

# 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.

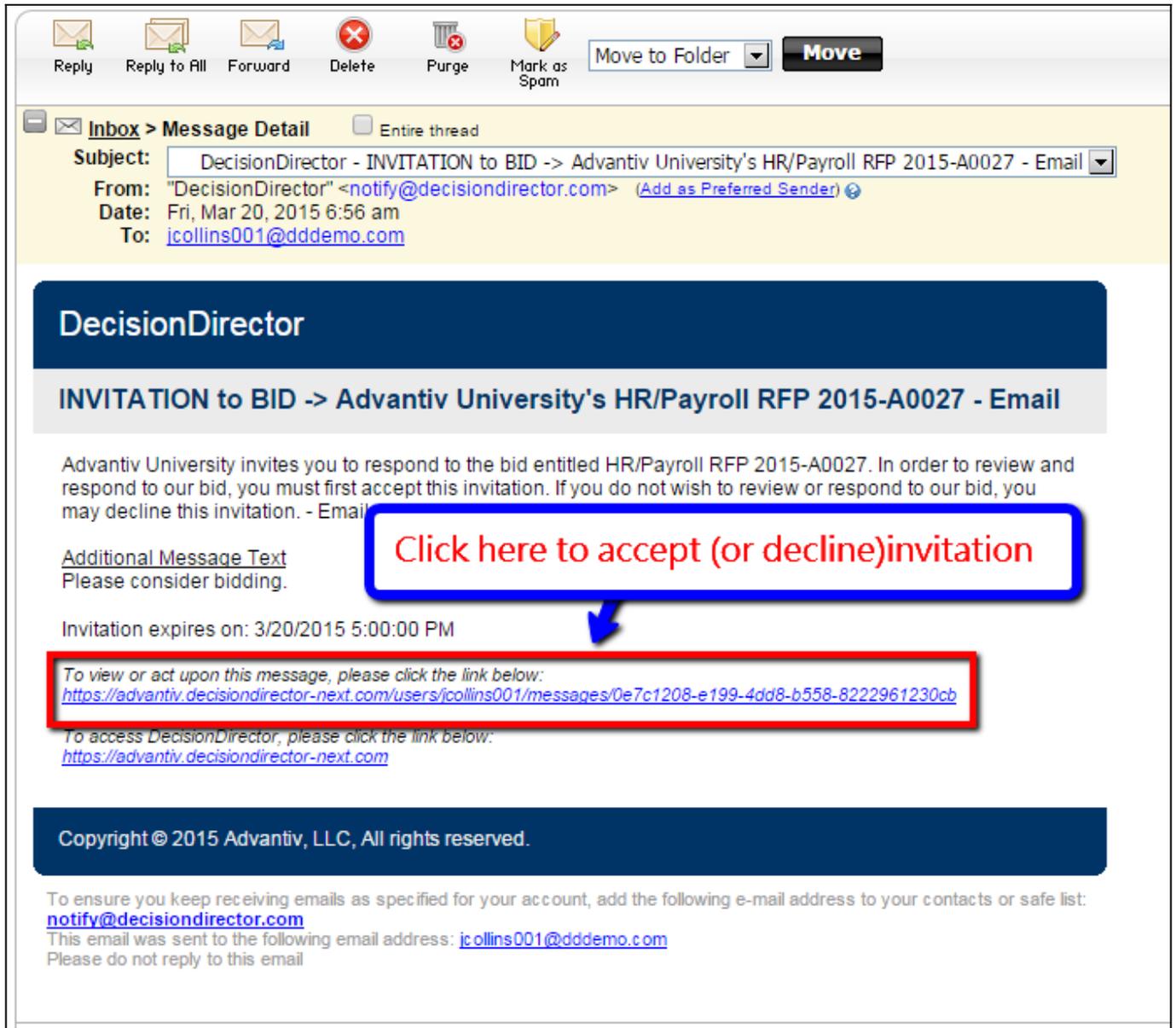
## Organizations and Engagement Managers

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.

DECISION DIRECTOR

Diane White Quick Nav Learn More Support

**Diane White**

Dashboard Messages Access Account Settings

Messages

Created On	Title
3/20/2015 6:04 AM	INVITATION to BID -> Advantiv University's HR/Payroll RFP 2015-A0027
12/18/2014 11:36 AM	INVITATION to BID -> Bedrock Industries's Bedrock - RFP ADM #A-1
5/16/2014 8:23 AM	Accepted Invitation -> Bid Respondent for HR/Payroll RFP - 2014-05-13-B007
5/16/2014 8:23 AM	Accepted Invitation -> Bid Respondent for HR/Payroll RFP - 2014-05-13-B007
5/16/2014 8:23 AM	INVITATION to PARTICIPATE -> Bid Respondent request for HR/Payroll RFP - 2014-05-13-B007
5/16/2014 8:12 AM	INVITATION to BID -> Advantiv University's HR/Payroll RFP - 2014-05-13-B007
5/16/2014 8:12 AM	INVITATION to BID -> Advantiv University's HR/Payroll RFP - 2014-05-13-B007

Message Details

**INVITATION to BID -> Advantiv University's HR/Payroll RFP 2015-A0027**

Regarding: HR/Payroll RFP 2015-A0027  
Created On: 3/20/2015 6:04 AM MST  
Message Type: Invitation

Advantiv University invites you to respond to the bid entitled HR/Payroll RFP 2015-A0027. In order to review and respond to our bid, you must first accept this invitation. If you do not wish to review or respond to our bid, you may decline this invitation.

Additional Message Text  
We would welcome your participation in this bid opportunity.

Invitation expires on: 3/20/2015 5:00:00 PM

Invitation (Current Status = Invited): [Accept/Decline & Manage Invitation](#)

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**Click to RSVP...**

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, as shown below:

DECISION DIRECTOR

Sarah Johnson Quick Nav Learn More Support

**Sarah Johnson**

Dashboard Messages Access Account Settings

Organizations

Sample Vendor 1  
Top Level Organization  
Sample software vendor

Workspaces

Users

[Dashboard](#) [Engagements](#)

**In this example, Sarah Johnson was assigned the role of DecisionDirector Engagement Manager \*after\* the Invitation to Bid was sent out. This means that she would not have an email invitation nor an invitation in her Messages log.**

**But, when she goes to My Dashboard, she does have an Engagements link that will allow her to manage invitations.**

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## 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:

**Organization: APEX HR Systems (d)**

Engagements | Active Engagements | Invitations

Dashboard | Engagements | Configuration

Invitation Listing

Current Status: Invited

Title: INVITATION to BID -> Advantiv University's HR/Payroll RFP 2015-A0027

Text: Advantiv University invites you to respond to the bid entitled HR/Payroll RFP 2015-A0027. In order to review and respond to our bid, you must first accept this invitation. If you do not wish to review or respond to our bid, you may decline this invitation.

**Accept... Decline...**

**Additional Message Text**  
We would welcome your participation in this bid opportunity.

Invitation expires on: 3/20/2015 5:00:00 PM

3/20/2015 6:04 AM MST

From: Advantiv University > HR/Payroll RFP Project - 2015

Expires On: 3/20/2015 5:00 PM MST

History

Occurred On	Status	Person
3/20/2015 6:04 AM	Invited	

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The vendor's organization Engagement's tab is where Engagement Managers can accept and decline Invitations to Bid, invite teammates to assist in the response, to generate documents, and to submit the bid when done.

You make your choice to Accept or Decline here.

If you Accept, you can begin to manage the bid, including adding people to the proposal team.

If you Decline, you can still Accept up until the expiration of the invitation.

The screenshot shows a software interface with a sidebar on the left containing 'Engagements', 'Active Engagements', and 'Invitations'. The main window is titled 'DecisionDirector - Invitation Change Status' and has a 'Cancel / Close Window' button in the top right. The dialog is titled 'Invitation - Accept' and contains the following fields and text:

- An information icon followed by the text: "Thank you for accepting this invitation to provide a bid response to the HR/Payroll RFP 2015-A0027. Upon your acceptance, an engagement will be created and you can begin to build your response team."
- A field for '\* Selected Invitation:' containing the text: "INVITATION to BID -> Advantiv University's HR/Payroll RFP 2015-A0027".
- An 'Internal Note:' field containing the text: "We have been waiting for this one!".
- A 'Message to Issuer' section with a '\* Title:' field containing "Accepted Invitation -> Bidder for HR/Payroll RFP 2015-A0027" and a '\* Text:' field containing "This provider has accepted the invitation to respond to the bid entitled HR/Payroll RFP 2015-A0027".
- An 'Additional Text:' field containing the text: "Thank you for including us. We will be happy to review and consider providing a bid.".
- An 'Accept' button at the bottom.

Annotations include:

- A blue-bordered box with red text: "Add a note for the internal record as well as a note back to the client..." with an arrow pointing to the 'Internal Note:' field.
- A blue-bordered box with red text: "...then click Accept" with an arrow pointing to the 'Accept' button.
- Red boxes highlight the 'Internal Note:' field, the 'Additional Text:' field, and the 'Accept' button.

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Once you've accepted the Invitation to Bid, you can begin to [manage the bid](#), including [creating the proposal team](#).

Good luck!