



bids&tenders

FAQ for bids&tenders Pro

Have you seen Pro?

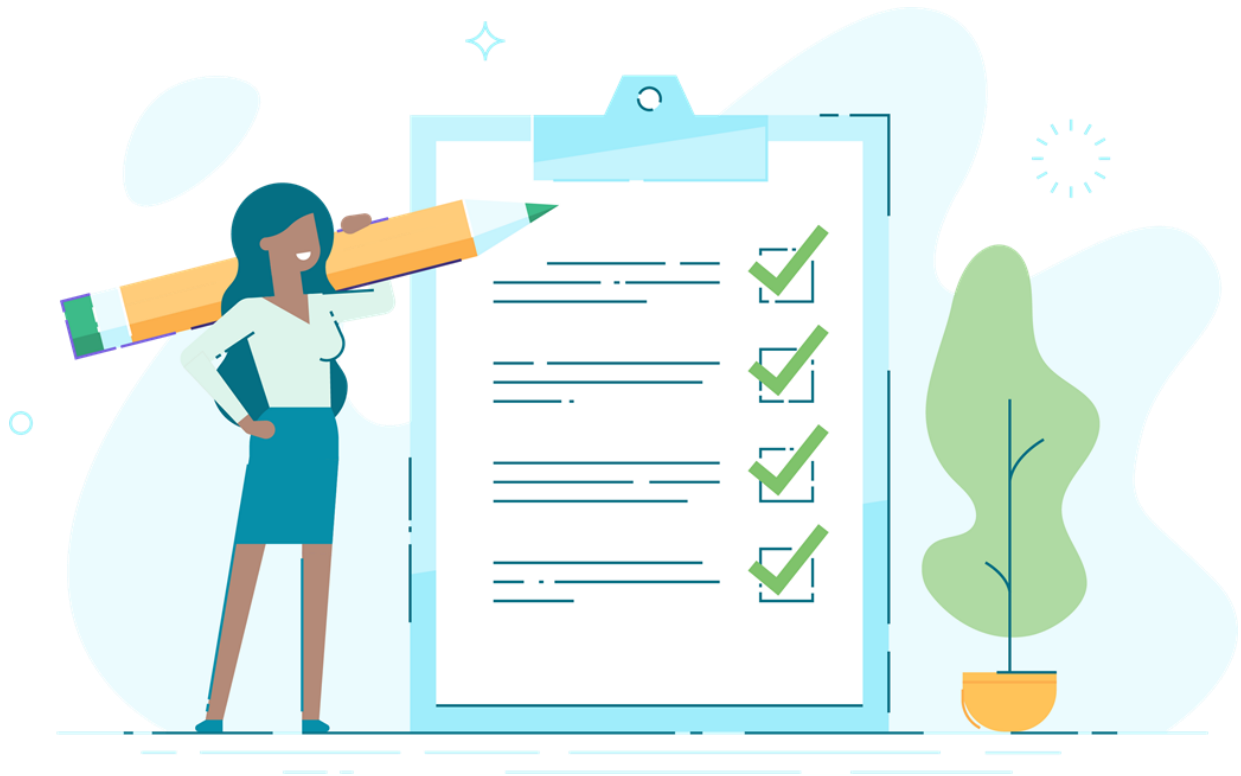
Here is a short sneak peak video of the new bids&tenders Pro.

https://youtu.be/uK7R_Dtn1Wo



Things to know

- All your data is already on Pro for you to access.
- Existing SSO connections needs to be re-established on Pro even if it is connected on legacy (no charge to re-establish).
- Pro has the ability for us to push important communication to clients directly through the interface.
- So many updated and new features available.



Things to know

Browser Requirements

- Chrome is the recommended browser for this platform
- Other supported platforms are Firefox, Edge and IE (most up to date version)
- 1400 or higher resolution is recommended for clear picture.





**System
Changes**

New Terminology

Legacy Terms

- Vendor
- Plan taker
- Bid / Contract
- Purchasing Representative
- Audit
- Email Log
- Bid Meeting/Site Meeting
- Tables
- Notes
- Reminders

Pro Terms

- Supplier
- Registered Supplier
- Project
- Procurement lead
- Activity Feed
- Message Centre
- Project Meeting
- Forms
- Comments
- Tasks



What's a Project?

In pro everything is inside of a project. A project has phases:

- Build - Source
- Build - Contract
- Build – Source - Contract

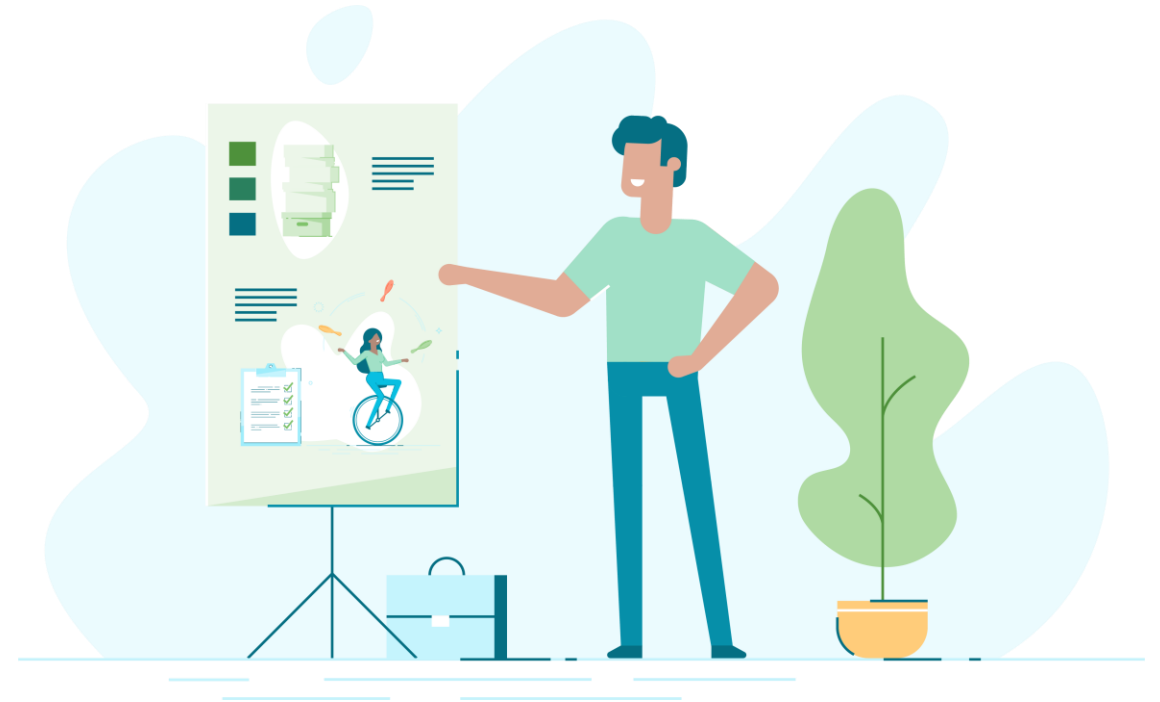


What's a Project?

Build This is where you setup your project. Please review the settings prior to publishing to ensure everything is correct. You can change these settings as many times as you need prior to the publishing of the project.

Source This is where the tasks and activities happen after the Procurement Opportunity has been published and once it has been closed.

Contract This where the tasks and activities happen once a Procurement Opportunity has been Awarded.





Support and
More

Community Hub

An online community forum, where we can connect with each other as often as we need to!

- Release updates
- Announcements and enews
- General discussion
- Feature requests
- Buyer Support Portal



<https://bidsandtenders.zendesk.com/hc/en-us>

Training

Free Options:

- WalkMe (guidance built into the app)
- Buyer Support Portal
- Pre-recorded Videos

Paid Training:

- Live Online Learning
- In-Person Onsite

