NetVendor Project Bidding Tool Help Guide

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What is a Project?

A Project is the overall outline of a Bid proposal, submitted by a property looking for specific services, often requiring several sub-contractors to apply. When a Project is created, the Project lead will:

- Provide details of the project including any necessary documents and/or files and states.
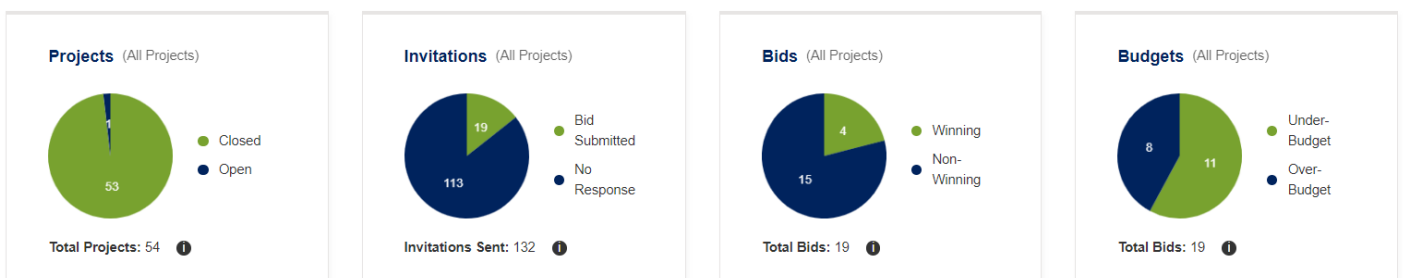- Explain any special criteria the vendors must meet.

What is a Bid?

A bid outlines specific details of the Project. Bids are submitted by Vendors who are invited by the property to submit a bid for a specific project. When a vendor submits a bid, they should provide:

- An itemized list of Materials and Labor costs
- The expected time it will take to complete the project
- Any additional details, documents, or files relevant to bid

The Projects Dashboard

To open the Projects Tool dashboard, click on **Projects** in sidebar Menu. At the top of the Dashboard are four pie charts displaying general project data: **Projects**, **Invitations**, **Bids** and **Budgets**.

Projects (All Projects)
- Closed: 53
- Open: 1
- Total Projects: 54 ℹ️

Invitations (All Projects)
- Bid Submitted: 19
- No Response: 113
- Invitations Sent: 132 ℹ️

Bids (All Projects)
- Winning: 4
- Non-Winning: 15
- Total Bids: 19 ℹ️

Budgets (All Projects)
- Under-Budget: 11
- Over-Budget: 8
- Total Bids: 19 ℹ️

(**Note:** Data for graphs is determined by filter selections)

Notes:

Graphs will not display if no data is available yet.

Dashboard graphs display data from currently selected filters.

Hover your mouse over the ℹ️ symbol for additional graph details.

Searching for a Project

Below the Dashboard graphs is the Projects Filter/Search tool, where you can filter projects by: **Name**, **Property**, **Region**, **ID**, **Status**, **Service**, **Date Created** and **Budget Amount**. To search for a project, enter your desired filter selections, then click on the **Search** button in lower right

Notes:
1. Filters can be hidden from view by clicking on **Hide Filters** button. To re-open, click on **Show Filters** button.
2. Archived projects can be included in any search by checking the **Include Archived** box.

Under the search results you will see a list of all Projects that match the filters you selected in your search.
The list view of all projects includes the following columns:

- Project **Created Date**
- Project **Status**
- Project **Creator**
- Project **ID**
- Project **Name**

- Project **Property/Properties**
- Number of **Invited** vendors
- Number of **Bids** received
- Bid **Deadline** Date
- **Close** project button

Note:
Highlighted columns in the Project List are sortable by clicking the column header.
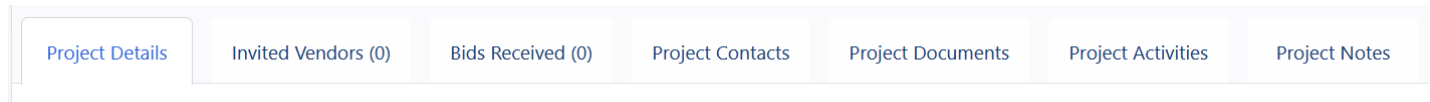
Viewing a Project

Clicking on a Project's **Name** will open the Project Page, where you have access to the following Action Items:

- **Invite Vendors** – Click this button to invite vendors to bid on your project.
- **Edit Project** – You have the ability to edit your project as long as you have not yet invited vendors to bid.
- **Clone Project** – To create a similar project, you can use the Clone Project feature.
- **Close Project** – Use this button if your project needs to be closed for any reason.

When in Project Page view, you also have access to the following tabs:

Project Details	Invited Vendors (0)	Bids Received (0)	Project Contacts	Project Documents	Project Activities	Project Notes

- **Project Details** – Allows you to view the Project description, details and any files provided by project creator
- **Invited vendors** – Lists all vendors that have been invited to bid on the project and includes messaging feature)
- **Bids Received** – Lists all Bids that have been received for the project, and allows you to compare bids)
- **Project Contacts** – Allows you to add your own contacts, and view all contacts added by invited vendors)
- **Project Documents** – Allows you to add, delete and view all documents added to project by you or vendors)
- **Project Activities** – Contains a running record of all Activity on the project from the moment it was created
- **Project Notes** – a convenient place to jot down names, numbers, to-do items etc. for a project.

Creating a Project

To create a new Project, Click the **Create New project** button located directly above the project filters. This will open the New Project Form. You must fill out all required fields to submit a Project. Optional fields may be left blank, but the more information you can provide the better equipped vendors will be to create accurate bids. When you are finished, Click the **Save Project** button at the bottom.

Editing a Project

If needed, a project can be edited by clicking **Edit Project** from the Action Buttons. The Edit feature is only available *prior to* vendors being invited to bid on the project.

Closing a Project

If a Project is no longer needed or was created by mistake you can click the **Close** button to close the project. Once a project is closed it cannot be reopened – if a project is closed by mistake you will need to re-create the project.

Cloning a Project

You can clone an existing Project by clicking the **Clone Project** button under Project Description. You can make changes when cloning project. When a project is cloned, the project **documents** and **contacts** will not be cloned.

Archiving a Project

Once a project has either been closed or has an accepted bid you have the option to *archive* that project by clicking the **Archive** button. Archived projects will not be displayed in project list or graph data unless "Include Archived" is selected in filter feature. Archived projects can be restored by clicking **Restore** button.

Searching for Vendors

Once a project is created, then you can start the vendor Invite process by clicking on the **Invite Vendors** button from the action Menu, which will open the vendor search feature. The search feature is pre-filled with the Service Category and Zip Code (with 25-mile radius) that were selected during the project creation. Filter selections can be changed, or cleared using the **Clear Filters** button. You can also filter your search using the **Advanced** Search filters.

+ Invite Vendors

Inviting Vendors to Bid

To select vendors from the search results, check the box in the **Select** column to the left of vendor's name. Once you have selected the vendors you wish to invite, click the **Invite Vendors** button at the bottom of the page, then confirm your selections. You can select as many vendors as you want to invite to submit a bid.

After inviting vendors to bid on a project, you will be able to see all invited vendors on the **Invited Vendors** Tab along with the following information for each invited vendor:

- Name of Vendor
- NetVendor ID of vendor
- Date Invite sent
- Invite viewed status

- Compliant status
- Bid Status
- Re-send Invite button
- Send Message Button

Notes:

Compliant vendors will have a green circle and "Yes" in the **Compliant** column.

Non-compliant vendors will have a red circle and "No" in the **Compliant** column.

Vendors who are not currently enrolled with your company, will have "N/A" in the **Compliant** column.

Vendors must acknowledge that they must be both enrolled and compliant to be awarded a bid.

Re-sending Vendor Invites

If you have not yet heard back from an invited vendor, you have the option to resend that vendor an invite by clicking the **Re-send Invite** button. (**Note**: NetVendor sends weekly reminder emails to vendors who have not submitted a bid.)

Messaging a Vendor

If you need to contact a vendor, you have the option to send a vendor a message by clicking **Send Message** net to that vendor's name. This will open a message board between you and the vendor, where you can chat with the vendor about the project as well as share documents.

Messaging All Vendors

If you want to send the same message/file(s) to *all* vendors invited to bid on a project, click the **Message All Vendors** button, type your message, then click **Send** button. (**Note**: Invited vendors cannot see other vendors' replies.)

Viewing a Bid

You can view and compare all bids received for a project on the **Bids Received** tab. To view a single bid, click the **View** button to the right of the bid. This will open the Bid Details page, where you can see a line-item view of the bid along with any notes, comments and/or files that the vendor included with their bid.

Bid Details

Material

Dollar Amount	Quantity	Unit of Measurement	Description	Total
$500.00	6	Each	Roll Carpet	$3,000.00

Labor

Dollar Amount	Quantity	Unit of Measurement	Description	Total
$50.00	12	Hour	N/A	$600.00
$50.00	12	Hour	N/A	$600.00

Material	$3,000.00
Labor	$1,200.00
Sub Total	$4,200.00
Taxes	$0.00
Total	$4,200.00

🖶 Print bid

☐ I acknowledge that bid cannot be awarded if winning bidder is not enrolled and compliant with Willow Bridge Property Company.

Accept   Decline

Comparing Bids

To compare multiple bids, check the box in the COMPARE column next to each you wish to compare, then click the **Compare** button at the bottom.

Bid Comparison Form

The Bid comparison form will be displayed on screen and can be downloaded as PDF, Printed, or Saved for later. You can choose a recommended bid by clicking "Recommend" below that vendor's name.

Multiple Bid Comparison forms can be created and saved on the Bids Received tab:

Comparisons Created

CREATED	# OF BIDS	RECOMMENDED BID	AMOUNT		
November 11, 2023	2	Night Owl National Contractors, Inc	$8,000.00	🗑	View
November 11, 2023	3	K2hn Construction NC, LLC	$4,400.00	🗑	View

Declining a Bid

You have the option to Decline a specific bid by clicking the **Decline** Button at the bottom of the **Bid Details** page.

- Declining the bid will automatically notify the bidder that their offer has been rejected.
- Invited vendors also have the option to Decline to Bid if they choose to do so.

Note:
After declining a bid, you will receive a notification at the top of the page confirming the bid was declined successfully

Accepting a Bid

Once you have made your decision, you can accept a vendor's bid by Clicking the **Accept** button at the bottom of the **Bid Details** Page. (**Note**: Before accepting a bid from a non-enrolled vendor, you must acknowledge that the vendor cannot be awarded the bid unless they are both enrolled and compliant with your company.
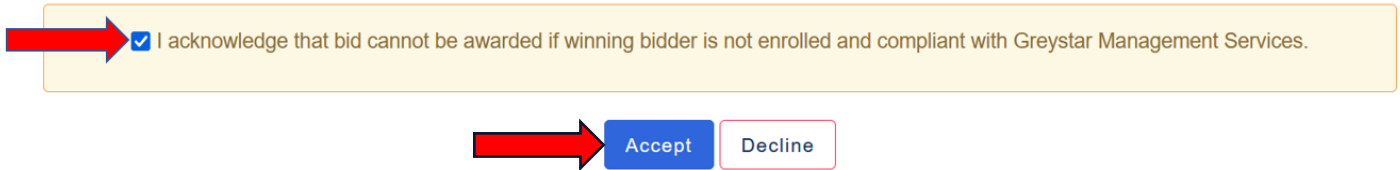
Once you accept a bid you should receive a notification at the top of the page confirming the bid was accepted. The winning vendor will be notified as well – both by email and in their Projects tool.

> Congratulations on selecting a winning bid! The winning bidder has been notified, reach out to them to initiate the contract process.

Printing a Bid

A Bid can be printed to file or paper by clicking on the **Print Bid** button at the bottom of Bid Details Page.