BID MANAGEMENT SYSTEM (SHAREPOINT ADD-IN)

User Guide

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Version 1.0

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About this Document

Purpose

This guide has been written to help you understand and use the Bid Management System, a SharePoint add-in. It presents the functional capabilities and operational details of a Bid Management Solution for bidders, evaluators and users and contains the procedures that you should know for performing your business tasks using the add-in.

Intended Audience

This guide is intended for all the users of the add-in on SharePoint who are seeking to capture, share and search key information of the company's various departments or projects on a single platform.

Products Supported

➤ SharePoint 2013+
➤ SharePoint Online

Version Supported

This user guide is relevant in all manner to explain and elaborate the functionalities which are available on our Free & Enterprise version of the Bid Management System.

Contents

1. Introduction

Electronic Bidding management System will facilitate the old bidding processes through electronic means basically by using online forms through internet. Electronic Bidding management System is a important process of any business that helps that corporation to search a reliable and affordable contractor according to its need.

What does a simple Bidding management system do? It manages:

- The information content of a bidding being issued.
- The administration process of both issuance of bids and receiving of bids.
- The content, structure and production of the bid submission and time and resource management for the bidder.
- The record keeping and audit trail of changes.
- A repository of all documentation.
- Reduce maintenance cost of data.
- Improve accuracy and efficiency of calculations.
- Flexibility of transactions can be completed in time.
- Provide proper and accurate information.
- Improve data security.

    1.1. Benefits

- The sourcing professional is often under pressure for time, so it is important that the administrative tasks are streamlined and minimized. Securely managed biddings can be issued to selected bidders' error free and on time
- Master templates can be available for all types of sourcing activities to cut down on drafting times
- A full audit trail of change and updates, questions and actions are kept
- Biddings can be sent out and received electronically via an on-line portal with or without attachments.
- Costs are reduced in the preparation and the distribution of the documents and the responses
- Reduced likelihood of poor submissions and costly delays due to suppliers not being in possession of the latest versions and updates
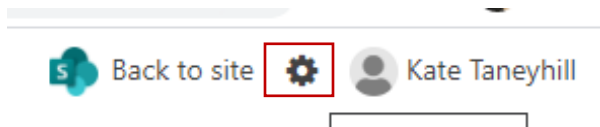- Security and limited access via passwords

2. Getting Started

1.2. Installation of Bid Management System

3. Configuration

4. Master Settings

To access the Master Settings, click the top right corner with settings icon as indicated in the image below:

Once you click the settings icon, the Masters Table will appear which needs to be filled. Please follow the following points to know how to fill the Masters Data.

4.1 Bid Types

4.1.1 Add Bid Types

To add a Bid Type:

- Click the "Add Bid Type" button and fill the "Bid Type Title"

- Select the Active/InActive Status of the bid
- Save the Bid, the newly added Bid will appear in the list soon after
- Click the Reset button to reenter the Bid Type

4.2 Bidders

4.2.1 Add Bidders

- Click on "Add a Bidder" button and fill in the details as indicated in the image

- Select the Active/InActive status and Save
- Click on Reset to rework on the Bidders form and the entry will be saved, refer image below

- To edit the Bidder entry, click on the pencil icon and proceed further
- You can also use the "Search by bidder name" filter to find the right bidder

4.3 Bid Status

- Click on Bid Status to open the Not Started, In Progress, Closed and Completed chart
- Update the text as per your preferred terminology and save the details
- The changes will be reflected in the desired field

4.4 Personalization

- Go to "Personalization" from the settings button
- A personalization form will appear, fill it with respect to your personal requirements, refer the image below:

- You can add your company specific terms to all the fields marked with red Asterix (*)

1.2.1.Give your branding

To give the add-in desired branding and look, you can do this from manage Title, theme color and logo option available.

- Add your company theme color – pick from the color palette.
- Change the title of the add-in to your desired name.
- Add your company logo – this logo will appear on the top left screen of the add-in. Refer to the image below:
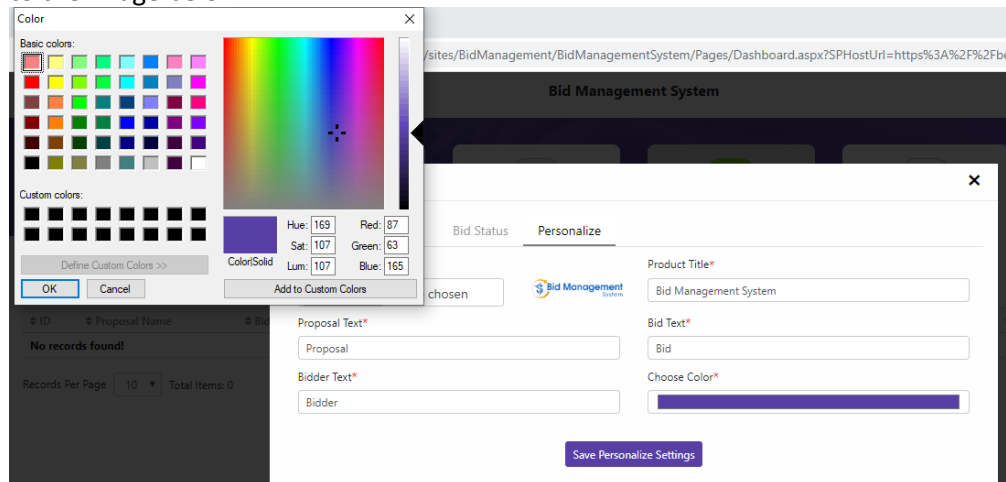
5. Add Proposal

- To add a proposal, go to "Add Proposal" button located at the top right corner right below the Bid Status shortcut as indicated in the below below:

+ Add Proposal

⇕ Bidders	Action

« ‹ Page 1 of 1 › »

- Upon clicking, a table will appear as indicated below. Fill the relevant information as shown

Add Proposal ✕

Proposal Title*

Fire and Security Alarm System

Proposal Type*

Select Proposal Type ▾

Proposal Description

Your proposal description here

Start Date*

Start Date 🗓

End Date*

End Date 🗓

Evaluators*

Chris Gray ✕

Proposal Owners

Gareth Chan ✕

Attachments ❓

Choose Files | No file chosen

Active/In-Active

🟢

Save Proposal | Reset

- Pick the Evaluators and Proposal Owners from your SharePoint Directory
- Select the "Proposal Type" which were previously saved in the Masters Settings

Proposal Type*

Select Proposal Type ▾

Select Proposal Type
Financial
Commercial

- Choose the Active/InActive status
- You can also attach the Proposal document from the "Choose Files" button

- Click on "Save Proposal" to save the entries
- Click "Rest" button to rework on the entries
- The information saved will be reflected in the home page under "Not Started" Tab, refer the image below:

2. Filters

To use the filters, refer to the filters section as indicated in the image below:

- You can search the proposal by selectin multiple search options such as Search by Proposal, Select a Bid, Start and End Bid Date and Status
- The relevant results would appear as indicated in the image below
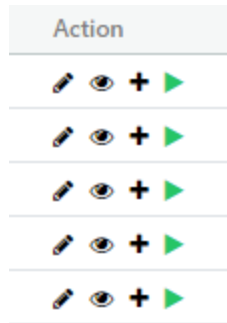

2.1. Reset Filters

You can reset all the filters by clicking the refresh button
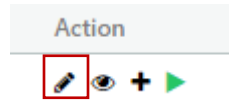
0

Completed

Started ▾ ⟳

6. Actions

To access the action, click the dashboard icons as indicated below:

6.1 Edit Proposals

- To edit a proposal click on the pencil icon under the "Actions"

- Select on the proposal to be edited and this shortcut will let you quickly edit the proposal
- Upon clicking the pencil icon, the editable fields of that particular proposal will open in a form, refer the image below:

Edit Proposal   ✕

Proposal Title*   Proposal Type*

| Fire and Security Alarm System | | Commercial   ▾ |

Proposal Description

| Your proposal description here |

Start Date*   End Date*

| 04/16/2020   🗓 | | 04/24/2020   🗓 |

Evaluators*   Proposal Owners

| Chris Gray ☒ | | Gareth Chan ☒ |

Attachments ❓   Active/In-Active

| Choose Files | No file chosen | 🟢
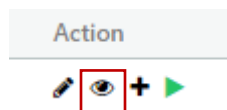
                    Save Proposal   Reset

- Make the edits as per your requirements in the fields
- Save the changes by clicking "Save Proposal"

6.2 View Proposal

- To view a proposal click on the eye icon under the "Actions"

Action

✏ 👁 ✚ ▶

- You can view the Proposal and give a quick overview before adding Bidders and Starting the Bid, refer the image below:

6.3 Add Bidder

- To add a bidder click on the plus icon under the "Actions"
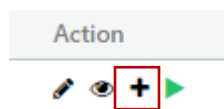
- This will open a short cut to add a bidder, refer the image below:

- Fill the bidder details by clicking the "Add Bidder" button as indicated in the image below and Save the details
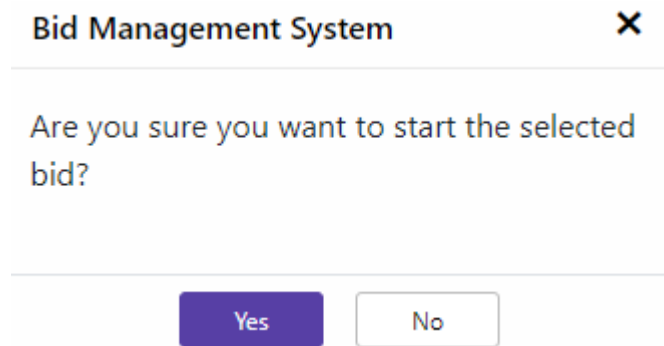
- You can edit the Bidder details nu clicking on pencil icon under action and save changes

6.4 Start and Stop a Bid
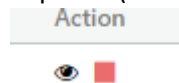
- To start a bid click on the play icon under the "Actions"

Action

✏ 👁 ＋ ▶
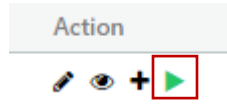
- Upon clicking, a confirmation alert will pop up which you need to accept by clicking Yes.

Bid Management System   ✕

Are you sure you want to start the selected bid?

Yes   No

Note: At least one bidder details should be entered. Once you click on the start icon, the bidder will receive an email notification using which the bid documents can be reviewed and the bidder can review the bid and act.

- As soon as you start the bid, the bidder will receive an email notification and you will see the start icon being changed to stop icon (in red) as indicated below:

Action

👁 🟥

- In order to stop the bid, click the stop icon in red and proceed with further instructions
- The bidder along with evaluator will receive an email notification about the closure

6.5 View Bidder

- The user can click on the man icon under the Action tab to see who the bidders are, refer the image below:

Action

👁 🧍
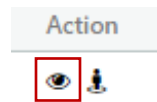
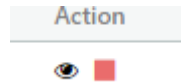- Upon clicking, you will be shown the selected bidders, refer to the image below:

＋ Add Bidder

ID	Bidder	Representatives	Emails	Mobile	Address	Status	Action
1	ABC Fire and Security Systems	AJ Sharma	ananya.sharma@beyondkey.com	4721700	9th Floor, NRK Business Park Indore		📄

- Click on Document icon under the Actions tab to review the documents shared by the bidder

6.5 View Proposal

- To view the Bid Proposal click the eye icon as indicated below (next to "Stop Bidding" icon)

- Upon clicking, your proposal details will appear as indicated in the image below:
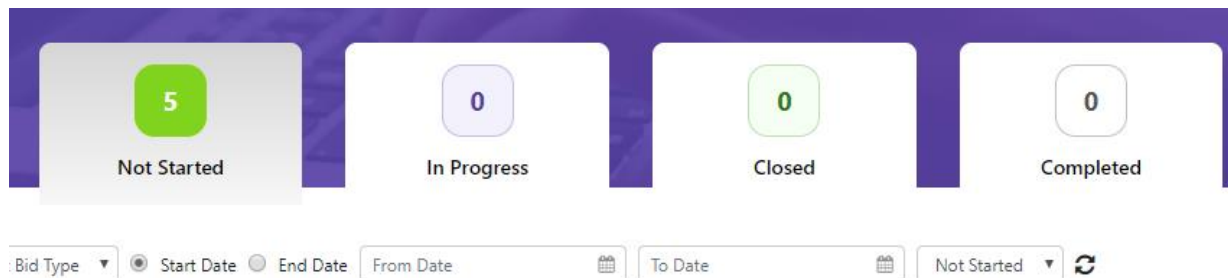

7. Bid Status Shortcut (Homepage access)

You can view the Bid Status using the filters available in the banner, refer the image below:

- The status opened will be shown in green as indicated in the above image

8. Review the Proposal

The bidder will access the automated email sent by the Bid Management System, refer the email below:

Dear Supplier,

You have been invited to participate in bidding for the "Fire and Security Alarm System" Project, kindly review the attachments for more details by clicking here .

Please upload your proposal(s) as requested by clicking here .

Please submit your proposal(s) before 2020-05-28T07:00:00Z.

Shall you have any clarification, please contact the representative cc'ed in this email.

Best Regards,
Bid Management System Team

9. Uploading a Proposal

The bidder will access the automated email sent by the Bid Management System, refer the email below:

Dear Supplier,

You have been invited to participate in bidding for the "Fire and Security Alarm System" Project, kindly review the attachments for more details by clicking here .

Please upload your proposal(s) as requested by clicking here .

Please submit your proposal(s) before 2020-05-28T07:00:00Z.

Shall you have any clarification, please contact the representative cc'ed in this email.

Best Regards,
Bid Management System Team

- By accessing "Clicking here" hyperlink, the bidder will go to a SharePoint document library where he/she can upload the documents, proposal, refer below:
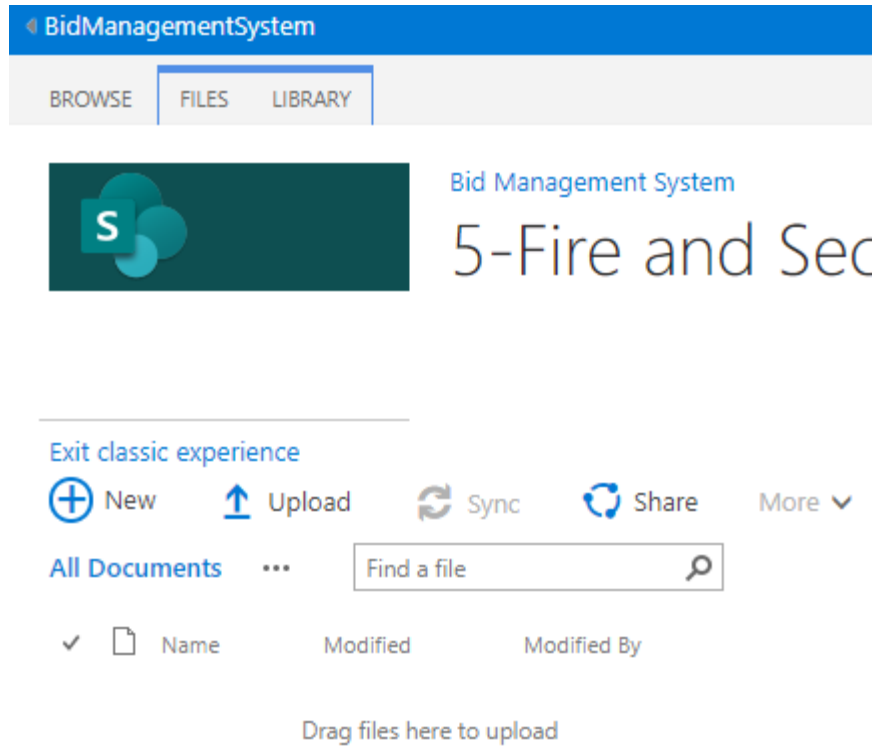
10. Bid Evaluation (Evaluator's view)

The Evaluator's view is different than the Bid creator's view, refer to the image below.

10.1 View Bidder

Click on the eye icon to view the bidder and related details, refer image below:

Add Bidder - Fire and Security Alarm System

+ Add Bidder

ID	Bidder	Representatives	Emails	Mobile	Address	Status	Action
1	ABC Fire and Security Systems	AJ Sharma	ananya.sharma@beyondkey.com	4721700	9th Floor, NRK Business Park Indore		📄

Click on the document icon under the "Actions" to review the bidder details and proposal
Note: This will be done by the Evaluator and he/she would see different action items.

10.2 View Proposal

The Evaluator can view the Bid and review the proposal shared by bidders by clicking on the man icon under the Actions section, refer images below:

11. Help Instruction and Contact Us

Refer Help Instruction page and contact us for support. Users can easily reach our crisp Help Instruction page from the tiles available on the home page. The short help instructions guide provides you with quick insights about how processes are performed in this add-in and this can be of great help for beginners.

After referring to the help instruction page or this user guide, if you are stuck on any of the processes, our Contact us tile can easily navigate you to connect with us. We encourage you to connect with us with any kind of questions or suggestions you have, and we'd love to listen and respond to them.

Happy Bidding! Thank you!