

Miami-Dade County

## Extending Bidder Invitations to Select Email Recipients Job Aid

Version 1.0



## **TABLE OF CONTENTS**

TABLE OF CONTENTS	2
PURPOSE AND DESCRIPTION	2
Purpose	2
EXTENDING BIDDER INVITATIONS TO SELECT EMAIL RECIPIENTS	3

## PURPOSE AND DESCRIPTION

**Purpose:** This document explains the key activities involved in extending bidder invitations to select email recipients. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.



## EXTENDING BIDDER INVITATIONS TO SELECT EMAIL RECIPIENTS

Sele			cacions	Sutto	1.					
Not	e: Clerk of	the Boa	ard and	Vendo	or Services are	defaulte	ed to re	eceive no	otificatio	ons.
	MILLAND CARD								inferm	8
	< Supply Chain Operatio	ons			Buyer			New Window   He	🟠 🔍 🔍 🚦 🖥	-
	Approvals	Crea	te Event Details							
	Create Events	Create	an Event Summary							
	Event Details	Bu	siness Unit ME	Event ID NEXT	Round 1 Version 1	Event Format R	71			
	Maintain Event Templat	ites	Event Status Cover		Y 7 848		٢			
	Bid Factor Setup		"Event Name Request for	Information ME	× Preview Date 02/25/202	1 📰 Time 12:00PM	1			
	Bid Factor Group Setup	P	Description		Start Date 02/25/202	1 1 Time 1:00PM				
	Standard Comments				End Date 02/25/202	1 1 Time 3:00PM				
	Standard Comments Ty	ype			Copy From	<b>×</b>	Go			
	Manage Sourcing Even	Required	fields reside on pages marked v	with an asterisk (*) – you may	not save your event until all required fields are filled.					
	Event Responses	Step 1:	Define Event Basics	and optional rules for this ever	et.					
	Contracts Setup	~	* Event Settings	and Options	Paymer	t Terms and Contact Info				
	2 Manage Contracts	~	Add an RFx Do	cument	Web for	ms and addendum files				
	Purchase Orders	v Step 2	Configure Event Bid	Factors						
		Create in	e listings for this event. * Event Bid Fac	tors						
		Step 3 Send out	Select Bidders to Inv	<b>ite</b> L designate it as a public even	nt. or both.					
			* Bidder Invitation	ons						
		Step 4	Invite Collaborators	You may not post your event	while collaborators are reviewing it.					
If it	's a <b>Public</b> I	Event o	ption, s	elect t	he <b>Details</b> icor	in the l	PUBLIC	_AUC ro	• • • • • • • • • • • • • • • • • • •	
	's a <b>Public</b> I	Event o	ption, s	elect t	he <b>Details</b> icor	in the l	PUBLIC	_AUC ro	• 1001 . W.	
If it	's a <b>Public</b>	Event o	ption, s	elect t	he <b>Details</b> icor	in the I	PUBLIC	_AUC ro	≪ 1907. •	د الالالالالالالالالالالالالالالالالالا
	'S a <b>Public</b>	Event o	ption, s	select t	he <b>Details</b> icor <sub>Buyer</sub>	in the l	PUBLIC	_AUC ro	W.	Q Q
If it	'S a <b>Public</b> by Chain Operations the an Event the Bidders	Event o	ption, s	elect t	he <b>Details</b> icor <sub>Buyer</sub>	in the I	PUBLIC	_AUC ro	New Window   H	C Q Perc
If it	'S a <b>Public</b> I by Chain Operations the an Event the <b>Bidders</b> Business Unit AD bubic Event	Event O	ption, s	select t	he <b>Details</b> icor Buyer	n in the l	PUBLIC	_AUC ro	€ work •	C Per
If it	And Chain Operations Any Chain Operations	Event O	ption, s	select t	he <b>Details</b> icor Buyer	n in the l	PUBLIC	_AUC ro	W.	C Q
If it	'S a Public I by Chain Operations the an Event be Bidders Business Unit AD ublic Event ler Invitation List ① Q Contact Distribution	Event O	ption, s	select t	he <b>Details</b> icor Buyer	Event Type	PUBLIC	_AUC ro	€ WD. W. Mew Window   H New Window   H 4 [1-3 of 3 ∨] ≥	R R Rep   Pert
If it	Y S a Public I by Chain Operations the an Event te Bidders Business Unit AD ublic Event ter Invitation List ⑦ Q Select Bidder ID	Event O Event ID NEXT Bidder Type	ption, s	1 Version	he Details icor Buyer 1 Event Format Buy Bidder Company	Event Type	PUBLIC	AUC ro	www.	R R
If it	Y Chain Operations by Chain Operations the Aldders Business Unit AD bublic Event ler Invitation List ⑦ Q Select Bidder ID COB	Event O Event ID NEXT Bidder Type Bidder	Ption, s	select t	he Details icor Buyer 1 Event Format Buy Bidder Company Clerk of the Board - Mami-Dade	Event Type	PUBLIC RFx Diversity	AUC ro	www.	€ Pers N
If it	Y S a Public I by Chain Operations the Bidders Business Unit AD ublic Event ler Invitation List ③ Q Select Bidder ID COB VOSS	Event O Event ID NEXT Bidder Type Bidder Bidder	ption, s	select t	Buyer       1     Event Format       Bidder Company       Clerk of the Board - Mami-Dade       County	Event Type	PUBLIC RFx Diversity	AUC ro	www.	ep   Per
If it	Y Chain Operations  Aty Chain Operations  At	Event O Event ID NEXT Bidder Type Bidder Bidder Publc	ption, s	select t	he Details icor Buyer Buyer Super Event Format Buy Event Format Buy Clerk of the Board - Miami-Dade County Vendor Services - Miami-Dade County This is a Public Event	Event Type	PUBLIC RFx Diversity	AUC ro	www.	ep   Per
If it	Ary Chain Operations Ary Chain	Event O Event ID NEXT Bidder Type Bidder Bidder Public	Ption, s	select t version  Location  1  1  1  1  1  1  1  1  1  1  1  1  1	he Details icon buyer bu	Event Type	PUBLIC RFx Diversity	AUC roo	( In 3 of 3 v)	R Rep   Per
If it	Ary Chain Operations Ary Chain Operations Ary Chain Operations Ary Chain Operations Ary Chain Operations Ary Chain Operations Business Unit AD Business Unit AD COB VOSS PUBLIC_AUC Ch for Bidders	Event O Event ID NEXT Bidder Type Bidder Bidder Dublc	Ption, s Round	select t	he Details icon Buyer 1 Event Format Buy 2 Event Format Buy 3 Event Format Buy 4 Event Format Buy 5 Units is a Public Event 5 Units is a Public Event 5 Save Bud	Event Type Category Ers as Group	PUBLIC RFx Diversity	AUC roo	( In 3 of 3 v)	R Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q
If it	Ary Chain Operations hy Chain Operations hy Chain Operations he Bidders Business Unit AD bublic Event ler Invitation List @ Q Select Bidder ID COB VOSS PUBLIC_AUC ch for Bidders Business Unit AD PUBLIC_AUC	Event O Event ID NEXT Bidder Type Bidder Bidder Public	Ption, s Round	select t Version Location 1 1 1 1 1 1 1 1 1	he Details icon Buyer I Event Format Buy I Event Fo	Event Type Category ers as Group	PUBLIC RFx Diversity	AUC ro	( I.3 of 3 v)	R R
If it	Ary Chain Operations Ary Chain	Event O Event ID NEXT Bidder Type Bidder Bidder Public	Ption, s Round	select t Version Location 1 1 1 1 1 1 1 1 1	he Details icon Buyer I Event Format Buy I Event Fo	Event Type Category ers as Group	PUBLIC RFx Diversity	AUC ro	( I.3 of 3 v)	R R
If it	Arr to Event Overview	Event O Event ID NEXT Bidder Type Bidder Bidder Public	Ption, s	select t Version Location 1 1 1 1 1 1 1 1 1	he Details icon Buyer I Event Format Buy I Event Fo	Event Type Category Category ers as Group	PUBLIC RFx Diversity	AUC ro		R R
If it	Ary Chain Operations Ary Chain Operations Ary Chain Operations Ary Chain Operations Ary Chain Operations Business Unit AD Business Unit AD COB COB VOSS PUBLIC_AUC Ch for Bidders Save Event Changes hum to Event Overview	Event O Event ID NEXT Bidder Type Bidder Bidder Public	Ption, s Round	select t	he Details icon Buyer  I Event Format Buy  Left of the Board - Mami-Dade Confry Centor Services - Mami-Dade Confry This is a Public Event Save Bid GoTo	Event Type Category Category	PUBLIC RFx Diversity	AUC ro	(wn +	2. € H   Pen
If it	Ar Chain Operations Ar Chain Ar	Event O Event ID NEXT Bidder Type Bidder Bidder Public	Ption, s Round	select t	he Details icon Buyer  I Event Format Buy  Left of the Board - Mami-Dade Confry Centor Services - Mami-Dade Confry This is a Public Event Save Bid GoTo	Event Type Category Category	PUBLIC RFx Diversity	AUC ro	(wn +	2. € H   Pen
If it	Ary Chain Operations Ary Chain Operations Ary Chain Operations Ary Chain Operations Business Unit AD Business Unit AD COB COB VOSS PUBLIC_AUC Ch for Bidders Save Event Changes hum to Event Overview	Event O Event ID NEXT Bidder Type Bidder Bidder Bidder Duble	ption, s Round Status Dispatch Lines	select t	he Details icon Buyer  I Event Format Buy  Bidder Company Clerk of the Board - Miami-Dade Confy Confy Confy Confy Save Bid GoTo Confy Conf	Event Type Category Category category category category	PUBLIC RFx Diversity	AUC ro		2. € eep   Perr
If it	Arr Devent Changes	Event O Event ID NEXT Bidder Type Bidder Bidder Dublc	ption, s Round	l Version	he Details icon Buyer I Event Format Buy I Event Format Buy Clerk of the Board - Mami-Dade County Clerk of the Board - Mami-Dade County This is a Public Event Save Bidd GoTo	Event Type Category C	PUBLIC RFx Diversity	AUC ro	Image: Weight of the second	N I



(	Supply Chain	Operations			1	Buyer		🐔 Q 👤 🗄
								New Window   Help   Personali
	Create an E Invite Bidd	Event lers						
	Bus	iness Unit AD	Event ID N	EXT Rour	nd 1 Version	n 1 Event Format Buy	Event Type	REX
	Public Ev	ent						
	Bidder Invita	ation List ⑦						
	III Q							1-2 of 2 💙 🕨 🕨 Vi
	Select	Bidder ID	Bidder Type	Status	Location	Bidder Company	*Dispatch Method	
		СОВ	Bidder		1	Clerk of the Board - Miami-Dade County	Email	
		VOSS	Bidder		1	Vendor Services - Miami-Dade	Email	8
						County		
11	Search for Bid	Iders		Dispatch Lines		Save	Bidders as Group	
	Save	Event Changes				CoTo		
	Deturn to Fe	Event changes				Gold		Go
	< Return to Ev	Vent Overview						
S N tl	elect the lote: The hem as	ne <b>OK</b> bi ne emai a recipi	utton. I recipient ent does	will rece not grant	ive notifi automat	e desired recipier ications for all eve tic event access. F	ents, but m For non-pu	erely adding blic events,
S N tl ir	ielect the lote: The hem as ndividu	ne <b>OK</b> b ne emai a recipi als mus ate in ev	utton. I recipient ent does t be perso vent biddii	will rece not grant nally invit	ive notifi automat ted and r	e desired recipier ications for all eve tic event access. F registered in the S	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to
S N tl ir	Select the select select the select selec	ne <b>OK</b> b ne emai a recipi als mus ate in ev	ict Name a utton. I recipient ent does t be perso vent biddin	will rece not grant nally invit	ive notifi automat ted and r	e desired recipier ications for all eve tic event access. F registered in the S	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to
S N tl ir p	Select th Note: Th hem as ndividu participa	ne <b>OK</b> b ne emai a recipi als mus ate in ev	ict Name a utton. I recipient ent does t be perso vent biddin	will rece not grant nally invit	ive notifi automat ted and r	e desired recipier ications for all eve tic event access. F registered in the S	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to
S N tl ir p	Select the Note: The hem as ndividu participa	ne <b>OK</b> b ne emai a recipi als mus ate in ev	ict Name a utton. I recipient ent does t be perso vent biddin	will recent not grant nally inviting.	ive notifi automat ted and r	e desired recipier ications for all eve tic event access. F registered in the S	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to
S N tl ir	Gelect the Jote: The hem as ndividu participa Create an B Dute Bide	ne <b>OK</b> b ne emai a recipi als mus ate in ev	ict Name a utton. I recipient ent does t be perso vent biddin	will rece not grant nally invit	ive notifi automat ted and r	e desired recipier ications for all eve tic event access. F registered in the S	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to
S N tl ir	Select the Select the Note: The hem as ndividu participa articipa (Supply Chain Create an E Invite Bidd	e <b>Conta</b> ne <b>OK</b> b ne emai a recipi als mus ate in ev operations	tt Name a utton. I recipient ent does t be perso vent biddin	will rece not grant nally invit	I ID of th ive notifi automat ted and r	e desired recipier ications for all eve tic event access. F registered in the S Buyer	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to
S N ti irr p	Select th Jote: Th hem as ndividu participa (* Supply Chain Create an F Invite Bidd Buss Dublic Evo	ne <b>OK</b> b ne emai a recipi als mus ate in ev operations	et Name a utton. I recipient ent does i t be perso vent biddin	will recent not grant nally invit ng.	I ID of th ive notifi automat ted and r	e desired recipier ications for all eve tic event access. F registered in the S Buyer	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to
S N ti ir p	Gelect th Jote: Th hem as ndividu participa create an E Invite Bidd Bus Bidder Invite	e <b>Conta</b> ne <b>OK</b> b ne emai a recipi als mus ate in ev operations Event lers iness Unit AD ent ation List ⑦	et Name a utton. I recipient ent does t be perso vent biddin	will recent not grant nally invit ng.	I ID of th ive notifi automat ted and r	e desired recipier ications for all eve tic event access. F registered in the S Buyer	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to
S N tl ir p	Create an E Invite Bus Public Evo Bidder Invite	e <b>Conta</b> ne <b>OK</b> b ne emai a recipi als mus als mus ate in ev	et Name a utton. I recipient ent does t be perso vent biddin	will recent not grant nally invit ng.	I ID of th ive notifi automat ted and r e nd 1 Version Private Ev	e desired recipier ications for all eve tic event access. F registered in the S Buyer 1 Event Format Buy rent Contacts	ents, but m For non-pu Supplier Po	erely adding blic events, ortal to RFx
S N tl ir p	Select the Note: The hem as ndividu participa articipa (Supply Chain Create an P Invite Bidd Buss Public Ev Bidder Invita Select	e Conta ne OK b ne emai a recipi als mus ate in ex Operations	Et Name a utton. I recipient ent does t be perso vent biddin EventID N Setid MDC	will recent not grant nally invit ng. EXT Roun	I ID of th ive notifi automat ted and r r d 1 Version Private Ev	e desired recipier ications for all eve tic event access. F registered in the S Buyer a 1 Event Format Buy yent Contacts	ents, but m For non-pu Supplier Po Event Type	erely adding blic events, ortal to
S N tl ir p	Create an E Invite Bidder Bidder Invite Bidder Invite Bidder Invite	e Conta ne OK b ne emai a recipi als mus ate in ev operations	Et Name a utton. I recipient ent does i t be perso vent biddin Event D N Setid MDC Additional Event C	will recent not grant nally invit ng. EXT Roun Bidder II	I ID of th ive notifi automat ted and r e d 1 Version Private Ev	e desired recipier ications for all eve tic event access. F registered in the S Buyer a 1 Event Format Buy rent Contacts	ents, but m For non-pu Supplier Po Event Type	erely adding blic events, ortal to New Window   Help   Personalic RFx
S N tl ir p	Create an E Invite Bidder Bidder Invite Bidder Invite Bidder Invite	e Conta ne OK b ne emai a recipi als mus ate in ev exent lers iness Unit AD ent tion List ⑦ Bidder ID coB	EventID N Setid MDC Additional Event C T Q	will recent not grant nally invit ng. EXT Roun Bidder II	I ID of th ive notifi automat ted and r returns returns Private Ev D voss	e desired recipier ications for all eve tic event access. F registered in the S Buyer a 1 Event Format Buy rent Contacts	ents, but m For non-pu Supplier Po Event Type	REX
S N tl ir p	Create an E Note: The hem as ndividu participa Create an E Note: Eve Busi Public Eve Bidder Invita Select	e Conta ne OK b ne emai a recipi als mus ate in ev operations Event lers iness Unit AD ent ation List © Bidder ID coB voss	Event ID N Setid MDC Additional Event C Contact C C	will recent not grant nally invit ng. EXT Roun Bidder II ontacts	I ID of th ive notific automatic ted and r read nd 1 Version Private Ev D Voss	e desired recipier ications for all eve tic event access. F registered in the S Buyer a 1 Event Format Buy vent Contacts	ents, but m For non-pu Supplier Po Event Type	erely adding blic events, ortal to
S N tl ir p	Select the select the hem as ndividu participa articipa ( Supply Chain Create an E Invite Bidd Bus Bidder Invita Bidder Invita Select	e Conta ne OK bine emai a recipi als musi ate in ev operations Event lers inces Unit AD ent bidder ID cob voss ders	EventID N Setid MDC Additional Event C Contact C	will recent not grant nally invit ng. EXT Roun Bidder II ontacts	I ID of th ive notifi automat ted and r red and r Private Ev D voss	e desired recipier ications for all eve tic event access. F registered in the S Buyer 1 Event Format Buy rent Contacts	ents, but m For non-pu Supplier Po Event Type	erely adding blic events, ortal to REX REX
S N tl ir p	Select the hem as ndividu participa (Supply Chain Create an F Invite Bidd Buss Bidder Invite Bidder Invite Select	e Conta ne OK b ne emai a recipi als mus ate in ex operations Event lers liness Unit AD ent bidder ID COB VOSS ders	EventID N Setid MDC Additional Event C Contact C	will recent not grant nally invit ng. EXT Roun Bidder II ontacts	I ID of th ive notifi automat ted and r red and r Private Ev D voss	e desired recipier ications for all eve tic event access. F registered in the S Buyer a 1 Event Format Buy vent Contacts	ents, but m For non-pu Supplier Po Event Type	erely adding blic events, ortal to
	Select the select selec	e Conta ne OK b ne emai a recipi als mus ate in ev operations Event ters iness Unit AD ent bidder ID cOB voss ders Event Changes	Event ID N Setid MDC Additional Event C Contact C OK C	will recent not grant nally invit ng. EXT Roun Bidder II ontacts	I ID of th ive notifi automat ted and r r r Private Ev D voss	e desired recipier ications for all eve tic event access. F registered in the S Buyer a 1 Event Format Buy rent Contacts	ents, but m For non-pu Supplier Po Event Type	RFX x y Contained
S N tl ir p	Select the select the hem as ndividu participa (Create an E Invite Bidd Bidder Invite Bidder Invite Select Select Select Select Select Select Select Select Select Select	e Conta ne OK b ne emai a recipi als mus ate in ev event ters iness Unit AD ent ation List © COB COB VOSS ders Event Changes rent Overview	EventID N Setid MDC Additional Event C Contact CC	will recent not grant nally invit ng. EXT Roun Bidder II ontacts ancel Refresh	I ID of th ive notifi automat ted and r e nd 1 Version Private Ev D voss	e desired recipier ications for all eve tic event access. F registered in the S Buyer a 1 Event Format Buy yent Contacts	ents, but m For non-pu Supplier Po Event Type	RFX Control to Control to C