PowerAdvocate Sourcing Intelligence®

Buyers' Frequently Asked Questions

August 2019

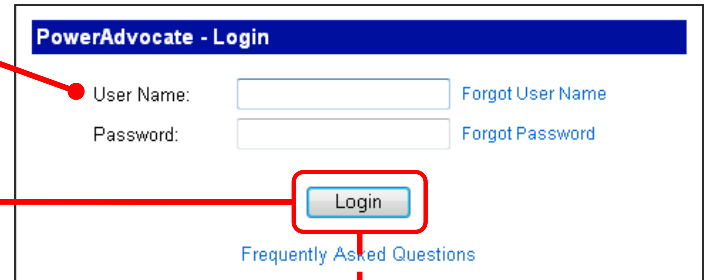
Power Advocate

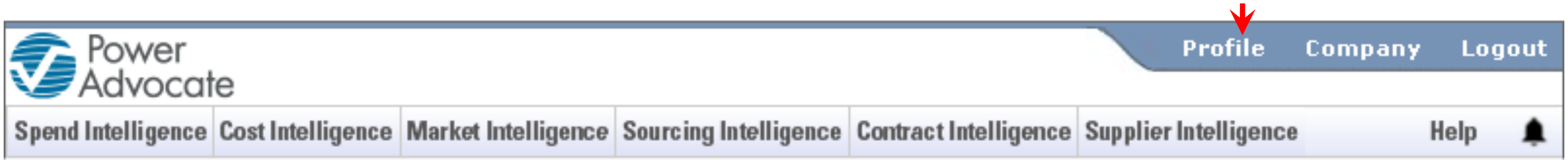
How do I log in to Sourcing Intelligence?

1. Launch a web browser and go to www.poweradvocate.com, and then click the orange **Login** button.

2. Enter your account **User Name** and **Password** (both are case-sensitive).

3. Click **Login**.





Your “Home” product’s Dashboard appears.

If Sourcing Intelligence is not your Home product, click **Sourcing Intelligence** on the navigation bar to display its Dashboard.

Tips

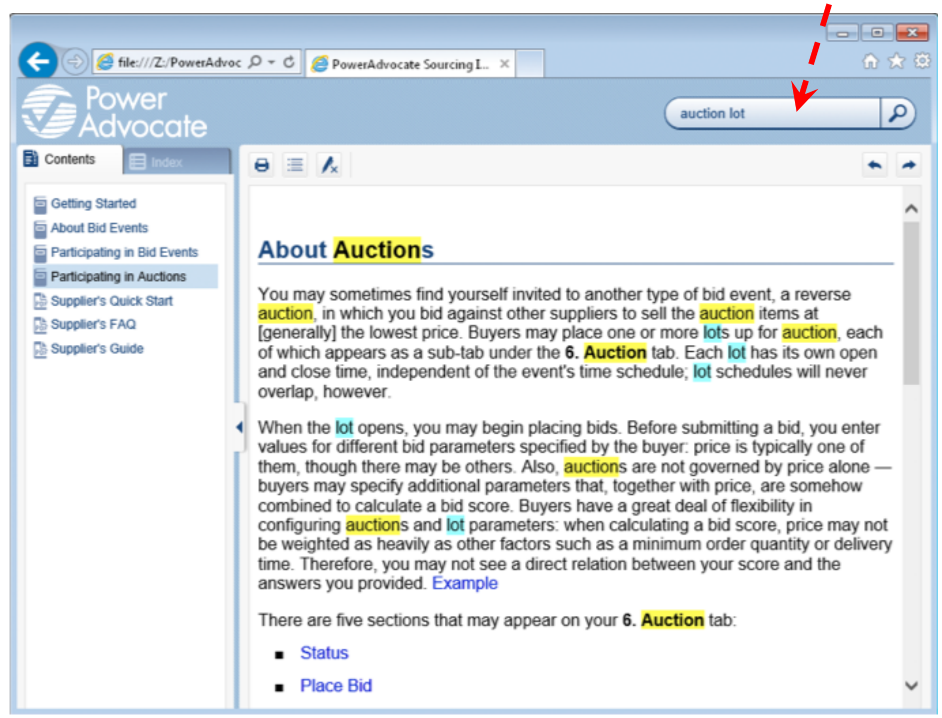
- PowerAdvocate functions in most web browsers; however, using browsers other than Internet Explorer (IE) version 11 or higher may cause certain functionality to work unexpectedly.
- To set your Home product, click **Profile** on the navigation bar, select a product in the **Product Information** section, and click **Update Information**. That product’s Dashboard appears first the next time you log in.

How do I get more information if I need it?

You can contact PowerAdvocate Support at support@poweradvocate.com or by calling **857-453-5800**, Monday through Friday (excluding U.S. Federal Holidays) from 8:00 AM to 8:00 PM Eastern Time

Online Help

- You can access the Help System at any time by clicking **Help** on the main navigation bar
- The Help System opens in a new window; use full-text search to get a ranked list of relevant help topics
- The Help System is fully navigable, with features such as search term highlighting
- You can download PDF versions of the documentation from within the Help System



What information is displayed on my Dashboard?

The Dashboard provides a roll-up view of all of your bid events grouped by state, plus additional customizations you add.

Search for events by title, number, items, and item subcategories by keyword

Create a New Event

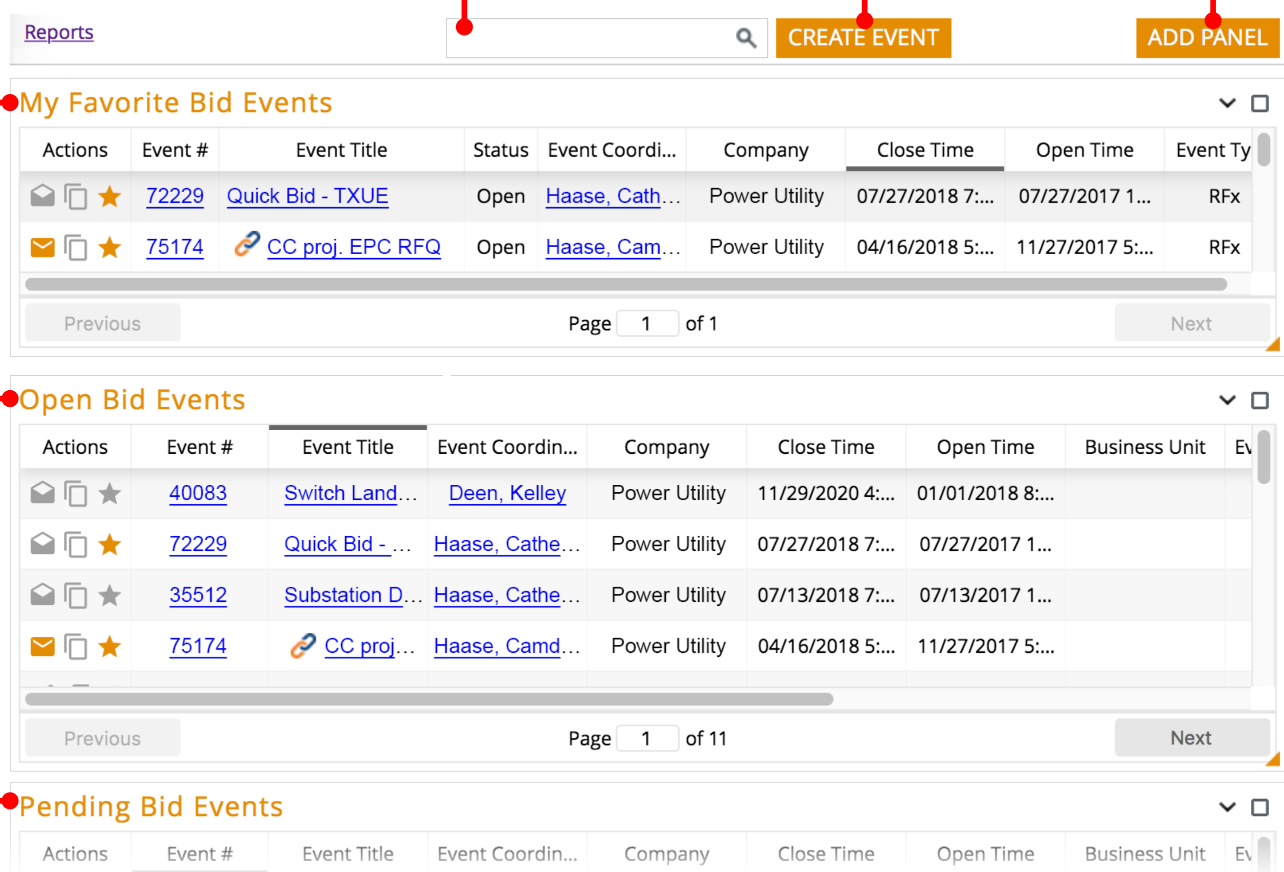
Create a Custom Panel

Favorite Bid Events is a selection of events you choose to monitor

Open Bid Events are active and open for bids

Additional panels show **Pending**, **Post Bid**, **Completed**, and **Cancelled** events by default

You can further customize those panels, or add your own



What are event states?

Each event passes through four basic event states from the time it is created until the time it is completed: **Pending**, **Open**, **Post Bid**, and **Completed** (a fifth state, **Canceled**, contains events canceled from the **Setup > Schedule** tab). Clicking an event's title from the Dashboard displays its **Status** tab. Buyers and suppliers may access corresponding **Pre-Bid**, **Bid**, and **Post Bid** tabs if appropriate for the event state.

Buyer View

Supplier View

Pending
An event is considered *Pending* from the time the Bid Event Coordinator (BEC) first creates it to the time it opens. The **Setup** tab is the main focus in this phase; suppliers cannot view the details of Pending events. If the BEC requires a *Pre-Bid* period, suppliers can access **Pre-Bid** tabs to retrieve files that you post, and to post their responses before the bid opens. Supplier responses are posted on your **Submittals > Pre-Bid** tab.

Open
Once the event is *Open*, the BEC's role shifts to event management via the **Status** tab. Events are visible to suppliers as soon as they are attached to the event via the **Setup > Suppliers** tab, but they must wait until the event opens before they can begin downloading the RFx, filling out datasheets, etc. (suppliers *can* upload before the event opens). If there was a Pre-Bid period, suppliers cannot access their **Bid** tabs (regardless of when the bid opens) until the BEC changes their Approval Status to **Approved** from the **Setup > Suppliers** tab.

Post Bid
An event enters the *Post Bid* state when it reaches its Close time. At that time buyers can review suppliers' final submittals before making awards. The BEC can enable a *Post Bid* period to exchange additional documents with selected suppliers, create additional rounds of bidding, or evaluate suppliers.

Completed
An event is *Completed* once the BEC finalizes awards (or selects "no award"), from the **Awards** tab; the catalog of Completed events is maintained primarily for reference. If you subscribe to PowerAdvocate Contract Intelligence, the **Contracts** tab allows you to create contracts from within the event.

How do I create an event?

1. From the Dashboard, click **Create Event**.

2. Enter a **Bid Event Title**, **Bid Event Number**, and select a **Buyer Company** (usually your own).

3. Select a **Bid Format** and **Currency**.

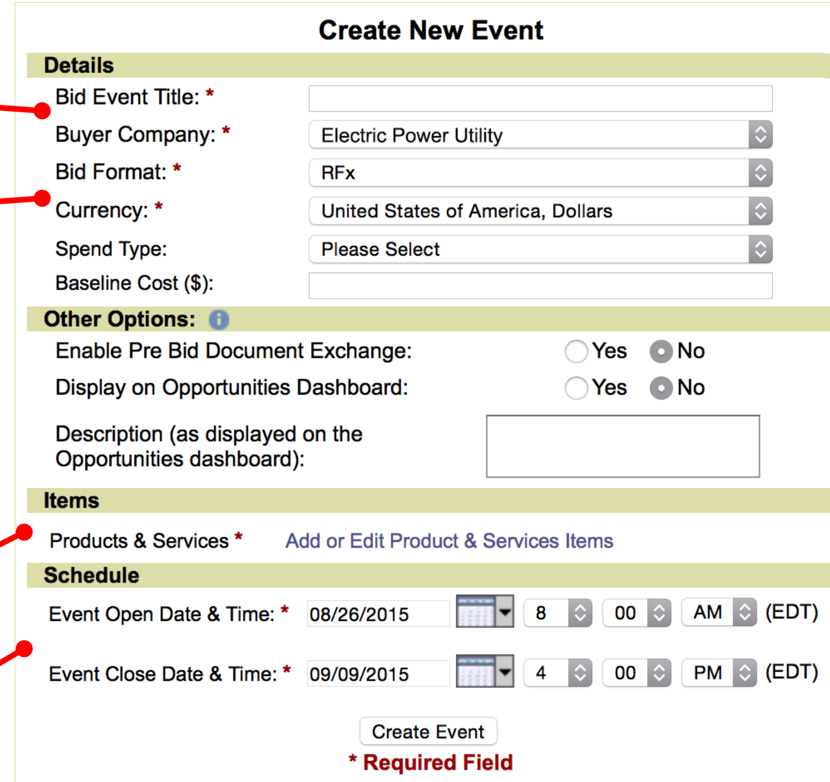
4. Complete any remaining Details fields as required by your company.

   You may also enable a Pre-Bid period, and make the event visible to all PowerAdvocate suppliers via the Opportunities Dashboard.

5. Click **Add or Edit Products & Services Items** and select at least one item being purchased.

6. Select the event's **Open** and **Close** schedule.

7. Click **Create Event**.



Tips

- The default Event Open date is 1 week from event creation at 8:00 AM and the default Event Close date is 2 weeks later at 4:00 PM; you set your time zone on your User Profile page.
- You can schedule additional milestones and activities from the **Setup > Schedule** tab.
- If schedules are changed, you should notify suppliers via the **Status** tab.

What are the different types of events/bid formats?

There are three basic types of events, characterized by the bid format:

RFx

- RFx (a reference to RFPs, RFQs, and RFIs) is the most common event format.
- You post your requirements for the products and services you wish to purchase, and receive bid packages from your suppliers.
- You can view bid progress and supplier submittals throughout the course of an event — since you can work with suppliers during the event, RFx events usually produce more complete bids than Sealed Bid events.

Sealed Bid

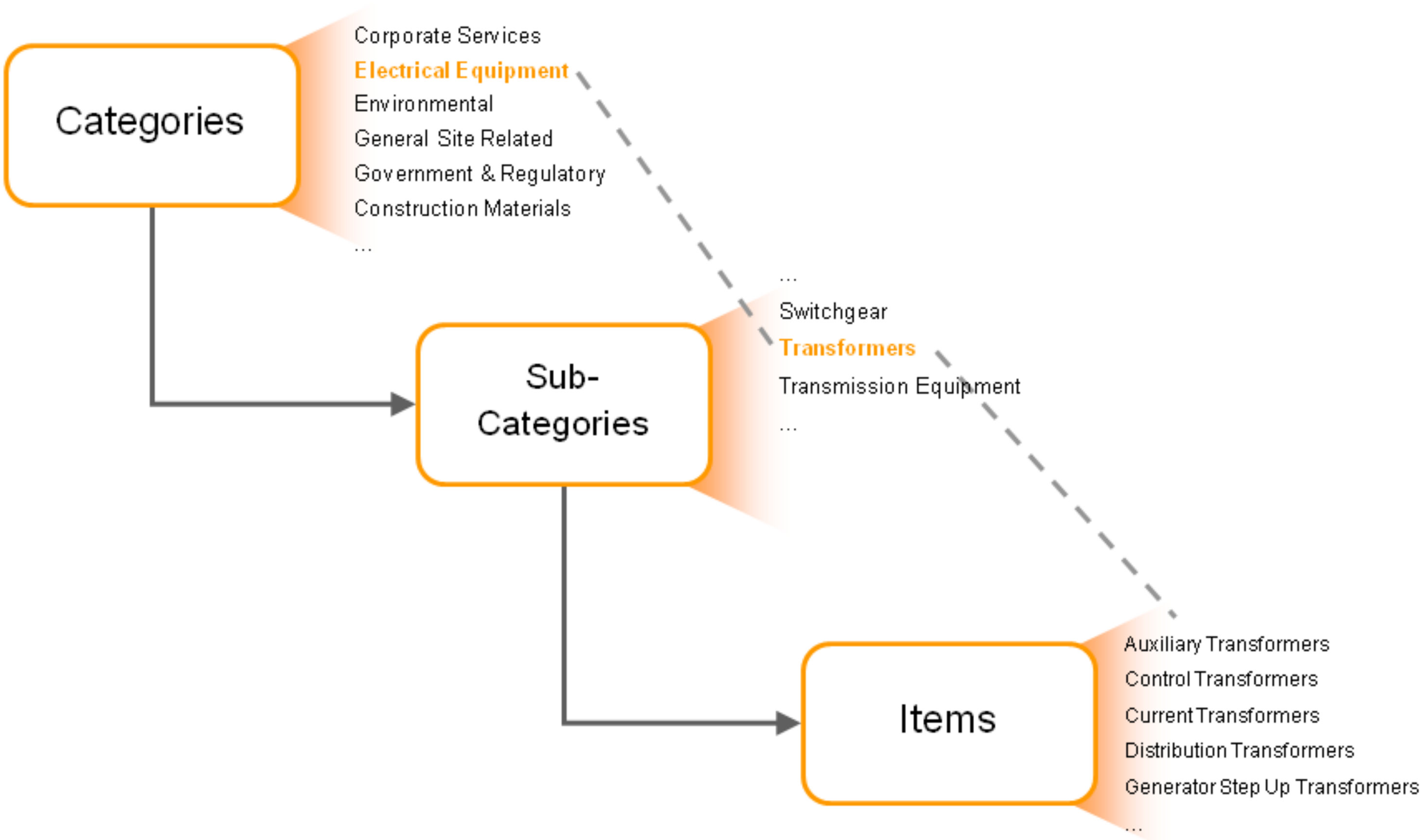
- Setup is similar to RFx.
- The buyer team cannot review suppliers' submittals until after the event closes.
- Because you cannot monitor suppliers' documents as they are submitted, Sealed Bid events generally require more clarification cycles after the event closes (vs. RFx events).

[Reverse] Auction

- You configure individual lots of items (products and services) you wish to purchase, and receive suppliers' bids in real time. Bids start high and move lower.
- Auctions require a great deal of up-front preparation, though the results can be dramatic if used on appropriate items in fiercely competitive markets.
- Each lot can be configured independently, with different suppliers participating, different formats, etc.
- Auction items are most often commodities where price is the major factor and brand plays a limited role.
- You can create a simple "lowest price wins" auction, or make it as complex as your needs dictate. Auctions need not be governed by price alone — for instance, you can specify additional parameters that might weight the bid score more heavily towards suppliers with low minimum order quantities and short lead times. The documentation contains detailed examples of configuring auction lots.

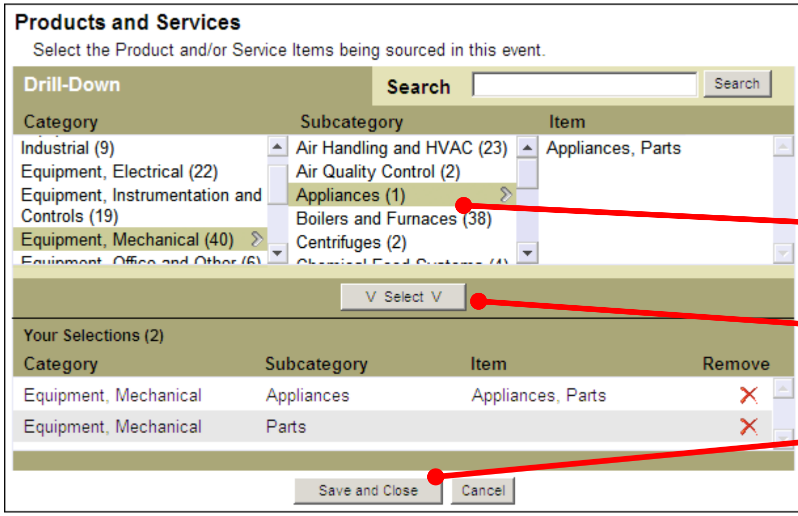
What is the PowerAdvocate item directory?

PowerAdvocate Sourcing Intelligence uses a three-tier item directory (or schema) consisting of categories, sub-categories, and items. You must attach at least one item or subcategory to each event – this data helps when searching for or filtering events, filtering the supplier database, working with Technical datasheets, and computing metrics. Market Intelligence uses the same directory when creating Categories to use as search filters.



How do I select items?

There are two places to attach items to an event in Sourcing Intelligence:

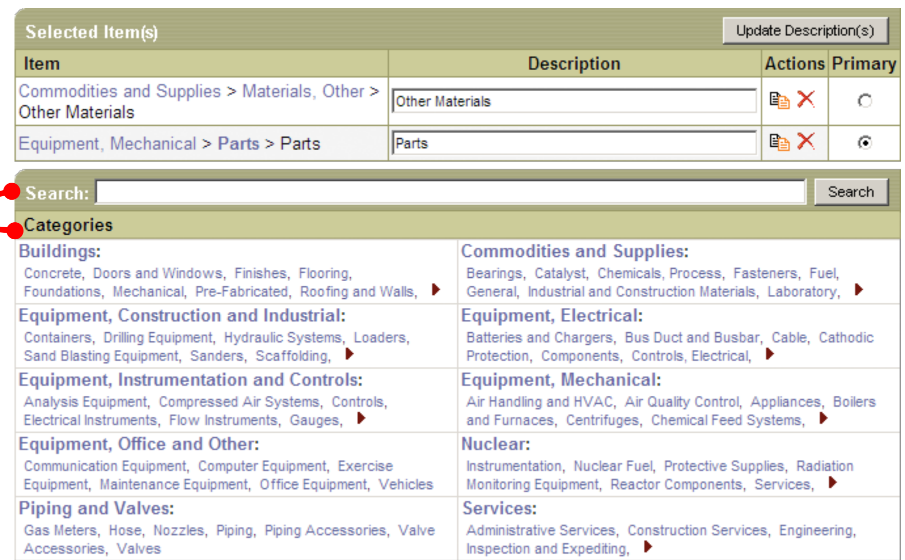


When creating an event, you must add at least one item:

1. From the Create Event page, click **Add or Edit Products & Services Items**.
2. Browse the item directory from the **Drill-Down** tab, or find specific items on the **Search** tab.
3. Select a Subcategory or Item and click **v Select v** to add it to your list.
4. Click **Save and Close**.

After an event is created, you can add/modify items from the **Setup > Items** tab:

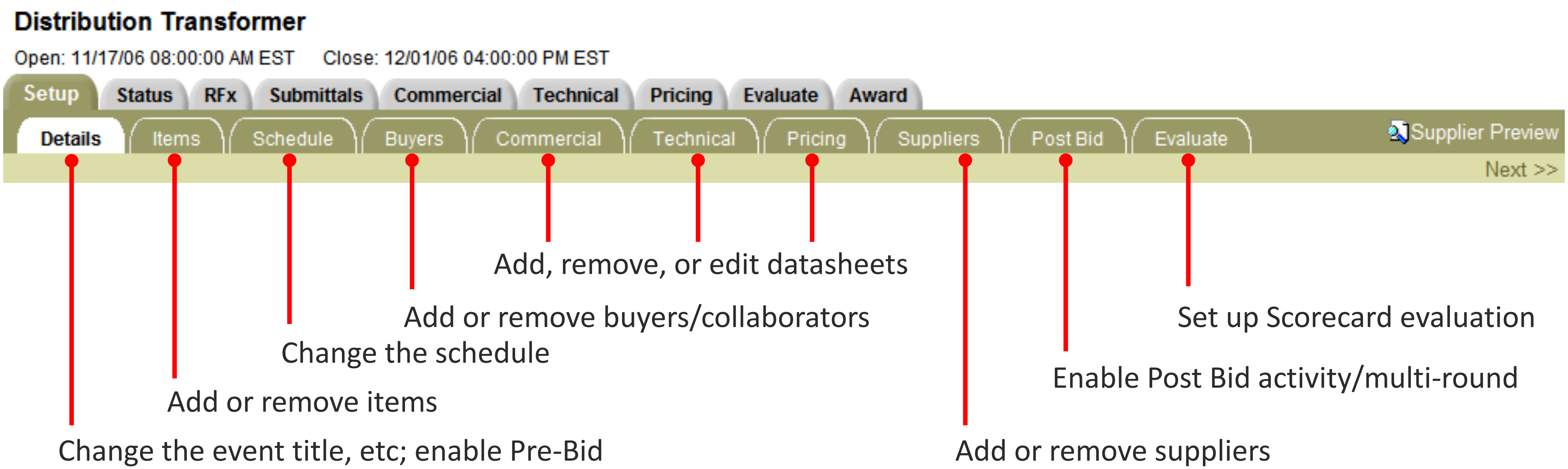
1. Click on categories or subcategories to drill down into the directory, or use the **Search** field.
2. Select one or more items; you can modify descriptions if necessary.
3. Click **Add Item**.



What else is involved in event setup?

The pages that follow illustrate a sample workflow. Generally, the **Setup** sub-tabs on the bottom row are for configuring an event before it opens, and the tabs across the top are for managing events in progress.

Once an event has been created, the remaining setup can be done *in any order*, and virtually all event configuration settings can be changed *on the fly*, *at any time*.

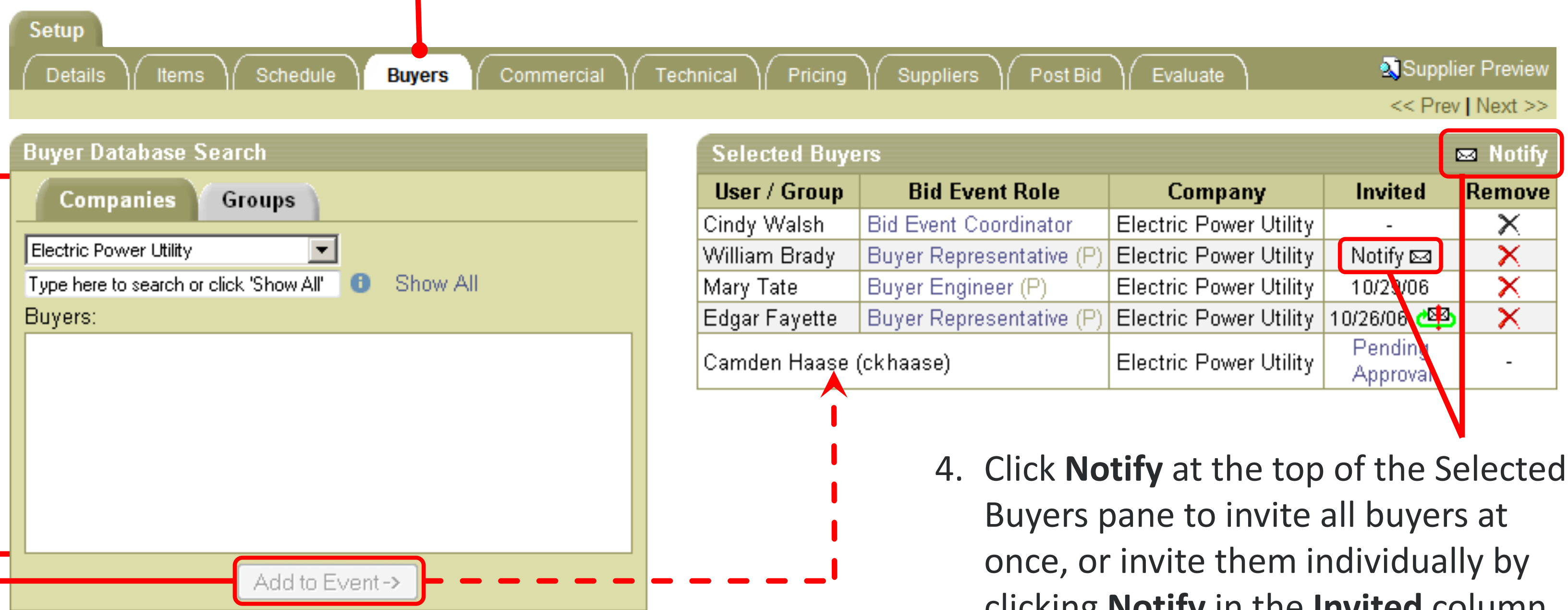


Tips

- ➢ Settings from the Create Event page appear on the Details, Items, and Schedule tab should you need to modify them.
- ➢ Certain limitations exist to maintain a fair and consistent process.
- ➢ The **Post Bid** and **Evaluate** sub-tabs are not used until after the event closes. An additional **Auction** tab appears for Auction events.

How do I set up my buyer team?

1. Go to the **Setup > Buyers** tab.



2. Search for and select users or groups to invite.

3. Click **Add to Event.**

4. Click **Notify** at the top of the Selected Buyers pane to invite all buyers at once, or invite them individually by clicking **Notify** in the **Invited** column.

Tips

- To view all buyers at a company, click **Show All**. If you cannot find a particular buyer, click add user and invite them.
- You can add multiple buyers at once; click ❌ to remove one from the Selected Buyers list.
- You (the event creator) become the Bid Event Coordinator (BEC), and have complete access to the event. Other team members have assigned roles that define their permissions for this event. You can reassign roles (including the BEC role) as necessary.

What do roles mean within Sourcing Intelligence?

- The PowerAdvocate platform uses role-based permissions to control each user’s level of access.
- Each user is assigned a Primary Role that specifies:
  - Which events the user can access
  - The screens/tabs that the user can access within an event
  - The user’s access level (view-only, edit, delete, etc.)
- There are several user roles, with varying levels of access:
  - Buyer Manager
  - Advanced Buyer
  - Buyer
  - Buyer Representative
  - Buyer Engineer
  - Other company-specific roles
- The BEC can also assign event-specific roles to users, which take precedence in granting higher or lower access rights.
- PowerAdvocate typically controls company and user permissions
  - All new ‘buyer’ users are assigned to the Buyer Representative role by default
  - All ‘supplier’ users are assigned the Supplier Representative role by default
  - Call PowerAdvocate to configure a user’s primary role
- PowerAdvocate can also configure new roles with customized permissions to suit your needs.

Can someone "fill in" for me as the BEC of my event?

You can change buyer roles (including the BEC role) as necessary – *the new role applies to this event only*.

Selected Buyers				Notify
User / Group	Bid Event Role	Company	Invited	Remove
Cindy Walsh	Bid Event Coordinator	Electric Power Utility	-	X
William Brady	Buyer Representative (P)	Electric Power Utility	Notify	X
Mary Tate	Buyer Engineer (P)	Electric Power Utility	10/29/06	X

1. From the **Setup > Buyers** tab, click a user's **Bid Event Role**.
2. Select a new role for the user.
   Click a role name to preview its access permissions.
3. Click **Submit**.
4. Confirm the change and click **Submit**.

Mary Tate with **Electric Power Utility** has a Primary Role of **Buyer Engineer**.

This role/company has access to the following screens for this event only:

Role: Buyer Engineer (Electric Power Utility)		
Screen Access		Comment
+ Setup		
Status	✓	
RFX	✓	
Submittals	✓	
Commercial	✓	
Technical	✓	
Pricing	✓	Partial Access (Pending, Open Events Only)
Auction	✓	
Post Bid	✓	
Evaluate	✓	
Award		

You may change this user's role for this event by selecting the appropriate role below.

Roles For this Event Only: *

- ◉ Do Not Change Role: Buyer Engineer
- ○ Change Role To: Buyer Representative
- ○ Change Role To: Bid Event Coordinator

To change this user's role for all events or create a new role, contact your platform administrator.

Submit | Cancel

* Required Field

You have chosen to change the role of **Mary Tate** (Electric Power Utility) from **Buyer Engineer** to **Bid Event Coordinator (BEC)** for this event only.

This means that **Cindy Walsh** with **Electric Power Utility** will no longer be the **Bid Event Coordinator** and will be assigned to the Primary Role of **Buyer Manager** for this event.

Send Emails to Former and Future BEC:

Former BEC	Future BEC
☐ Cindy Walsh	☐ Mary Tate

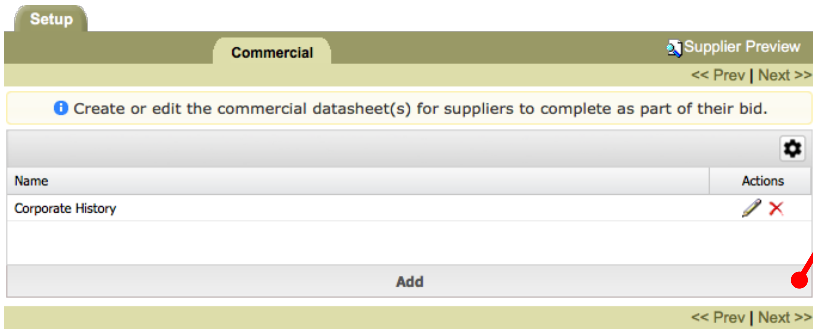
Back | Submit | Cancel

Tips

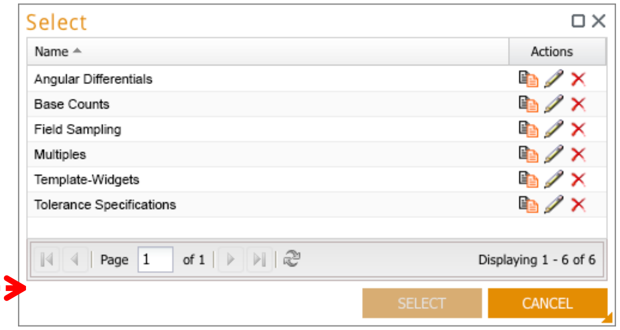
- Confirmation screens allow you to send notification emails to you and the new BEC.
- Roles can be changed back, or further modified at any time, by the new BEC.

How do I create a datasheet? (1 of 2)

1. Go to the **Setup > Commercial**, **Technical**, or **Pricing** tab.



2. Click **Add**.



3. Do one of the following:
   - To copy an existing datasheet, select it and click **Select**
   - To copy an existing datasheet to an event and open it for editing, click
   - To edit an existing datasheet, select it and click

Tips

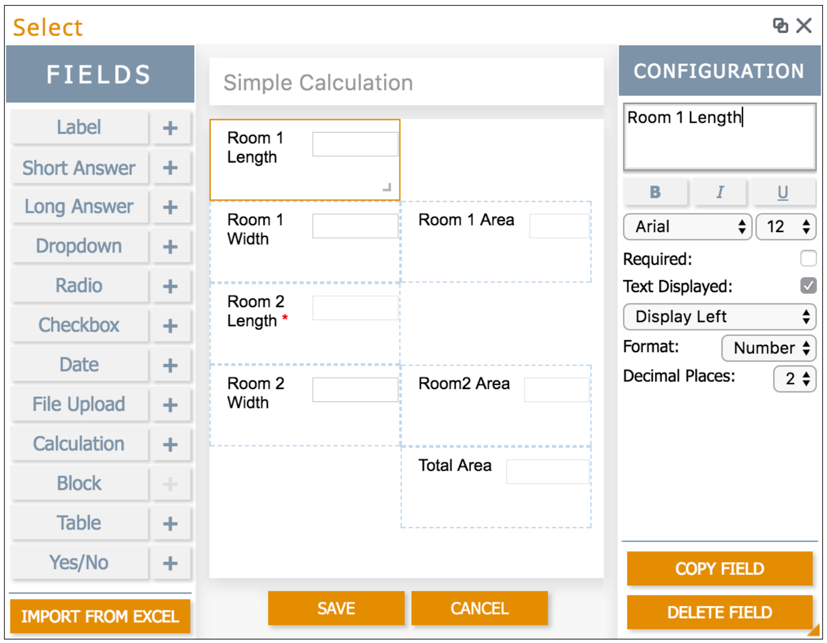
- Datasheets are forms for collecting information; an event may have many datasheets, one, or none at all.
- You can display suppliers' submittals side-by-side or export the data to an Excel spreadsheet for further manipulation.
- An alternative to datasheets is posting documents on the event's **RFx** tab for suppliers to download, fill in, and upload to the **Submittals** tab.

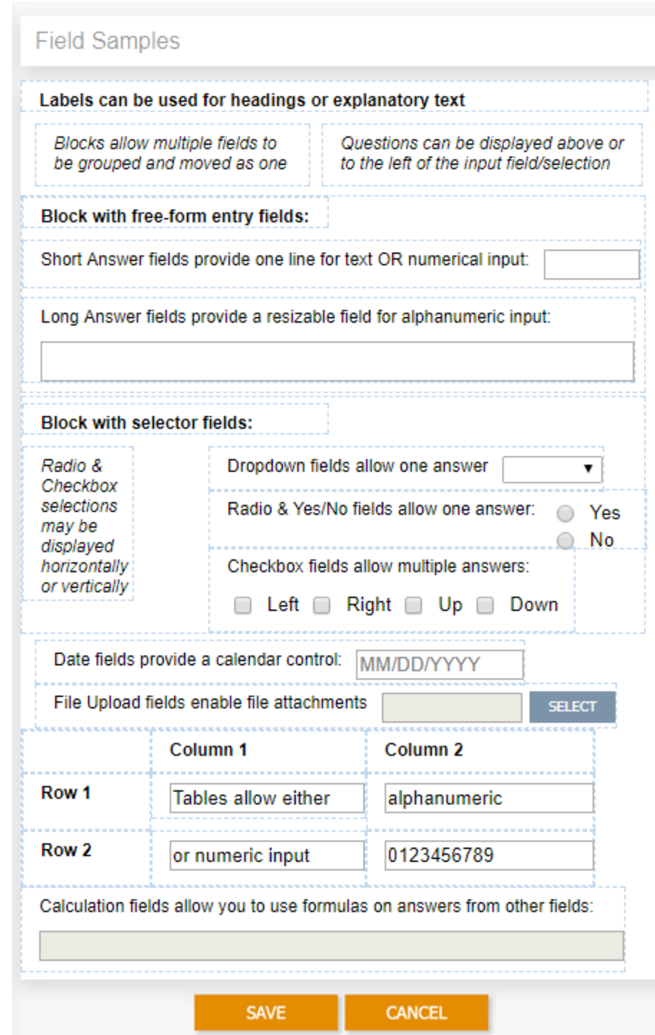
How do I create a datasheet? (2 of 2)

Datasheet Builder:

The Datasheet builder has three main components:

- The left column contains a selection of Fields you can use in a datasheet
- The center column is a “canvas” for datasheet layout (and a field for the datasheet
- The right column contains Configuration options for the selected field.



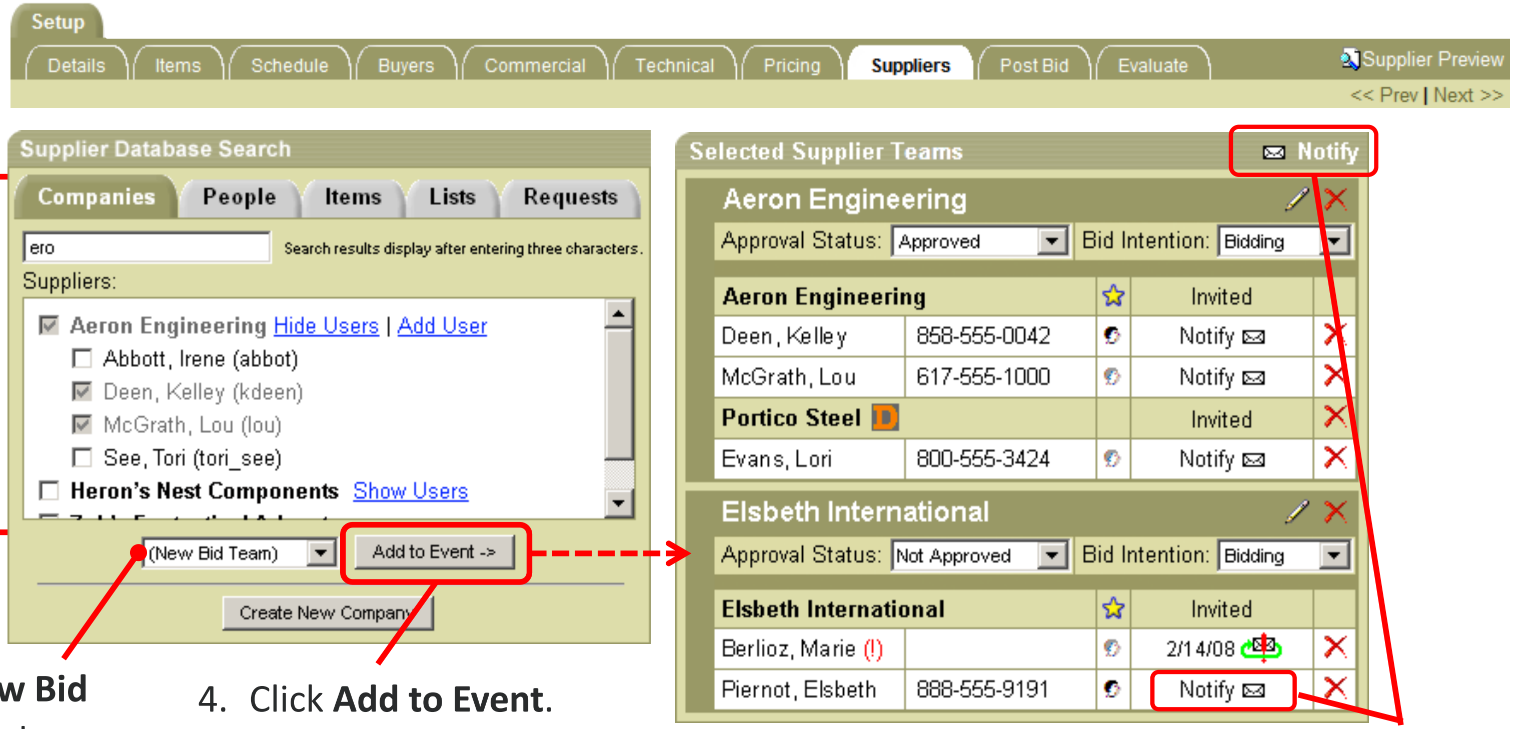


To add a field, click and drag it from the left column to the canvas.

Once added to the canvas, you can click a field to access its configuration options, click a different field type to change it, click and drag the field to move it, or click and drag the orange triangle to resize it.

How do I invite suppliers to participate in an event?

1. Click the **Setup > Suppliers** tab.



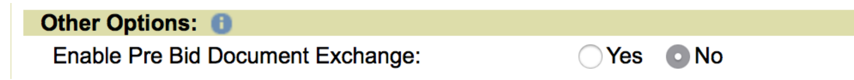
2. Search for and select suppliers by company, person, items sold, or a list of your favorite suppliers.
3. Leave the default **(New Bid Team)** to create a new team, or select an existing bid team.
4. Click **Add to Event**.
5. Click **Notify** at the top of the Selected Supplier Teams pane to invite all suppliers at once, or invite them individually by clicking **Notify** in the **Invited** column.

Tips

- If you cannot find a particular supplier contact, click add user and invite them to register. If you can't find a particular supplier, click **Create New Company**.
- Supplier teams can be noted as **Invited**, **Bidding** or **Declined** via pull-down; Supplier teams or individual supplier contacts can be added or removed (click ❌) at any time.
- If you subscribe to Market Intelligence, a **Lists** tab provides direct access to your custom supplier lists.

How do I run a Pre-Bid Document Exchange?

When creating an event or configuring event details (**Setup > Details** tab, for an event that has not yet opened), you have the option to require a Pre-Bid Document Exchange:

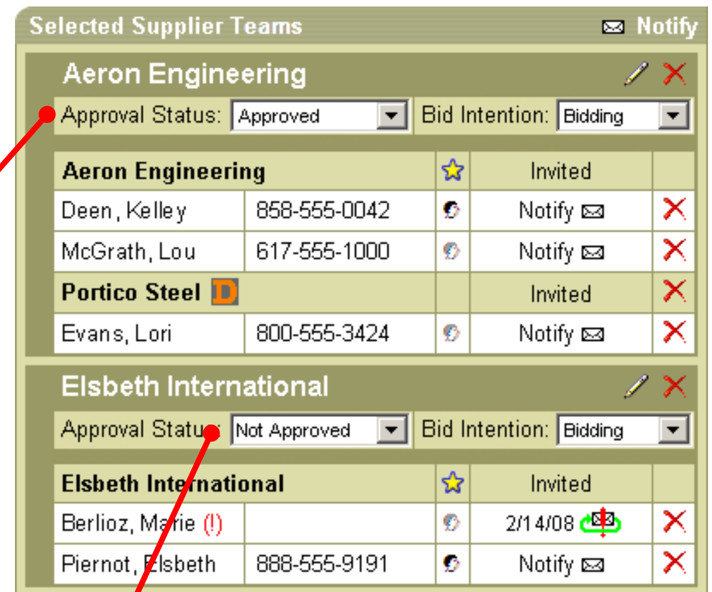


A Pre-Bid Document Exchange allows you to post RFx documents to the **RFx > Pre-Bid** tab, which suppliers can download from their **1. Download RFP > Pre-Bid** tab before the event opens. Likewise, suppliers can upload responses to their **2. Upload Proposal > Pre-Bid** tab that appear on your **Submittals > Pre-Bid** tab.

Furthermore, regardless of whether the event is Open or not, suppliers cannot see their **1. Download RFP > Bid** or **2. Upload Proposal > Bid** tabs until you explicitly approve them to participate in the bid event once it is Open.

To approve a supplier for a bid event:

1. Open the event and go to the **Setup > Suppliers** tab.
2. In the **Selected Supplier Teams** pane, set the team's Approval Status from Pending Approval to **Approved**.



The supplier can then access the Bid sub-tabs (though they cannot download documents from their **1. Download RFP > Bid** tab until the event opens)

Tip

- If you choose not to approve a team, setting their Approval Status to **Not Approved** is optional (e.g., for your reference only), as they cannot access the bid event unless they have an **Approved** status.

How do I open my event to other suppliers?

When creating an event, you have the option to display the event on the Opportunities Dashboard, which all PowerAdvocate suppliers can view on their Opportunities tab.

Suppliers can view only high-level event details (title, products/services, open & close dates) and any additional description you provide — suppliers must request access to the event, which you must approve before they can view and participate in the event itself.

Events | Opportunities

Opportunities Dashboard

Event Title	Company	Products / Services	Open Date	Close Date	Accessible
Actuators	Acme Electric	Controls	08/18/2015 8:00 AM EDT	08/31/2015 4:30 PM EDT	
Next-Gen Boiler Upgrade	Universal Energy	Boiler Components	08/15/2015 8:00 AM EST	12/31/2015 4:00 PM EST	
Description: Looking for a cutting-edge implementation for a green building in the planning stages.					
Project Simulator	Solar Arrays LLC	Construction Services	08/01/2015 8:00 AM EDT	09/07/2015 4:00 PM EDT	Pending
Site 101 Rough-out	Sheridan Builders	Piping	07/01/2015 9:00 AM EDT	12/31/2015 6:00 PM EST	

To post an event to the Opportunities Dashboard:

1. In the **Options** section of the **Setup > Suppliers** tab, set Display on Opportunities Dashboard to Yes.

2. Click **Okay** to confirm that you are making your event visible to all suppliers.

3. Enter a **Description** to help suppliers evaluate if they are a potential fit.

4. Click **Save**.

5. Review the Supplier Access Requests tab (via **Setup > Suppliers**) periodically to approve or deny any access requests you may receive from interested suppliers.

Other Options:

Enable Pre Bid Document Exchange: Yes No

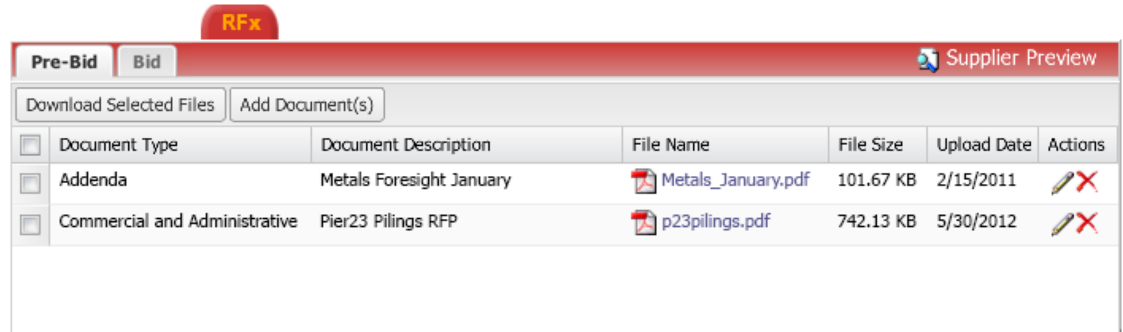
Display on Opportunities Dashboard: Yes No

Description (as displayed on the Opportunities dashboard):

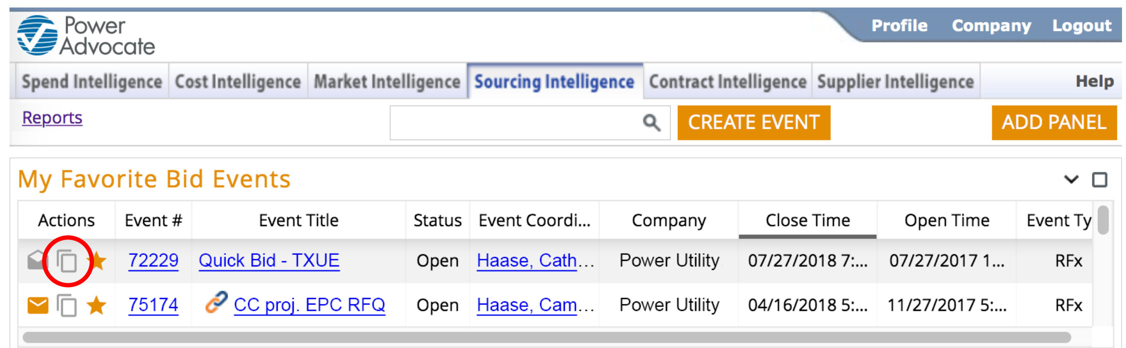
How can I include my standard T&Cs in an event?

There are 3 different ways to include your Terms and Conditions in an event.

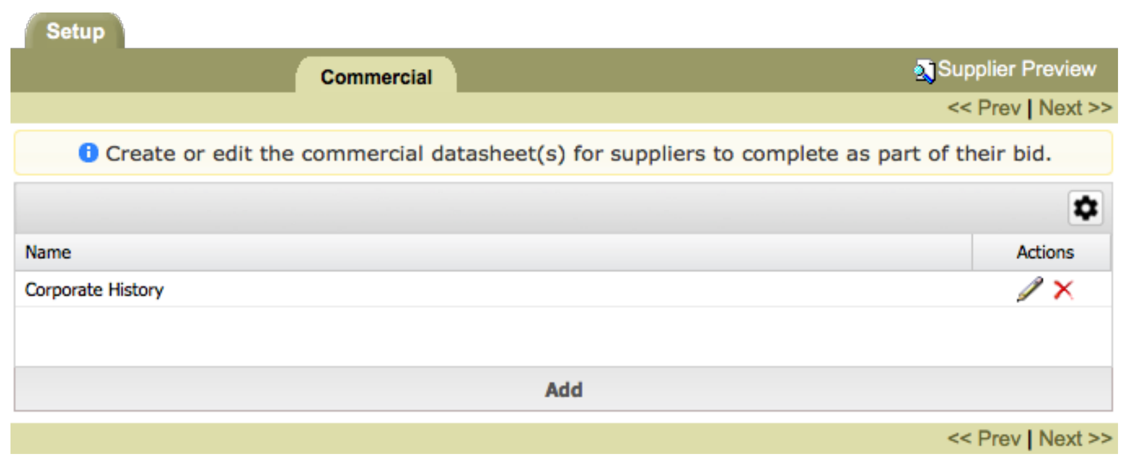
Method 1
Upload Ts&Cs documents to the event's **RFx** tab for suppliers to fill out and then upload to the **Submittals** tab – good when using MS Office documents so reviewers can mark up changes.



Method 2
Create a **Base Event** to use as a template (with your standard documents, datasheets, etc.), and create new events by copying that base event – this is more efficient method than #1, especially with multiple documents.

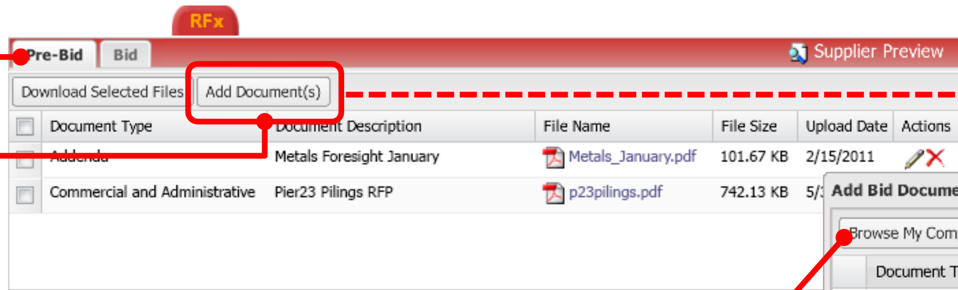


Method 3
Use a Commercial datasheet template and add it to the event – best when you need suppliers to agree to each term separately; an additional datasheet can collect exceptions.
Also useful when you have multiple short-answer or multiple choice questions, as you can compare all suppliers' answers side-by-side.

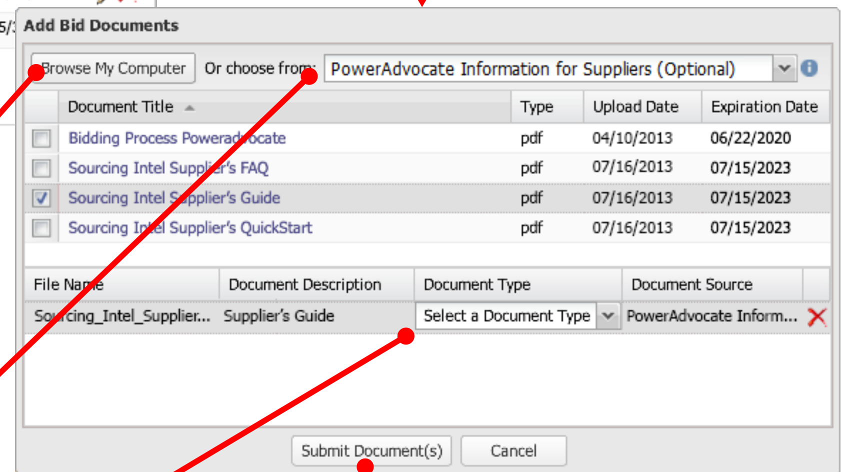


How do I attach bid documents to an event?

1. Click the event's **RFx** tab and select a sub-tab as appropriate.



2. Click **Add Documents**.



3. Select the documents to add:
   - To add documents from your computer/network, click **Browse My Computer**, find the document, and click **Open**.
   - To add Knowledge Documents, select a list to choose from and then check each document you wish to add.

4. Select a **Document Type**.

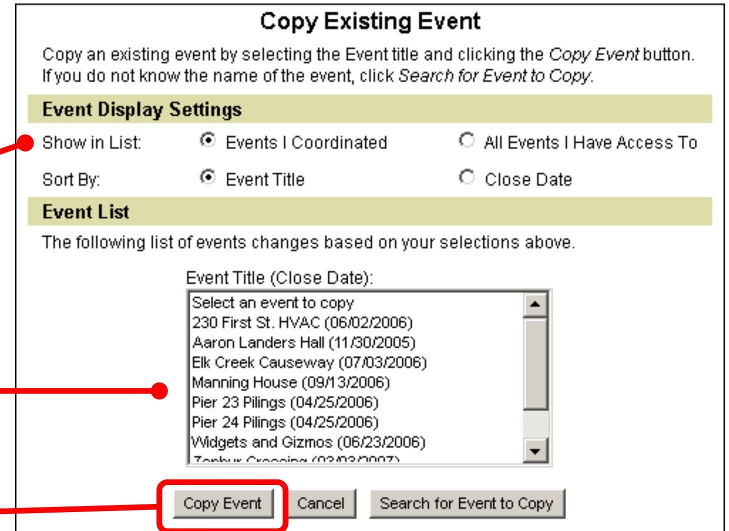
5. Click **Submit Document(s)**.

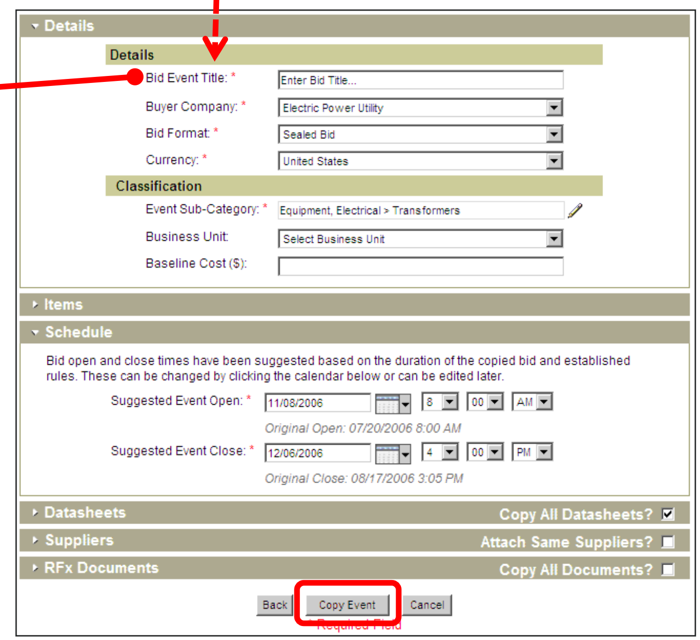
Tips

- You can add, modify (✎), or delete (✗) documents at any time before the event closes.
- There is no limit on the number or size of documents that you can upload; multiple files can also be compressed into a .zip archive for upload.
- Click **Supplier Preview** to navigate through the event tabs as appear to your suppliers.

Can I use a previous event as a template for a new event?

1. From the Dashboard, click **Copy Event**.
2. Select **Events I Coordinated** to list events for which you were the BEC, or **All Events I Have Access To**.
3. Select an event to copy.
4. Click **Copy Event**.
5. Enter a new **Bid Event Title**.
6. Configure the event – you can copy documents, datasheets, supplier teams, etc. into the new event.
7. Click **Copy Event**.
8. Review your event settings on the Validate Event Details page and then click **Copy Event**.





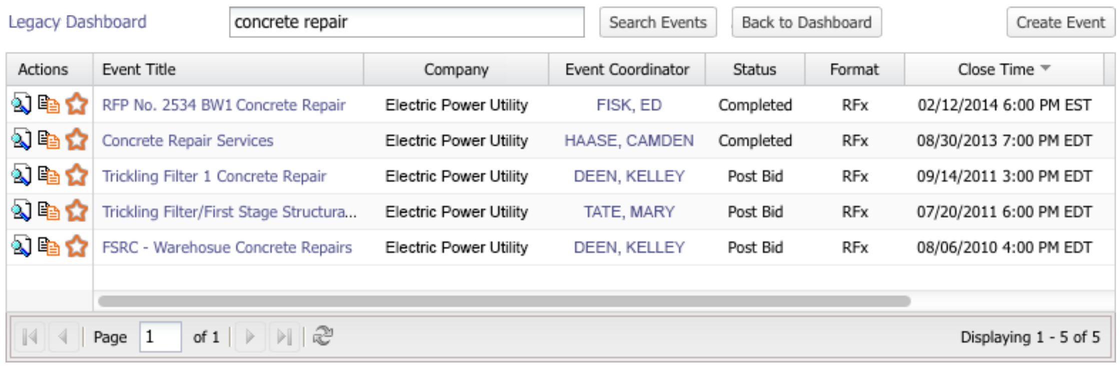
Tips

- The Details, Items, and Schedule sections always appear; others may appear based upon your permissions and event access.
- The new/copied event is completely independent of the original.

How do I search for events?

Enter search terms in the field at the top of the Dashboard and click **Search Events**.

You can Search for events by title, number, items, and item subcategories by keyword



Actions	Event Title	Company	Event Coordinator	Status	Format	Close Time
	RFP No. 2534 BW1 Concrete Repair	Electric Power Utility	FISK, ED	Completed	RFx	02/12/2014 6:00 PM EST
	Concrete Repair Services	Electric Power Utility	HAASE, CAMDEN	Completed	RFx	08/30/2013 7:00 PM EDT
	Trickling Filter 1 Concrete Repair	Electric Power Utility	DEEN, KELLEY	Post Bid	RFx	09/14/2011 3:00 PM EDT
	Trickling Filter/First Stage Structura...	Electric Power Utility	TATE, MARY	Post Bid	RFx	07/20/2011 6:00 PM EDT
	FSRC - Warehosue Concrete Repairs	Electric Power Utility	DEEN, KELLEY	Post Bid	RFx	08/06/2010 4:00 PM EDT

On the search results page:

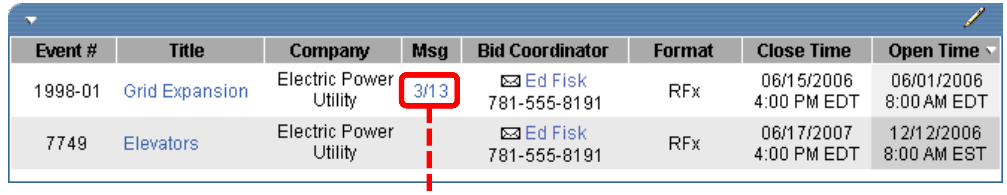
- For events you can access:
  - Click to display a preview, or the click the event title to open it
  - Click to copy the event
  - Click to favorite an event

- For other events:
  - Click or the event title to display a [limited] preview
  - Click to request access from the event's coordinator

How do I communicate with my Buyer and Supplier teams?

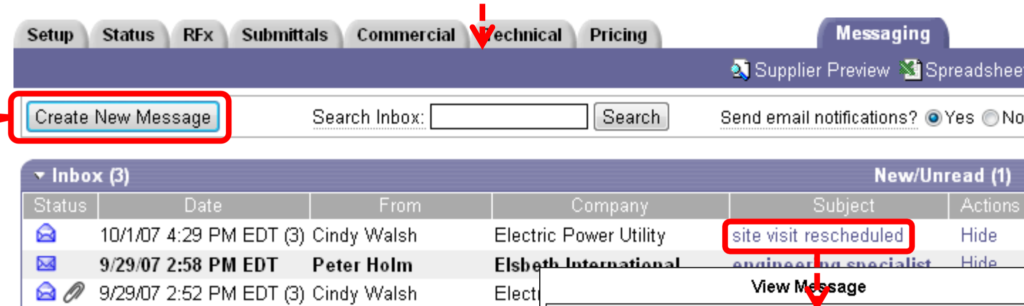
Your company uses one of the following messaging options in Sourcing Intelligence:

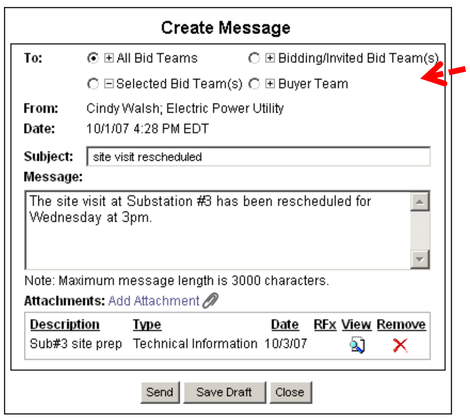
- **PowerAdvocate Messaging** – Click ✉ within an event to create a new message via PA Messaging.
- **Standard email** – Click an ✉ icon to create a new message in your default email application.



To create a message with PowerAdvocate Messaging:

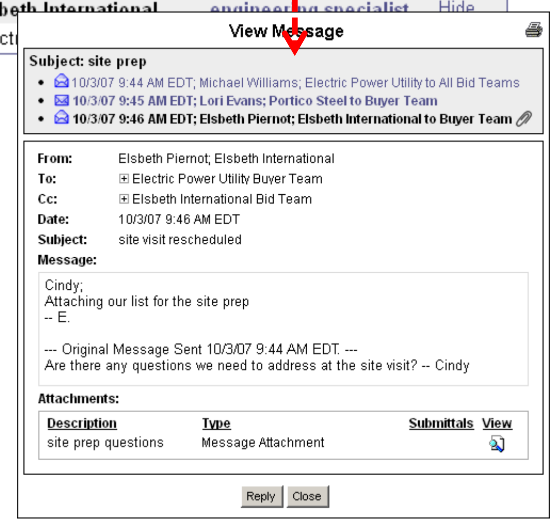
1. Click the event's **Messaging** tab, any ✉ icon on the **Status** tab, or ✉ / ✉ in the **Actions** column on the Dashboard.
2. Click **Create New Message**.





To view a message:

- Click the message subject or status icon (✉ / ✉)

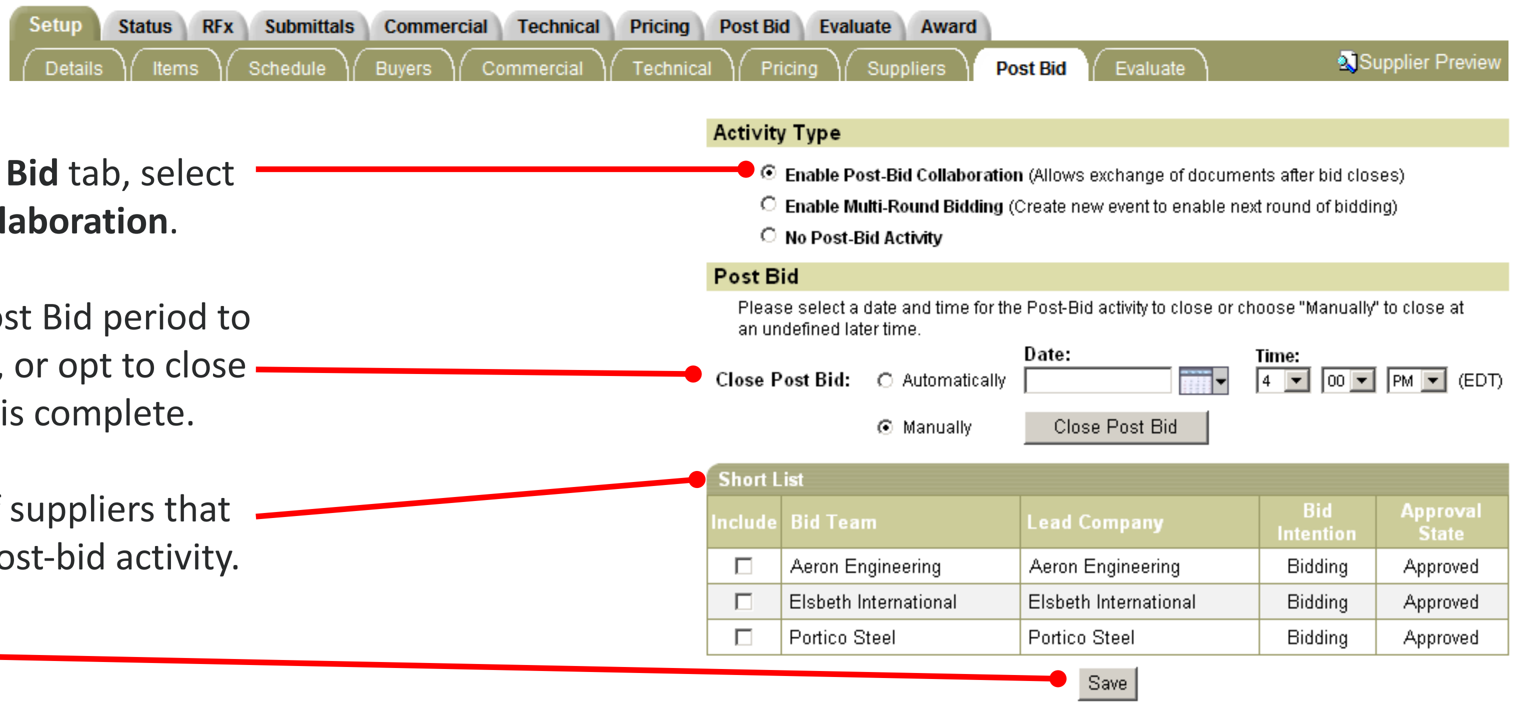


Tips

- ➢ PA Messaging supports event-specific communication between buyer and supplier teams. Messages and file attachments are embedded within an event, and cannot be viewed outside of that event.
- ➢ Messages are sent to entire teams; one-to-one messaging is not allowed.
- ➢ You can receive [external] email notifications of new event-related messages.

Can I continue working with suppliers after an event has closed?

Power Advocate



1. On the **Setup > Post Bid** tab, select **Enable Post Bid Collaboration**.

2. Set a time for the Post Bid period to close **Automatically**, or opt to close it **Manually** when it is complete.

3. Select a Short List of suppliers that may participate in post-bid activity.

4. Click **Save**.

   Once saved, a **Post Bid** tab appears on the top row.

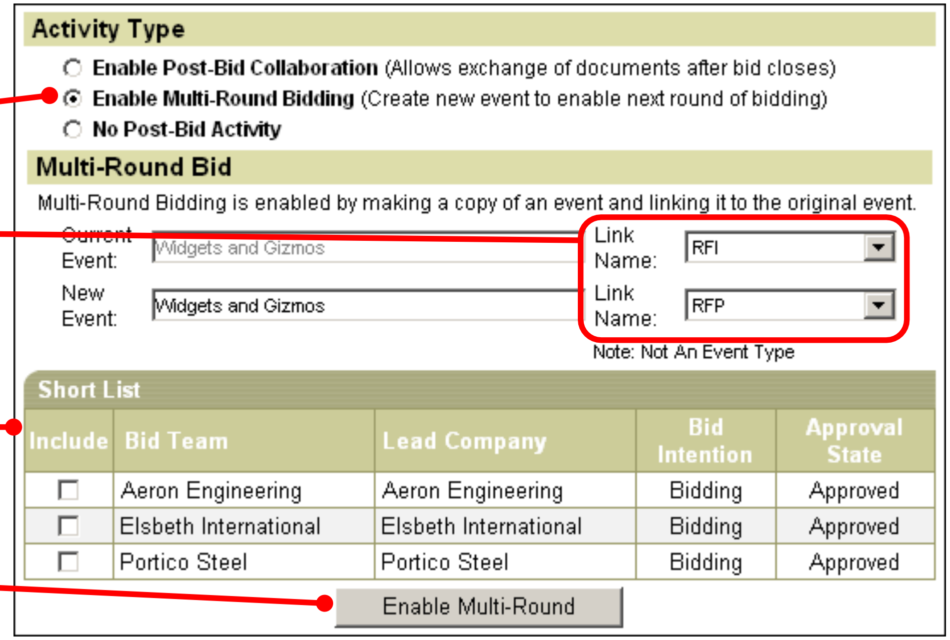
5. Go to the main **Post Bid > Buyer Docs** tab and upload any additional documents you need to work with in the Post Bid period.

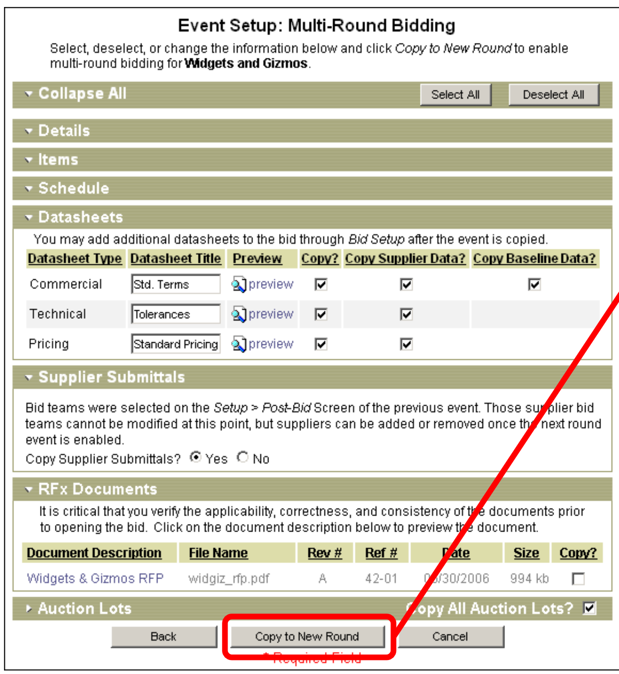
Tips

- You can post documents to be viewed by all bid teams, or a specific bid team only.
- Post Bid documents that suppliers upload appear on your **Post Bid > Submittals** tab.

How do I turn an RFI event into an RFP event?

1. Create an RFx event and manage it as usual.
2. Once the event closes, go to the **Setup > Post Bid** tab.
3. Select **Enable Multi-Round Bidding**.
4. Name the new event and enter **Link Names** for both events to distinguish them and for navigating between them (RFI & RFP, Round 1 & Round 2, etc.).
5. Select a Short List of suppliers that may participate in the next round.
6. Click **Enable Multi-Round**.





7. Configure the event – you can copy documents, datasheets, supplier teams, etc. into the next round.
8. Click **Copy to New Round**.
9. Review your event settings on the Validate Event Details page and then click **Copy to New Round**.

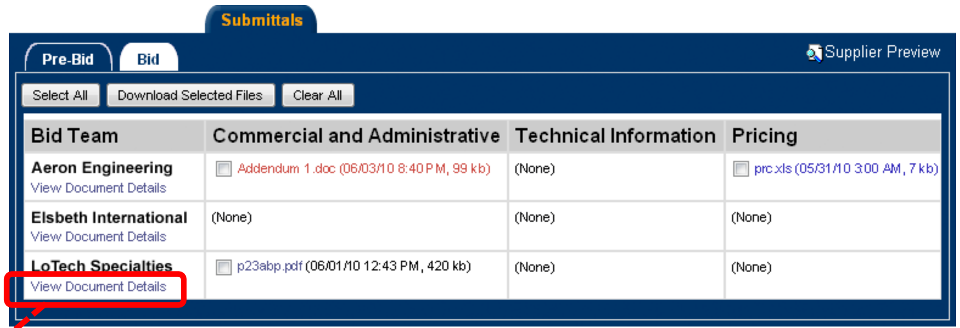
Tips

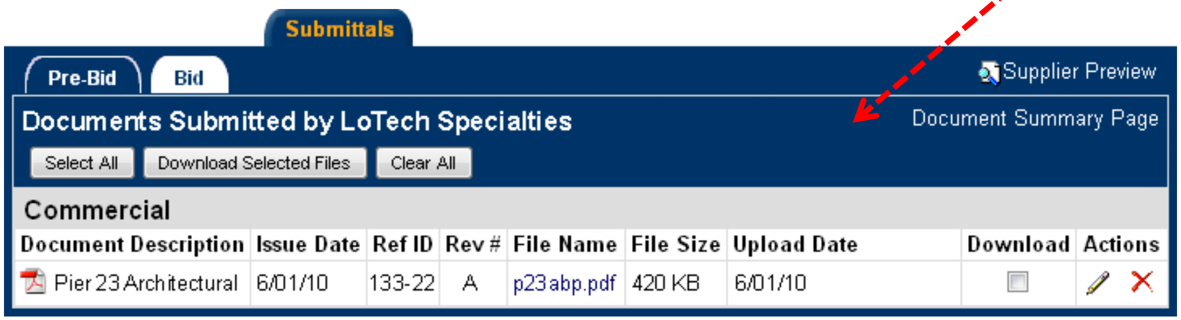
- ➢ Enabling Multi-Round bidding makes a full event copy, with submitted data.
- ➢ The new event can be modified to include or request additional information.

How do I access supplier submittals?

The **Submittals** tab displays suppliers' responses to your bid packages.

The document summary page (the default view) displays the documents that each supplier team has submitted, categorized by Commercial, Technical, or Pricing.

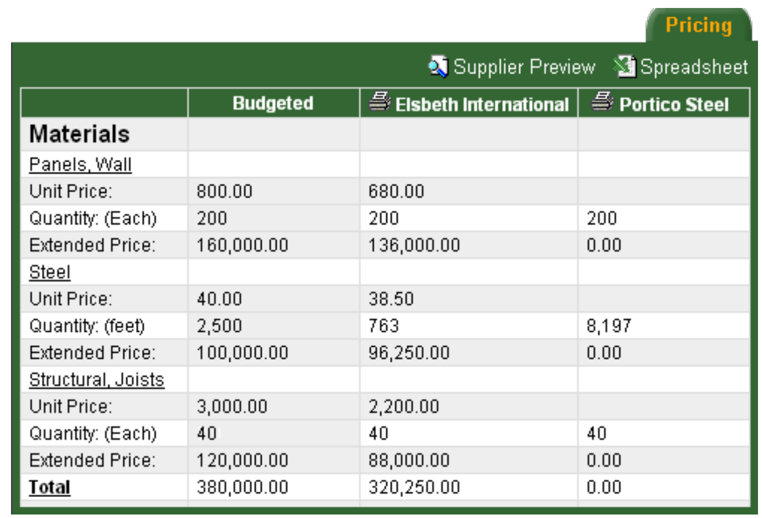




Click **View Document Details** above a team's name to view a description and version details for each document submitted; click **Document Summary Page** to toggle back to the other view

The main **Commercial**, **Technical**, and **Pricing** datasheet tabs display suppliers' answers to the questions you configured on the corresponding **Setup > [Datasheet]** tabs.

The tabular format is intended to facilitate comparison across suppliers; click **Spreadsheet** to save all data in a Microsoft Excel spreadsheet for offline analysis.



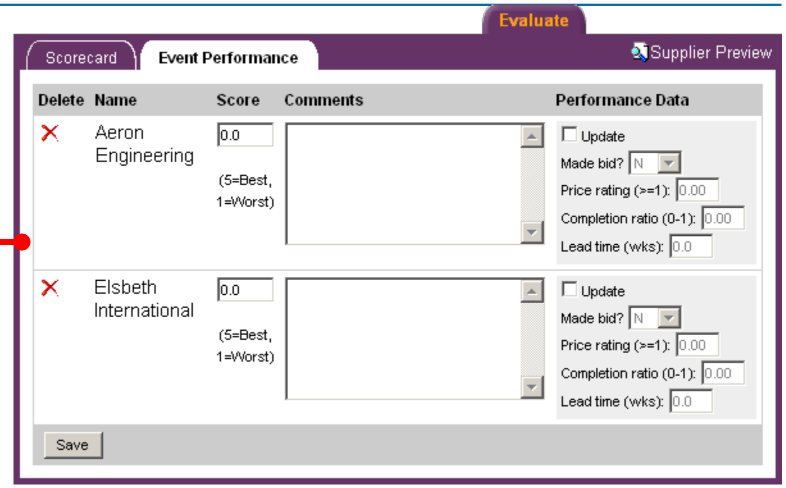
	Budgeted	Elsbeth International	Portico Steel
Materials			
Panels, Wall			
Unit Price:	800.00	680.00	
Quantity: (Each)	200	200	200
Extended Price:	160,000.00	136,000.00	0.00
Steel			
Unit Price:	40.00	38.50	
Quantity: (feet)	2,500	763	8,197
Extended Price:	100,000.00	96,250.00	0.00
Structural, Joists			
Unit Price:	3,000.00	2,200.00	
Quantity: (Each)	40	40	40
Extended Price:	120,000.00	88,000.00	0.00
Total	380,000.00	320,250.00	0.00

Is there a way to leave event feedback or rate suppliers?

There are two types of evaluations, both of which are optional:

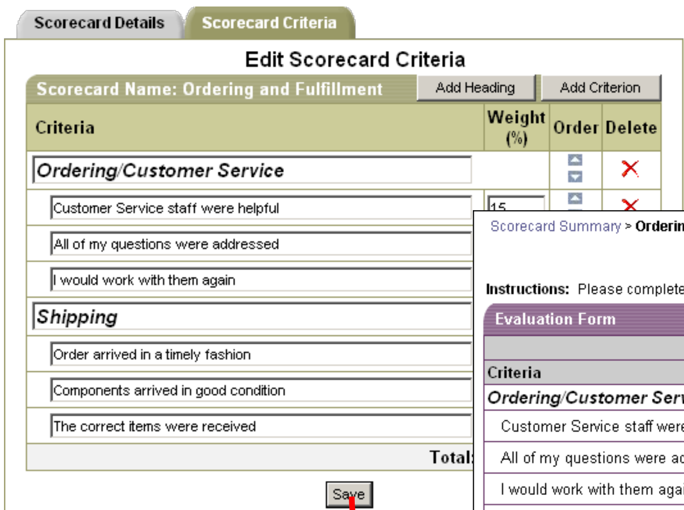
Event Performance:

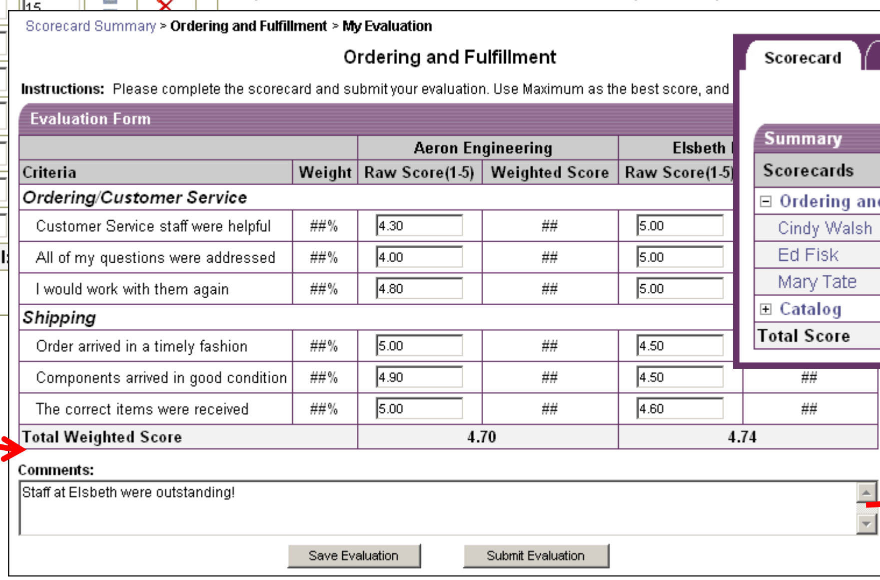
The **Evaluate** tab appears automatically after an event closes; it is a standard form to collect comments and general information.

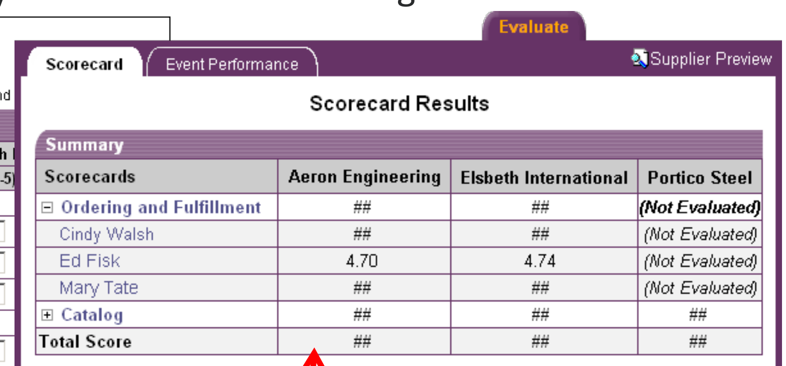


Scorecards:

You create custom scorecards on the **Setup > Evaluate** tab with your own questions/criteria, and specify how the results are weighted.





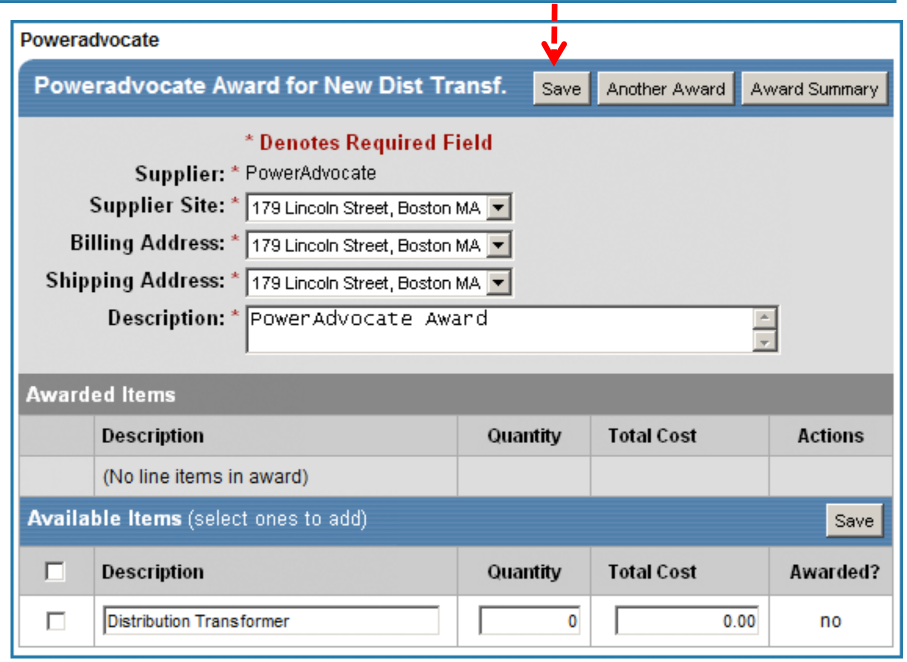


Buyer team members complete the form you create.

Results are tabulated on the **Evaluate > Scorecard** tab.

How do I award a bid to a supplier?

1. From the **Award** tab (which appears after the bid closes), click **Award Items**.
2. Select the **Supplier Site** and **Billing/Shipping Addresses**, and enter an award **Description**.
3. Check off the Items that you want to award and enter the **Quantity** and **Total Cost**.
4. Click **Save**; if you have additional items to award, click **Another Award**.
5. When awards are complete, click **Award Items**.
6. Click **Submit Award**.
7. Notify suppliers of their award status; there is no automatic notification.

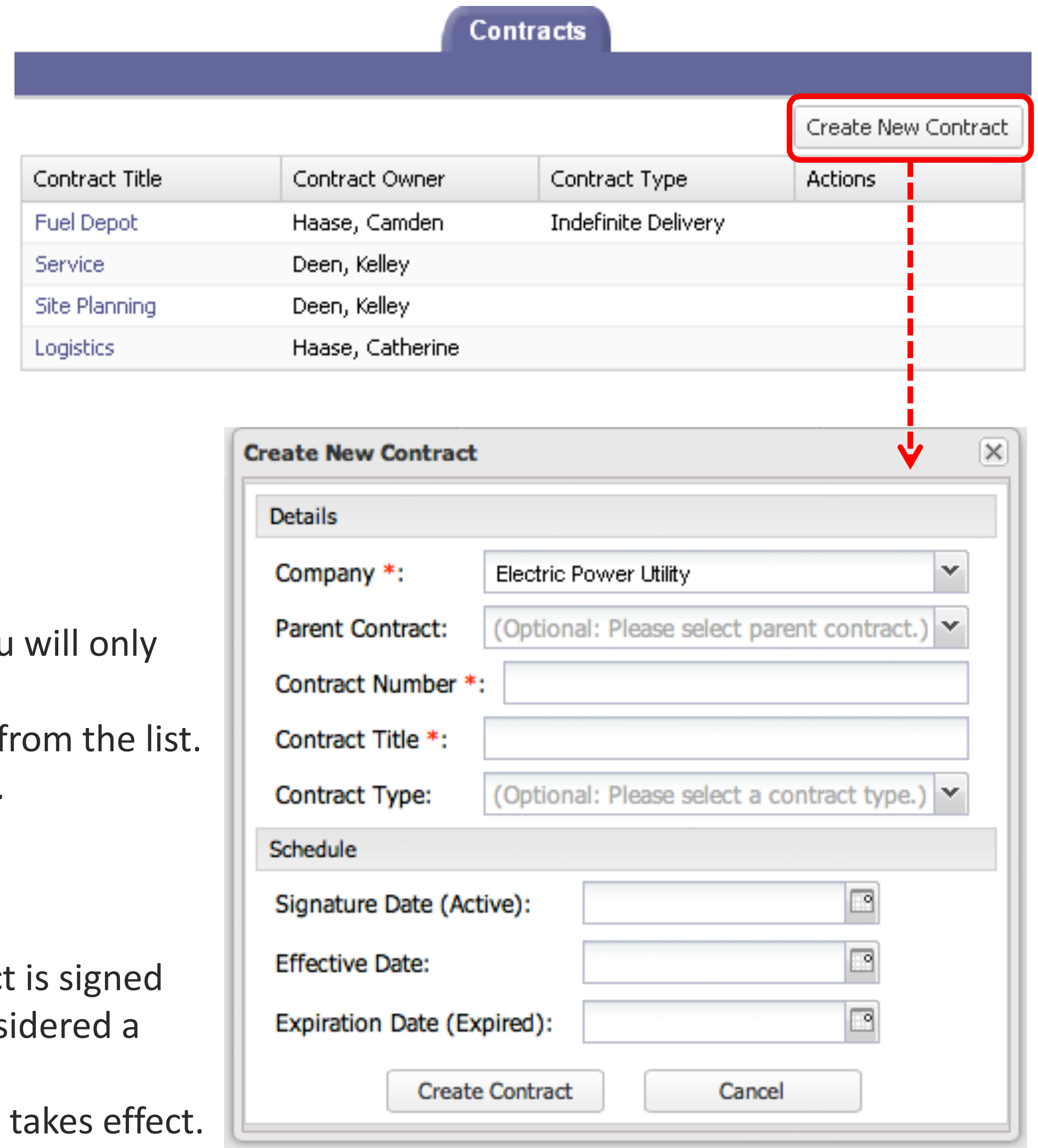


Tip

➢ Once an event is Closed, you cannot configure post-bid activity or multi-round bidding, though you can copy it to use as a template in a new event.

How do I create a Contract?

If you subscribe to Contract Intelligence, you can access the **Contracts** tab and create contracts from within Bid Event. This tab displays both contracts that were created from within an event, and Contract Intelligence contracts that were associated with the event from the contract's **Setup > Details** tab. Click a **Contract Title** to view the contract in Contract Intelligence.



1. After items are awarded and submitted, click the event's **Contracts** tab.

2. Click **Create New Contract**.

3. Fill in the contract **Details**:
   - Select a **Company** if possible (in most cases you will only have one choice, your own company).
   - If this contract has a **Parent Contract**, select it from the list.
   - Provide a **Contract Number** and **Contract Title**.
   - Select a **Contract Type** as appropriate.

4. Optionally, provide one or more Schedule dates.
   - **Signature Date:** The date on which the contract is signed and becomes active; prior to this date it is considered a draft.
   - **Effective Date:** The date on which the contract takes effect.
   - **Expiration Date:** The date on which the contract expires.

5. Click **Create Contract**.