

Submitting (and Unsubmitting) Bids

Last Modified on 02/05/2022 3:09 pm MST

Submitting a Bid

When a bid is 100% complete and ready to submit, the vendor's Engagement Manager will go through the following steps in order to submit the bid:

1. Select the bid from the list of active engagements.
2. Confirm that the bid is eligible for submission.
3. Submit.

STOP: If your client has instructed you to upload your DecisionDirector response to another site as your official bid submission, you most likely do not need to perform this step. See [Generating a Document Zip File for Upload](#).

Accessing Active Engagements

Go to your dashboard. Click the Engagements link for your company.

(If you are tasked with submitting bids and do not have an Engagements link, then you will need to have your DecisionDirector administrator assign the role of Engagement Guest to you. If you do not know who your administrator is, you can contact [Advantiv Support](#).)

DECISION DIRECTOR

Diane White

Quick Nav

Learn More

Support

Diane White

Dashboard

Messages

Access

Account Settings

Organizations

APEX HCM Systems (d)
Top Level Organization

Dashboard

Engagements

Workspaces

Activities

Users

From her dashboard, Diane can access the Engagements link for her company to view and manage bids and bid invitations.

Copyright © 2016, Advantiv Solutions, LLC. | [Terms of Use](#)

Powered by the DecisionDirector® platform

The click the Active Engagements link. This will reveal the list of active engagements.

DECISION DIRECTOR

Diane White Quick Nav Learn More Support

Organization: APEX HCM Systems (d)

Dashboard Engagements Configuration

Engagements

Active Engagements

Invitations

Active Engagements
APEX HCM Systems (d) Engagements.

Invitations
Engagement Invitations for APEX HCM Systems (d).

Diane wishes to submit a bid. She will click the Active Engagements link to see the list of bids.

Copyright © 2016, Advantiv Solutions, LLC. | Terms of Use

Powered by the DecisionDirector® platform

Select the Bid to be Submitted

Choose the bid you wish to submit by clicking on the its entry in the list of engagements.

DECISION DIRECTOR

Diane White Quick Nav Learn More Support

Organization: APEX HCM Systems (d)

Dashboard Engagements Configuration

Engagements

Active Engagements

Invitations

Engagement Name	Organization	Activity	Engagement Type
APEX HCM Systems	Advantiv University	HR/Payroll RFP - 2014-05-13-B007.A-DNU	Bid
APEX HCM Systems	Advantiv University	SAMPLE>> HR/Payroll RFP 2015-A0027	Bid

Diane selects this bid to view its status and to submit.

Copyright © 2016, Advantiv Solutions, LLC. | Terms of Use

Powered by the DecisionDirector® platform

Review Status and Submit Bid

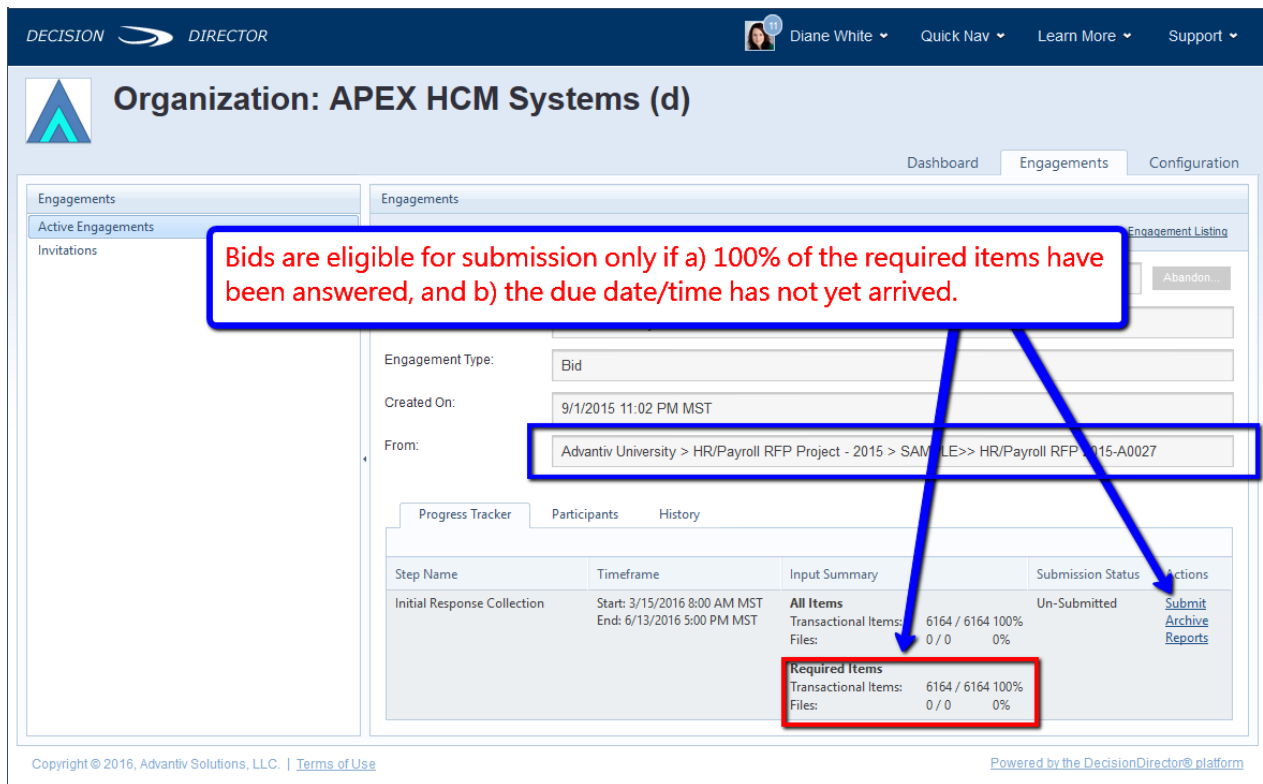
The Progress Tracker tab shows the status of the bid. Only when all required items are answered, and only if it is still prior to the due date and time, may a bid be submitted.

If these two conditions are not met, then DecisionDirector will not display the Submit link (pointed to by the arrow on the right).

Click the Submit link to submit the bid. You will be prompted to provide an internal note for the submission log. The customer will not see this note.

Once submitted, the bid can be viewed but can no longer be modified, and the Submit link will now become the

Unsubmit link. The customer will have view-only access to the bid once the due date and time arrives, and never before.



DECISION DIRECTOR

Organization: APEX HCM Systems (d)

Dashboard Engagements Configuration

Engagements

Active Engagements

Invitations

Engagement Listing

Abandon...

Engagement Type: Bid

Created On: 9/1/2015 11:02 PM MST

From: Advantiv University > HR/Payroll RFP Project - 2015 > SAM LE>> HR/Payroll RFP 2015-A0027

Progress Tracker Participants History

Step Name	Timeframe	Input Summary	Submission Status	Actions
Initial Response Collection	Start: 3/15/2016 8:00 AM MST End: 6/13/2016 5:00 PM MST	All Items Transactional Items: 6164 / 6164 100% Files: 0 / 0 0% Required Items Transactional Items: 6164 / 6164 100% Files: 0 / 0 0%	Un-Submitted	Submit Archive Reports

Copyright © 2016, Advantiv Solutions, LLC. | [Terms of Use](#)

Powered by the DecisionDirector® platform

Unsubmitting a Bid

Should you wish to revise your bid after it has been submitted, you may do so only if it is still prior to the due date and time. You will click the Unsubmit link to return the bid to unsubmitted status, and you and your team may revise the bid.

Of course, if you decide to no-bid after you have submitted the bid, you may unsubmit it, provided that you do so before the due date and time. Unsubmitted bids are never seen by the customer.

IMPORTANT NOTE: If you Unsubmit a bid in order to revise it, you must Submit the bid again if you intend for the customer to receive it.