

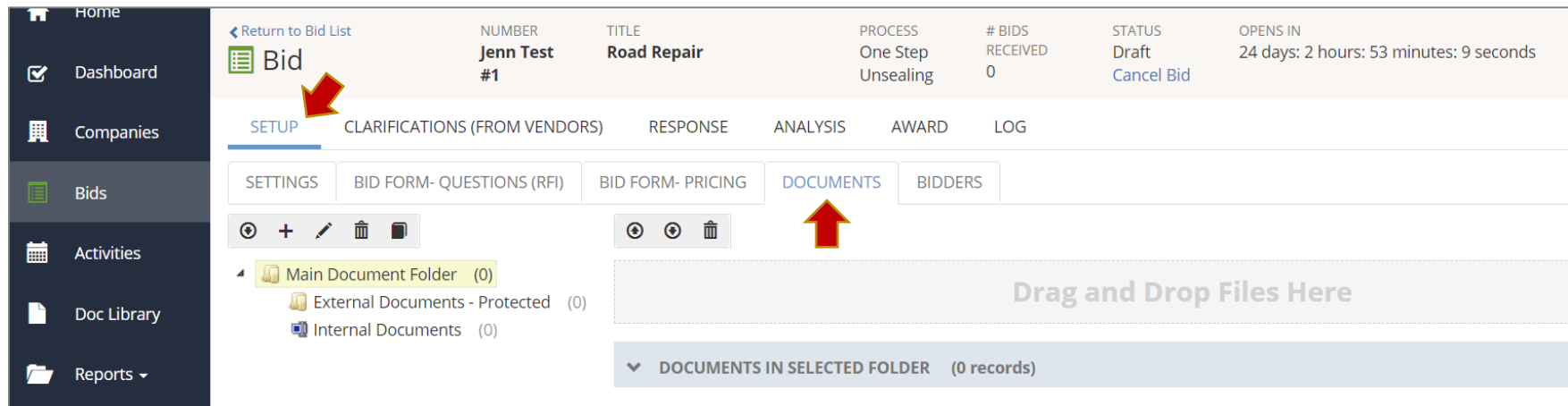
ISSUING ADDENDA

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

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

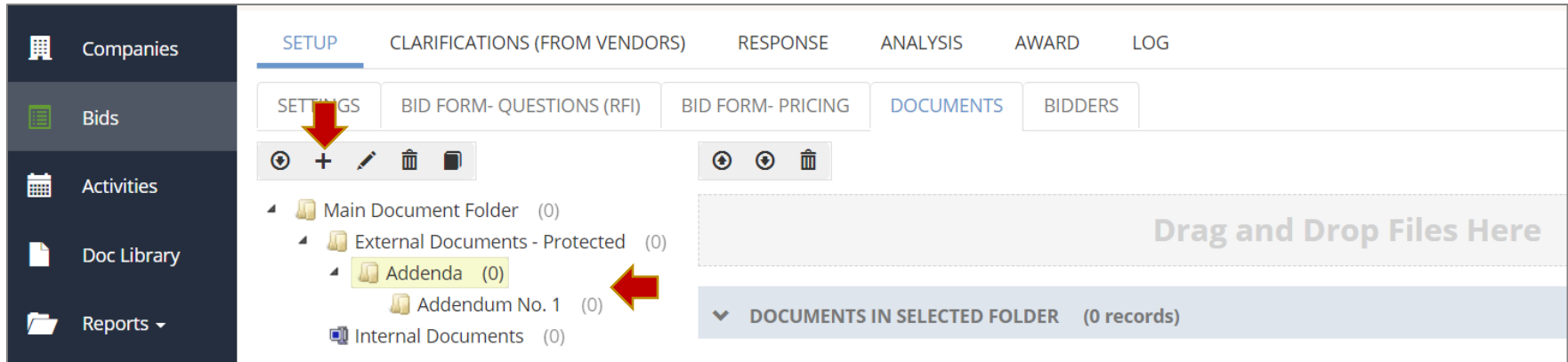
Uploading Addenda Documents

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



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

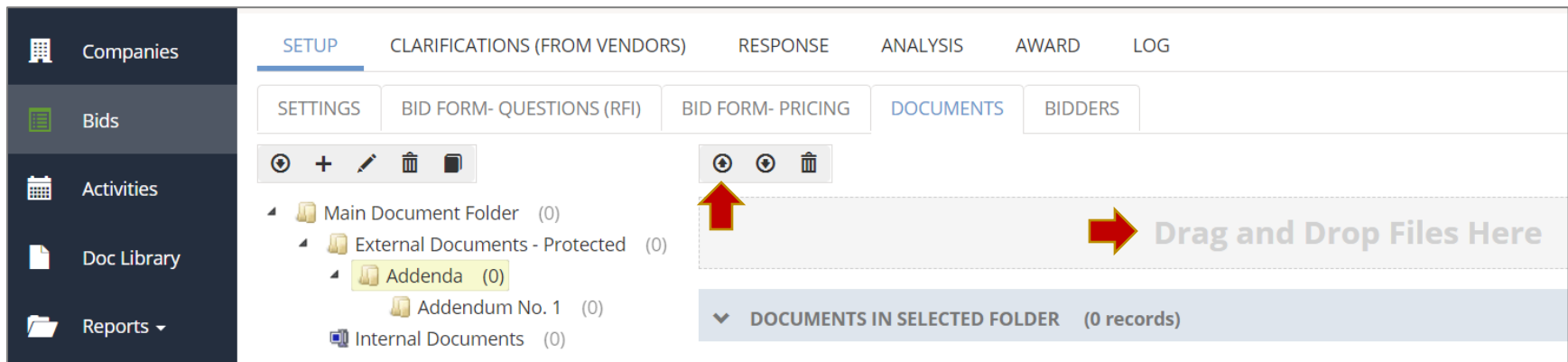
Note: You can add folders/sub-folders at any time. If you don't have a folder called "Addenda," you can create one by selecting the main folder you want to add the sub-folder, click the + icon and add/name the new folder.



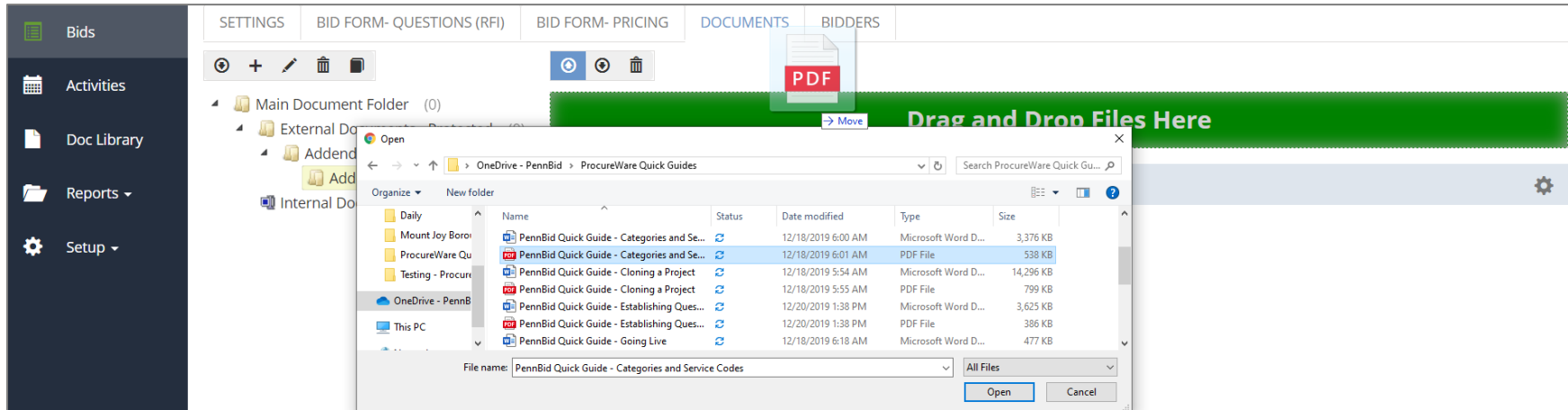
The screenshot shows the PENNBID interface with the 'DOCUMENTS' tab selected. The left sidebar contains 'Companies', 'Bids', 'Activities', 'Doc Library', and 'Reports'. The top navigation bar includes 'SETUP', 'CLARIFICATIONS (FROM VENDORS)', 'RESPONSE', 'ANALYSIS', 'AWARD', and 'LOG'. Below the navigation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

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

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



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



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



Modifying the Solicitation

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

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

The screenshot shows the PennBid web application interface. On the left is a dark sidebar with navigation items: Companies, Bids (highlighted with a red arrow), Activities, Doc Library, Reports, and Setup. The main content area has a top navigation bar with tabs: SETUP (selected), CLARIFICATIONS (FROM VENDORS), RESPONSE, ANALYSIS, AWARD, and LOG. Below this is a sub-tab bar with: SETTINGS (selected), BID FORM- QUESTIONS (RFI), BID FORM- PRICING, DOCUMENTS, and BIDDERS. The main content area contains two lines of text with links: "For our Quick-Start guides, [click here](#)." and "For our User Videos (password required- email info@pennbid for more information), [click here](#)." Below this is a table with bid details. The table has three columns: NUMBER, STATUS, and VENDOR SERVICE AREA VIEW. The first row shows "Jenn Test #1", "Draft", and "Yes". The second row shows "Road Repair", "No", and "Yes". In the top right corner of the table area, there are three buttons: "Clone", "Delete", and "Edit" (highlighted with a red arrow).

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

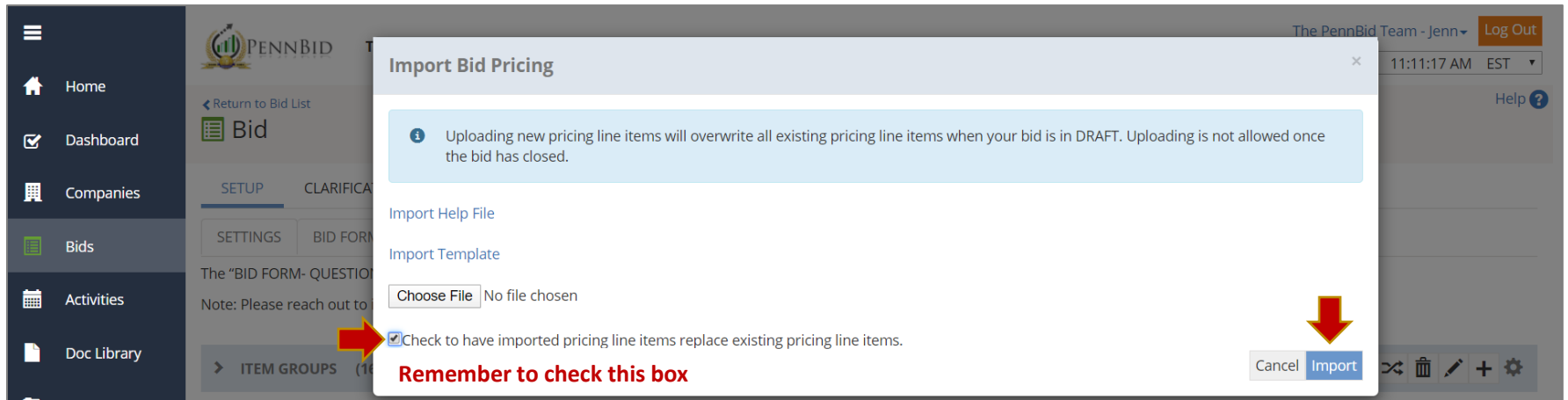
The screenshot displays the PENNBID web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area shows a 'PricingLineItem' modal form. A red arrow points from the 'Pricing Line Item' table in the background to the modal. The modal 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

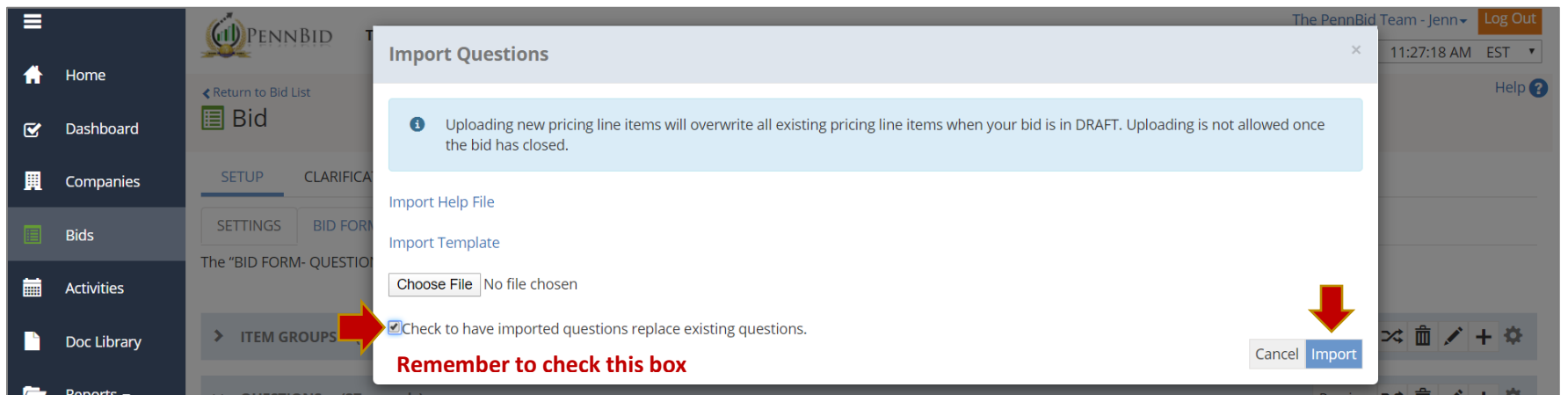
At the top right of the modal are 'Cancel' and 'Save' buttons. A red arrow points to the 'Save' button. In the background, another red arrow points to a pencil icon in the table's action column.



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, a navigation bar contains 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 header includes a dropdown for "Bidding Companies" and a toolbar with buttons for "Invite Unregistered Company To Bid", a plus sign, a trash icon, a pencil icon, and a "Notify" button. A red arrow points to the "Notify" button. Below the header, there are input fields for "NAME" (with "Enter Text" placeholder), "BIDDING STATUS" (with "Active" and "Inactive" radio buttons), and "COMPANY STATUS" (with "Active" and "Inactive" radio buttons). A "BID ACTIVITY" section contains several checkboxes with corresponding icons: "None", "Downloaded Document", "Clarification Request", "Submitted Bid", "System Unsubmit", "Vendor Unsubmit", "Bid Withdrawn", "Registered", and "Attended".

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

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.

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

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.

Invite Unregistered Company To Bid + [trash] [edit] Notify [gear]

NAME: Enter Text

BIDDING STATUS: Active Inactive

COMPANY STATUS: Active Inactive

BID ACTIVITY:

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

✓ The notification has been sent.



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

The screenshot shows the PennBid web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, and Reports. The main content area is titled 'Bid' and displays details for a bid with the number 'Jenn Test #1' and title 'Road Repair'. The process is 'One Step Unsealing', the status is 'Draft', and it 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 displays the log entry:

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.