



By-Invitation-Only Solicitations

At times there is a desire to offer solicitations or bids only to a selected group of bidders. With a mouse click, a solicitation can be changed from “public” to “Private By-Invitation-Only.” Here’s how:

NOTE 1 – It is important to understand when a bid is set as “**Private – By Invitation Only**” only those invited will have access to the solicitation and the solicitation is NOT visible to the general public.

Step 1 – Set up the project within PennBid; however, within the **Bidders** tab, under **Bidders List Options**, click **Edit**, “**Private, Invite by Company**,” then **Update**.

Setup | Events | Categories | Documents | Questions | Orders | Bidders | Bids | Log

Solicitation - Bidders List

Solicitation Title: Your Project Title Here
Number: Shady Maple Authority
Bids Due: 1/28/2016 4:00:00 PM Eastern
Status: Open

Visible to Vendors: Currently Visible | [Hide](#)

The **Bidders** function allows for the overall management of the Bidders List. It is also used [Link to PennBid User Guide](#) and [Tutorial Videos](#).

Bidders List Options

Invitation Type Public Private, Invite by Company

Display Bidders List to Vendor

Enable Role Selection

Enable Intent to Bid



Step 2 – Adding your selected bidders

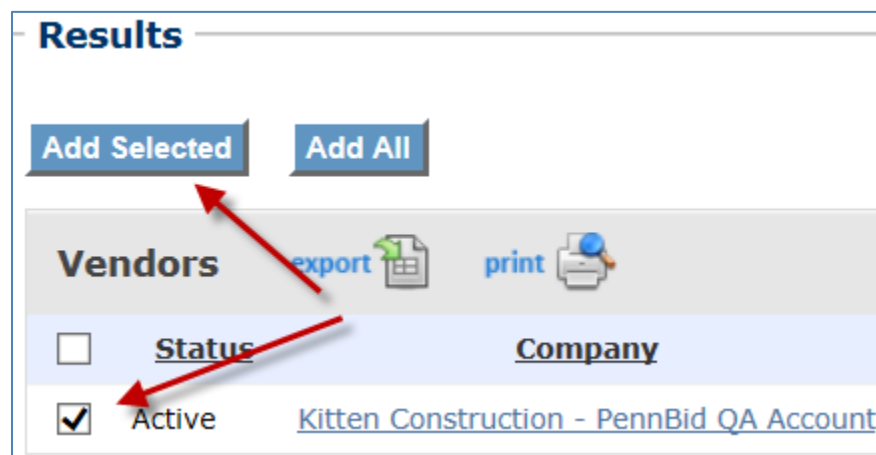
- From the **Bidders** tab (top blue bar), scroll down and click **Add Vendor**.

A screenshot of the "Bidders List" interface. At the top, there is a header "Bidders List". Below it are two tabs: "Company" and "Category". Underneath the tabs is a row of four blue buttons: "Add Vendor", "Remove Selected", "Notify Selected", and "Notify All". A red arrow points to the "Add Vendor" button.

- The screen will change and you can search for specific vendors with a Simple or Advanced Search.

A screenshot of the "Search for a Company or Contact" interface. It features a header "Search for a Company or Contact". Below the header is a section labeled "Display Results By" with two radio buttons: "Company" (which is selected) and "Contact". Below this is a search input field with the text "kitten" entered. At the bottom of the search area is a blue "Search" button.

- PennBid will return Results. Simply select the vendor(s) and click **Add Selected**. Continue this process to add all desired vendors.



Step 3 – When ready, display the solicitation by clicking “**Show**” from any screen.

Step 4 – Notifying selected bidders – **IMPORTANT – DO NOT FORGET THIS STEP**

- From the **Bidders** tab (top blue bar), scroll down and click **Notify All**. Write a short note, click **Next**, **Send**, and **Ok**.

Please contact us with any questions related to this process. We are happy to provide options or assist with setting up the framework in PennBid.