bids" button for the solicitation in your dashboard.

### 2.3.1 Submitted Bids

On the solicitations listing, next to each solicitation you'll see a little green plus (+) icon. Click this to expand the solicitation actions:

	Parking lot repaving services - South Parking Lot	closed	1	Apr 29, 2021
---	---	--------	---	--------------

Figure 18: Solicitations Actions

Once expanded, you'll see a variety of solicitation actions. Here, we're interested in the "View Bids" option:

	Parking lot repaving services - South Parking Lot	closed	1	Apr 29, 2021			
	<a href="#">View Activity</a>		<a href="#">View Bids</a>		<a href="#">Add Intent to Award</a>		<a href="#">Edit</a>
URL to listing: <a href="https://bidlocker.us/details/1838_Parking_Lot_Repaving_Services__South_Parking_Lot">https://bidlocker.us/details/1838_Parking_Lot_Repaving_Services__South_Parking_Lot</a>							
Created by: Jane Staff							

Figure 19: Solicitations Actions Expanded

Click that to access the “View Bids” module for this solicitation. If the solicitation is still in progress (and is not flagged as an on-call, or an indefinite-type, solicitation), you won’t be able to download any of the submitted responses, but you can still download a list of participating vendors to date, send emails, set up evaluator links, and set up a virtual public opening:

DASHBOARD
Solicitations
Vendor Tools
Email Tools
Reports
File Library
My Profile
Activity Log
My Account
Agency

Port of Risa Beach

Logged in as: Jane Staff

Bids
Awards
Listing Activity
Send Email Notice to Bidders
Evaluator Share Links
Public Opening

Vendor Bids:

Fiber Optic Network Upgrade (East Campus)

Solicitation Status: closed

These are the vendor responses submitted for this solicitation.

Download All Bids
Download bidders as .CSV

Vendor	Submitted On	
<a href="#">Drafters On-Call</a>	8/9/21 16:28	<a href="#">Download Bid</a> <a href="#">Edit Notes</a>

Figure 20: View Bids Module

If the solicitation has completed, and vendors can no longer submit responses, or this is an on-call or indefinite-type solicitation, you’ll see options to download the responses individually or all together.

Click the “Download Bid” button next to each vendor response to download the responses one by one, or click the “Download all bids as a .ZIP file” to download everything at once.

To access a .CSV file of all the participating vendors, use the “Download bidders as .CSV” button to start a download of the vendor information.

**2.3.1.1 Marking Solicitations as Non-responsive** If you’d like to mark a solicitation as non-responsive, for example because the vendor didn’t meet all of the requirements of the project or didn’t include some necessary documentation, you can do so by clicking on the “Notes and Status” button for that solicitation. On the following page, you can use the checkbox to mark the solicitation as non-responsive. If you need to undo this, you can uncheck the checkbox and the solicitation will once again be considered responsive.



Please note: marking a solicitation as non-responsive prevents it from appearing in any bulk solicitation downloads, and also hides it from any evaluator share links you’ve created.

**2.3.1.2 Bids and Bid Stages** If your solicitation has additional bid stages, you can review these additional stages on the **Bids & Bid Stages** page. Here, you can set or update the due date for additional stages as needed — such as, for example, if you’ve set an additional stage with no established schedule and will leave the additional stage as pending until your schedule is set.

Fourth Stage: Final Additional Documentation

Additional stage solicitation type:

Status:

Approval required:

Vendor submission required:

Close date:

Request for Quotes

pending

yes

no

1/1/25 17:00 [set close date](#)

These are the vendors who have submitted documents for this solicitation stage.

Vendor	Approved?	Completed?	
<a href="#">Equity Hub</a>	<input type="checkbox"/>		

Approved Second-Stage Vendors

Only the vendors you select will be allowed to continue to the second stage submission process. You may update this list at any time.

Approve Selected Vendors

☒ Send email to vendors?

Figure 21: Managing Additional Bid Stages

If you’ve set up a bid stage without a date set, you can set the bid stage due date using the “set close date” button for that stage. If you have the *Additional Email Notes* option enabled, here you can also add a note to the email that will be sent to vendors when you set a date for this solicitation stage.

Here you can also approve vendors for additional stages, in situations where you’re only allowing certain selected vendors to participate in subsequent stages.

When approving vendors, you can also email them with a notice that they’ve been selected by checking the box marked “**Send email to vendors?**” Each vendor will only be emailed once, unless you have changed their approval status, i.e. if you have two vendors and have approved one, and then at a later date a third vendor participates in the solicitation, you can mark them as approved and Bid Locker will only send an email to the new vendor, not all three. With the *Additional Email Notes* option enabled, you can also add a note to the approval email.

## 2.3.2 Bid Tabulation

If this is a line-item bid solicitation, you’ll see a button labeled “View Tabulation” in the table containing the vendor responses. You can click this to view a bid tabulation of all of the submitted vendor bids, with the low bid highlighted in green.

Vendor Bids:  
**South Parking Lot Paving**

**Secondary-Stage Vendor Submission is on.**  
 Requested Documents: First-Tier Subcontractor Disclosure, no due date

**Solicitation Status:** open

*These are the vendor responses submitted for this solicitation so far. This solicitation is still open, so you cannot download them at this time.*

[Download All Bids](#)
[Download bidders as .CSV](#)

Vendor	Submitted On	View tabulation
A1 Construction	11/27/21 04:00	<a href="#">Download Bid</a> <a href="#">Edit Notes</a>
Zsófi Construction	11/27/21 03:57	<a href="#">Download Bid</a> <a href="#">Edit Notes</a>




Figure 22: Bid Tabulation Button

When you download the submitted bids in a line-item solicitation, each vendor's bid will be included as a .CSV file in the download, and any other bid documents they've uploaded will be included in a folder.

**2.3.2.1 Viewing the Bid Tabulation** Once you've clicked through to the bid tabulation page, you'll see all of your line items and the vendor responses to them. The lowest bidder is highlighted in green in the "Totals" column. You can also download the tabulation as a .CSV file or a PDF, using the buttons underneath the bid tabulation table.

Bid Tabulation							
<b>Solicitation:</b> South Parking Lot Paving							
<b>Vendors:</b> A1 Construction [ <a href="#">profile</a> ] Zsófi Construction [ <a href="#">profile</a> ]							
Vendor	Line Items	Unit of Measure	Amount Requested	Item Cost	Item Total	Shipping	Total
<b>A1 Construction</b>							
	Aggregate (Separated)	Cu Yds	200.00	\$22.00	\$4,400.00		
	Concrete	Cu Yds	400.00	\$25.00	\$10,000.00		
	Environmental Eval			\$450.00			
	Piping 2" (Steel)	Ft	1500.00	\$18.00	\$27,000.00		
	Piping 8" PVC	Ft	6000.00	\$0.60	\$3,600.00		
<b>Subtotals:</b>					<b>\$45,000.00</b>	<b>\$0.00</b>	
<b>Contact:</b> James Craig < <a href="mailto:jcraig@a1construction.com">jcraig@a1construction.com</a> > - 267-225-1407							<b>\$45,000.00</b>
<b>Zsófi Construction</b>							
	Aggregate (Separated)	Cu Yds	200.00	\$25.00	\$5,000.00		
	Concrete	Cu Yds	400.00	\$30.00	\$12,000.00		
	Environmental Eval			\$300.00			
	Piping 2" (Steel)	Ft	1500.00	\$15.00	\$22,500.00		
	Piping 8" PVC	Ft	6000.00	\$0.50	\$3,000.00		
<b>Subtotals:</b>					<b>\$42,500.00</b>	<b>\$0.00</b>	
<b>Contact:</b> Zsófi < <a href="mailto:zsofi@zcs.net">zsofi@zcs.net</a> > - 267-225-1407							<b>* \$42,500.00</b>
<a href="#">Download as .CSV</a>		<a href="#">Download as .PDF</a>					

Figure 23: Bid Tabulation

### 2.3.3 Accessing Additional Documentation Submitted by Vendors

If you've set up the solicitation to require additional documentation from vendors, either as a supplemental documentation request (e.g. a first-tier subcontractor disclosure form, to be submitted after the bids due date) or as a multi-stage solicitation, then at the bottom of the bids page you'll see a section labeled "Second-Stage Vendor Uploads" — this is where you can access that documentation once vendors have uploaded it.

### Second-Stage Vendor Uploads

This solicitation has second-stage bid submission enabled. Here you can see a list of which vendors have completed their second-stage bid submission.

Vendor	Completed?
<a href="#">A1 Construction</a>	
<a href="#">Zsófi Construction</a>	

These download buttons allow you to download only the second-stage documents for each vendor. The primary bid download buttons, in the main bids table, will always include any second-stage submissions that vendors have uploaded.

*This solicitation is still in progress, so you can't download second-stage documents yet.*

Figure 24: Accessing Additional Documentation

If this is a multi-stage solicitation where you must approve vendors to proceed to the final submission stage, you'll have an option to check off the approved vendors and notify them by pressing the button labeled "Approve Selected Vendors." You can also email them at this time, or if you'd prefer to email them manually, you can uncheck the box to send a notification email, and no email will be sent.

### 2.3.4 Filtering Bid Document Types

When setting up your solicitation, you'll have had the option to set up document types. This can be useful if you'd like to download only parts of your vendors' submissions, e.g. to send proposals without the fee schedules to evaluators. You can specify as many document types as you need, and name them whatever is sensible for your solicitation. When vendors upload their documents, they'll be given a chance to select the type of document for each upload they send, and their selections will be saved with their submission.

Vendor Bids:

## South Parking Lot Paving

**Secondary-Stage Vendor Submission is on.**  
Requested Documents: First-Tier Subcontractor Disclosure, no due date

**Solicitation Status:** open

*These are the vendor responses submitted for this solicitation so far. This solicitation is still open, so you cannot download them at this time.*

[Download All Bids](#)
[Download bidders as .CSV](#)

Vendor	Submitted On	View tabulation
<a href="#">A1 Construction</a>	11/27/21 04:00	<a href="#">Download Bid</a> <a href="#">Edit Notes</a>
<a href="#">Zsófi Construction</a>	11/27/21 03:57	<a href="#">Download Bid</a> <a href="#">Edit Notes</a>

#### Filter Document Types

You can filter your bid packet downloads for this solicitation to include only specific types of vendor documents.

Vendors marked each file by type when they uploaded them. Select one or more document types to download only those selected documents for each bid packet.

**Document Types:**

- ☒ Include all document types
- ☐ Additional Fee Schedule
- ☐ Sample Book

Figure 25: Filtering Bid Document Types

When you've set up bid document types for a solicitation, you'll see an additional box to the right of the vendor submissions, the "Filter Document Types" box. By default, the "include all document types" box is checked, and this makes all of your download links behave as they normally would. If you check any

of the other document types, the “include all document types” checkbox unchecks, and then all of the download buttons (whether a single submission or the bundle of all of the submissions) will only include your selected types in the resulting .ZIP file.

## 2.4 Issuing Awards

When a solicitation is over and done with, and you’ve selected a vendor to receive the contract, you can affix the notice of intent to award using the “Award Documents” button in the solicitation’s action bar.

Add Award Documents:

**Caldwell Hall HVAC Upgrades**

Type:

RFP

Close Date:

July 15, 2022 2:00PM

Vendors:

H. James HVAC And More

[\[view public listing page ↗\]](#)

**Attach Award Documents**

Use the button below to select your award documents. You can attach as many documents as you need, and can notify relevant vendors when you've attached them.

Select files...

File	File Size	Notified?	Document Type
There are no attached award documents.			

Figure 26: Issuing Awards

Each award document you upload will have an award document type assigned to it, by default the “Award Document” type. You can set these to be other document types, such as a notice of intent to award or a notice of cancelation, using the dropdown menu next to each uploaded award document.

Any award documents you affix to the solicitation will be immediately accessible on the public solicitation page.

### 2.4.1 Assigning Awards to Vendors

If you have the full awards suite enabled, then you’ll be able to select one or more vendors for a solicitation and assign an award to them. For each vendor, you can optionally include a contract dollar amount and scope of work. After assigning the award to the vendor(s), if you have the PDF generation module enabled, you can also generate a notice of intent to award, which will include the vendor(s) to whom you have issued an award, along with contract amount and scope if provided.

### 2.4.2 Setting the Award Status

You can set the status of the solicitation to one of three options — award pending, finalized, and no award. When a solicitation closes, it remains in the closed status until you assign one of these statuses.

You can also send an email at this time to participating vendors to let them know that you've issued the award or are in the process of issuing an award. By default, the "Send email to participating vendors?" checkbox is checked, and will send the email when you set or change the award status. If you don't want to send an award notice email, you can uncheck this checkbox before updating the award status.

**Update Award Status**

**Solicitation status:** closed

If you're ready to update the award status for this solicitation, you can select one of the options below. If you just want to update the award notes, you can leave the award status as-is to save only the notes.

[Set Award Pending](#) [Finalize Award](#) [Issue No Award](#)

**Email Notification**

☒ Send email notice to participating vendors?

This email notice will go to 0 vendors.

**Additional Email Recipients**

Optional, multiple emails can be comma-separated

**Award Notes**

If you'd like to add a note about this award (e.g. the recipient, the official award date, and so on), you can do so here. This will be included in the email sent to vendors.

[Update Award Notes](#)

Figure 27: Award Notes

**2.4.2.1 Award Notes** You can also set the award notes at this time. The award notes field is intended for a short note to accompany the status, such as "Award pending council meeting on the 22nd" or some other short message of that nature.

Setting or changing the award status will update the award notes. If you want to update the award notes but not set or change the award status, you can update just the award notes using the button labeled "Update Award Notes" and leave the status unchanged.

### 2.4.3 Sending Pre-Award Notices

You'll often want to send some information to your bidders before issuing an award, as in the case of sending a bid tabulation out to the participating vendors. Some of the solicitation listing types (such as ITBs and RFQs) will enable this additional stage on the awards page:

### Bid Tabulation Documents

Use the button below to select your bid tabulation documents. You can attach as many documents as you need, and can notify relevant vendors when you've attached them.

Select files...

File	File Size	Notified?
There are no uploaded files.		

### Notify Vendors

When you've attached your bid tabulation documents to this solicitation, you can notify the relevant vendors (i.e. those who expressed interest or submitted a bid) by sending them an email here.

This notification email will go to 4 vendors.

Send Bid Tabulation Notice

Figure 28: Sending Bid Tabulation Notices

When available, you can affix pre-award documents to your solicitation and send an email notice to the participating vendors, before issuing your final notice of intent to award. You don't have to email vendors — any files you affix here will be immediately accessible on the public solicitation page, but if you'd like to let people know, you can use the button labeled "Send Bid Tabulation Notice" on the right-hand side of this section.

## 2.5 Additional Solicitation Functions

In addition to viewing submitted bids and issuing awards, Bid Locker offers a number of features to help you manage the solicitation process.

### 2.5.1 Solicitation Activity

To get an at-a-glance look at your solicitation's activity, including the vendors who have expressed interest, questions asked during the Q&A period, and more, you can click the "View Activity" button in any solicitation's action bar in the main list in the Solicitations module:



Solicitation Activity:

## South Parking Lot Paving

This is an update-to-date view of your solicitation activity, the interested parties list, pre-bid conference registration, and listing analytics.

### Interested Parties

Vendors who have expressed interest in this solicitation

Download as .CSV
Send Email Notice to Interested Vendors

Business	Contact	Location
A1 Construction	James Craig	Port Deposit, MD

\* Is Plan Center

### Planholders

Vendors who have downloaded one or more of the solicitation documents

Download as .CSV
Send Email Notice to Planholders

Business	Contact	Location	Files Accessed	Downloaded all?
No planholders				

\* Is Plan Center

### Invitations

This solicitation is open to the public

### Pre-bid Conference Registration

Vendors who have confirmed attendance for the pre-bid conference

Download as .CSV
Send Email Notice to Pre-bid Conference Registrants

Business	Contact	Registered On	
A1 Construction	James Craig	5/18/21 5:43:48 PM	<input checked="" type="checkbox"/> Attended
Zsófi Construction	Zsófi	6/8/21 10:38:52 AM	<input checked="" type="checkbox"/> Attended

☒ Record pre-bid conference attendance?

### Vendor Q&A

Figure 29: Solicitations Actions Expanded

This takes you to the Solicitation Activity page, which shows you the vendors who have expressed interest, invited vendors (for invitation-only solicitations), and several other pieces of information.

If you don't see some of the options on your Solicitation Activity pages, then you may not have that feature enabled for your agency. All of these are included with Bid Locker Plus, so if you see one listed here that you'd like, but it isn't on your Activity page, please contact us and we'll enable it for you.

**2.5.1.1 Invitation Requests** If you have enabled invitation requests for vendors, then on this page you will see any invitation requests if they have been made. For each invitation request, you can either issue an invitation, which will set up the invitation and email the vendor, or decline the request, which will close out the request but not notify the vendor.

**2.5.1.2 Restricted Solicitation Access Requests** If you have limited access to a solicitation to vendors with manual approval, they will appear in this section. You can approve or decline approval for any requested vendor. If you grant approval, they'll receive an email letting them know they can now access the platform. If you decline to grant them access, they will not receive any notice.

**2.5.1.3 Email Advertisement Recipients** If the email notifications module is enabled, then these are the vendors who will have received an initial email notice when the solicitation went live.

**2.5.1.4 Interested Parties** The Interested Parties list is a list of all of the vendors who have expressed interest in the solicitation, using the public-facing "Express Interest" button. You can download a .CSV file of these vendors or send them a broadcast notice using the buttons above the table. Plan centers are marked with an asterisk.

**2.5.1.5 Planholders** The Planholders list is a list of all of the vendors who have downloaded one or more of the solicitation documents. Vendors who have downloaded all of them are indicated with the green checkmark. You can download a .CSV file of these vendors or send them a broadcast notice using the buttons above the table. Plan centers are marked with an asterisk.

**2.5.1.6 Pre-Bid Conference Registration** If you have set up a pre-bid conference, and have activated pre-bid conference registration for this solicitation, you'll see a list of registrants here. You can download a .CSV file of these vendors or send them a broadcast notice using the buttons above the table.

If you'd like to track attendance at the pre-bid conference, you can click the **Record Pre-Bid Conference Attendance?** button to activate the attendance recording option. The buttons in the right-most column will let you record a registrant as having actually attended.

You can keep the list of pre-bid conference attendees hidden until you've finalized the list using the checkbox at the top of this section. This can help prevent vendors from accessing a partial list and missing out on information related to the entire list of pre-bid conference attendees.

You can also add pre-bid conference participants manually using the **Add Vendor** option. This expands a panel where you can manually enter pre-bid conference attendee information or use the search field to search your vendor database for the vendor, in the event that they're already registered with your agency.

**2.5.1.7 Q&A** If you have the Q&A module enabled, this is a list of vendor-submitted questions related to this solicitation.

**2.5.1.8 Invitations** If this is an invitation-only solicitation, the vendors you have invited to the solicitation are shown here. You can download a .CSV file of these vendors or send them a broadcast notice using the buttons above the table.

**2.5.1.9 Revisions and Addenda (Change Tracking)** If you have change-tracking for addenda enabled, then any changes you've made to this solicitation will be listed here. This is purely for your reference, so you can see at a glance your change history for this solicitation.

**2.5.1.10 Bid Document Analytics** This table will show the solicitation documents you've attached to this solicitation and a count of the number of times they've been downloaded, including both logged-in vendors and anonymous browsers (if you allow anonymous document downloads.)

**2.5.1.11 Search Analytics** This table will show some simple analytics about this solicitation, including how many times it's been viewed by anonymous browsers and logged-in vendors.

## **2.5.2 Email History and Notification Tools**

On this page, you can review the emails sent related to this solicitation. This page will display an email log for all of the emails sent, from initial listing publication notices to the listing close email.

This page also displays a list of vendors who received the initial solicitation publication notice, and shows whether they were selected from your database or entered manually.

Also on this page, you can send an email notice to participating vendors, vendors who received the original solicitation notice, or both. You can either start with one of your existing email templates, or write an email from scratch. Either way, you must include both a subject line and an email body.

If you'd like to include your email signature (that you may have configured in the "My Profile" section of your agency dashboard), you can do so by clicking the box labeled "Add email signature?"

## **2.5.3 Quick Evaluator Links**

For projects that may need outside evaluators — people who aren't a part of your purchasing team, or who don't have Bid Locker staffer accounts — you can create quick evaluator links. These links are URLs that you can share, that will give someone without a Bid Locker account access to the vendor submissions for a specific solicitation.

Quick Evaluator links can be optionally password-protected, and you can also add a short message for evaluators, that they'll see when they access their quick evaluator URL.

These links also work with the bid document types option in the solicitation setup, so that if you've requested that vendors select the document types for their uploads when submitting their responses (e.g. to have them upload a proposal and a fee schedule separately), you can select just specific document types to share with your evaluators.

To create a quick evaluator link, use the "Add New Evaluator Link" button to get started. You'll see a field to set an optional password and an optional evaluator message:

If you have outside evaluators (i.e. people without Bid Locker accounts) to review the responses to this solicitation, you can set up an evaluator link here. You'll be able to share this link, and the evaluators can access the solicitation documents you select.

### Evaluator Options

Password

\_\_\_\_\_

File Edit View Insert Format Tools Table

		Paragraph ▼	B I										
P													
POWERED BY TINY													

Figure 30: Setting up a Quick Eval Link

Once you've set up the evaluator link, you'll see it in the list of quick evaluator links on the main page:

If you have outside evaluators (i.e. people without Bid Locker accounts) to review the responses to this solicitation, you can set up evaluator links here. You'll be able to share these link, and evaluators can access the solicitation documents you select.

Selected Documents	Evaluator Link	
<i>all documents</i>	<a href="#">[right-click to copy link]</a>	<div>EditRemove</div>

Right-click on the evaluator link to copy the link for sharing. When you've sent this link to your evaluators, they'll be able to access the documents for the bid you've selected.

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to download the vendor submissions, as well as any additional instructions and documentation you provide, and the evaluators may access all of this information and post their responses directly back to the quick evaluator link you provide.

**2.5.3.1.1 Inviting Evaluators** You can select any evaluator account that you've set up in the Agency Users section of the admin dashboard. If you check the "Send notice to evaluators?" checkbox, they'll receive an email once you add them.

#### Additional Evaluator Options

Under this section, you can specify a due date for evaluators and request that they submit their responses back via Bid Locker.

**2.5.3.1.2 Additional Evaluation Instructions** You can attach any additional evaluation instructions to the quick evaluator link here.

### 2.5.4 Virtual Public Openings

Bid Locker includes a Virtual Public Opening module, to facilitate the "public opening" process without requiring you to hold an in-person event.

To set up a public opening, you must first specify a public opening date. This will let you issue an invitation to participating vendors, as well as generate a public opening secure link that you can share with others as needed.

**Public Opening: Parking lot repaving services - South Parking Lot**

You can schedule a public opening here, and can change this date any time until you've actually conducted a public opening.

---

**Public Opening**

Set a public opening date, and you'll be able to send an invitation out to vendors.

Opening Date

5/19/21 15:00

Schedule Opening

---

**Send Invitations**

You haven't sent an invitation to participating vendors yet.

Send Invitation to Participating Vendors

You can also invite people to the public opening by sharing this public opening key. Anyone with this key can view the public opening when it takes place:

<https://bidlocker.us/Vendor/ViewPublicOpening/30ba79a1-25d6-4169-920e-aa6f9184d7db>

---

**Begin Public Bid Opening**

When you're ready, click here to begin the public bid opening process.

Begin Public Bid Opening

Figure 32: Setting up a Virtual Public Opening

Once you've set your public opening date, you can send an email invitation out to all of the participating vendors with the "Send Invitation to Participating Vendors" button. When you're ready to run the virtual public opening, use the "Begin Public Opening" button to begin.

**2.5.4.1 Running Public Openings** While running a public opening, you'll see every document that each vendor has submitted as their bid response. For each document, you can opt to share the entire document, or you can share individual pages from each document. When vendors join the public opening, they'll see a similar interface, but without any controls to share documents or pages — they'll see the documents or selected pages as you share them, but won't be able to access anything until you've shared it.

To share a complete document, use the "Open" button for the desired document:

### Run Public Bid Opening: Parking lot repaving services - South Parking Lot

The table below contains all of the bid documents for every submitted bid packet. For bid document, you can either share the entire document with the "Open" button, or share specific pages with the "Select Pages" button. If you want to share only specific pages, choose "Select Pages" and share the desired pages from the preview pane. Any participating vendors will see the documents and pages that you're sharing as you go.

This solicitation has closed, and bids are available for public opening.

<b>Begin Bid Opening:</b>	<a href="#">Join Audio Conference</a>
<b>Bid Submitted by:</b> <a href="#">Strange Industries</a>	
<b>Contact:</b> Zsófi	<b>Submitted:</b> 4/27/21 11:16
<a href="#">Sample Materials.pdf</a>	<a href="#">Select Pages</a> <a href="#">Open</a>





Figure 33: Running a Virtual Public Opening

For many common document types, Bid Locker can produce document previews page by page. If you'd like to share specific pages, and not the entire document, click the "Select Pages" button to access a preview pane.

**Contact:** Zsófi

**Submitted:** 4/27/21 11:16

[Sample Materials.pdf](#) [Select Pages](#) [Open](#)



[Close](#)

Figure 34: Running a Virtual Public Opening and Sharing Individual Pages

With the preview pane open, you can click on any page to see a full-sized preview. In the full-sized preview, click the "Share" button to share that specific page with the participants in the virtual public opening.

When you're done, you can click away or close the browser. You don't need to do anything in specific to end the public opening.

**2.5.4.2 Audio Conferencing** If you'd like to conduct an audio conference call via your browser, you can do so with the "Join Audio Conference" button. As you do this, you and every vendor who also join the conference will be joined in a group audio chat.

When you're done with the audio conference, you can click the "End Audio Conference" button to end the voice chat. You can also close the browser or click away to another page to end the chat. The chat won't end on its own, so be sure to do one of these things to end it, lest you accidentally continue broadcasting the conversations in your office out via the audio conference.

*Please note:* you'll need speakers and a microphone connected to your computer to use the Audio Conference option.

## 2.5.5 The Vendor QA Module

For any solicitation, you can define one or more Q&A periods. During these periods, vendors will be able to submit questions via their vendor-facing solicitation details page.

You can access a solicitation's Q&A setup page by clicking the "Manage QA" button on the solicitation's action bar. There, you'll see the Q&A setup page for that solicitation:

### Manage QA Periods: Parking lot repaving services - South Parking Lot

You may set one or several QA periods for this solicitation. During each QA period, registered suppliers will be able to submit questions. After the QA period has ended, you can review and answer the questions, remove duplicate/incomplete questions, and download the questions and answers in a .CSV file.

Add QA Period

#### QA Periods

QA Begins	QA Ends	Status
There are no QA periods for this solicitation.		

#### Questions

Download as .CSV

Question	Submitted
No submitted questions	

Figure 35: QA Setup Page

**2.5.5.1 Setting up QA periods** Use the "Add QA Period" button to set the start and end dates for a QA period. You can have as many QA periods during the solicitation lifespan as you need. Vendors will only be able to submit questions during one of these QA periods.

**2.5.5.2 QA Delegation** If you have the Delegation module enabled, here you will also have an option to add delegated users to a QA period. Any users you add to the QA period delegation will receive the same email notices you do when a question is asked, and they can also answer those questions themselves. If you have contract managers or project managers with domain expertise on a given solicitation, this is a convenient way to let them answer questions for vendors without going through you. You can select as many delegated recipients as you like here.

**2.5.5.3 Answering Questions** As vendors ask questions, each submitted question will appear under the section labeled “Questions” on the QA page. To answer the vendors’ submitted questions, you have a couple of options, depending on your preferred workflow.

**2.5.5.3.1 Editing Questions** If you need to edit a submitted vendor question, e.g. for clarity, you can use the “Edit Question” button under the question you’d like to revise. The original will be preserved, but no longer displayed.

**2.5.5.3.2 Closing Questions Without Answering** If you receive a question that you’d like to close without answering, for example if the vendor’s cat has walked across the keyboard and inadvertently submitted some random letters, you can use the “Close without answer” button to close the question. It will no longer be included among your questions and answers. You can also reopen it again by clicking the “Reopen for answer” button.

**2.5.5.3.3 Downloading Questions as a .CSV File** If you’d like to download the submitted questions as a .CSV file, you can do so with the button labeled “Download as .CSV” on the QA page. This will prepare a .CSV file with all of the questions submitted so far. You can then answer these in the preferred software of your choice.

**2.5.5.3.4 Adding Questions by Hand** Using the “Add Question Manually” button on the Manage QA Periods page, you can enter a question to the vendor questions yourself. This can be useful if you’ve received a question via another means outside the Bid Locker platform.

**2.5.5.3.5 Answering Questions in the QA Module** If you prefer, you can also answer the questions within the QA module itself. Your answers are saved alongside the questions, and will be available in any subsequent .CSV downloads.

If you answer vendor questions in the QA module, you can also optionally make your answers visible on the public solicitation page. You can set the visibility of your answers on the **Bid Options** section in the Agency Setting page, whether they are not displayed, anyone can see them, or only registered vendors can see them.

**2.5.5.3.6 Marking Questions as Answer Pending** If you’d like to display a question on the vendor-facing solicitation page, to let vendors know that this question has already been asked and an answer is forthcoming, you can mark the question as “answer pending” on the question editing screen.

**2.5.5.3.7 Automatically Generating a QA Addendum** *Please note:* if you don’t have the templating module enabled, but would like to use this feature to automatically generate your QA addenda, please contact us. We’d be happy to help you get the templating module set up.

If your agency has the Bid Locker templating module enabled, you also have the option to generate a QA addendum automatically. You can generate a QA addendum with the submitted questions and your answers by clicking the “Finalize” button next to the closed QA period. This takes you to the QA finalization page, where you can generate a PDF addendum and email it to the relevant vendors for the solicitation. On this screen, you can choose a filename for the addendum and select the vendors to receive a notification.

When ready, you can click the “Finalize QA Period” button, and the addendum will be prepared, affixed to the solicitation, and any emails you have selected will be sent.



Manage QA Periods:

## Finalizing Fiber Optic Network Upgrade (East Campus)

You may now finalize this QA period and optionally produce a PDF addendum with questions and answers. If you generate a PDF addendum, we can also email the vendors you select.

**Questions Asked: 1**  
**Questions Answered: 1**  
**Closed without Answering: 0**

### Generate PDF Addendum for this QA period?

☒ Generate PDF addendum?

You can finalize this QA period without generating a PDF, e.g. if you've downloaded the questions as a CSV and answered them in your own template. If you finalize this period without generating an addendum, you'll still have the option to do so later should you choose.

QA Addendum Filename

Addendum 2 - Questions and Answers.pdf

\* required

*Please note:* this is the suggested filename for this QA addendum. You can change to something else, but this file must have a unique name, i.e. it cannot be named the same as another attached document for this solicitation.

Send notification emails?

☒ Send email to relevant vendors (those who have expressed interest or submitted a bid)?  
☐ Send email to the original notification recipients (including distribution lists, custom recipient lists, and so on)?

Finalize QA Period
Cancel Edit

Figure 36: Finalizing a QA Period

If you don't want to generate a PDF addendum, you can uncheck the checkbox labeled "Generate PDF addendum?" before clicking the "Finalize QA Period" button. This will mark the submitted questions as answered and finalize the QA period, but no PDF will be generated, and no emails will go out.

If you need to regenerate an affixed QA addendum, after it's already been generated, then you can do so by first revisiting the finalized QA period (by clicking on "Finalized" status) and then by clicking the "Regenerate PDF Addendum" button.

### 3 Vendor Database

With the Bid Locker Vendor Database module, you can access the profiles and business information of all of the vendors who have shared their Bid Locker profiles with your agency.

As described in greater detail in the Notes on Vendor Operation section, vendors who use the Bid Locker platform will only set up a single profile for their business, which they then share with the agencies they want to work with. Once a vendor has shared their profile with you, they're considered to be a part of your vendor database, and you can see their profile, accept bid submissions from them, send them notifications, and more.

When you access the Vendor Database module, you'll see a vendor list:

Vendors

Export Vendors to CSV

Send Broadcast Notice

☐ Selected vendors only

Show

10

entries

Search:

Business	Contact	Location	Registered	
Drywall Plus	Ama Maryam	Hilliard, OH	Jul 24, 2020	<a href="#">View</a>
eerik inpuj sound	Aubrey	Naperville, IL	Sep 15, 2020	<a href="#">View</a>
Promotion	Bunny McGee	way, OR	Apr 8, 2020	<a href="#">View</a>
Essex General Construction	Jodi Sommers	Eugene, OR	Feb 22, 2021	<a href="#">View</a>
All in One Cleaning	Joisse Aleksandra	New City, NY	Jul 24, 2020	<a href="#">View</a>
Church Repair And More	Oda Elisaveta	Camas, WA	Jul 24, 2020	<a href="#">View</a>
Test.CWS.VEndor	Rachael C	Hillsboro, OR	Apr 12, 2021	<a href="#">View</a>
Ace Photocopier Repair	Rishi Niall	Lady Lake, FL	Jul 24, 2020	<a href="#">View</a>
Strange Industries	Zsófi	Hillsboro, OR	Feb 1, 2021	<a href="#">View</a>

Business

Contact

Location

Registered

Showing 1 to 9 of 9 entries

Previous

1

Next

Figure 37: The Vendor List

Here, you can access the various vendor database functions.

*Please note:* for the functions that let you select multiple vendors, you can ctrl-click or command-click on multiple profiles, or hold down the shift key to click on and select a range of profiles.

#### 3.1 Viewing a Vendor Profile

To view a single vendor profile, click the "View" button for that vendor. There, you'll see their business details, the commodity codes they may have chosen when they registered, any certifications they've included in their profile, and a history of projects for which they've expressed interest or submitted bids.

### 3.1.1 Attaching Files to a Vendor Profile

Under the **Attached Files** section of the vendor profile, you can affix documents to this vendor's profile. These documents can only be seen or accessed by your agency — they're never visible to the public. This can provide a way to store information, such as forms or documentation specific to the vendor's participation in purchasing activity, alongside their profile.

### 3.1.2 Vendor Approval

If your agency has special requirements around vendor registration, you can enable vendor approval in the **Vendor Account Controls** section of the Agency Settings module. When this option is enabled, all new vendors will have their account placed in an "Approval Pending" state. They can update their profile but won't be able to download any solicitation documents or participate in solicitations until you have approved their account.

### 3.1.3 Vendor Suspension

If your agency has had problems with troublesome vendors, spammers, or other bad actors, you can enable vendor suspension in the **Vendor Account Controls** section of the Agency Settings module. When this option is enabled, you'll now have the option to place a vendor's account in the "Suspending Pending Review" state. Any vendor whose account has been suspended will no longer be able to download any solicitation documents or participate in solicitations until you remove their suspension.

### 3.1.4 Plan Center Override

If you have special requirements around plan centers (e.g. disallowing them from republishing your solicitation documents), you may need to use this option. Some plan centers will uncheck the plan center flag in their profile to get around these kinds of restrictions. This option lets you manually flag their profile as a plan center, and they can no longer uncheck the plan center flag themselves. This can help maintain your access controls for plan centers.

## 3.2 Exporting to a .CSV File

To export your entire vendor database to a .CSV file, click the "Export Vendors to CSV" button.

To export one vendor, or a selection of vendors, select the profile by clicking on it (but not on the "View" button), or select multiple profiles as described above. Then, make sure the "Selected vendors only" checkbox is checked, and click the "Export Vendors to CSV" button.

## 3.3 Sending a Broadcast Notice

To send your entire vendor database an email notice, click the "Send Broadcast Notice" button. You'll be taken to the familiar email-sending screen, and this time the recipient list will indicate that you're sending a notice to every vendor in your database.

To send a notice to one vendor, or a selection of vendors, select the profile by clicking on it (but not on the "View" button), or select multiple profiles as described above. Then, make sure the "Selected vendors only" checkbox is checked, and click the "Send Broadcast Notice" button. Now, the recipient list will indicate just the profile or profiles you've selected.

## 3.4 Additional Vendor Questions

You may have additional information you'd like to gather from prospective vendors before you do business with them. The Bid Locker profile they set up collects some basic information — contact information, type of business entity, a capabilities statement, preferred commodity codes and certifications — but you may have additional questions you'd like answered by vendors.

Bid Locker lets you configure additional profile questions for vendors. These questions are restricted just to your agency. No one outside your agency will be able to access these additional questions.

You can set up these additional questions in the Agency Settings module, and when you do, the vendors' answers will appear in their profiles when you view them.

Once you've done so, whenever a vendor goes to share their profile with you (and be registered in your vendor database), they'll be prompted to answer those additional questions. If they skip them, they'll see a notice on their vendor dashboard reminding them to do so — they can't clear that reminder notice without completing your additional questions, so it serves as a strong encouragement for them to do so.

To learn more about setting up additional vendor questions, please see the Vendor Questions section of the Settings module.

## 4 Email Tools

Bid Locker includes a robust email distribution list module, intended to help you prepare email lists for sending communications, such as solicitation notifications, invitations to events, and more, to relevant vendors.

If, for example, you had a hand-curated list of construction contractors that you wanted to ensure saw several related solicitation notices, you can set up a distribution list of these contractors and reuse the list in each of the individual solicitation notices. Or, for example, if you've recently attended an outreach event and received business cards from several potential new vendors, you could build a distribution list of just those vendors, and use it in solicitation notices, invitations to future events, and more.

You can access the Bid Locker email tools via the "Email Tools" link in the top navigation bar. Within this module, you'll see several tools:

- Email Log,
- Send Broadcast Notice,
- Email Lists,
- and Email Template Library.

The Email Log is a historical review of emails that Bid Locker has sent on behalf of your agency, including solicitation publications, hand-written emails, and automated notices.

**DASHBOARD** Solicitations Vendor Tools **Email Tools** File Library My Profile Activity Log My Account Agency Settings

---

# Equity Hub

Logged in as: Jane Staff

Email Activity Send Broadcast Notice Email Lists Email Template Library

## Email Activity

This table shows your agency's recent email history. For each email, you can view the contents in full or the recipient list. Please note that this email log does not show all the email substitutions (e.g. %TITLE%), because each email may have several different substitutions if it's going out to multiple recipients. In other words, the recipients always see their emails with the correct values substituted in.

Email	Sent	
Bid Locker Notice: A listing has closed - %TITLE%	Apr 29, 2021	<a href="#">Details</a>
Bid Locker Notice: A bid has been submitted to %AGENCY%	Apr 27, 2021	<a href="#">Details</a>
Bid Locker Notice: %AGENCY% has published a new solicitation	Apr 27, 2021	<a href="#">Details</a>

Figure 38: The Email Log

The "Send Broadcast Notice" tool lets you send an email to your vendors, as well as people who are not yet in your vendor database, either using an email template or writing an email by hand.

The "Email Lists" tool lets you curate your email distribution lists. Here, you can create new lists, update your existing lists, or remove them as needed.

The “Email Template Library” lets you create and edit the email templates that are accessible to the staffers in your agency, and the email templates that Bid Locker will use in sending emails when solicitations are published, updated, and so on.

## 4.1 Email Activity

Every email that Bid Locker sends to vendors on behalf of your agency is logged in the email log, along with the recipients and the event (such as a solicitation closing) that caused the email to be sent.

Click the “Details” link next to any email to see the details for that email:

The screenshot shows the 'Equity Hub' interface. At the top is a navigation bar with links: DASHBOARD, Solicitations, Vendor Tools, Email Tools, File Library, My Profile, Activity Log, My Account, and Agency Settings. Below this, the user is logged in as 'Jane Staff'. A secondary navigation bar contains links: Email Activity, Send Broadcast Notice, Email Lists, and Email Template Library. The main content area is titled 'Email Activity Log Details'. It includes a note: 'Please note: if this email was sent out by an automated process, the email substitutions will have been processed before the email was sent.' The email subject is 'Bid Locker Notice: A listing has closed - %TITLE%'. Below the subject, it says 'This is the email body. You can toggle between the HTML email and plaintext versions with the button below.' There is a blue button labeled 'Show as HTML'. The email body content is displayed in a monospaced font: 'Bid Locker Notice: The following listing has closed: %TITLE% Close date: %CLOSE\_DATE% Timestamp: %TIMESTAMP% You're receiving this notice because you've s This is a Bid Locker automated notice.' At the bottom, there is a section titled 'Recipients' with a table header 'Recipient'.

Figure 39: Email Activity

## 4.2 Sending a Broadcast Notice

This is a more robust version of the broadcast notice tool in the Vendor Database module. The key way it differs is that it also lets you select one or more email distribution lists to use as recipient lists for the email you’d like to send.

As before, you can either start with one of your existing email templates, or prepare an email by hand. If you select a template, you can make any edits you need before sending your email — the template is

loaded into the editor but can be changed as much or as little as the communication requires before you send it.

Once you've prepared your email, you can select your recipients from your distribution lists, as well as entering recipient addresses manually in the "Custom List" box, or by searching for vendors in your vendor database via the "Search Vendors" box. The search tool will populate with an auto-completed list of relevant vendors as you type — you can add the vendor by clicking on their name.

If you've set an email signature in your agency staffer profile, you can affix it to your email using the "Add Email Signature?" box.

When you're ready to send your email, click the "Send Email" button.

### 4.3 Managing Email Distribution Lists

Using the Email Lists tool, you can set up as many email distribution lists as needed. Each list can be private (only accessible to you) or shared (accessible to every staffer in your agency). This is an example set of email lists:

The screenshot displays a web interface for managing email distribution lists. It features three distinct list entries, each with a header bar, a form for name and sharing status, a table of query parameters, and action buttons.

- List 1: All Registered Vendors**
  - Name:  (Required field)
  - Is Shared List?: ☐
  - Table:

Type	Value	
all		Edit Delete
<input type="text" value="all"/>	<input type="text"/>	Add
  - Buttons: Save Changes, Preview Vendors on List
- List 2: Internal Custom List**
  - Name:  (Required field)
  - Is Shared List?: ☒
  - Table:

Type	Value	
email literal	jane@purchasing.co	Edit Delete
email literal	joe@purchasing.co	Edit Delete
<input type="text" value="all"/>	<input type="text"/>	Add
  - Buttons: Save Changes, Preview Vendors on List
- List 3: All Plan Centers**
  - Name:  (Required field)
  - Is Shared List?: ☐
  - Table:

Type	Value	
is plan center		Edit Delete
<input type="text" value="all"/>	<input type="text"/>	Add
  - Buttons: Save Changes, Preview Vendors on List

Figure 40: Setting up Email Distribution Lists

Each list consists of one or more query parameters, which are combined together to produce a final list. These query parameters are additive — when you add multiple parameters, the list expands to contain every vendor or email address that matches any of them. Each query parameter lets you build a vendor list from different relevant criteria.

These are the types of query parameters:

- All,
- Keyword,
- Profile Tag,
- Specific Commodity Code,
- Email Literal,
- Has Specific Diverse Certification,
- Has Any Diverse Certification,
- Is Plan Center.

**The “All” parameter:** include every vendor in your vendor database in this distribution list. This will build an email distribution list with every vendor in your database — and if necessary, you can add email literals to build an even larger distribution list.

**The “Keyword” parameter:** search the vendor database, including vendor name, business name, capabilities, and several other fields, and include every vendor who matches the keyword. For example, if you include a parameter for the keyword “construction,” this will match every vendor who’s listed construction in their capabilities statement, or whose business name includes the word “construction.”

**The “Profile Tag” parameter:** search the vendor database, including vendors whose profile tags match the given profile tag

**The “Specific Commodity Code” parameter:** include every vendor who’s selected this commodity code in their vendor profile.

**The “Email Literal” parameter:** include this as a manually-entered email. If, for example, you’ve attended an outreach event recently and have a stack of business cards from potential new vendors who aren’t yet in your database, you can build a distribution list from their email addresses.

**The “Has Specific Diverse Certification” parameter:** include any vendor whose profile includes the specific certification (e.g. MBE, DBE, and so on) that you enter.

**The “Has Any Diverse Certification” parameter:** include any vendor who has listed any diverse certification in their profile. If you’re interested in doing outreach to certified vendors, and don’t intend to distinguish between the type of business entity they’ve been certified as, this is the option to use.

**The “Is Plan Center” parameter means:** include any business that has indicated in its profile that it is a plan center.

#### 4.3.1 Examples

If you have a collection of construction projects coming up, and you’ve just held an outreach event to bring in potential new vendors, you may want to build a distribution list that covers vendors you’ve worked with, but also includes the new vendors you’ve just spoken with.

What you can do in this instance is build an email list with the following options:

- A **Keyword** parameter with the search term “construction,”
- Several **Email literal** parameters, each with the email address of one of the vendors you’ve recently spoken to.

By building a list with these parameters, you’ll include every construction firm in your vendor database, as well as the new vendors. You can now use this list as a recipient list in sending out solicitations, broadcast notices, and more.

As another example, if you’d like to build a distribution list of every plan center registered with you, you can create a list with the following options:

- An **Is Plan Center** parameter,



And that's it. This list will grow dynamically as more plan centers register with you. Whenever you use this distribution list, it will include every business that has set the "is a plan center" option in their profile.

## 4.4 Managing Your Email Templates

The Bid Locker platform sends a variety of emails on a regular basis — alerting vendors when new solicitations are published, inviting vendors to virtual public openings, and so on. For all of these emails, Bid Locker uses email templates, stock messages that come pre-loaded, but that you can edit as needed.

You can also create your own email templates, for example if you have some regularly occurring events that you periodically hold, and the email invitations to these events are consistent from event to event.

Within the Email Tools module, you'll find the subsection for the Email Template Library. This is where you can create and edit your email templates.

### Email Template Library

Welcome to your email template library. You have 12 email templates.

*Please note that you cannot delete the built-in email templates. The ones that we need for the system to function are protected and can only be edited.*

[Add Email Template](#)

Email Name	Subject Line	
Agency User Password Reset	Password reset on your Bid Locker agency staff account	<a href="#">Edit</a> <a href="#">Delete</a>
Agency User Welcome	Welcome to your Bid Locker agency staff account	<a href="#">Edit</a> <a href="#">Delete</a>
Bid Submitted (Vendor Notice)	Bid Locker Notice: A bid has been submitted to %AGENCY%	<a href="#">Edit</a> <a href="#">Delete</a>
Bid Withdrawn (Vendor Notice)	Bid Locker Notice: A bid has been withdrawn for %TITLE%	<a href="#">Edit</a> <a href="#">Delete</a>
Event Invitation 01	Invitation to event on: DATE	<a href="#">Edit</a> <a href="#">Delete</a>
Intent to Award Published (Vendor Notice)	Bid Locker Notice: An award has been issued for %TITLE%	<a href="#">Edit</a> <a href="#">Delete</a>
Invitation-Only Listing Published (Vendor Notice)	Bid Locker Notice: You have been invited to participate in a new solicitation	<a href="#">Edit</a> <a href="#">Delete</a>
Listing Amended (Vendor Notice)	Bid Locker Notice: A listing has been changed - %TITLE%	<a href="#">Edit</a> <a href="#">Delete</a>
Listing Closed (Vendor Notice)	Bid Locker Notice: A listing has closed - %TITLE%	<a href="#">Edit</a> <a href="#">Delete</a>
Listing Withdrawn (Vendor Notice)	Bid Locker Notice: A listing has been withdrawn - %TITLE%	<a href="#">Edit</a> <a href="#">Delete</a>
New Listing Published (Vendor Notice)	Bid Locker Notice: %AGENCY% has published a new solicitation	<a href="#">Edit</a> <a href="#">Delete</a>
Public Bid Opening (Vendor Notice)	A public bid opening has been scheduled for %TITLE%	<a href="#">Edit</a> <a href="#">Delete</a>

Figure 41: Email Templates

There are two types of email templates, system templates and user templates. System templates are the email templates that Bid Locker sends out for various system notifications, and you cannot delete these. User templates are the email templates that you have created. You can create as many user templates as you like, and you can delete these.

## 5 Additional Tools

In addition to the several main modules, Bid Locker provides some additional tools to help you make the most of your platform. Here, we'll take a look at these.

### 5.1 File Library

The File Library is a way that you can conveniently provide access to some files for your vendors and potential vendors. You can use the file library to supply vendor on-boarding forms, tax documents they may need to complete, your guidelines for vendors, or anything else that you'd like to keep available on an ongoing basis (e.g. things that are not tied to specific solicitations or time-limited events or opportunities.)

All of the files you upload to your file library will be available on your agency landing page, and can be downloaded by vendors, as well as by people who aren't logged in or don't have profiles.

*Please note:* you do not want to upload any files containing sensitive information to your file library!

To upload files to your file library, click the "File Library" link in the top navigation menu. Then, click the "Select files..." button and select the files to upload. Any files you add to your file library will be made available immediately.

### File Library

Welcome to your file library. These files are available on your agency homepage.

#### Upload file to library

Select files...

File	File Size	
logo-blue.png	66,951	remove
scottie.jpg	94,037	remove

Figure 42: The File Library

### 5.2 Activity Log

Bid Locker includes an audit log that keeps a history of all of the activity done by both agency staff and vendors. You can see the audit log for your agency — which will contain records for all staff activity as well as any vendor activity that has involved in any way your agency's records (e.g. submitting responses to your solicitations) — by clicking the "Activity Log" link in the top navigation menu.

The online audit log viewer displays at most the last 1,000 entries in the activity history. You can download a complete audit log by clicking the "Export to CSV" button.

## 6 Admin Tools

A handful of tools within Bid Locker are only accessible to the agency administrator accounts. These tools allow the agency administrator to do certain operations that ordinary users can't do, such as reassign listings from one staffer to another.

### 6.1 Reassign Listings

If you need to reassign listings from one staffer to another, you can use the **Reassign Listings** tool. With this tool, you can reassign a single listing or do bulk reassignments.

Title	Owner	Status	Close Date
4th St Building Turbine Replacement RFP #1650	Zsófi ▼	awardpending	2/15/22
Fiber Optic Network Upgrade (East Campus)	Zsófi ▼	open	2/11/22

Figure 43: Reassign Listings

For each listing, you'll see the current owner. You can change this by selecting a new owner from the dropdown menu.

#### 6.1.1 Bulk Reassign Listings

On the right-hand side of the **Reassign Listings** tool, you'll see a panel to do bulk listing reassignments.

### Bulk Reassign

If you want to quickly reassign every solicitation owned by one staffer to another staffer, you can use this bulk reassign tool. Select the staffer whose solicitations you want to transfer, then the staffer who will receive them. Click the "Bulk Reassign" button, and be sure to save the assignments with the "Update Listing Ownership" button at the top or bottom of the page.

Reassign from:

--

▼

Reassign To:

--

▼

Bulk Reassign

Figure 44: Bulk Reassign Listings

This lets you select a user to reassign every listing away from and a separate user to reassign all of those listings to. Select the two users and click the "Bulk Reassign" button, and then click "Update Listing Ownership" on the page to save your reassignments.

## 7 Agency Settings

Bid Locker has a variety of settings and configuration options, to let you fine-tune how the platform works for you, update the information on your public agency landing page, and more.

In this section, we'll describe the settings available to you.

### 7.1 General Settings

In the General Settings section, you'll find a number of settings that relate to the general operation of the Bid Locker platform for your agency.

These are divided into the following sections.

#### 7.1.1 Agency Options

**Use commodity codes?** Enables the use of commodity codes for your agency.

**Commodity Codes:** This is the commodity code set that your agency will use when setting up new solicitations, sending emails to distribution lists, and other places where the commodity codes appear.

**Use solicitation tags?** Enables the use of tags for solicitations for your agency, as another means of identifying solicitations for vendors, sending emails to distribution lists, and so on.

**Listing Types:** These are the types of solicitations that you'll be able to pick from when setting up new solicitations.

**Notify Relevant Vendors As...** Various system events will send email notifications to vendors who have engaged with a solicitation in some way. You can define which groups of vendors will receive these email notifications. The options are bidders, interested parties, and planholders; you can choose any combination of these, or all of them.

**Time Zone:** This is the time zone for your agency, which determines the timestamp shown in your emails, as well as when your solicitations are published, closed, and so on.

#### 7.1.2 Solicitation Document Options

**Bid Document Access:** This lets you determine who can download any documents attached to your solicitations. You can choose from the following: Anyone can download, Registered vendors, Registered vendors (Plan centers disallowed), Vendor must express interest, Vendor must express interest (plan centers disallowed).

If you select "Anyone can download," then your solicitation documents will always be available for download — whether the vendor is logged in and registered with you or not.

If you select "Registered vendors" (with or without the plan center restriction), then vendors must be registered with you before they can download your solicitation documents.

If you select "Approved vendors" (with or without the plan center restriction), then vendors must be registered with you and approved by you before they can download your solicitation documents.

If you select "Vendor must express interest" (with or without the plan center restriction), then vendors must be registered with you and use the "Express Interest" button before they can download your solicitation documents.

You can disallow plan centers from accessing your documents by selecting one of the options that disallows them. *Please note:* while you can use the **Plan Center Override** option to manually flag plan centers, it's still possible to evade these strictions (e.g. a plan center staffer may set up their own, separate vendor profile and access some solicitation documents), so it's best not to rely on these as a hard-and-fast limit.

**Are award documents always visible?** If you'd like award documents (bid tabulations, notices of intent to award, and so on) to be accessible regardless of any other restrictions on downloading, you can check this box. When checked, award documents will always be accessible, whether or not the vendor is logged or browsing anonymously.

### 7.1.3 Display Options

**Preferred Display Language:** This is the default language that your agency will use to display the interface.

*English is the only language option now; we have plans to add other language options in the future. Vendors will always be able to override this in their settings, if they set a preferred display language as well.*

### 7.1.4 Default Notice Recipient

The internal notices that Bid Locker sends to agency staffers by default will go to the relevant staffer, e.g. the person who created a solicitation will get notices about that solicitation, and so on. In small offices, you may prefer that everyone receive every notice. This is where you can set that.

**Email Address(es):** This is a comma-separated list of recipients who will receive all of Bid Locker's system notices.

**Preferred Email Recipient(s):** This lets you choose the recipient(s) for system notices, either the relevant staffer, or the list of email addresses supplied in the last field.

### 7.1.5 Notice Delivery Options

You can enable or disable several of the internal notices Bid Locker generates. Some of these are sent when vendors perform some action, while some may be generated by some system activity (such as a listing closing.) If you don't want to receive these notices, you can disable them here.

### 7.1.6 Internal Point of Contact

If you have someone in your office who has been assigned to be the Bid Locker point of contact, e.g. someone who's most knowledgeable about the platform, you can add their contact information here. This contact information will never be made public.

## 7.2 Bid Options

These options govern a variety of vendor bid submission-related features.

### 7.2.1 Bid Submission Options

**Accept online bids?** Enabled by default, you can disable this to disable online bid submission entirely.

**Allow bids to be revised after submission?** Some agencies have, in their bylaws, restrictions on allowing vendors to revise bids after submission. For those agencies, vendors are required to withdraw and resubmit their solicitation responses. This option allows those agencies to use Bid Locker in compliance with their bylaws; when disabled, vendors can still withdraw and resubmit responses (up to the solicitation close date), but they can't revise them in-place. When this option is enabled, vendors can revise their submission responses in-place, without first withdrawing and then resubmitting.

**Enable public bid openings?** This option enables or disables the virtual public opening module.

**Enable bid document upload types?** This option enables or disables the bid document types feature in the solicitation setup.

**Include bid document types on submittal sheet?** If you're using the submittal sheet as a way to quickly identify and display completed submissions, this lets you see all of the document types that each vendor has selected when uploading their responses.

**Enable bid document type sealing?** Enable the sealing function for document types, allowing you to keep certain document types (e.g. financial proposals) locked until an additional later date has passed.

**Enable bid document requirement groups?** This allows you to define additional document type requirements, using the requirement group rules.

**Are plan centers excluded from expressing interest and submitting responses?** This option lets you exclude plan centers from fully participating in solicitations.

**Preferred Solicitation Close Time:** This lets you set an agency-wide preferred solicitation close time. When set, the close date selector will default to this time, as a way to help minimize data entry errors. You can always override the close time, even when using a preferred close time; this is just a default.

**Courtesy Email Before Solicitation Close:** If you'd like to receive an email reminder before solicitations close, you can enable that by choosing an interval of time before close here.

## 7.2.2 Supplementary Documentation and Multi-Stage Bid Options

**Enable secondary bid submission?** This option enables or disables the supplementary documentation feature in the solicitation setup.

**Hide secondary bid documents on submittal sheet?** This option causes any secondary-stage documentation to be omitted from the automatically-generate submittal sheets.

**Include timestamp for secondary bid documents on submittal sheet?** This option adds the upload timestamp to any secondary-stage documentation included on the automatically-generate submittal sheets.

## 7.2.3 QA Options

**Enable the vendor QA module?** When checked, this enables the vendor QA module. The vendor QA module adds a feature to each solicitation, where you can add one or more QA periods, during which time vendors can submit questions about the solicitation. When each QA period ends, you can either download the questions as a .CSV file or answer them via the QA module. If you answer the questions via the QA module, you can optionally generate a PDF addendum with the questions and answers, affix it to the solicitation, and notify vendors automatically.

**Is the vendor required to express interest on a given solicitation before they can submit a question about it?** If enabled, then the vendor must express interest in the solicitation before they can submit questions. If disabled, vendors do not need to express interest — they can ask questions as long as they're registered with your agency.

**Visibility of Answered Questions:** You can make the answers you've given to vendor questions visible on the public solicitation page by selecting one of the options here, and can optionally restrict the answer visibility only to registered vendors.

## 7.2.4 Pre-Bid Conference Options

**Enable the pre-bid conference module?** When checked, this enables the pre-bid conference features. If your agency will never host any pre-bid conferences, you can uncheck this and you won't see anything relating to pre-bid conferences.

**Enable pre-bid conference registration?** When checked, this enables the pre-bid conference registration features. If you'll never require pre-bid conference registration, you can uncheck this and you won't see any features pertaining to pre-bid conference registration.

**Pre-bid Conference Registration List Visibility** Sets the visibility of the pre-bid or pre-proposal conference attendee list, i.e. allows you to determine who can see it — anyone, only vendors registered with Bid Locker, or only vendors who have signed up to attend the meeting.

**Pre-bid Conference Registration List Details** This allows you to choose which vendor information is displayed on the vendor-facing solicitation page.

### 7.2.5 Display Options

**Show agency staffer's contact information on listing details?** When this is set, then the agency staffer who creates a solicitation will have their public contact information (as set in the "My Profile" screen) displayed on their solicitations. When this is disabled, all solicitations will show the agency's default contact information, as set in the "Address & Contact Information" settings section.

### 7.2.6 Interested Parties and Planholders

**Enable the Interested Parties List?** When this is set, your agency will have an interested parties list on each solicitation.

**Ask interested parties to specify their type of interest (e.g. prime contractor, sub, and so on) when downloading documents?** This will give vendors an option to specify their type of interest in the solicitation when expressing interest in the solicitation.

**Interested Parties List Display:** This lets you determine whether the interested parties list, i.e. people who have expressed interest in a given solicitation, is never visible to the public, is visible only to logged-in users, or is visible to everyone, logged in or not.

**Interested Parties Details:** This lets you determine which information vendors can see when they view or download the interested parties list.

**Extended Interested Parties Details:** If vendors have included certifications and a business tagline in their vendor profile, this lets you include that information on the interested parties list.

**Allow per-solicitation setting of interested parties list?** If you'd like finer-grained control over which solicitations have an interested parties list, you can enable this. Then, on your solicitation setup page, you can manually enable or disable the interested parties list for each solicitation.

**Enable the Planholders List?** When this is set, your agency will have a planholders list on each solicitation.

**Ask planholders to specify their type of interest (e.g. prime contractor, sub, and so on) when downloading documents?** This will give vendors an option to specify their type of interest in the solicitation when downloading solicitation documents.

**Planholders List Display:** This lets you determine whether the planholders list, i.e. people who have downloaded one or more documents for a given solicitation, is never visible to the public, is visible only to logged-in users, or is visible to everyone, logged in or not.

**Planholders Details:** This lets you determine which information vendors can see when they view or download the planholders list.

**Extended Interested Parties Details:** If vendors have included certifications and a business tagline in their vendor profile, this lets you include that information on the planholders list.

**Allow per-solicitation setting of the planholders list?** If you'd like finer-grained control over which solicitations have a planholders list, you can enable this. Then, on your solicitation setup page, you can manually enable or disable the planholders list for each solicitation.



### **7.3 Greeting Text**

Throughout the Bid Locker platform, there are numerous places where your agency may display some informational text, a tagline, or something similar. In the Greeting Text section, you can add the appropriate promotional language for your agency.

You can also add standard solicitation language on this page. Any text you add as standard solicitation language will be included on every public-facing solicitation details page for your agency. This can be helpful if you have some additional instructions you'd like to make every vendor aware of.

### **7.4 Logo and Background**

You can upload a new logo for your agency using the image upload tool here. After selecting and uploading your logo, you can resize, crop, and reposition the logo as needed.

You can also select a different background image for your agency. This is the background decoration that appears on your agency landing page and at the top of your public solicitation pages.

### **7.5 Address & Contact Information**

This is where you can set your agency's public contact information, mailing address, and physical address.

### **7.6 Departments**

If you'd like to set a list of departments, for use in assigning solicitations to departments, you can do so here. This is optional, but if you set a list of departments, please enter one department name per line.

### **7.7 Categories**

If you'd like to set a list of categories, for use in assigning solicitations to categories, you can do so here. This is optional, but if you set a list of categories, please enter one department name per line.

### **7.8 Bid Templates**

The Bid Templates page will show you any templates you've created for listing bid requirements or document types. You can review the templates you have access to, and remove any you've created.

### **7.9 Fillable Solicitation Forms**

If you'd like to present vendors with an additional set of fillable forms to be completed while submitting their bids, you can do so using the Auxiliary Forms feature. You can create as many forms as needed, and each form can consist of one or more prompts. The types of answers you can require are:

- Text entry
- Long text entry
- Yes/no
- Number
- Date
- File upload

When vendors complete these forms, their responses will be stored in a text file included in their bid submission downloads — except for file uploads, which will be stored in a separate folder in their bid submissions.

## 7.10 Generated PDF Templates

Bid Locker can generate templates for various tasks, such as automatically generating QA or solicitation addenda. In this section of the Agency Settings, you can see the various templates you have available, as well as create your own templates.

Each template can be edited by clicking the “Edit” button for that template. Please note that system templates can only be edited, not deleted, because they’re necessary for the platform to generate certain templated documents.

### 7.10.1 Custom Substitution Tags

In addition to the built-in substitution tags, you can define your own substitution tags for use in the generated PDF templates. Each tag you define will be substituted in when the template is generated. If you define a tag that’s the same as one of the system-provided substitution tags, your tag will override the system-provided one. As an example, if you defined your own %AGENCY% substitution tag, the value you provide would override the system’s %AGENCY% tag value.

## 7.11 Service Areas

If you’d like to set a list of service areas for your agency, you can do so here. If you set this, then when vendors share their profile with your agency and register with your vendor database, they’ll be asked to specify which service areas they can provide services for.

You can then see the service areas they’ve selected on their vendor profiles in the Vendor Database module.

## 7.12 Vendor Account Controls

If your agency has special requirements around vendor registration, you can enable vendor account approval here. All new vendors will have their accounts placed in a “Approval Pending” state, awaiting your approval. They will be able to log in, update their profile, and so on, but will not be able to download your solicitation documents or participate in any solicitations until approved.

You can add a note here, which appears on the public solicitation details page and on the vendor dashboard, for vendors you have not yet approved.

If your agency has had problems with troublesome vendors, spammers, or other bad actors, you can enable vendor suspension here. Suspended vendors will be able to log in, update their profile, and so on, but will not be able to download your solicitation documents or participate in any solicitations until you remove their suspension.

You can also add a note here, shown only to suspended vendors, that appears on the public solicitation details page and on the vendor dashboard.

## 7.13 Vendor Questions

When vendors register their profiles with Bid Locker, they fill out a simple profile that collects some basic information, like their contact information, type of business entity, a capabilities statement, their preferred commodity codes, and certifications they’ve obtained. If this information is sufficient for your agency, then you won’t need to set up any additional vendor questions.

If, however, there is other information you’d like to collect from your prospective vendors, then you can set up additional vendor questions here. When vendors share their profile with you and register with your vendor database, Bid Locker will present them with your additional questions to complete their profile with you.

You can add as many additional vendor questions as you need — each question comprises three parts, a field name, a field type, and a description to explain the field to the vendor.

**Metadata name:** This is the name of the question, a word or two.

**Metadata type:** This is the type of answer you are asking the vendor to complete — it can be a short text answer, a long text answer (i.e. multiple lines), or a file upload.

**Description:** This is an explanation of the question, or instructions to the vendor on the information they should provide.

**Is Required to Submit Responses?** Will the vendor be required to complete this field before they can submit a response?

**Is Required to Access Documents?** Will the vendor be required to complete this field before they can download solicitation documents?

**Send an email notice when this field is completed?** Enabling this will have an email notification sent to you when a vendor provides an answer to this question.

### 7.13.1 Example

As an example, if you wanted to set up an additional vendor question requesting a specific business licensing form, you could define the question as follows:

- **Metadata name:** City Business License
- **Metadata type:** File Upload
- **Description:** Please upload a scanned copy of your city business license.

With an additional vendor question set up like this example, when vendors register with you, they'll be prompted to upload a city business license. After registering, you'll be able to access their supplied city business license on their vendor profile.

## 7.14 Custom Certifications

While Bid Locker invites vendors to list the certifications they've obtained in their initial profile setup, you may want to allow vendors to list additional certifications that other agencies may not recognize.

These could include self-attested certifications (e.g. for various types of underutilized business entities) or certifications from specific organizations, but generally would be certifications that a vendor wouldn't think to include in their general Bid Locker profile.

To enable agency-specific custom certifications here, check the box here. You'll also want to include some messaging in the "Explanatory Text" section indicating what additional types of certifications your agency will recognize, to help vendors identify what they can include among their certifications specific to your agency.

## 7.15 User Interface Customization

Throughout Bid Locker, we've tried to use sensible language to accurately reflect the terminology of public procurement. Your agency, however, may use some different language to describe parts of your procurement process, your solicitation documents, and so on. Here, you can customize Bid Locker to suit your needs.

*Please note:* if you have some terminology you'd like to customize that you don't see here, please contact us. We're happy to add customization options for just about any of the terms of procurement that appear on the Bid Locker platform. And don't worry — if you don't set anything here, we'll still use the default language which we've tried to be sensible with.

### 7.15.1 File Library Options

There is currently one file library option:

## Try to detect video files in the file library and load them in a video player?

If this option is checked, Bid Locker will try to detect any uploaded video files uploaded to your file library. If it can detect that a file is a video, it will add a “Play Video” button in the file library next to the file. If the vendor presses the “Play Video” button, Bid Locker will play the video in the browser, instead of sending it as a downloaded file.

## 7.16 Default Location

You can select a default location, where your solicitations will appear when vendors perform location-based searches in the vendor-facing search system.

## 7.17 Agency Url

In the Agency Landing Page section, we described how your agency has a dedicated landing page where vendors can find your solicitations, contact information, and more.

The URL for your landing page looks something like this and consists of two parts:

<https://bidlocker.us/a/yourAgencyName>

The first part, <https://bidlocker.us/a/>, you cannot change, but the second part, **yourAgencyName**, can be changed.

Equity Hub assigned this second part when we set up your agency profile, but if your organization name changes, or if the name Equity Hub initially set for you isn't the name you'd like to keep using, you can change it here. If you change your agency URL, the change is effective immediately.

You can use letters, numbers, and the underscore (\_), but no spaces, punctuation or special characters.

**Caution:** you probably don't want to change the landing page URL for your agency often, since it will make it difficult for your vendors to find your agency when you change it, i.e. if they've bookmarked your old landing page URL or if they have printed materials with your old landing page URL on them.

## 7.18 Users

While you won't ordinarily need to add or remove agency staff accounts from your Bid Locker agency staff list, the need may occasionally arise. This is where you can do that.

*Please note:* this section is only accessible to staff accounts that are marked as “admin” accounts.

To add a new staff account, click the “Create new agency user account” button. Fill in the new staffer's profile information — keep in mind that the contact information you enter here may be displayed publicly on the Bid Locker site, so be sure to use their office information only.

When you've finished entering the new staffer's information, click the “Create User” button to create the account. The staffer will receive an email with their login information and password, and they can log in immediately and begin using Bid Locker.

If a staffer has left and you need to disable their account, click the “deactivate” link to disable their profile. Any solicitations or documents they've created will remain, but they'll no longer be able to log in.

### 7.18.1 User Grants

Occasionally, you may wish to grant additional permissions to certain staffers. You can do so by editing their profile, and selecting the desired grants.

To allow a staffer to reopen a closed solicitation, enable the grant permission labeled “Can this user reopen closed solicitations?”

To allow a staffer access to work with another staffer's solicitations, first select the grant titled "Can this user work on another user's solicitations?" and then select the staffer whose solicitations they're gaining permissions for. You can select one or many other staffers for grant permissions.

## 8 Addenda

### 8.1 Contacting Us

If you have questions or need help setting up your agency solicitations, we're always happy to help. You can reach us at:

**Phone:** 267-225-1407 **Email:** [help@equityhub.us](mailto:help@equityhub.us)

### 8.2 Document and File Size Limits

There are no limits on document or file sizes for your uploads to Bid Locker. Whether attaching documents to your solicitations or uploading files to your file library, you may upload as many as you need, and of any file size.

### 8.3 Supported Browsers

**Please note that we support the following web browsers:**

- Chrome or Chromium
- Firefox
- Safari
- Vivaldi

We do not support Microsoft Internet Explorer. If you're not using one of the supported browsers, we can't guarantee that Bid Locker will function properly.

**Please note:** some PDF and document viewer software is set up to open the Bid Locker website directly within their viewer when you click on a link in a PDF document. This is also unsupported. If your PDF viewer doesn't open a new browser window with one of our supported browsers, Bid Locker won't work for you. If this happens, you'll need to reopen Bid Locker in one of our supported browsers.