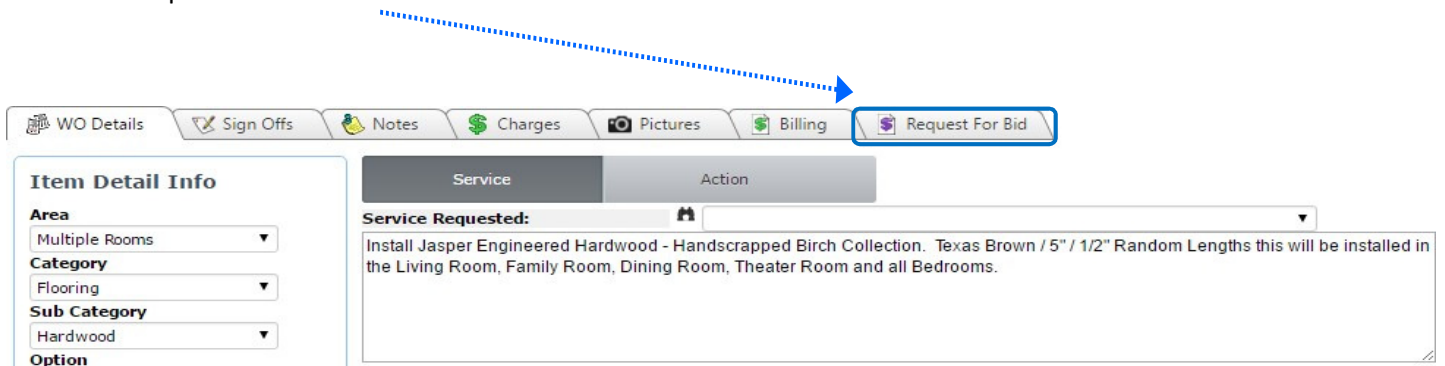


## Request for Bid

To use the Request for Bid feature the Administrator will need to turn the feature on by going to Tools → System Setup → Settings → in the middle of the page Other Options at the bottom check the Show WO Request for Bid box → click

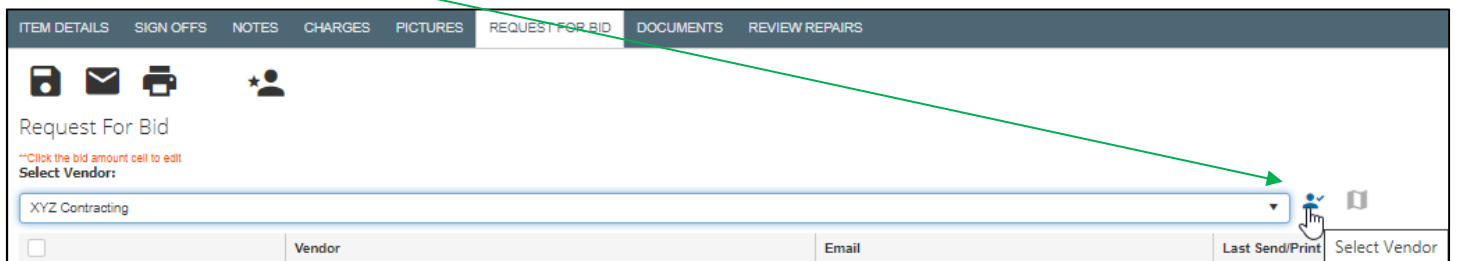


Within the work order ensure that all the details are applied to define the work that is being requested to be performed. Select the Request for Bid tab

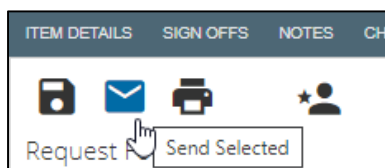


Begin to type the Vendor you would like to receive a bid from. Once the Vendor has been selected click the **Select Vendor** icon. Continue until all Vendors have been selected.

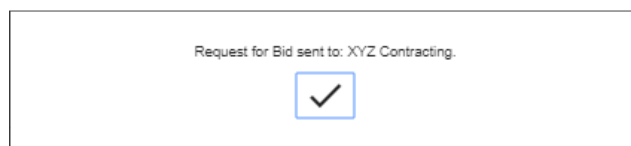
**Note:** You can request a bid from as many vendors as you desire.



Check the box next to Vendor to select all the Vendors and then click the **Send Selected** icon. This will send a Request to Bid email with the Work Order attached for their review.



You will then receive the following pop up confirming and as the sender you will receive the same email the Vendor receives





## Request for Bid

### Sample of the Email:



### Sample of Request for Bid:

### Request For Bid

<b>To</b> XYZ Contracting Email: dlabrosse@verisk.com	<b>Owner Information</b> Trevor Cooper (Primary) dlabrosse@verisk.com Betty Cooper (Secondary) 123 Stone Rock Road Madison, WI 53700 Lot/Block: 9999 Time to Call: after 3 pm Tenant/Renter: No	<b>Item</b> No: MHB1014-001 Type: Warranty Job ID: 99-99 <hr/> <b>Project</b> Eton Hills <hr/> <b>Site</b> Madison Home Building
---	---	---

Open	Review	Repair	Due	Completed	War. Exp
05/05/2020		05/06/2020 10:00 AM - 05/06/2020 12:00 PM	05/07/2020		10/02/2020
Area	Category/Sub Category		Supervisor	Staff	
Basement-Family Room	Drywall - Wall		Rhonda Herndon	Debra LaBrosse	

Please respect our homeowners; please don't park in the driveway. If you are working outside, please notify the homeowner prior to your arrival of the scheduled appointment. NOTE: All work must be completed on time.  
If you cannot complete work on time, please call our customer service department at (800) 000-0000.

**Service Requested**  
 Cracked

**Bid Amount**

Vendor \_\_\_\_\_ / / \_\_\_\_\_  
DATE  
SIGNATURE REQUIRED

## Request for Bid

The **Last Send/Print** column will display the date & time the Bid was last sent.

ITEM DETAILS	SIGN OFFS	NOTES	CHARGES	PICTURES	REQUEST FOR BID	DOCUMENTS	REVIEW REPAIRS												
<div style="font-size: 10pt; margin-bottom: 5px;">Request For Bid</div> <div style="font-size: 8pt; color: red; margin-bottom: 5px;">**Click the bid amount cell to edit</div> <div style="font-size: 8pt; margin-bottom: 5px;">Select Vendor:</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="width: 100%;" type="text"/> </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 8pt;"> <thead> <tr> <th style="width: 30px;"><input type="checkbox"/></th> <th style="width: 20%;">Vendor</th> <th style="width: 20%;">Email</th> <th style="width: 15%;">Last Send/Print</th> <th style="width: 15%;">Bid Amount</th> <th style="width: 10%;">Canceled</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>XYZ Contracting</td> <td>dlabrosse@verisk.com</td> <td style="border: 2px solid red;">05/14/2020 01:45 PM</td> <td style="border: 2px solid green;">\$0.00</td> <td>No</td> </tr> </tbody> </table>								<input type="checkbox"/>	Vendor	Email	Last Send/Print	Bid Amount	Canceled	<input type="checkbox"/>	XYZ Contracting	dlabrosse@verisk.com	05/14/2020 01:45 PM	\$0.00	No
<input type="checkbox"/>	Vendor	Email	Last Send/Print	Bid Amount	Canceled														
<input type="checkbox"/>	XYZ Contracting	dlabrosse@verisk.com	05/14/2020 01:45 PM	\$0.00	No														

When a Vendor replies with a Bid Amount apply that amount within the **Bid Amount** column. Check the Vendor box to resend the Bid with the Bid amount (if applicable).

The Request for Bid history is documented in Action Taken History on the Work Order, Job Correspondence and Sub/Tech Correspondence.

### **Action Taken History:**

ITEM DETAILS
SIGN OFFS
NOTES
CHARGES
PICTURES
REQUEST FOR BID\*\*
DOCUMENTS
REVIEW REPAIRS

📁
📱
+
✉
👤?
👤?
👤
✉
🖨
🗑

Item Details

**Area**

Basement-Fa... ▾

**Category**

Drywall ▾

**Sub Category**

Wall ▾

**Option**

▾

**Determination**

▾

**Vendor** ⓘ

+ - Project Vendor

± - Job Vendor

Barney Rubble ▾

**Vendor Acceptance:**

Not Sent

**Service Requested:** Cracked ▾

🔍

Cracked

📅

**Customer Request:** 🔍

**Action Taken:** ▾

🔍

📅

**Action Taken History:** 🔍

05/14/2020 01:45 PM Request for Bid sent to: XYZ Contracting - Sent by Employee: Debra LaBrosse.

COMMENTS BY: (Trevor Cooper, 05/05/2020 02:20 PM) comments here

Scheduled for Review changed: Original TBD to . New 05/06/2020 10:00 AM to 05/06/2020 12:00 PM. 0 - 5/5/2020



## Request for Bid

### Job Correspondence:

Detail	Owners (2)	Lists (15)	Schedules	Tasks (9)	Plan	Vendors	Costs**	Correspondence (26)	Documents & Pics (7)	
Document Merge	Quality Processes (3)	Equipment	Change Log							
Type:	<input type="text"/>	Status:	<input type="text"/>	By:	<input type="text" value="Choose an Employee"/>	<input type="text"/>				
Search:	<input type="text" value="Subject"/>	<input type="text" value="Contains"/>	<input type="text"/>							
When	Type	Subject	Initiate	With	CC	Status	Task	By	Link	Job ID
05/14/2020 01:45 PM	Text	Sent to Vendor Request for Bid: Item MHB1014-001	To	dlabrosse@verisk.com			No	Debra LaBrosse		99-99

### Sub/Tech Correspondence:

Vendor Detail	Employees (1)	Insurance	Billing	Tasks	Correspondence (7)	Documents & Pics (1)				
Type:	<input type="text"/>	Status:	<input type="text"/>	By:	<input type="text" value="Choose an Employee"/>	<input type="text"/>				
Search:	<input type="text" value="Subject"/>	<input type="text" value="Contains"/>	<input type="text"/>							
When	Type	Subject	Initiate	With	CC	Status	Task	By	Link	
05/14/2020 01:45 PM	Text	Sent to Vendor Request for Bid: Item MHB1014-001	To	dlabrosse@verisk.com			No	Debra LaBrosse		