Accepting (or Declining) an Invitation to Bid

Last Modified on 03/24/2016 8:40 pm MST

Overview

Our clients will use DecisionDirector to support their complex procurements, including the RFP/bid process. Our clients will typically publish the bids they create through DecisionDirector through their normal channel (bid site, bid publication service, email announcement, et cetera).

The RFP/bid document will instruct vendors to request access to the DecisionDirector bid response environment in order to respond to the RFP. Clients will provide access through an Invitation to Bid message that is sent to the vendor.

This article walks through the process of receiving and acting upon an Invitation to Bid.

Organizations and Engagement Managers

Vendor companies must first exist in DecisionDirector as an organization. If your company does not yet have an organization entry in DecisionDirector, contact Advantiv Support to have one created.

Once the organization record is created, one or more representatives of the vendor will need to become Engagement Managers for that organization. To make this happen, contact Advantiv Support.

Engagement Managers Receive Invitations to Bid via Email

After a vendor requests access to the RFP, the client will issue an Invitation to Bid message. This message will be directed to the vendor's Engagement Manager(s), if one exists, and will be sent as an email, such as shown below.
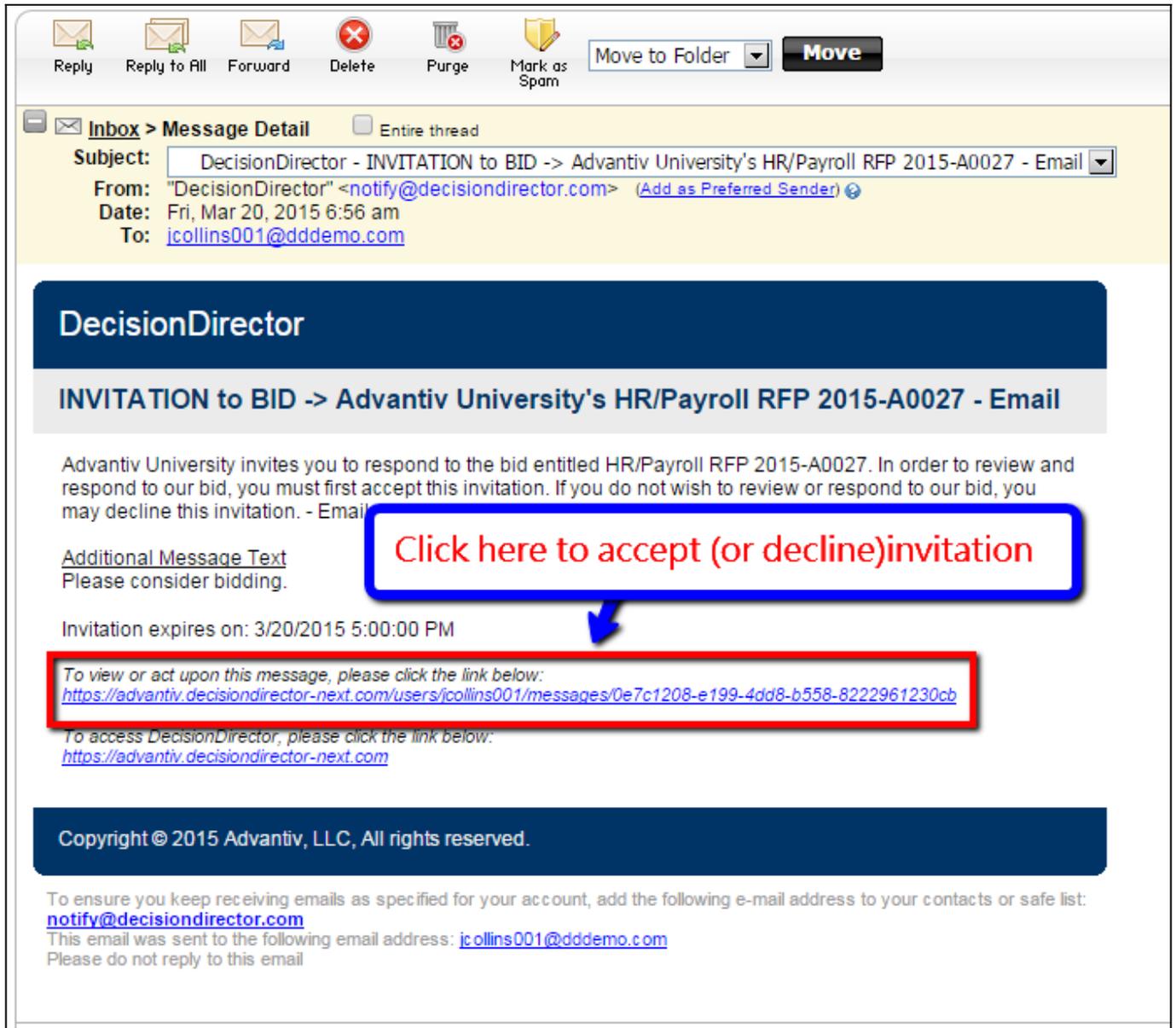
The Engagement Manager will click on the message link in order to accept (or decline) the invitation.

Accessing the Invitation to Bid through the Message Log

If the Engagement Manager received an Invitation to Bid email, the Invitation to Bid will also appear in the Engagement Manager's Message Log. The message of the invitation provides the necessary instructions for accepting or declining the invitation.

Clicking on the "Accept/Decline & Manage Invitation" link in the message will take the Engagement Manager to the Engagements tab for the organization. This tab provides the invitation and bid management functions of DecisionDirector.

If the Invitation to Bid was issued before the Vendor has an Assigned Engagement Manager

Sometimes, Invitations to Bid are issued before the vendor has an assigned DecisionDirector Engagement Manager. This is not a problem, as the ability to manage bid invitations can happen through the Engagement Manager's dashboard, a shown below:

Accepting (or Declining) the Invitation to Bid

The Engagements Tab allows Engagement Managers to view and manage Invitations and to view and manager Active Engagements. An invitation to bid becomes an active engagement upon acceptance. See below:

Once you've accepted the Invitation to Bid, you can begin to manage the bid, including creating the proposal team.

Good luck!