



# **Vendor Access**

## **General Information**

### **Documentation Guide**

**October 2024**

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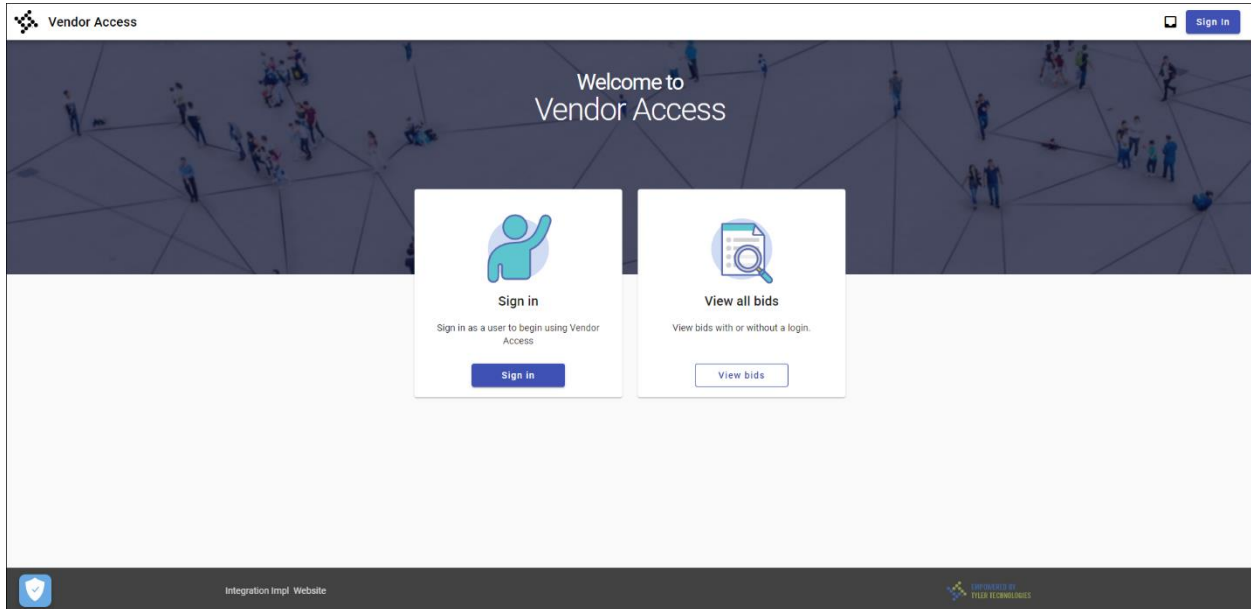
# Overview of Vendor Access

**Vendor Access** provides vendors doing business with Lafayette Consolidated Government (LCG) with cloud-based access to information stored in LCG’s information system.

Using Vendor Access, you can enter and maintain your business’s contact and remittance information, discount and payment terms, required documentation, and the commodity codes that represent the goods and services you can provide to LCG.

A listing of your organization’s current and prior 1099 data, bids, purchase orders, invoices, contracts, checks is also available in Vendor Access. With Vendor Access, you can also submit invoices and liquidate purchase orders directly.

Vendor Access allows you to search for and view bid request information, and then use that information to submit a bid offer or quote.



# Home Page

Once a vendor profile is established, the Vendor Access home page serves as the primary landing page when users log in to Vendor Access. It provides the vendor's profile information and access to other options, such as Bids, Commodities, Purchase Orders, Invoices, Checks, 1099 Forms, Contracts, and Work Orders.

**Vendor Access**

Welcome!  
Antonia Raoul-Smith

[Update profile](#)

[Submit invoice](#)

[Submit a bid](#)

Number	Open Amount	Total Amount	Entry Date	Status
20075809	2,375.00	2,375.00	11/19/2020	Open

Number	Entry Date	Total Amount	Status
21220401	11/19/2020	2,750.00	On Hold
21220400	11/19/2020	1,500.00	On Hold

Check Number	Date	Amount	Status
252532	01/13/2021	200.00	Printed
98787897	06/04/2020	0.00	Cleared
899890003	05/18/2020	24.90	Printed
8887771	05/12/2020	1.00	Printed
20101089	03/23/2020	0.00	Cleared

Contract Number	Contract Amount	Available Amount
62	5,000.00	3,575.00

WO Number	Activity	Created Date	Status
22300	PAVEMENT TESTING	11/17/2020	In Progress

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This screen also provides any announcements, if applicable.

The screenshot shows the Vendor Access home page for a user. The navigation menu on the left includes: Home, Vendor profile, Bids, Commodities, Purchase Orders, Invoices, Checks, Form 1099, Contracts, and Work Orders. The main content area features a 'Welcome!' message and a 'Submit a bid' button. Below this, there are two sections: 'Announcements' and 'Purchase Orders'. The 'Announcements' section contains a speaker icon and the text 'You're all caught up on announcements'. The 'Purchase Orders' section displays a table with the following data:

Number	Open Amount	Total Amount	Entry Date	Status
20230016	0.00	2,190.00	12/01/2022	Closed
20220022	449.99	449.99	01/10/2022	Open
20220021	0.00	1,490.54	12/16/2021	Closed
20220020	0.00	1,490.54	12/16/2021	Closed
20220019	0.00	1,490.54	12/16/2021	Closed

An 'All purchase orders' button is located at the bottom right of the Purchase Orders section.

The bottom of the home page provides overview information about the records that are associated with the vendor. These are informational only. To access the records, use the navigation menu.

The screenshot shows the Vendor Access home page for Antonia Raoul-Smith. The navigation menu on the left is the same as in the previous screenshot. The main content area features a 'Welcome!' message and a 'Submit a bid' button. Below this, there are four sections: 'Purchase Orders', 'Invoices', 'Checks', and 'Work orders'. The 'Purchase Orders' section displays a table with the following data:

Number	Open Amount	Total Amount	Entry Date	Status
20075809	2,375.00	2,375.00	11/19/2020	Open

The 'Invoices' section displays a table with the following data:

Number	Entry Date	Total Amount	Status
21220401	11/19/2020	2,750.00	On Hold
21220400	11/19/2020	1,500.00	On Hold

The 'Checks' section displays a table with the following data:

Check Number	Date	Amount	Status
252532	01/13/2021	200.00	Printed
98787897	06/04/2020	0.00	Cleared
899890003	05/18/2020	24.90	Printed
8887771	05/12/2020	1.00	Printed
20101089	03/23/2020	0.00	Cleared

The 'Contracts' section displays a table with the following data:

Contract Number	Contract Amount	Available Amount
62	5,000.00	3,575.00

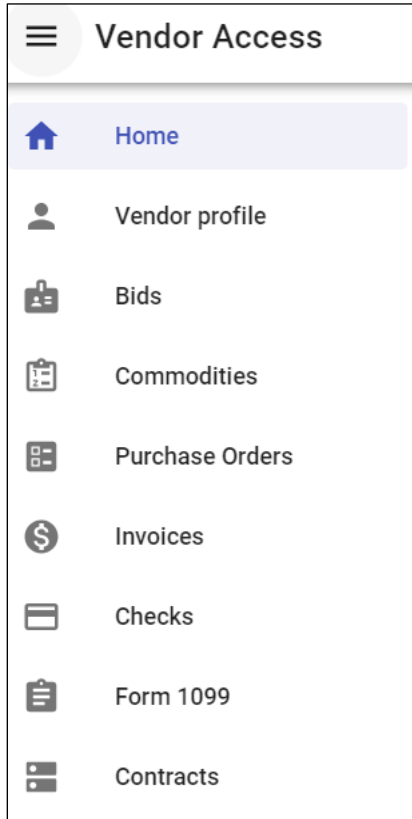
The 'Work orders' section displays a table with the following data:

WO Number	Activity	Created Date	Status
22300	PAVEMENT TESTING	11/17/2020	In Progress

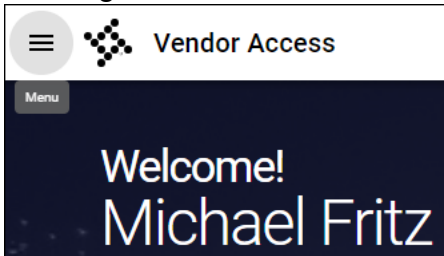
The footer of the page includes 'City Website | Contact | Terms of Use | Privacy Policy' and a logo for 'POWERED BY TRUSE TECHNOLOGIES'.

## Using the Navigation Menu

The navigation menu serves as the primary means of navigating through the Vendor Access application.

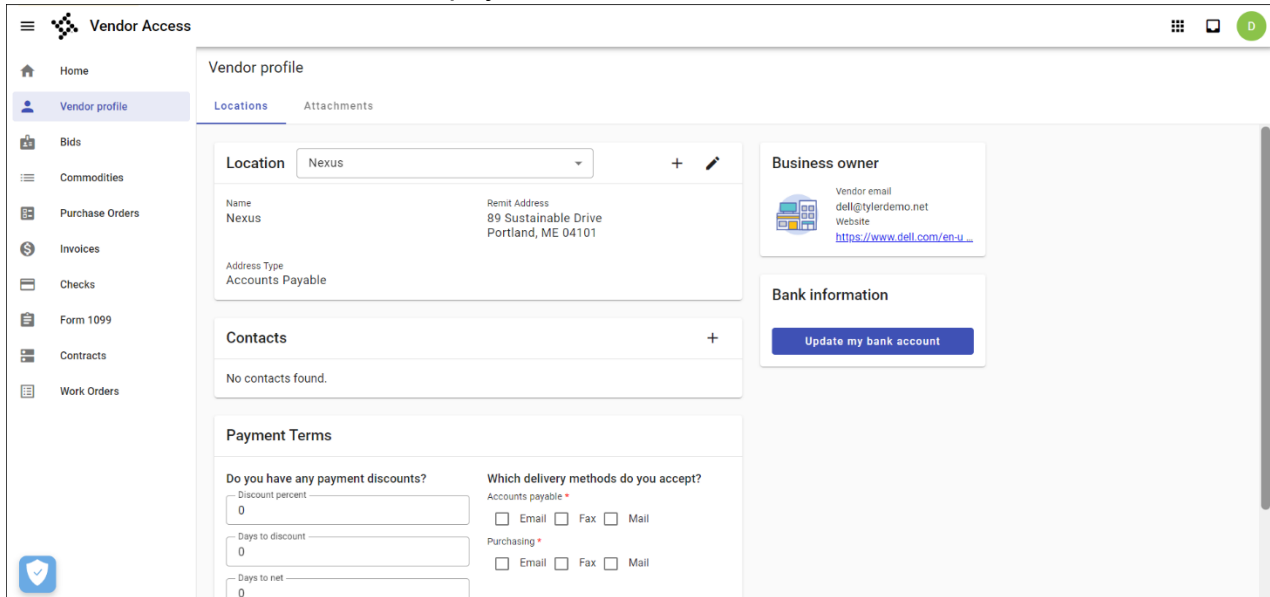


Clicking the Menu button at the top of the page hides or displays the navigation menu.



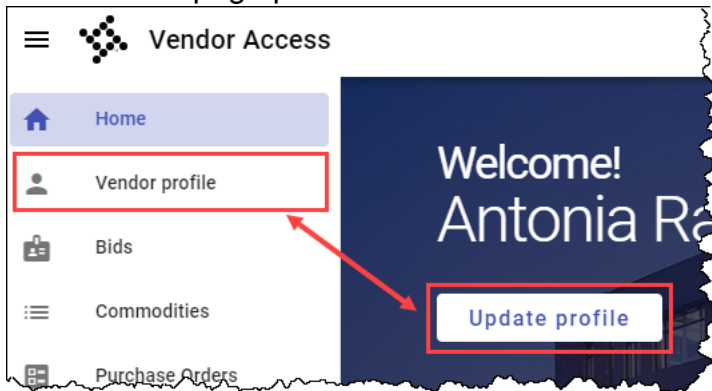
# Vendor Profile

The Vendor Profile provides essential information about the vendor, including associated locations, contacts, payment terms, and attachments.



## Maintaining Profile Information

In addition to selecting Vendor Profile in the navigation menu, the Update Profile option on the home page provides access to the Vendor Profile page.



## Locations

The Locations tab provides information for a selected location associated with the vendor, including the remit address, contact names and phone numbers, and accepted delivery and payment methods.



The Add and Edit options in each group allow vendors to maintain the information.

The image shows a 'Vendor profile' interface with a 'Locations' tab selected. A dropdown menu shows 'MARIA PEREZ, LLC' with a '+' icon and an edit icon (pencil) next to it. A red arrow points from the edit icon to a modal window titled 'Edit Location'. The modal contains the following fields:

- Location Name\*: MARIA PEREZ, LLC
- Doing Business As: PEREZ PAVING
- Email address: MARIA.PEREZ@PEREZPAVING.NET
- Type\*: General
- Address\*: 123 INDUSTRIAL WAY
- Address line 2: SUITE 103
- City: PORTLAND
- State: ME
- Zip Code: 04101

At the bottom of the modal are 'Save' and 'Cancel' buttons.

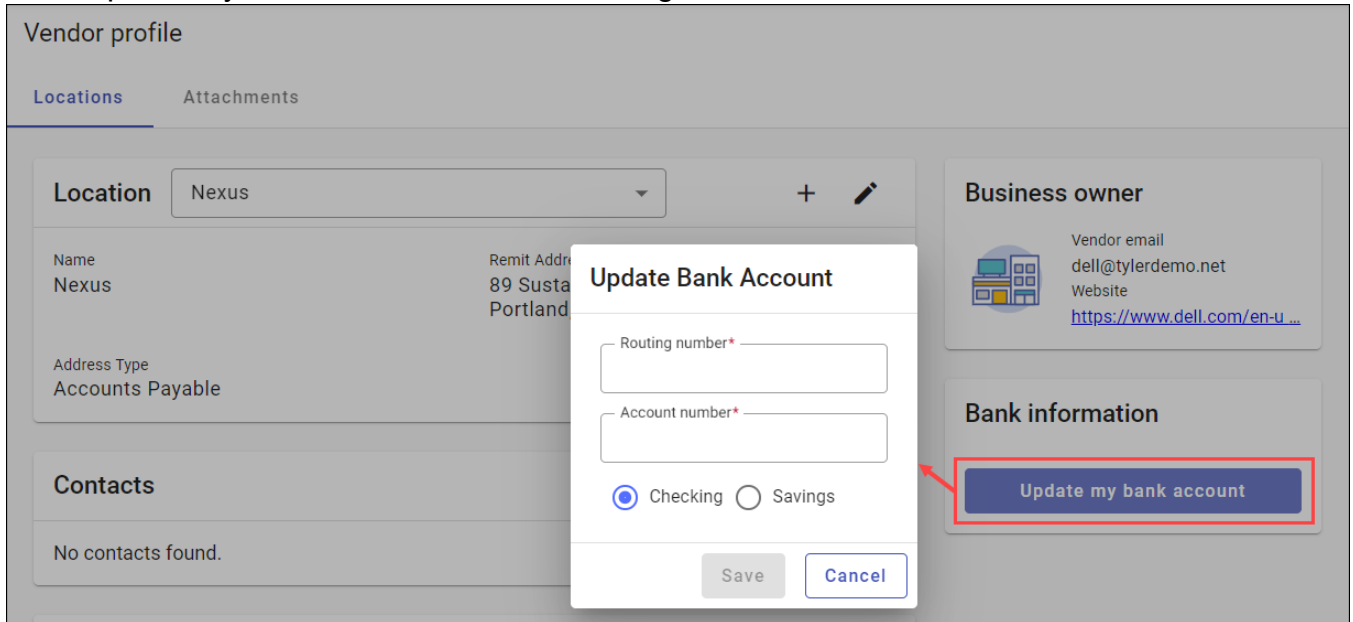
To view or maintain a different location, click the Location list and select the location. The screen refreshes to show the information for the selected location.

The screenshot shows the 'Vendor profile' page with the 'Locations' tab active. A dropdown menu is open for the 'Location' field, which currently displays 'MARIA PEREZ, LLC'. The dropdown list contains three items: 'MARIA PEREZ, LLC', 'MARIA PEREZ, LLC', and 'Perez Plowing'. A red arrow points to 'Perez Plowing'. The background shows the details for 'MARIA PEREZ, LLC', including the name, remittance address, and contact information.

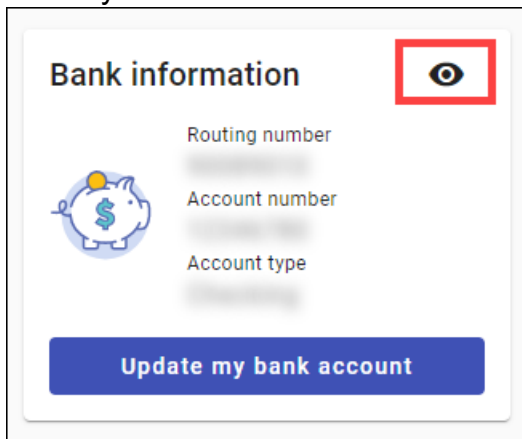
To add a new location, click Add, complete the fields to define the location, and click Save.

The screenshot shows the 'Vendor profile' page with the 'Locations' tab active. The 'Add Location' modal is open, and a red arrow points to the '+' icon in the 'Locations' list. The modal contains the following fields: 'Location Name\*' (MARIA PEREZ, LLC), 'Doing Business As' (PEREZ PAVING), 'Email address' (MARIA.PEREZ@PEREZPAVING.NET), 'Type\*' (General), 'Address\*' (123 INDUSTRIAL WAY), 'Address line 2' (SUITE 103), 'City' (PORTLAND), 'State' (ME), and 'Zip Code' (04101). 'Save' and 'Cancel' buttons are at the bottom.

Click Update My Bank Account to add or change bank account information.



The View option allows you to show or hide bank account information for privacy and security.



## Contacts

The Contacts group provides a list of contacts associated with the selected location. If no contacts exist, use the Add option to enter a new contact.

The screenshot shows a modal window titled "Add Contact" with a close button (X) in the top right corner. The modal contains the following fields:

- Full Name\* (text input)
- Type\* (dropdown menu)
- Phone\* (text input)
- Mobile Phone (text input)
- Email\* (text input)
- Comments (text area)

At the bottom of the modal are "Cancel" and "Save" buttons. A red box highlights a "+" icon in the top right corner of the modal, with a red arrow pointing to it from the right side of the image.

Clicking the More button displays a list of available actions for each contact record.

The screenshot shows a contact record for "Antonia" with the following details:

- General Contacts
- (207)-861-9181
- ANTONIA.RAOULSMITH@GMAIL.COM

Below the record is a "Payment Terms" section with the following questions:

- Do you have any payment discounts?
- Which delivery methods do you accept?

A red box highlights a "More" button (three vertical dots) in the top right corner of the record, and another red box highlights a dropdown menu that appears below it, containing the following options:

- Edit contact
- View details
- Opt-in text messaging

The Edit Contact and View Details options provide information about the selected contact. The Edit Contact window provides access to the fields to update the information whereas the View Contact window is informational only.

**Edit Contact** [X]

\* First Name

\* Last Name

Type\*

\* Phone

Mobile Phone

\* Email

Comments

**View Contact** [X]

First name  
Antonia

Last name  
Raoul-Smith

Type  
General Contacts

Phone number  
(207)-861-9181

Email  
ANTONIA.RAOULSMITH@GMAIL.COM

Comments

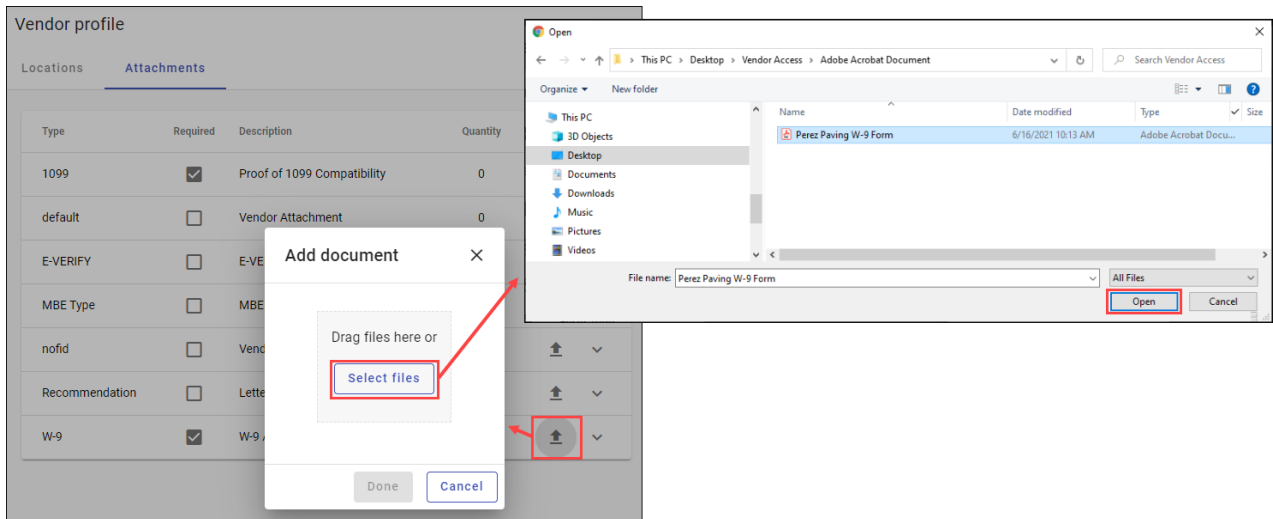
The Opt-In Text Messaging option allows users to receive text messages.

## Attachments

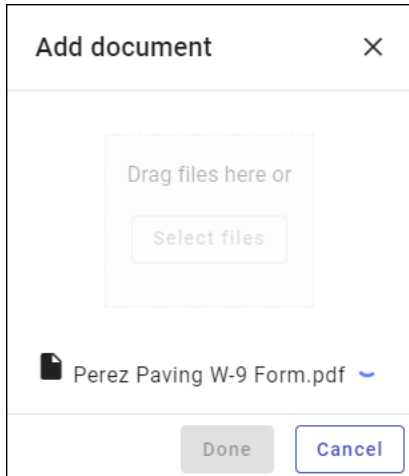
The Attachments tab displays a list of attachment types your organization has established for vendors in your Tyler ERP solution. Attachments may be required or optional.

Vendor profile				
Locations		Attachments		
Type	Required	Description	Quantity	Actions
default	<input checked="" type="checkbox"/>	Vendor Attachment	0	
Insurance Document	<input checked="" type="checkbox"/>	Vendor Insurance	1	
Test Attachment Type VA	<input checked="" type="checkbox"/>	TEST Vendor Attachment	0	
W-9	<input checked="" type="checkbox"/>	Vendor W-9	1	

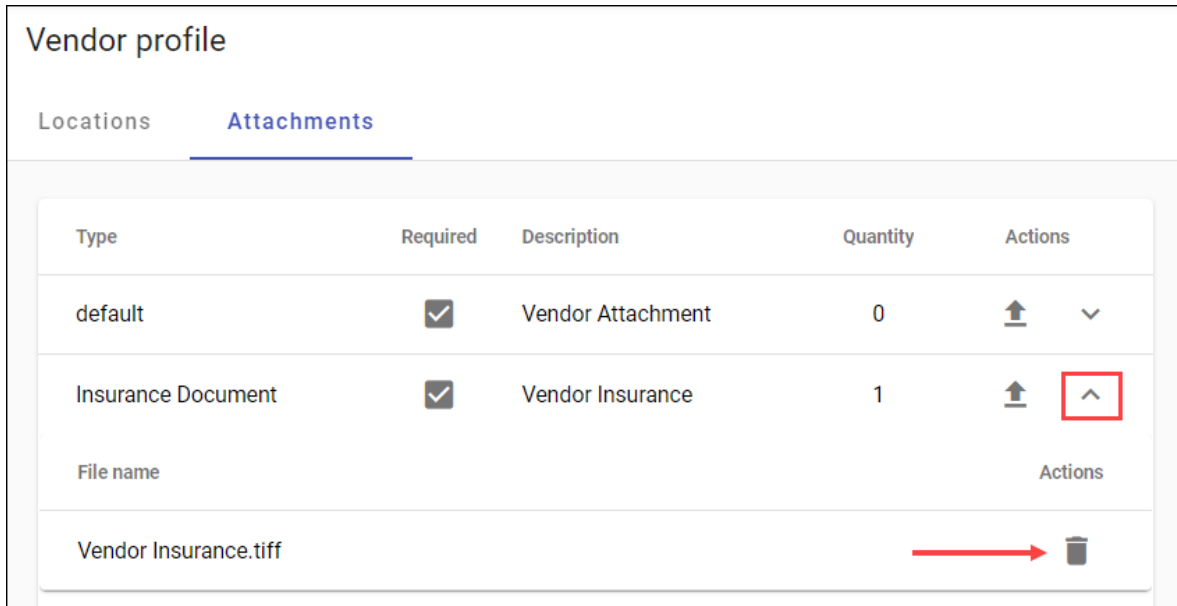
Clicking the Upload button provides the Add Document dialog box for selecting the file to attach from the workstation.



The selected attachment is added to the vendor profile.

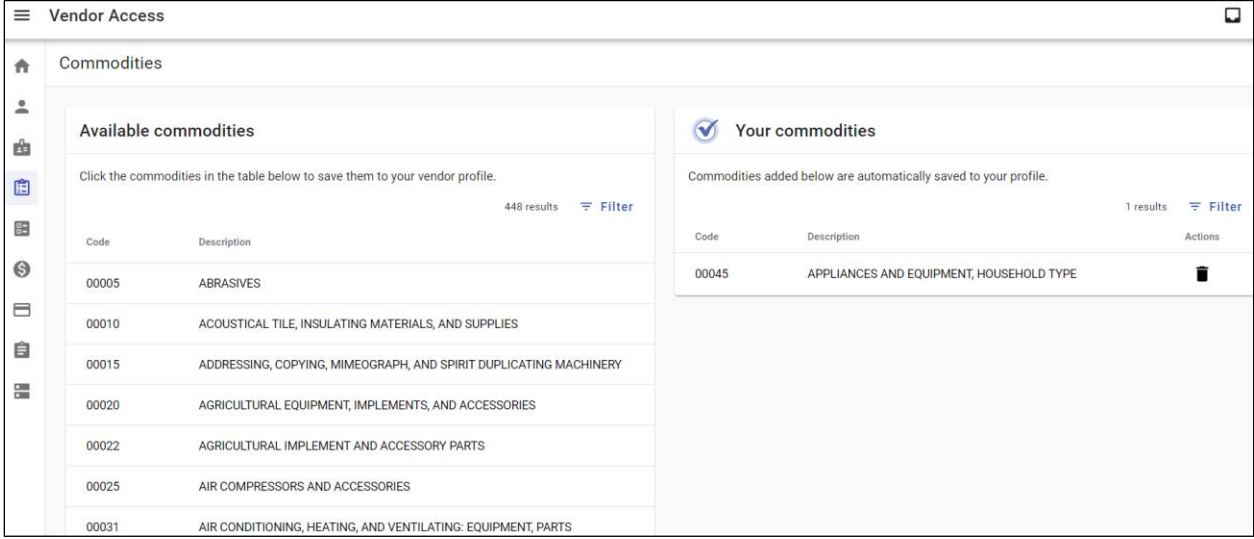


To delete an attachment, click the arrow in the Actions column to expand the group, and then click Delete.

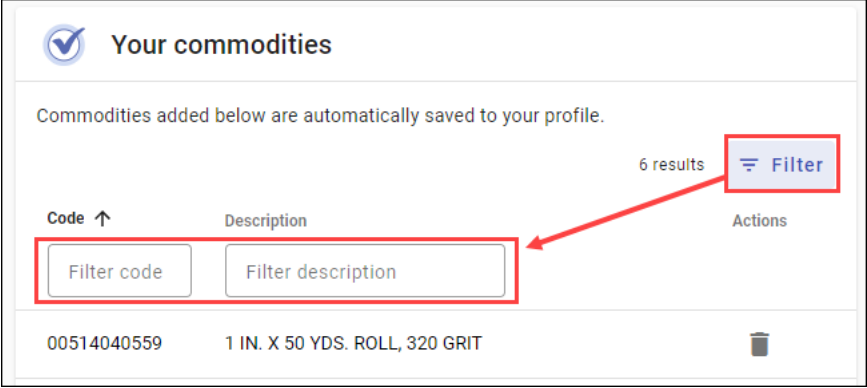


# Commodities

Clicking Commodities on the navigation menu displays the Commodities page with panels showing all of the available commodity codes in the system on the left and the commodity codes that are associated with the selected vendor on the right. The vendor's associated commodities determine which categories of goods and services the vendor can provide when bid opportunities arise in your organization's Tyler ERP solution.



The Filter options are available in each group to enter criteria to narrow the number of results.





## Adding a Commodity Code

Commodity codes that exist in the integrating system can be added to individual vendors. To add a commodity code to the selected vendor, search for the needed code and select it from the Commodities group.

Commodities

The screenshot shows two panels side-by-side. The left panel, titled 'Available commodities', contains a table with 22 results. A search filter 'Construction' is applied. The table lists commodity codes and descriptions, with the code 00940 highlighted in a red box. The right panel, titled 'Your commodities', shows 2 results. The code 00959 is highlighted in a red box, indicating it has been added to the vendor's profile.

Code	Description
00665	PLASTICS, RESINS, FIBERGLASS: CONSTRUCTION, FORMING, LAMINATING, AND MOLDING EQUIPMENT, ACCESSORIES, AND SUPPLIES
00909	BUILDING CONSTRUCTION SERVICES - NEW, INCLUDING MAINTENANCE AND REPAIR SERVICES
00940	EQUIPMENT MAINTENANCE, REPAIR, CONSTRUCTION, AND RELATED SERVICES FOR RAILROADS
00959	MARINE CONSTRUCTION AND RELATED SERVICES; MARINE EQUIPMENT MAINTENANCE AND REPAIR

Code	Description	Actions
00045	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE	
00959	MARINE CONSTRUCTION AND RELATED SERVICES; MARINE EQUIPMENT MAINTENANCE AND REPAIR	

The screen refreshes to add the selected commodity code to the Your Commodities group, updating the number of results accordingly.

## Deleting a Commodity Code

Deleting a commodity code removes it from the selected vendor record only. It does not remove the code from the system.

1. From the Your Commodities group, locate the commodity code to remove and select the Delete option.  
The application provides a confirmation message.
2. Click Confirm Delete to continue.  
The screen refreshes to remove the code from the Your Commodities group.

# Purchase Orders

Purchase Orders provides a list of purchase orders issued to the vendor from your organization.

The screenshot shows the 'Purchase Orders' interface. At the top, there are two filter buttons: 'Last 7 Days' and 'Last 30 Days'. Below them is a table with columns: Number, Description, Open Amount, Total Amount, and Status. The table contains one record: 20075809, Plow Post Office Parking Lot, 2,375.00, 2,375.00, Open. To the right is an 'Overview' sidebar showing 'You have 1 open PO's', 'Open amount \$2,375.00', and 'Total amount \$2,375.00'. At the bottom, there are pagination controls: 'Rows per page: 25', '1-1 of 1', and navigation arrows.

The Last 7 Days and Last 30 Days filters allow vendors to quickly view the purchase orders that have been issued in the past week and past month. Filters can also be applied by purchase order number, description, open amount, total amount, or status.

This screenshot shows the same interface as above, but with the 'Last 30 Days' filter selected and highlighted by a red arrow. Below the filter buttons, a red box highlights the filter input fields: 'Filter number', 'Filter description', 'Filter open amt', 'Filter total amt', and 'Filter status'. The table below these filters is empty, displaying the message 'No matching records found'.

Clicking the arrow for a purchase order provides additional details.

The screenshot shows the 'Purchase Orders' interface. At the top, there's a 'My purchase orders' section with filters for 'Last 7 Days' and 'Last 30 Days'. Below this is a table of purchase orders. One order is highlighted with a red box and an arrow pointing to a right-pointing arrow icon.

Number	Description	Open Amount	Total Amount	Status
20075809	Flow Post Office Parking Lot	2,375.00	2,375.00	Open

The detailed view of purchase order #20075809 is shown below. It includes a 'Summary' section with addresses, a 'Purchase order balance' section showing a subtotal of \$2,375.00 and an open amount of \$2,375.00, and a 'Line items (1)' table.

Number	Description	Quantity	Open Amount	Total Amount
1	Flow Post Office Parking Lot	20.00	2375.00	2375.00

Clicking Submit Invoice provides a screen with fields to enter the invoice number to submit in reference to the selected purchase order, as well as line-item liquidation options. The Liquidate All option completely liquidates the purchase order.

The screenshot shows the 'Submit invoice' interface. It features a 'Submit invoice: 20075809' section with an 'Invoice number' input field. To the right, there's a 'Purchase order totals' section showing a total amount of \$2,375.00. Below this is an 'Adjust quantities on line items' section with a 'Liquidate all' button. A table shows the line item details, with the quantity field highlighted in red and containing the value '0'. At the bottom, there are 'Cancel', 'Back', and 'Submit' buttons.

Line#	Description	UOM	Unit Price	Quantity	Available	Amount
1	Flow Post Office Parking Lot		125.00000	0	19	0

Click Submit to finish submitting the invoice to the organization. Click Back to return to the previous screen of purchase order details. Click Cancel to return to the home page.

# Invoices

Clicking Invoices provides the vendor's submitted invoices.

**Vendor Access**

**Invoices**

**My Invoices**

Last 7 Days Last 30 Days Filter

Number ↑	Description	Total Amount
21220400	Fix Pot Holes Along Main Stree	1500.00
21220401	Repair Potholes	2750.00

Rows per page: 25 1-2 of 2 < >

**Overview**

You have 2 Invoices

Total amount \$4,250.00

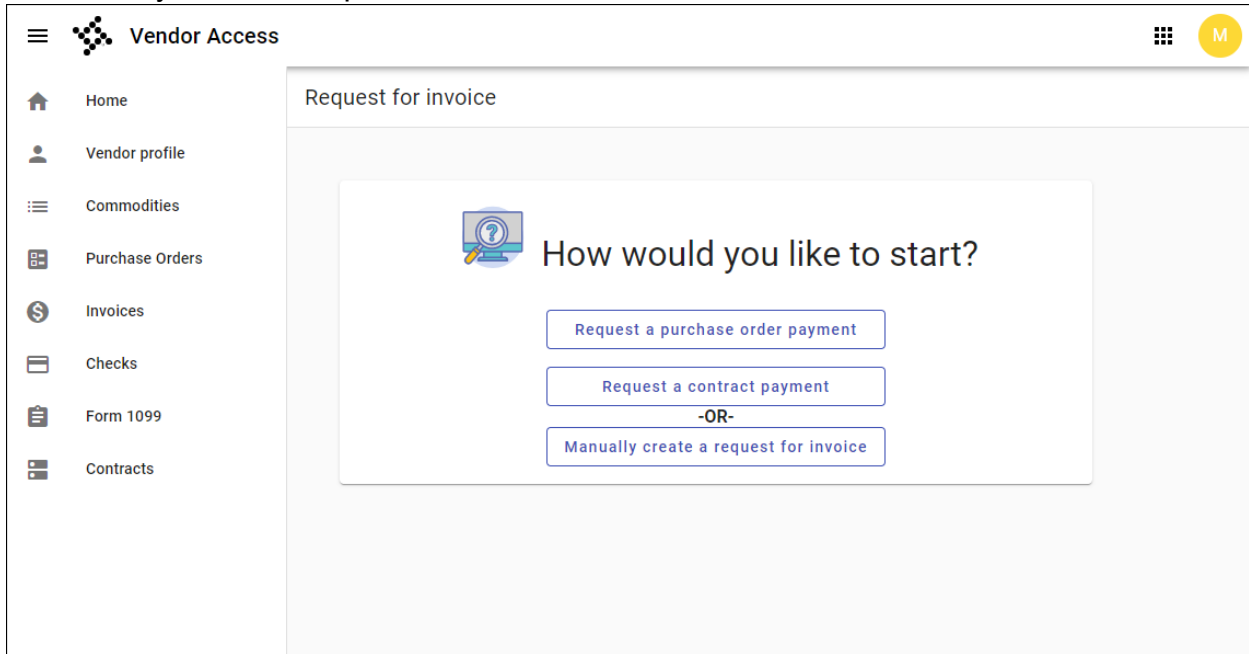
Amounts as of Jun 15, 2021

**Recently submitted invoices**

Number	Amount	Actions
989	125.00	🗑️
8967	125.00	🗑️
1245	125.00	🗑️
123456	.00	🗑️
123456	.00	🗑️
123	2375.00	🗑️
123	2375.00	🗑️

## Submitting an Invoice

Click Submit Invoice to request a purchase order payment, request a contract payment, or manually create a request for invoice.



To request a PO or contract payment, purchase orders and contracts must exist in the system.

Click Manually Create a Request for Invoice to enter the details of the invoice request and then click Submit to send it for processing. The Upload Invoice option allows you to attach an invoice to the request. The attachment is for informational purposes only; the system relies on the data entered into the fields.

The screenshot displays the 'Submit invoice' interface within the 'Vendor Access' system. On the left is a navigation menu with options: Home, Vendor profile, Commodities, Purchase Orders, Invoices, Checks, Form 1099, and Contracts. The main content area is titled 'Submit invoice' and contains the following elements:

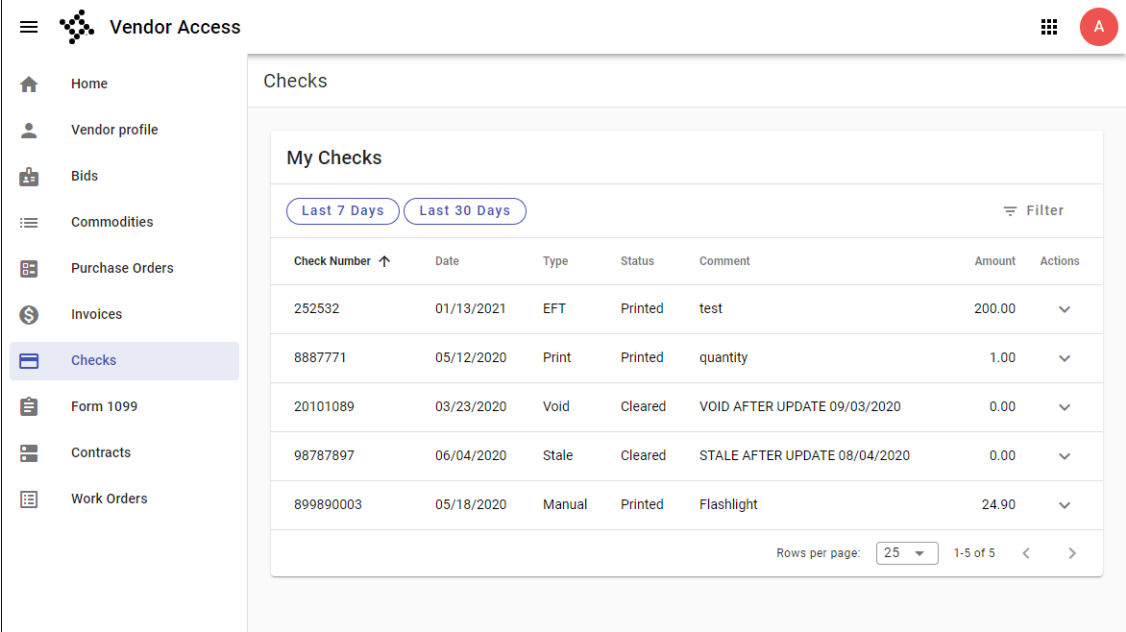
- Total amount:** A summary box showing a total of \$374.74 with a calculator icon.
- Manually request invoice:** A section with input fields for:
  - Invoice number: 20210005
  - Invoice date: 06/14/2021 (with a calendar icon)
  - Amount: 340.67
  - Tax rate: 10%
  - Description: FENCE REPAIR
- Buttons:** An 'Upload invoice' button with a document icon, and a footer containing 'Back', 'Cancel', and 'Submit' buttons.

Field	Description
<b>Total Amount</b>	
	The Total Amount is automatically calculated based on the values entered in the Amount and Tax Rate fields, by multiplying the amount by the tax rate percentage and adding this value to the amount. For example, $(100 \times 0.10) + 100 = 110$
<b>Manually Request Invoice</b>	
Invoice Number	Specifies the invoice number.
Invoice Date	Identifies the date associated with the invoice.
Amount	Specifies the dollar amount of the invoice.
Tax Rate	Indicates the tax rate to apply to the invoice amount. The tax rate percentage is added to the amount to
Description	Indicates the goods or services for which the invoice is submitted.

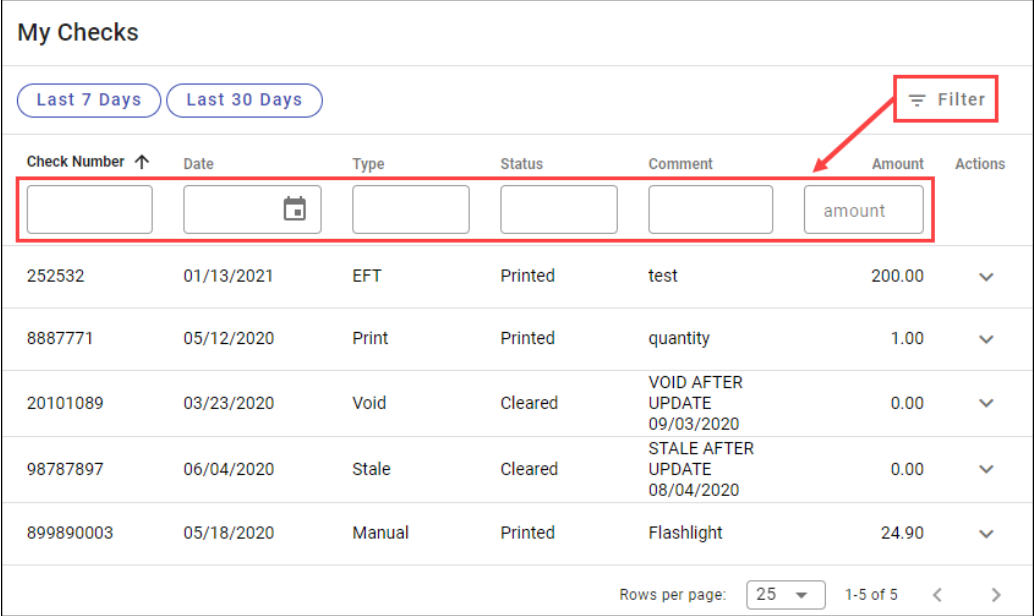
After clicking Submit, the invoice is sent to the LCG for review by the members of Accounts Payable who process invoices. The invoice does not appear in the vendor's list of submitted invoices in Vendor Access until it is formally accepted and processed.

# Checks

Clicking Checks displays a list of the checks that have been issued to the vendor, including EFTs, manual checks, printed checks, voided checks, and stale checks.



The checks can be filtered by the last 7 days or the last 30 days. Clicking the Filter option provides additional fields to apply specific filter criteria to the results, such as a check number, date, or amount.






Clicking the arrow for an individual check provides additional information, such as the invoice associated with the check. Select the invoice to view the full invoice details.

**My Checks**

Last 7 Days Last 30 Days Filter

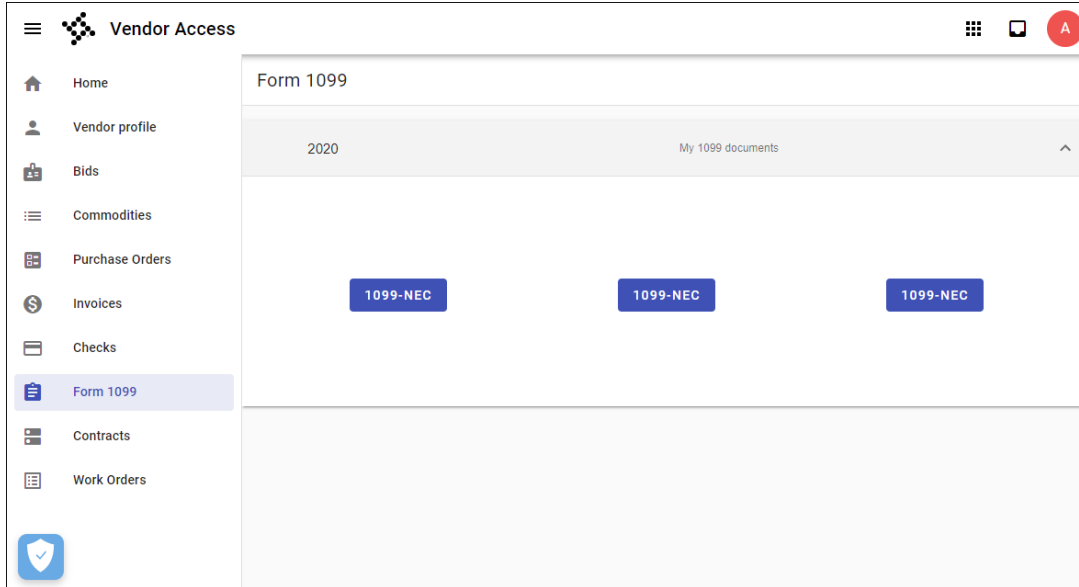
Check Number ↑	Date	Type	Status	Comment	Amount	Actions
899890003	05/18/2020	Manual	Printed	Flashlight	24.90	^

 Invoice Number: 21220098  
Description: Supplies for line operations  
Amount: \$30.00

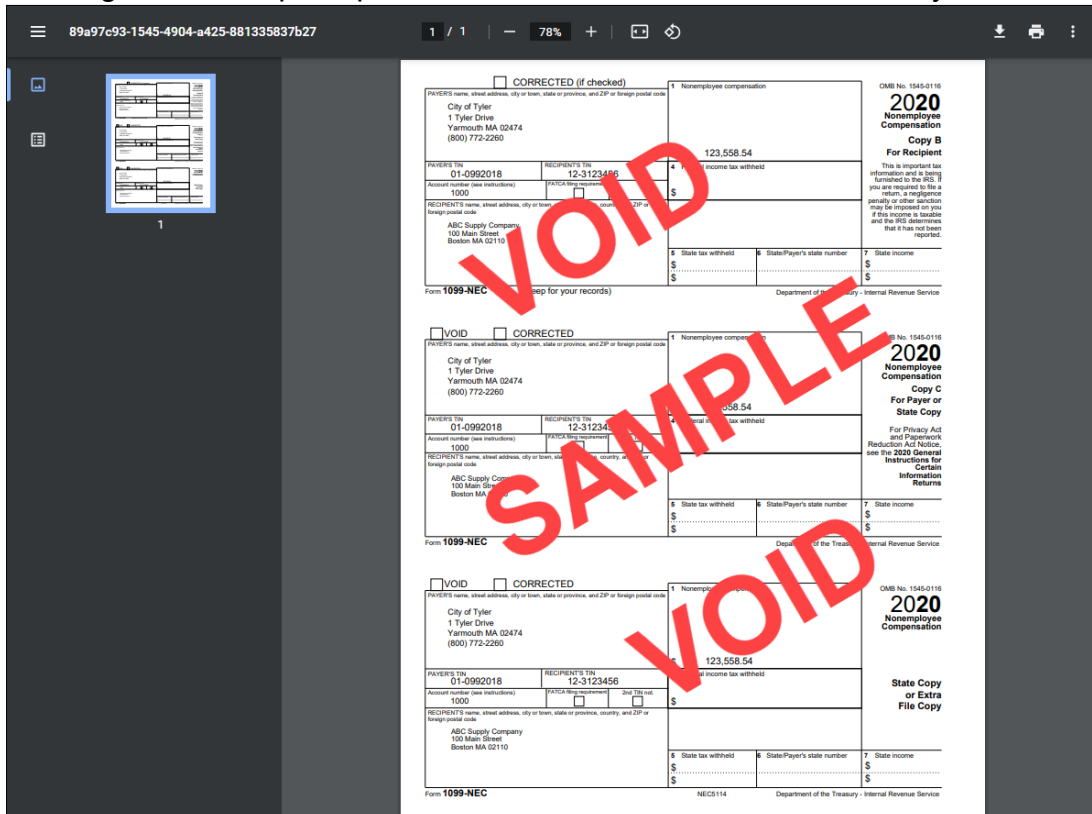
Rows per page: 25 1-1 of 1 < >

# Form 1099

Form 1099 provides the vendor's 1099 data by year.

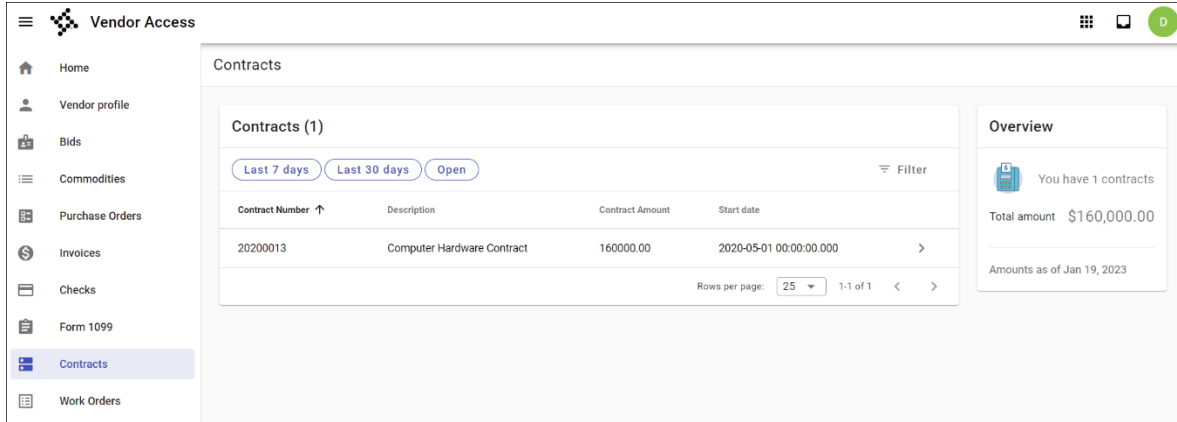


Clicking the 1099 option provides the vendor's 1099 form for that year.

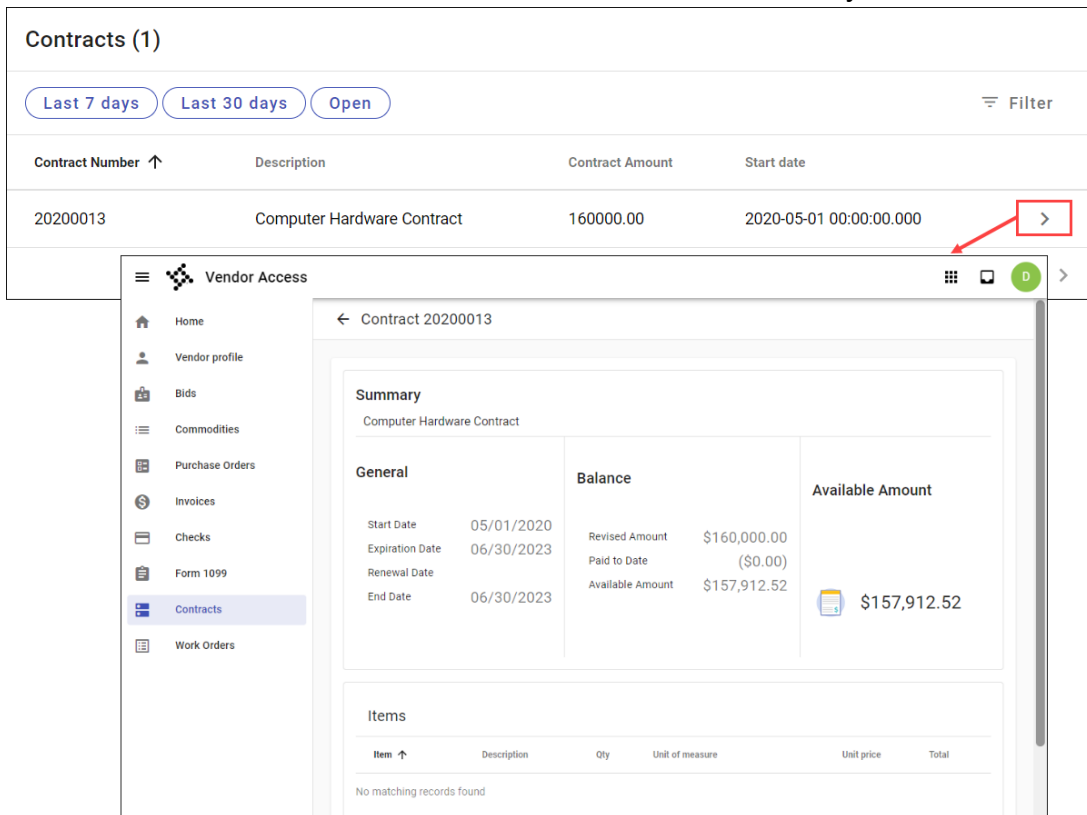


# Contracts

The vendor's associated contracts are provided in the Contracts section.



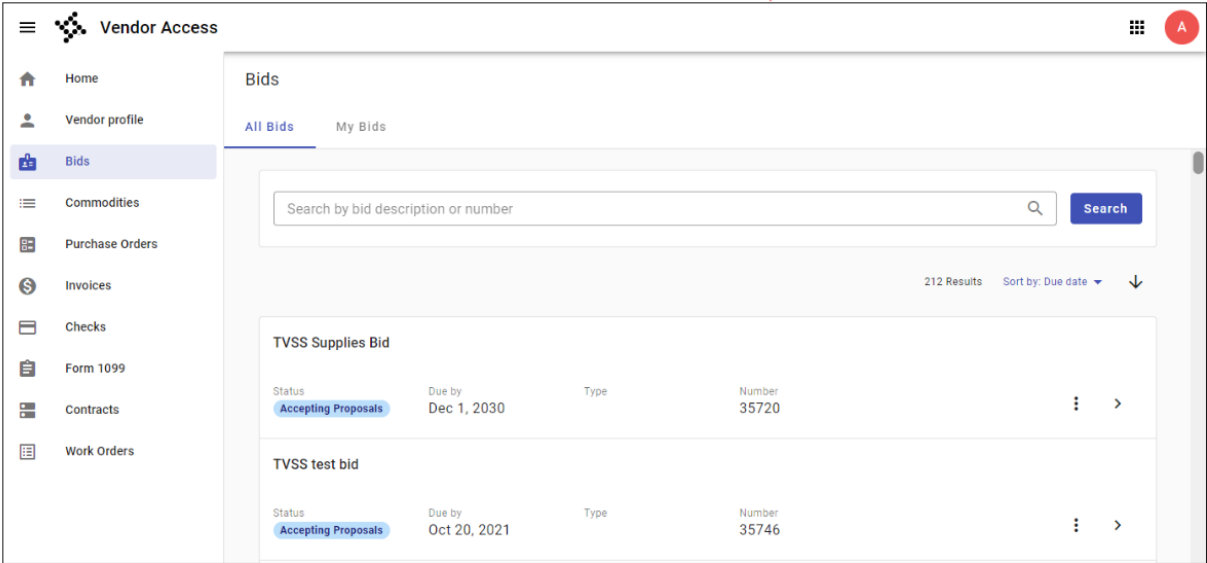
Click the arrow for a contract to view the contract details, including a summary, general information, the contract balance, available amount, and any associated items.




# Bids

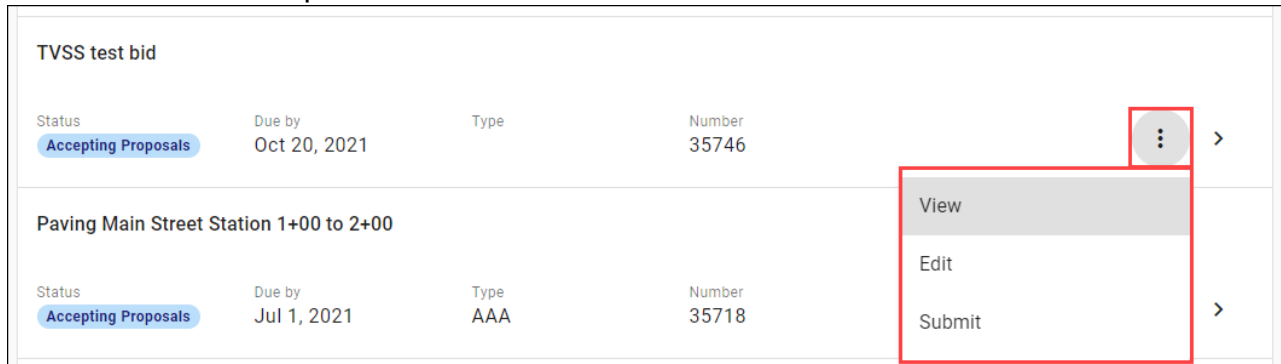
## Submitting a Bid

Use the Submit a Bid option to view current bids. If you have existing bids, the My Bids tab is available in addition to the All Bids tab. Use the search box to enter a bid description or bid number to complete a search.



The All Bids tab provides a list of all the public bids in the system. The My Bids tab provides a list of the bids associated with the vendor who is currently logged in.

The More button  provides a list of available actions to take for the selected bid.



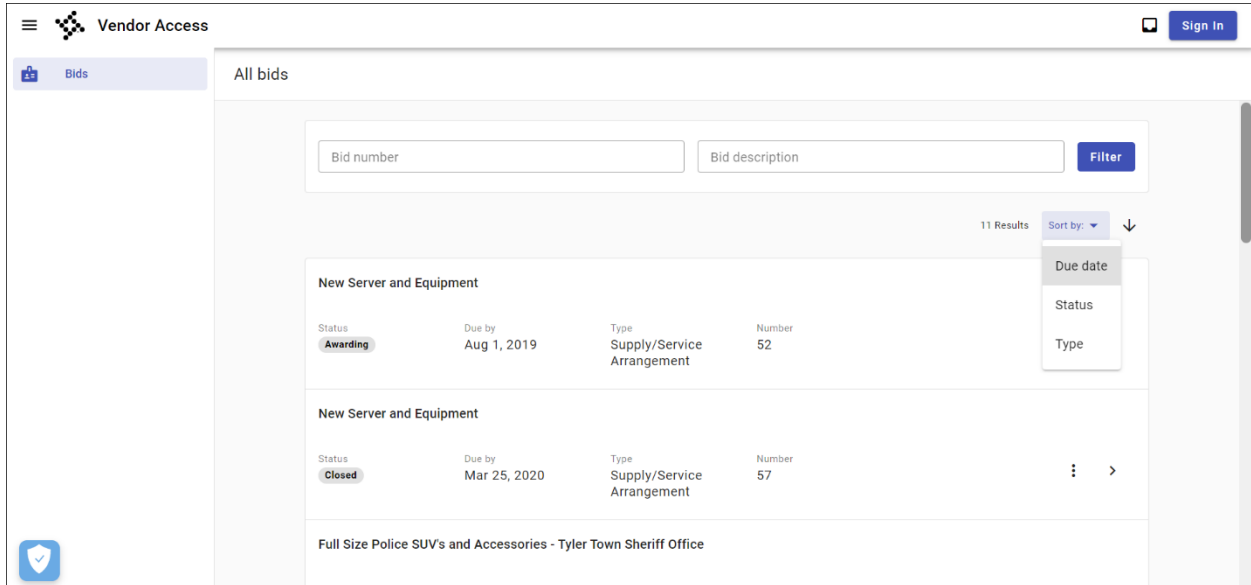
Status	Due by	Type	Number	
Accepting Proposals	Oct 20, 2021		35746	>
<b>Paving Main Street Station 1+00 to 2+00</b>				
Status	Due by	Type	Number	
Accepting Proposals	Jul 1, 2021	AAA	35718	>

Actions vary depending on the status of the bid and any associated dates, but may include the following:

- View—Provides the bid details.
- Rescind—Cancels or retracts the bid proposal.
- Edit—Provides fields to update the bid proposal.
- Submit—Submits the bid proposal to the organization for consideration.

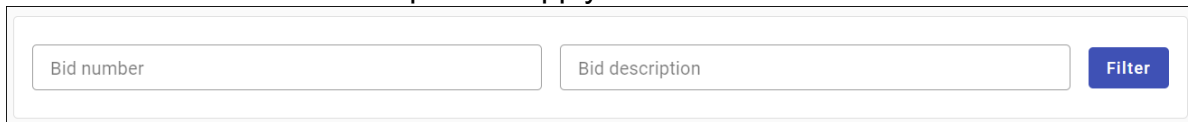
Bids are accessible from multiple places within Vendor Access. From a registered vendor's home page, clicking Bids in the navigation menu provides a screen with the All Bids and My Bids tabs, separating the vendor's bid proposals from all other bids.

For unregistered vendors, clicking View All Bids from the Welcome page provides a list of public bids. This option is available to all vendors, including those who are not registered. However, vendors must have a valid Identity account to log in to Vendor Access to view bids on this screen.



## Filtering and Sorting Bids

Enter a bid number or description to apply a filter to the list of bids based on the criteria.



The screen provides the number of results, as well as the sort criteria and sort direction (ascending or descending) for maintaining the sort order. Choose a sort option from the

list to set the list of bids in that order; click the arrow to set the direction of the results.

Bid number Bid description Filter

11 Results Sort by: ↓


- Due date
- Status
- Type

Status	Due by	Type	Number
Awarding	Aug 1, 2019	Supply/Service Arrangement	52

Individual bids are provided in the list of search results. Each listing indicates the name of the bid, its current status, the due date, the type of bid, and the bid number.

New Server and Equipment

Status	Due by	Type	Number	
Accepting Proposals	Jul 28, 2022	Supply/Service Arrangement	51	: >

The More button  provides available actions, which vary depending on the bid. In this example, clicking the More option provides the View action. Select this option or click the arrow to view details about the bid.

New Server and Equipment

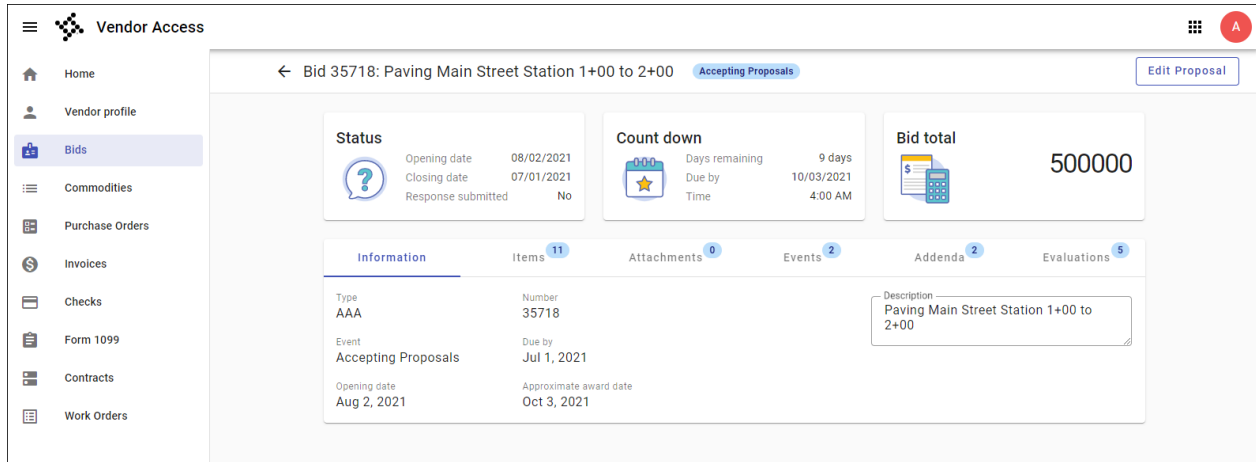
Status	Due by	Type	Number	
Accepting Proposals	Jul 28, 2022	Supply/Service Arrangement	51	: >

View

Full Size Police SUV's and Accessories - Tyler Town Sheriff Office

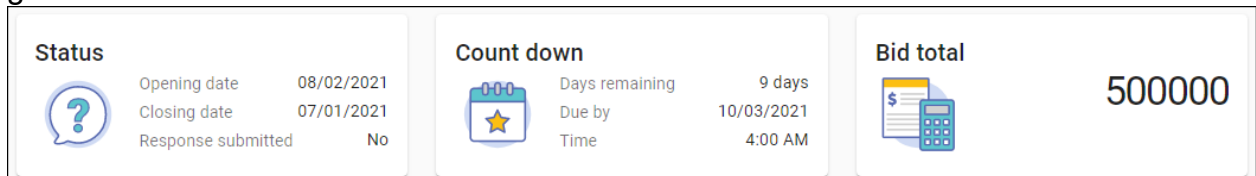
# Viewing Bid Details

The Bid Detail screen provides cards with key information in the page header and tabs with additional details.



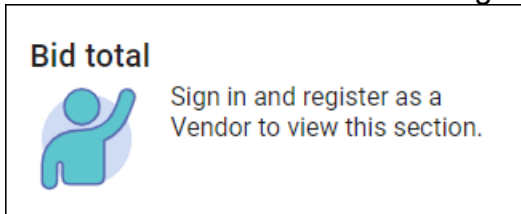
## Status, Count Down, and Bid Total Cards

The Status, Count Down, and Bid Total cards provide essential bid information at a glance.



- Status—Indicates the opening and closing dates of the bid and whether the logged-in vendor has submitted a response.
- Count Down—Provides the date and time by which the bid response is due and a countdown for the number of days remaining until then.
- Bid Total—Calculates the total dollar amount of the vendor's bid response. The application calculates this amount automatically based on the vendor's proposal. In this example, the vendor's bid response currently totals \$500,000.

**Note:** For vendors who are not signed in or registered, the bid total is hidden.





## Information Tab

The Information tab provides general information about the bid, including the bid type, bid number, current status/event, event due date, bid opening date, approximate awarding date, and description. The View Bid option allows vendors to view the bid.

Information	Items <span>5</span>	Attachments <span>0</span>	Events <span>2</span>	Addenda <span>0</span>	Evaluations	Awarded
Type	Number	Description				
Supply/Service Arrangement	51	New Server and Equipment				
Event	Due by	<a href="#">View bid</a>				
Accepting Proposals	Dec 31, 2020					
Opening date	Approximate award date					
Jan 1, 2021	Jan 5, 2021					

## Items Tab

The Items tab provides groups of bid item details. Clicking the arrow expands the group to display the item description, unit of measure (UOM), quantity, unit price, and total. The Group Total amount sums the total of all items in the group.

Information	Items <span>5</span>	Attachments <span>0</span>	Events <span>2</span>	Addenda <span>0</span>	Evaluations	Awarded
New Server 1		Group Total		\$0.00 ^		
Description	UOM	Quantity	Unit Price	Total		
Server, no TPM, 2.5in Chassis with up to 8 HDD (Software RAID): (2) Intel Xeon E5-2683 v3 2.0 GHz Processors (16) 16GB 2133MHz RDIMMs, Performance Optimized No Operating System, No Media, No CALs, No Installation No RAID with Embedded SATA (1) 120GB Solid State SATA 6Gbps 2.5in Hot-plug Hard Drive iDRAC8 Enterprise with Vflash, 8GB SD Card (1) Intel Ethernet X540 DP 10Gb BT + I350 1Gb BT DP Daughter Card Risers with up to 3, x8 PCIe Slots + 1 x16 PCIe Slot Dual, Hot-plug, Redundant Power Supply (1+1), 750W (2) NEMA 5-15P to C13 Wall Plug, 10 Feet (3m), Power Cord Performance BIOS Setting ReadyRails Sliding Rails With Cable Management Arm Bezel DVD ROM, SATA, Internal ProSupport with 5 Year NBD Onsite Service		1		0.00		
Server Room Equi...		Group Total		\$0.00 v		

## Attachments Tab

The Attachments tab provides access to the attachments associated with the bid.

## Events Tab

The Events tab lists key events, including dates, times, and locations, such as the bid opening date.

The screenshot shows the Events tab interface with a navigation bar at the top containing: Information, Items (5), Attachments (0), Events (2), Addenda (0), and Evaluations (3). The Events tab is selected. Below the navigation bar, there are two event entries:

- Bid Opening**  
Date: 06/05/2020, Friday, 6:00 PM GMT-4  
Location: 123 Main St, Tylertown ME 04096  
Description: Sealed Bid Opening
- Vendor Meeting**  
Date: 12/01/2019, Sunday, 5:00 PM GMT-5  
Location: 123 Main St, Tylertown ME 04096  
Description: Pre-Bid Proposal Meeting

## Addenda Tab

The Addenda tab provides bid addenda issued by the organization that revises the original bid invitation.

The screenshot shows the Addenda tab interface with a navigation bar at the top containing: Information, Items (11), Attachments (0), Events (2), Addenda (2), and Evaluations (5). The Addenda tab is selected. Below the navigation bar, there are two addenda entries:

- Colors for lampposts**  
Date: 12/22/2020, Tuesday, 12/22/2020
- Beautify street**  
Date: 11/18/2020, Wednesday, 11/18/2020  
Description: Adding a call for vendors to provide soil and landscaping prep, also applying grass and wildflower areas along paved road

## Evaluations Tab

The Evaluations tab provides a list of evaluation questions to answer. When vendors complete the bid details to submit a bid response, these questions are provided with fields for the vendors to enter their answers. The questions on the Evaluations tab are informational only; there is no direct access to answer the questions on this tab. The answers must be submitted on the vendor's bid proposal.

The screenshot shows the Evaluations tab interface with a navigation bar at the top containing: Information, Items (5), Attachments (0), Events (2), Addenda (0), and Evaluations (3). The Evaluations tab is selected. Below the navigation bar, the section is titled "Vendor evaluation questions" and contains three numbered questions:

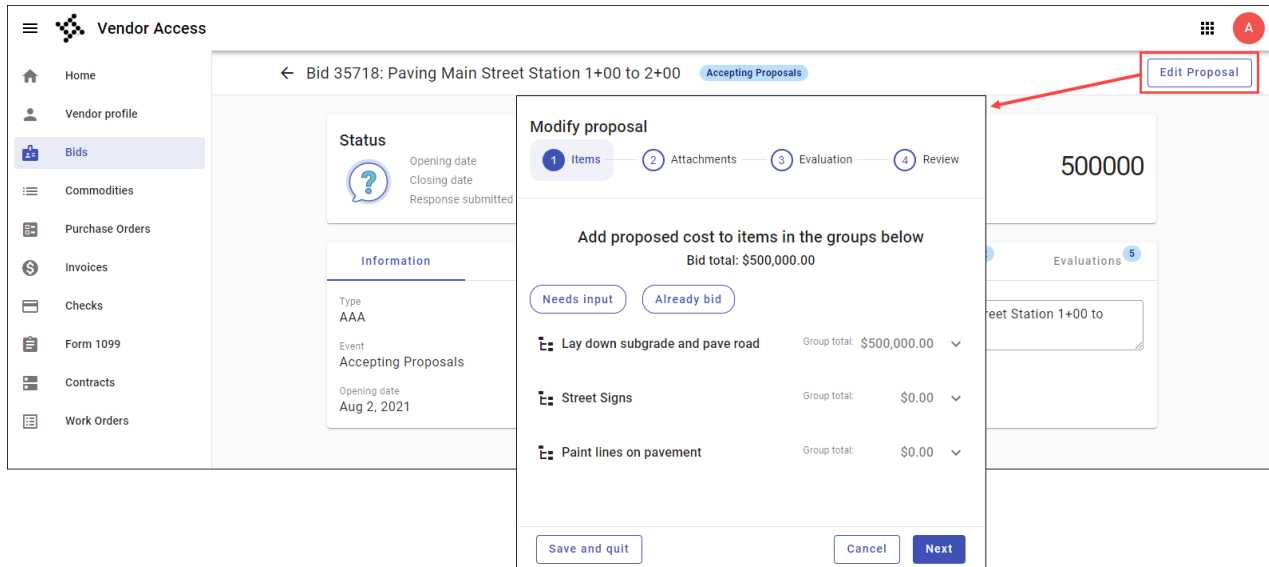
1. How many years has this organization been in business under its present business name?
2. Have any bankruptcy filings been submitted in the company's history?
3. Are there any pending lawsuits, judgements, or liens against your business? If so, please explain.

## Awarded Tab

The Awarded tab is hidden until the bid has been awarded.

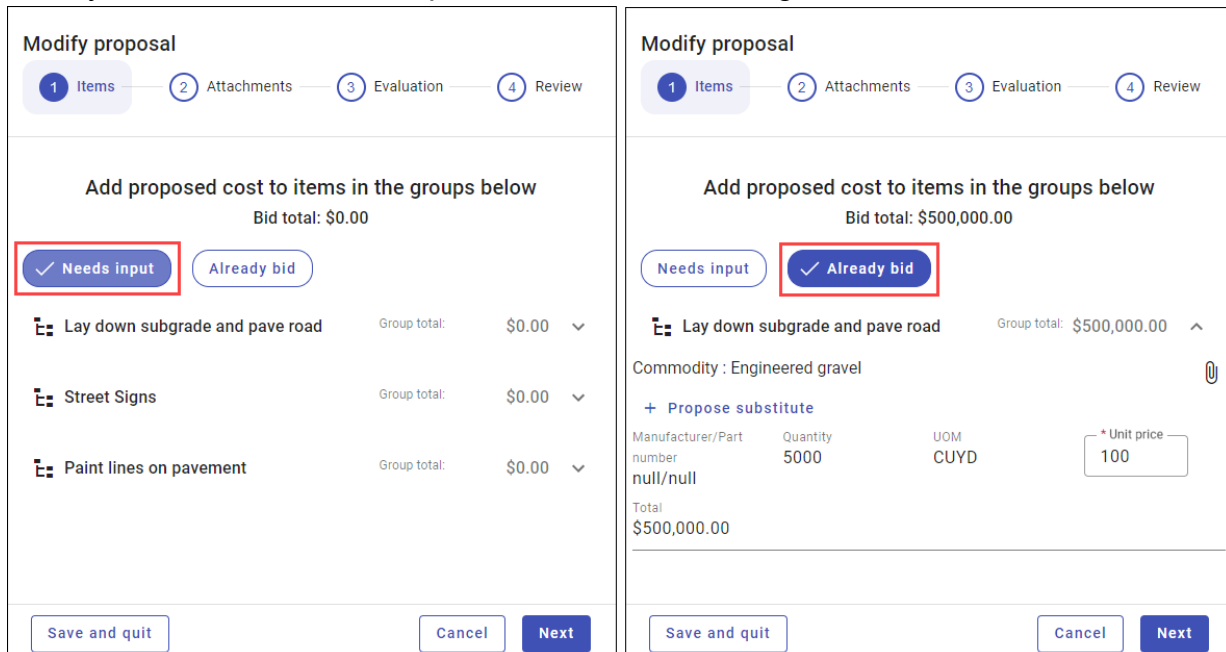
## Editing a Bid Proposal

If a bid proposal has not been submitted, clicking the Edit Proposal option from a bid response opens the Modify Proposal screen where vendors can update the bid proposal details.



## Applying Filters

Use the Needs Input and Already Bid filters to view only the items that still require input or only the items that are completed. Click each filter again to clear it.



## Updating Bid Items and Proposing Substitutes

Click the arrow to show or hide details for individual groups of commodities or items included in the response. Update the Unit Price field directly or click Propose Substitute

to enter the details for a substitute item. The Propose Substitute option is only available for items that have already been defined for the bid.

Add proposed cost to items in the groups below  
Bid total: \$500,000.00

Needs input    Already bid

Lay down subgrade and pave road    Group total: \$500,000.00

Commodity : Engineered gravel

Manufacturer/Part number	Quantity
null/null	5000
Total \$500,000.00	

Commodity ABRASIVE, PLASTONE:

Manufacturer/Part number	Quantity
null/null	2500
Total \$0.00	

**+ Propose substitute**

**Proposed Substitute**

\* Manufacturer

\* Part number

\* Unit price 100

\* Reason

Save    Cancel

Complete the fields and click Save.

Modify proposal

3 Evaluation    4 Review

**Proposed Substitute**

\* Manufacturer Sand and Gravel

\* Part number 857632

\* Unit price 90


\* Reason Lower price


Save    Cancel



The screen refreshes to apply the updated information to the bid proposal.

**Add proposed cost to items in the groups below**  
Bid total: \$450,000.00

Needs input Already bid

 **Lay down subgrade and pave road** Group total: \$450,000.00 ^

Commodity : Engineered gravel 


 [Delete substitute](#)  [Edit substitute](#)

Manufacturer/Part number	Quantity	UOM	* Unit price
Sand and Gravel/857632	5000	CUYD	90

Total  
\$450,000.00

Reason for substitute  
Lower price

---

Commodity ABRASIVE, PLASTONE: Drainage Sand 

Manufacturer/Part number	Quantity	UOM	* Unit price
null/null	2500	CUYD	

Total  
\$0.00

The Delete Substitute and Edit Substitute options are available to maintain the proposed substitute details.

Once all the bid details have been defined, click Next to move to the next step. Or, click Save and Quit to save the entered information and return to it another time.

## Bond Validation

If Bond Validation is enabled, the Bond Validation step is available. This feature is intended for use with electronic bond software, such as Surety2000. The Learn More link provides information about bond numbers. Enter the bond number and click Validate Now to complete this step, or click Do This Later to complete it at another time.

Modify proposal

✓ Items — 2 Bond validation — 3 Attachments — 4 Evaluation — 5 Review

Provide a bond number.

[Learn more...](#)

Bond number

## Attachments

The Attachments step provides the option to attach documentation to the bid proposal.

## Evaluation

The Evaluation step provides questions for vendors to answer related to the bid proposal. Select each question from the list on the left to move through them, completing the fields and clicking Submit Answer for each evaluation question.

**Modify proposal**

Items — 
  Attachments — 
  **3 Evaluation** — 
  4 Review

---

**Provide Answers to the evaluation question**

Question 1 - Have you paved a ro...

**Question 2 - Describe how you w...**

Question 3 - How many municipa...

Question 4 - Do you have at least...

Question 5 - How will you keep lo...

**Question 2**

Describe how you would handle traffic on Main Street during construction.

Comments

We'd have police presence with flashing lights, construction signs, and flaggers directing traffic each way.

**Submit Answer**


---

Click Next to proceed to the final step, which provides an opportunity to review and edit the information before submitting the bid proposal.


**Modify proposal**

Items — 
  Attachments — 
  Evaluation — 
  **4 Review**

---

 **Review and submit**


Bid total \$500,000.00

**Items** 

Number of items  
1 of 11


Total amount  
\$500,000.00

---

**Attachments** 

Number of attachments  
2


---

**Evaluation** 

Number of questions  
3

Total answered  
3

---

Click the Edit button  to move directly to that section to revise the information. Click Previous to move to the previous section. When you are ready to submit the bid proposal, click Submit.

# Rescinding a Bid Proposal

For submitted bids, the Rescind Proposal option is available on the Bid Details page, or from the More menu in the list of bids on the search page. Clicking this option immediately rescinds the bid submission and allows modification once again.

The screenshot displays the Vendor Access interface for Bid 35720: TVSS Supplies Bid. The page is titled "Bid 35720: TVSS Supplies Bid" and is in the "Accepting Proposals" state. A "Rescind Proposal" button is highlighted in the top right corner. The main content area includes three summary cards: "Status" (Opening date: 12/02/2030, Closing date: 12/01/2030, Response submitted: Yes), "Count down" (Days remaining: 3449 days, Due by: 12/03/2030, Time: 4:00 AM), and "Bid total" (\$0.00). Below these cards is an "Information" section with a table of bid details and a description field.

Information		Items 3	Attachments 0	Events 0	Addenda 0	Evaluations 4
Type	Number	Description				
	35720	TVSS Supplies Bid				
Event	Due by					
Accepting Proposals	Dec 1, 2030					
Opening date	Approximate award date					
Dec 2, 2030	Dec 3, 2030					