

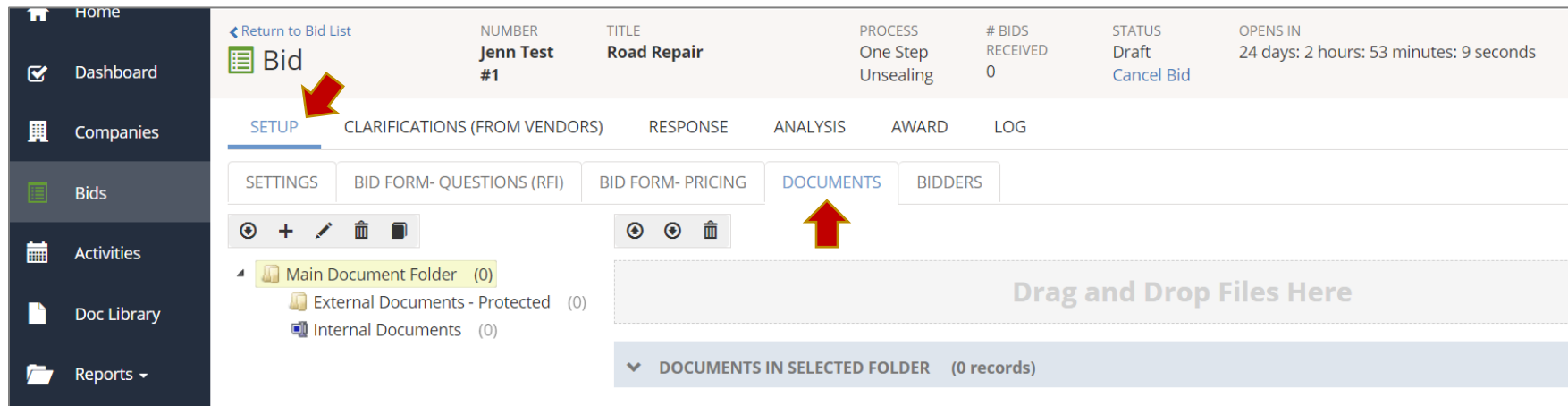
ISSUING ADDENDA

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

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

Uploading Addenda Documents

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



The screenshot shows the PennBid interface for a bid titled "Road Repair". The "Documents" tab is selected in the "Documents" section. A red arrow points to the "Documents" tab, and another red arrow points to the "Main Document Folder" in the document list.

NUMBER	TITLE	PROCESS	# BIDS RECEIVED	STATUS	OPENS IN
Jenn Test #1	Road Repair	One Step Unsealing	0	Draft Cancel Bid	24 days: 2 hours: 53 minutes: 9 seconds

Navigation tabs: **SETUP** | CLARIFICATIONS (FROM VENDORS) | RESPONSE | ANALYSIS | AWARD | LOG

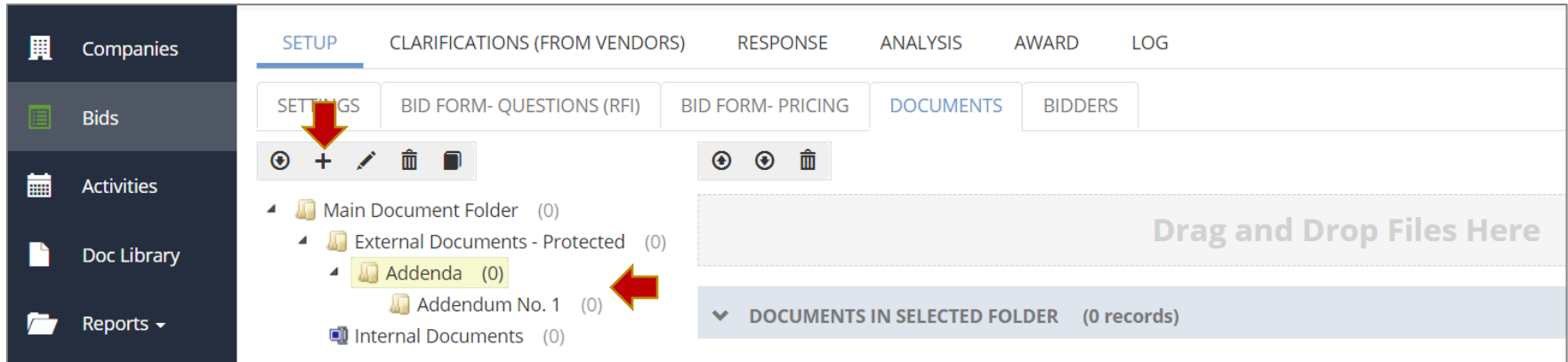
Document List:

- Main Document Folder (0)
 - External Documents - Protected (0)
 - Internal Documents (0)

Drag and Drop Files Here

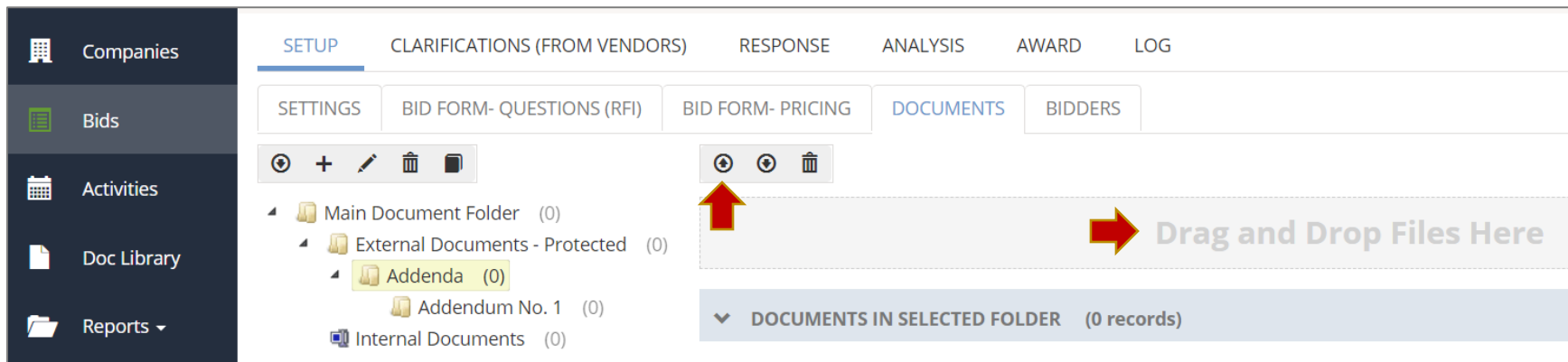
DOCUMENTS IN SELECTED FOLDER (0 records)

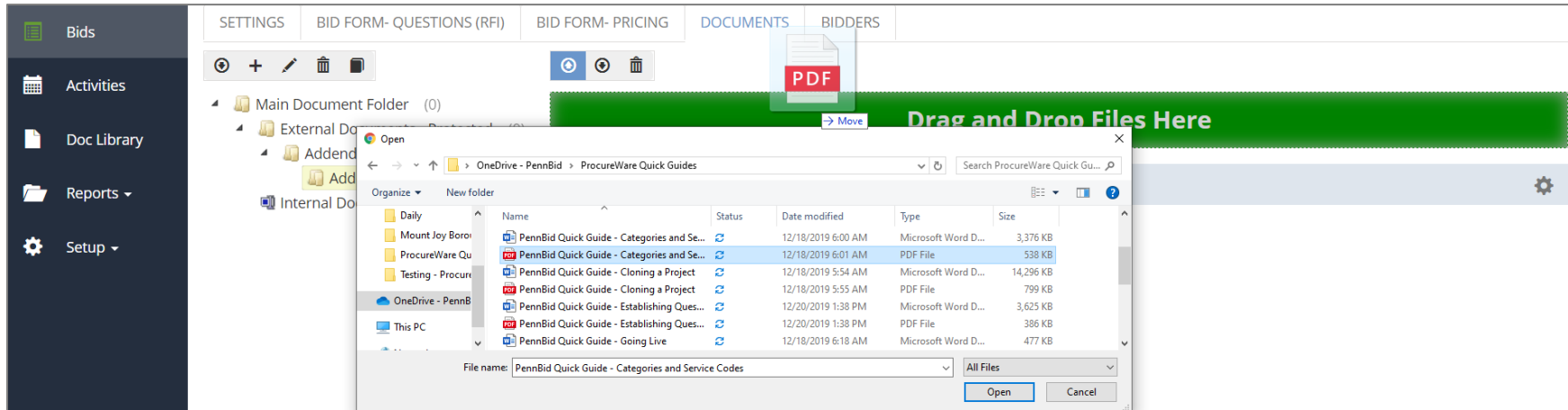
Note: You can add folders/sub-folders at any time. If you don't have a folder called "Addenda," you can create one by selecting the main folder you want to add the sub-folder, click the + icon and add/name the new folder.



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

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





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



Modifying the Solicitation

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

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

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

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

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



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

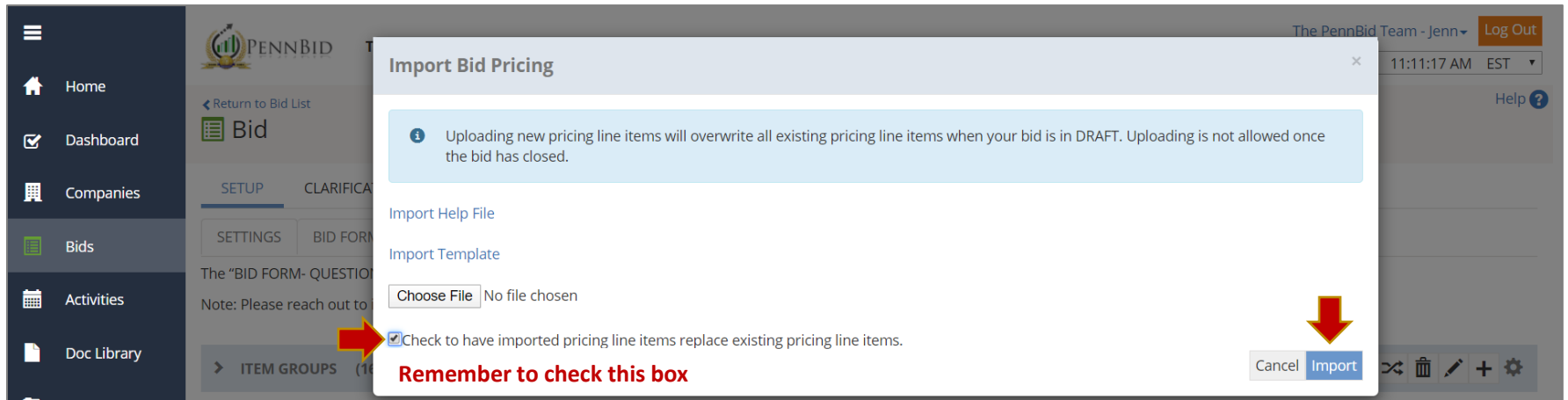
The screenshot displays the PENNBID web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area shows a 'PricingLineItem' modal form. The form contains the following fields and options:

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

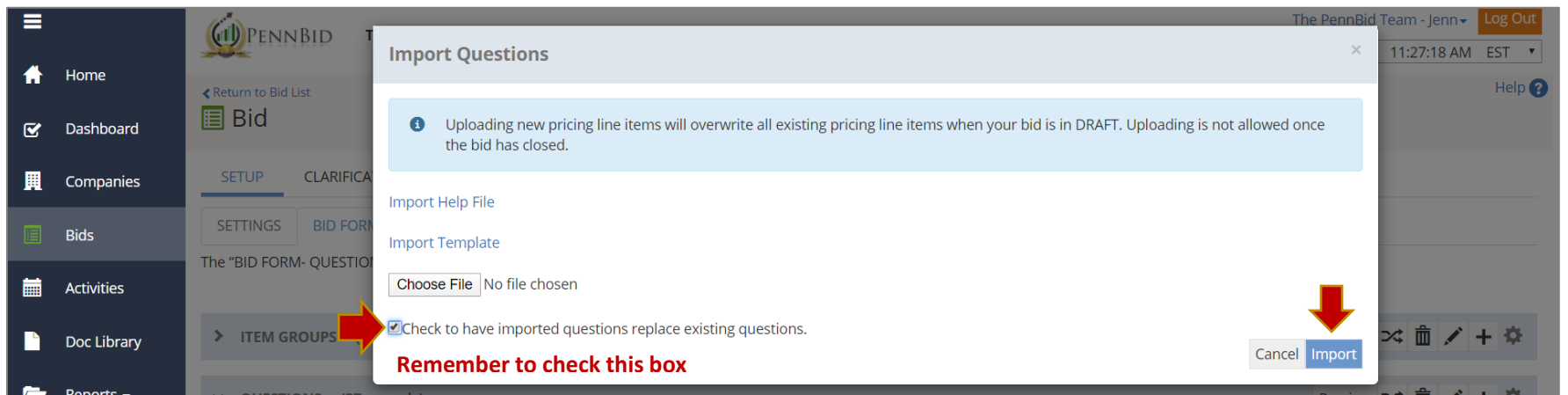
At the top right of the modal are 'Cancel' and 'Save' buttons. A red arrow points to the 'Save' button. In the background, a table lists pricing line items, with a red arrow pointing to the first item (ID 1) and another red arrow pointing to a pencil icon in the right-hand toolbar.



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



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



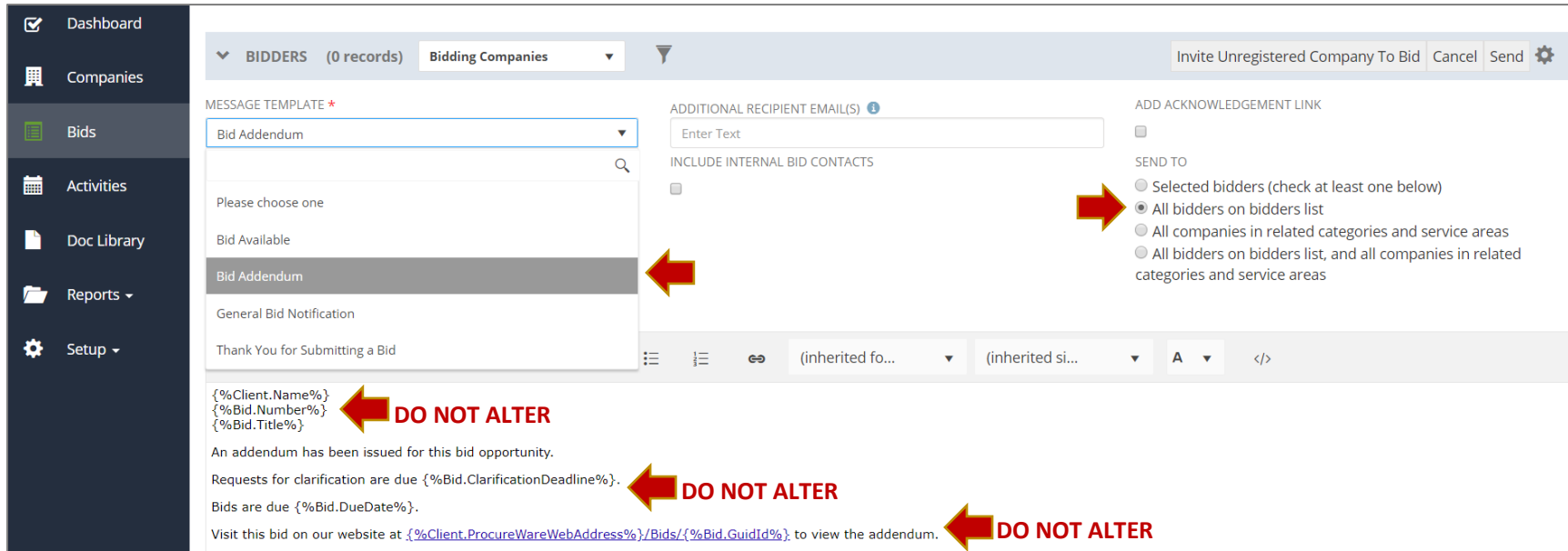


Notifying Bidders

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

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

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



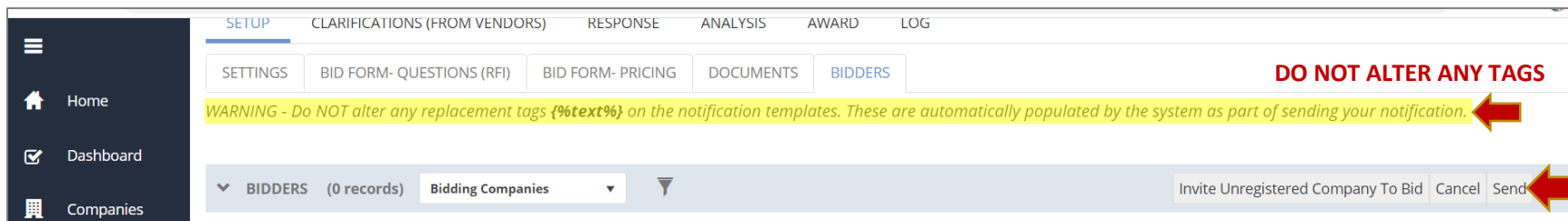
DO NOT ALTER

DO NOT ALTER

DO NOT ALTER

DO NOT ALTER

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



DO NOT ALTER ANY TAGS

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

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



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

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

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

Cancel Send

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

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

BIDDERS (2 records) Bidding Companies

NAME: Enter Text

BIDDING STATUS: Active Inactive

COMPANY STATUS: Active Inactive

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

The notification has been sent.



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

The screenshot displays the PennBid web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, and Reports. The main content area shows a bid summary for 'Jenn Test #1' with the title 'Road Repair'. The bid is in 'Draft' status and has 0 bids received. A red arrow points to the 'LOG' tab in the top toolbar. Below the toolbar are tabs for 'MESSAGE BATCHES', 'OUTBOUND MESSAGES', 'INBOUND MESSAGES', 'DOCUMENTS', and 'AUDIT'. The 'MESSAGE BATCH LOG' section shows 2 records. A table below lists the log entries:

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

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