Bid Submission in Bidx.com | Contractor Guides

Introduction

How is the bidding process changing?

Using Bidx.com for bid submission is a modernized approach to bidding. It moves the entire bidding process online, eliminating the need to install software. As a result, AASHTOWare Project Bids™ will no longer be used, and the process of downloading EBSX files is eliminated. When you submit bids, bid forms are accessed directly from the Proposal pages in Bidx.com.

Benefits of Online Bidding

- A smooth bidding experience with online bid completion and submission.
- Works on all modern operating systems and browsers (including Mac OS).
- No more installed bidding software (AASHTOWare Project Bids™).
- Enhanced workflow with upfront bidding requirements.

In this contractor toolkit, you'll find educational resources that will help you learn the new bidding workflows with Bidx.com.

Key Management

When you submit a bid for the first time, you'll need to **create a security key** and install your existing Infotech® Digital ID™ in your browser's keystore. The processes for creating your Digital ID and requesting to bid won't change.

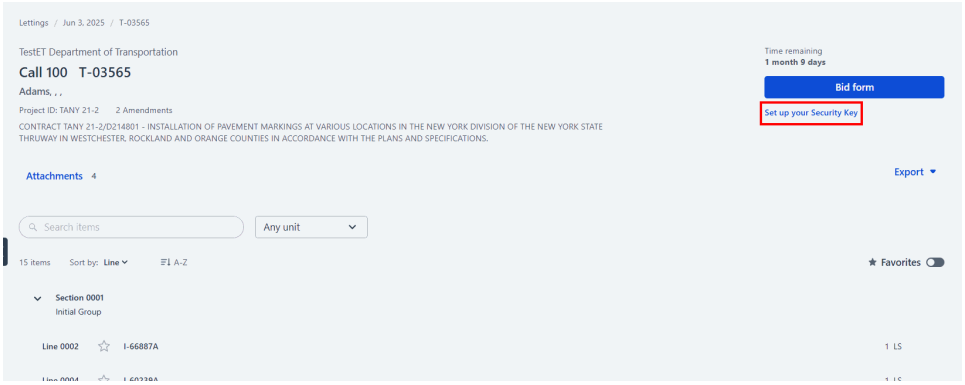
Creating a Security Key

A security key lets you save and restore draft bid data. This key can be used on any browser and computer, meaning you can install it anywhere to access your saved progress.

Basic and Pro users can create their security key directly from the proposal page or within the bid form.

Set up your Security Key

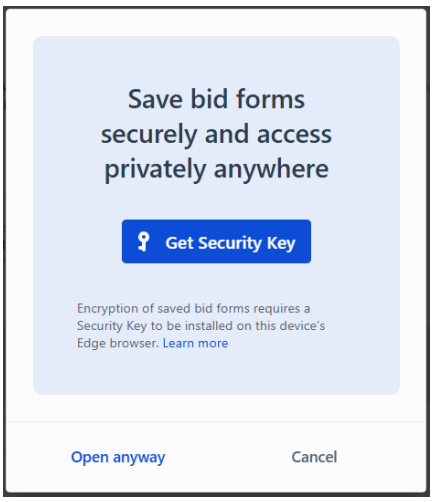
Step 1:



From the Proposal Page, click the **Set up your Security Key** link under the Bid form button.

Step 2:

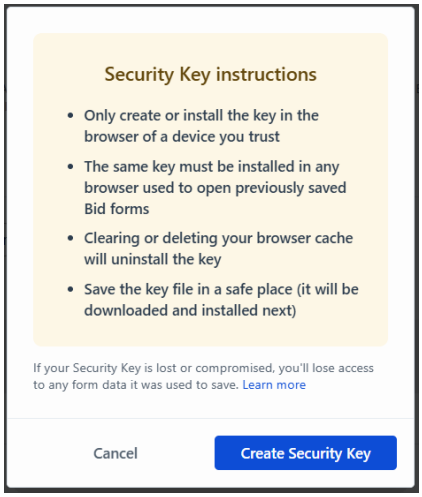
Get Security Key



A new window will appear. Click **Get Security Key**.

Step 3:

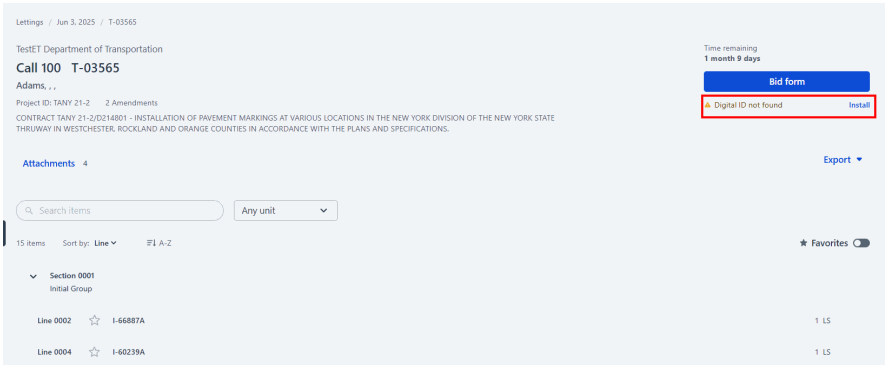
Create Security Key



After you read the security key instructions, click **Create Security Key**. The security key will be automatically downloaded to your device.

Step 4:

Digital ID not found



After verification, you may see a message below the Bid form button stating **Digital ID not found.** To proceed with the verification process, follow the steps outlined in the following section on Digital IDs.

Summary

After setting up your security key, your bid form data will be securely saved in the Bid Express service. Note that **clearing or deleting your browser cache will remove the security key**.

Be sure to store the security key file in a secure location on your computer.

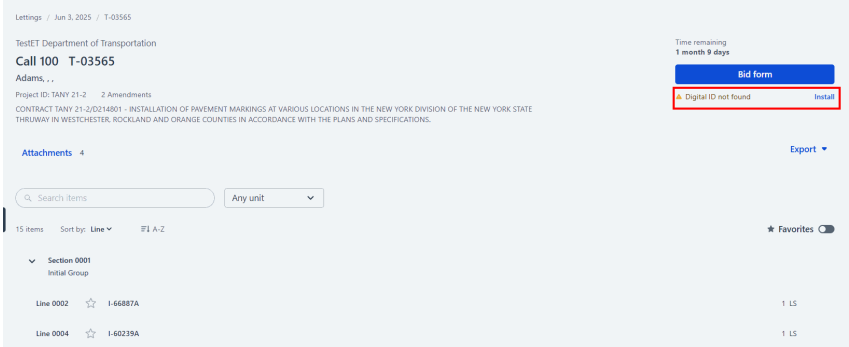
Digital ID™

Install your Digital ID™

When you submit a bid for the first time, you'll need to install your existing Infotech® Digital ID™ in your browser's keystore.

Step 1:

Digital ID not found



When you submit a bid for the first time using Bidx.com, you'll get a **Digital ID not found** warning displayed below the Bid form button. To initiate the Digital ID verification process, click the **Install** link.

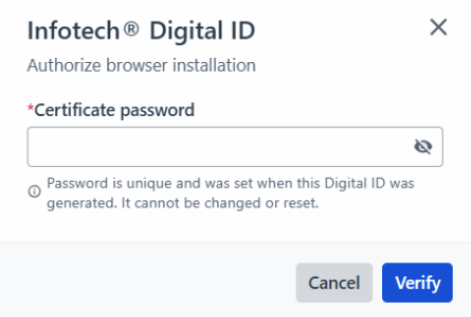
Step 2:

Open your existing Digital ID

Navigate to the file location containing your existing Digital ID security certificate (the file will have a **.cer** extension). Select the file and click **Open** to proceed.

Step 3:

Verify your Digital ID

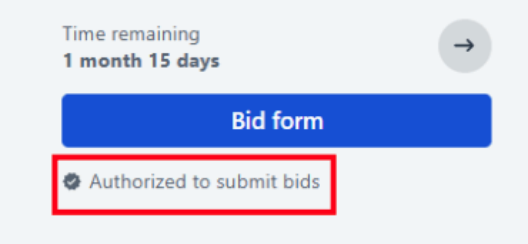


A modal window will open to enter the Certificate (Digital ID) password. Enter the password and click **Verify**.

Note: This is a unique password that was set when the Digital ID was generated. It can't be changed or reset.

Step 4:

Ready to Submit Bids!



Once the Digital ID has been verified, you'll see a label that says **Authorized to submit bids**.

Summary

After successfully importing your Infotech Digital ID into your browser's local keystore, you're ready to submit bids securely.

Bid Forms

Bidx.com has introduced streamlined workflows for viewing and submitting bids. With browser-based bidding, you can conveniently enter your bid information directly in Bidx.com.

In this guide, you'll learn how to:

- Access the bid form
- Navigate the bid form menu
- Complete your bid

Access the Bid Form

Introduction

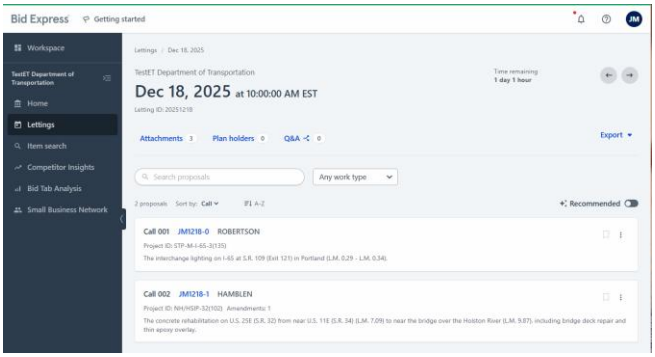
With the move to browser-based bidding, your experience will be streamlined for seamless bid completion and submission directly in Bidx.com. This means:

- No more downloading EBSX files
- No need for installed bidding software (AASHTOWare Project Bids)

Now, you can easily access and fill out the bid form directly on Bidx.com. You'll find this process is still familiar, but now with some exciting new features to make your bidding experience even smoother!

Step 1:

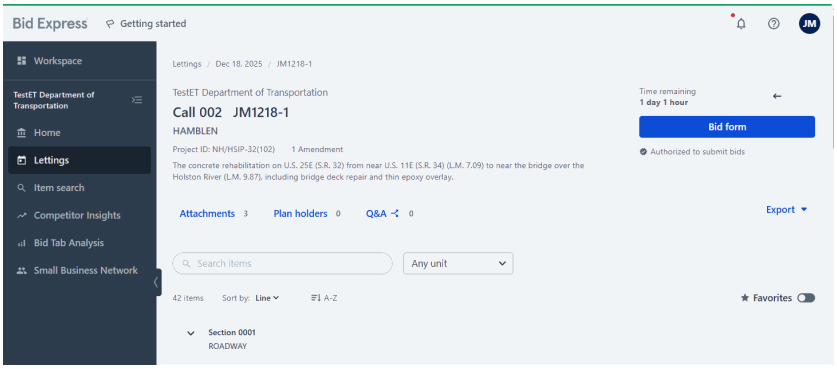
Find a Proposal



On the Lettings page, you'll see each proposal within the letting. Select the **Proposal ID** link to view the proposal and access the bid form.

Step 2:

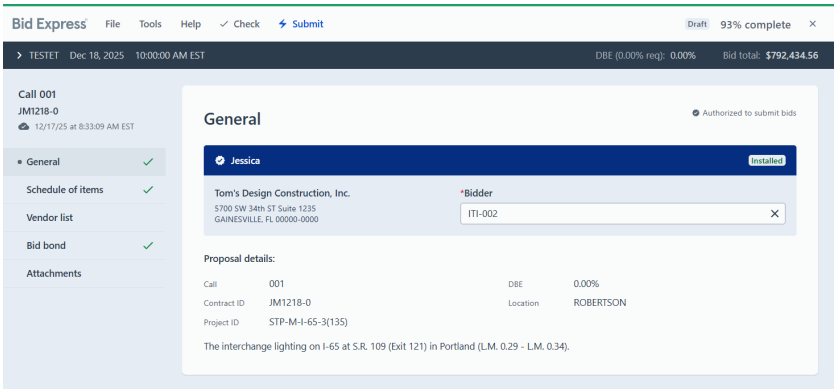
Access the bid form



Access the bid form on the Proposal page by clicking the **Bid Form** button.

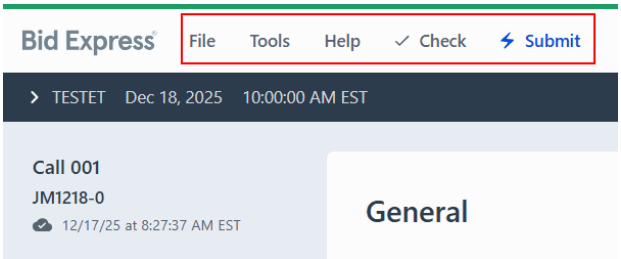
Below the bid form button, you'll find a message confirming whether you're authorized to submit bids online. You can learn more about this in the Key Management section of this training.

Complete and submit your bid



You now have direct access to complete and submit your bid directly in Bidx.com! You may notice that it feels very familiar, just like the bid form in AASHTOWare Project Bids, but with some new features to make your submission process even smoother. In the upcoming sections, we'll explore these new features and discover all the essential information needed to successfully submit your bids on Bidx.com.

Understand the Bid Form Menu Bar



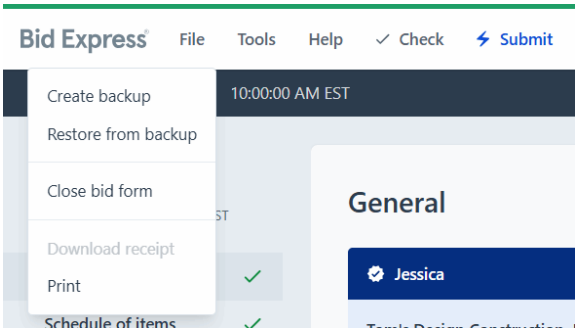
Bid Form Menu Bar - Left Side

On the left side of the Bid form menu bar, you'll see the following options: **File**, **Tools**, **Help**, **Check**, and **Submit**.

File Menu

When you click **File**, it expands an action menu offering the following essential options for managing your bid form.

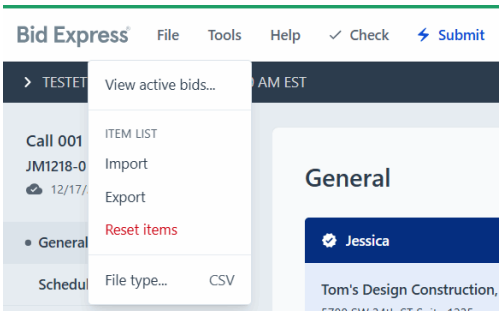
- **Create Backup**: Save a backup file of your current bid form to prevent data loss.
- **Restore from Backup**: Open a previously saved backup file to recover your bid form data.
- **Close Bid Form**: Exit the bid form and return to the Proposal page.
- **Download Receipt**: After successfully submitting a bid, you can download a receipt, which will also be emailed to the account holder. Alternatively, you can select the **Receipt** button located in the upper right-hand corner of your bid form.
    - *This option is only available after you've submitted a bid.*
- **Print**: Print the complete item list, including site, DBE, bid bond information, and any additional folders or forms set up by the agency.
    - *Note*: attachments will not be printed.



Tools Menu

When you click **Tools**, it expands an action menu offering the following essential options.

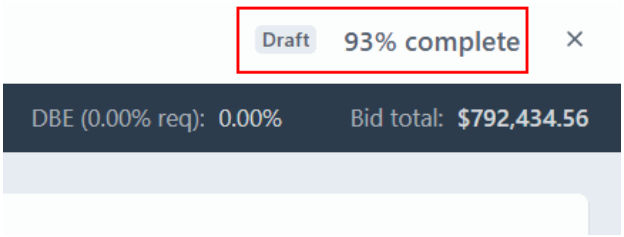
- **View Active Bids:** View your submitted bids for active lettings.
    - *This option is only available if you have active submitted bids.*
- **Item List** options
    - **Import:** When unit prices are imported, the system updates the proposal according to line numbers. Note that it doesn't verify whether the imported contract ID matches the proposal's contract ID.
    - **Export:** The item list is exported in the default file type selected using Tools > File type.
    - **Reset Items:** This option resets the unit prices entered in the Schedule of Items tab.
- **File Type (CSV):** Set the default export format for proposals. Acceptable formats include column-separated, comma-separated, and tab-separated.



Help, Check, Submit

- **Help:** This option opens the Bidx.com Knowledge Center in a new tab. You can browse help articles for assistance.
- **Check:** Use this feature to review your bid for any errors. More details are provided in the Check Your Bid module of this training.
- **Submit:** Click here to submit your bid. Further information can be found in the Bid Submission module of this training.

Bid Form Menu Bar - Right Side



On the right side of the Bid form menu bar, you'll see the **status** of the bid form and the **percent complete**.

Bid Form Status

The status indicator on the bid form will display: **Draft**, **Invalid**, **Submitted**, or **Replacement**. Understanding these statuses is crucial for managing your bids effectively and ensuring you remain aware of the current state of your submissions.

- **Draft**: indicates that the bid is still being worked on and hasn't been finalized and submitted yet.
- **Invalid**: indicates there are errors or issues that may need to be addressed.
- **Submitted**: confirms that the bid has been successfully submitted for consideration.
- **Replacement:** replace your active bid with the current contents of your bid form.

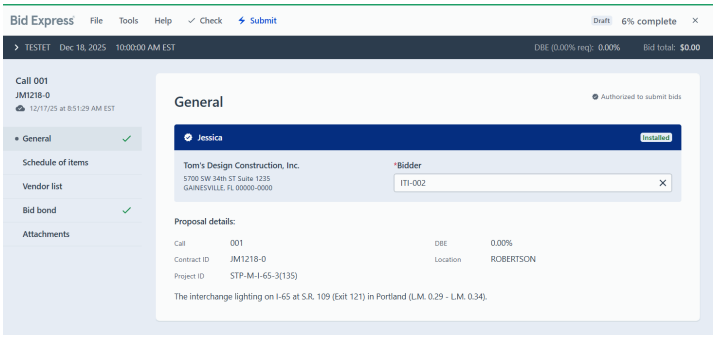
Percent Complete

The bid form completion percentage indicates how much of the form has been filled out. This metric helps you track your progress and ensures that you're aware of the remaining sections that need to be completed before submission.

Complete your bid

Ready to start filling out your bid?

Each proposal's bid form on Bidx.com may be set up differently, depending on your agency and settings. The following sections cover best practices and the typical actions and bid form organization you'll see most often.

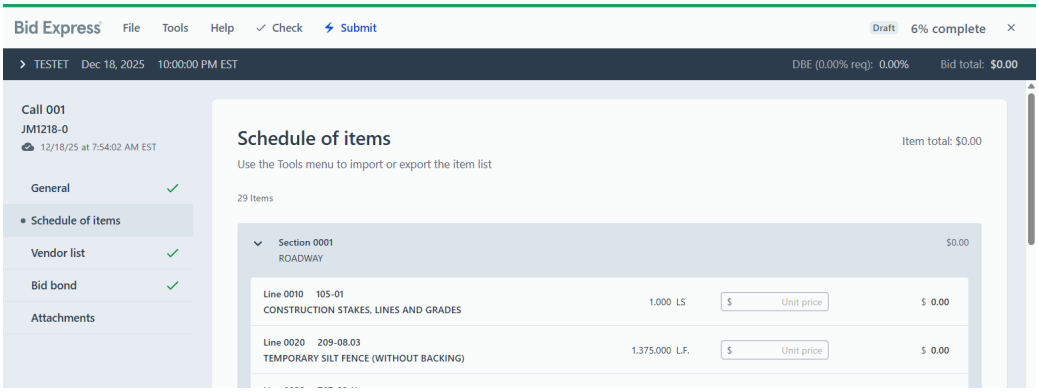


General tab

The **General** tab of a proposal bid form displays proposal details such as the Contract ID, Project

ID, Amendment count, and Location. These fields are set by the agency and can't be edited.

You'll be required to select your **Bidder ID** before submitting a bid.



Schedule of Items tab

The **Schedule of Items** tab lists the items of the proposal. The agency groups items into sections that include the quantity and unit. The agency can set items and sections to be alternate or optional, and can set minimum and maximum limits or fixed prices on items.

The search bar located above the list of items lets you search for and find items by entering the item description, line number, or item code. You can also use the drop-down boxes to filter the items by type or unit.

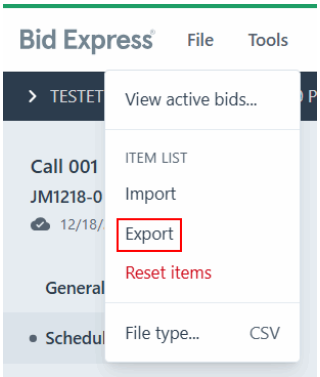
Enter the unit price for each item in the designated box in the **Unit Price** column. The extension price is automatically calculated by multiplying the unit price and the quantity, shown as the **Item Total** at the top of the grid and per individual line item.

You can also export the item list to calculate and determine item prices outside of the bid form. Once complete, import your calculated unit prices back into the bid from. This feature is useful for estimating bid prices using third-party software.

Export

The file is exported in the default format you designated from the Tools menu.

- From the bid form, select Export from the Tools menu. The proposal file will download to your computer.
- Navigate to the download location on your computer. Don't change the name of the file. You can change the type of file if necessary.



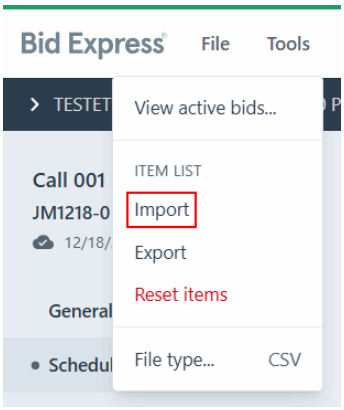
Import

When unit prices are imported, the system updates the proposal based on line numbers. *It does not verify if the imported contract ID matches the proposal's contract ID*.

The unit prices in the import file will be overridden by any existing unit prices in the proposal. To successfully import your proposal's pricing information, the line numbers and item numbers must match the original exported file. If they don't, these item prices won't import. The import process won't override a unit price if the line number or item number is missing.

The file is imported with the format you selected for the Item List File Type.

- From the bid form, select Import from the Tools menu.
- Navigate to the file's location and click Open. If necessary, change the file type.
- A success window displays a message stating the number of items that were successfully imported. Click Done to return to the bid form.



Sites tab

If the agency is using **cost plus time bids**, you'll see the **Sites** tab. For each Cost Plus Time site, you must enter a value in the **Days** field. This will be multiplied against the Cost Per Day and become the time cost of your bid.

- ***Note**:* Your agency may rename this tab and its columns, but the functionality remains the same.

Cost Plus Time bidding consists of traditional work items along with a time component, which together represent the total contract amount typically used in low bid determination. The time component is the Cost Per Day multiplied by a bid of the total number of calendar or available days required to complete a milestone. Low bid determination is typically based on the sum of both the time and item components. Both the work items and the time components appear in the bid proposal.

You must enter the number of days you want to bid in the Days column for each Cost Plus Time site.

- *Note:* If you can't edit the field, the site is listed for informational purposes and doesn't require you to enter a value.

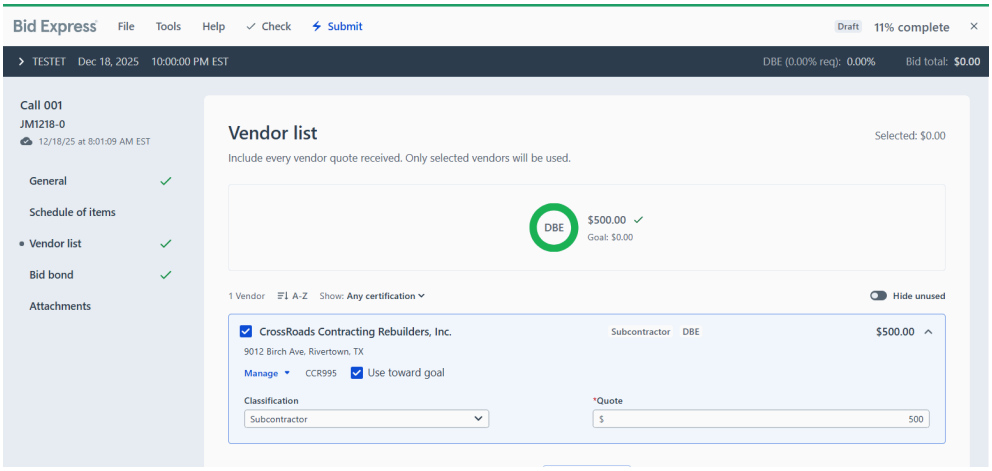
At the bottom of the grid, two totals are displayed: a Site Total and a Bid Total. The Site Total is the time component of your bid. The Bid Total is the sum of your bid items' extension prices and the site total.

Vendor List tab

The **Vendor List** tab lets you enter all vendor quotes and track suppliers, distributors, subcontractors, and manufacturers that are certified as disadvantaged businesses. This includes:

- DBE (Disadvantaged Business Enterprise)
- MBE (Minority Business Enterprise)
- WBE (Woman-owned Business Enterprise)

Learn more about best practices for tracking this in the **Manage Vendors** section of the training.



Bid Bond tab

The **Bid Bond** tab lets the contractor verify a paper or electronic bid bond to be included with the bid submission.

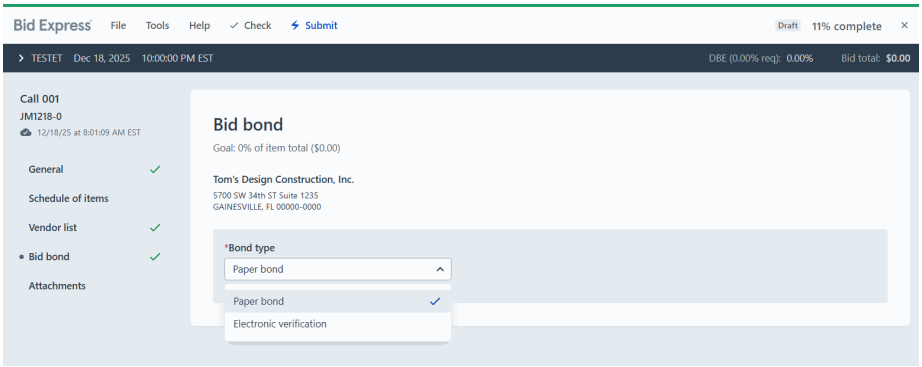
The agency can customize the information needed and choose how it's verified. If the agency enables electronic bond verification, select the appropriate Registry (Surety 2000 or Tinubu Surety), enter the Bond ID, and select Verify.

- *Note:* Electronic bond verification is independent from bid submission.

The **bond goal** at the top of the Bid Bond tab is a percentage of the bid set by the agency and can be electronically verified with a surety agency. When a bid bond is electronically verified, the bid bond percent is compared to the bond goal to check that it has been issued for at least the set minimum percent.

If the surety company has issued a maximum bond amount, this will be compared against the calculated bond goal dollar amount when the bid bond is verified. If the bid total is changed after verification, the Bid component will recheck the maximum bond amount against the bond goal amount. When you check or submit your bid, this will cause an error if the updated bond goal exceeds the maximum bond amount.

Bid errors don't always prevent you from submitting a bid, but the agency may reject bids that contain errors.



Custom agency tabs

The agency can request custom tabs as part of their bid form. These tabs are not covered in this training, but they may include fields that require explanations.

Attachments

When the agency requires you to include attachments or supporting documents with your bid, you'll see a **Browse** button to navigate to the location of the document file and a **Preview** button to see the uploaded document. Depending on your agency setting, you may be required to preview the document and verify that it's the correct one.

There are no file size attachment limitations.

Click **Browse**, select the file, and click **Open**. The Bid component securely uploads and encrypts the attachment until the agency views the bid. You may see a notification message in the lower left corner that the file was uploaded successfully.

Click **Preview** to see the document you uploaded. This may be required by the agency.

If the agency sets the option to require document verification, after you view the document, click the checkbox to verify that it's the correct document.

The attachment is not considered part of your bid until the file upload is successful.

Vendor List

The **Vendor List** tab -- which may be customized by the agency to display different text and include additional fields -- tracks information for all distributors, suppliers, subcontractors, and manufacturers. This tab replaces the DBE list tab used in the AASHTOWare Project Bids Bid component.

This tab lets agencies track DBE (Disadvantaged Business Enterprise) commitments with subcontractors and determine if an entry should be counted towards the DBE goal. It also displays the total DBE amount and indicates whether it meets the proposal's goal.

The total DBE commitment and the DBE requirements are displayed in both dollar values and as a percentage. You'll see an error message if you check or submit your bid without meeting the requirement.

Bid errors don't always prevent you from submitting a bid, but the agency may reject bids that contain errors.

Add a Vendor

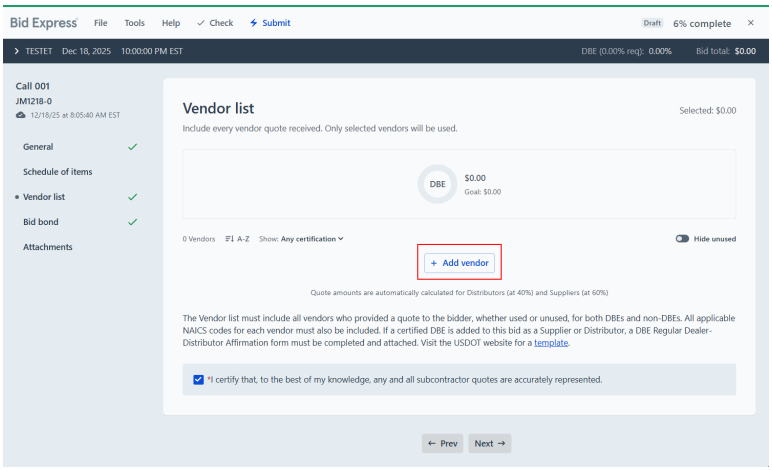
Introduction

The agency can format the Vendor List section to fit its needs, so you may not see the same options described in this section.

To get started, navigate to the Vendor List tab.

Step 1:

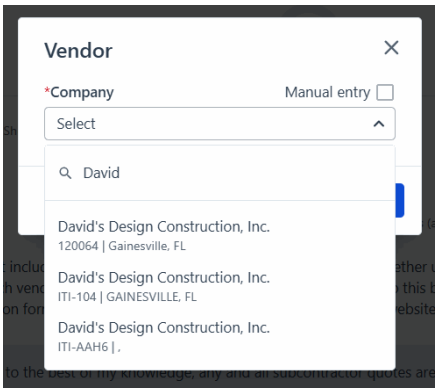
Add vendor



Click the **+Add vendor** button at the bottom of the page.

Step 2:

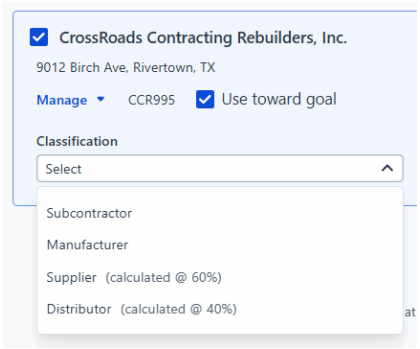
Select vendor



From the **Company** drop-down menu, type the company name or bidder ID to search for and select the vendor. Select the **Manual entry** checkbox and fill out the required fields to add a vendor that's not in the **Company** drop-down menu. Click **Save**.

Step 3:

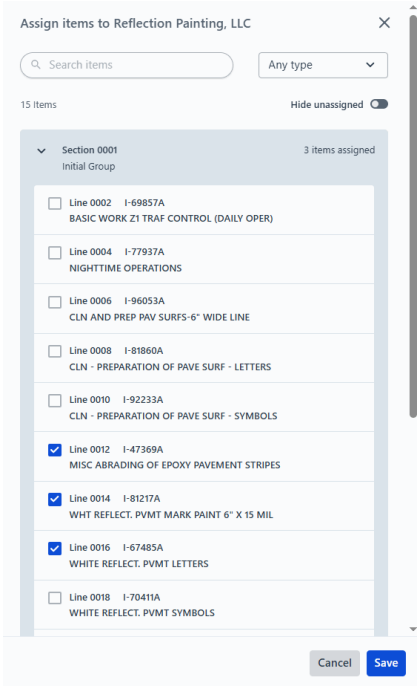
Select classification



From the **Classification** drop-down menu, select the appropriate category for the vendor: subcontractor, manufacturer, supplier, or distributor.

Step 4:

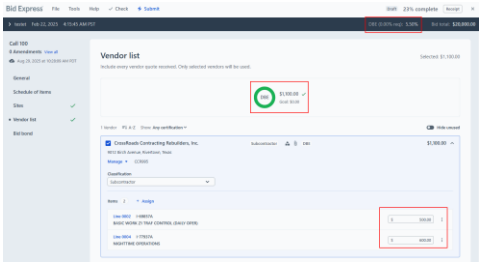
Assign items



To assign items to the vendor, click the **+Assign** button. A pop-up window will then display a list of proposal items. Select the checkbox next to each item you want to assign to this vendor, and then click **Save** to confirm your selections.

Step 5:

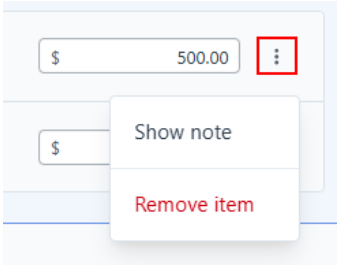
Enter quotes



Enter the dollar amount of the quote for each item row. The fields for the DBE goal amount and percentage at the top of the page will automatically update. When the total of the entered quotes meets the goal, the DBE circle icon will turn green.

Step 6:

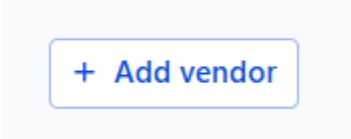
Manage assigned items



To add a note or remove an item, click the action menu located next to the quote field and select your preferred option from the list.

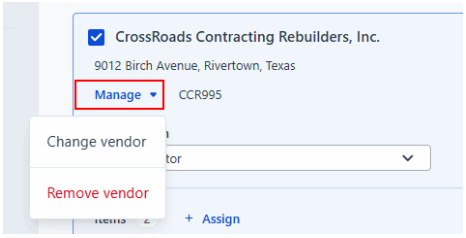
Step 7:

Add more vendors



Repeat the process to add another vendor.

Manage a vendor entry



Change or Remove Vendor

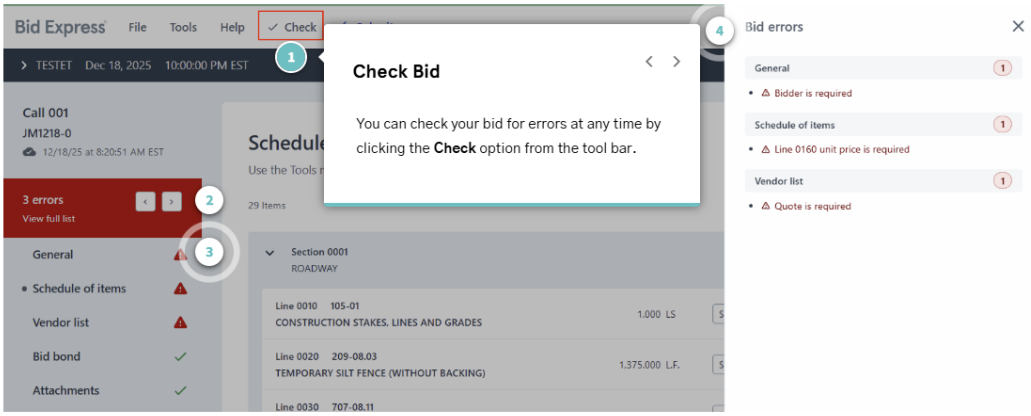
You can update the information for a vendor already added to your bid.

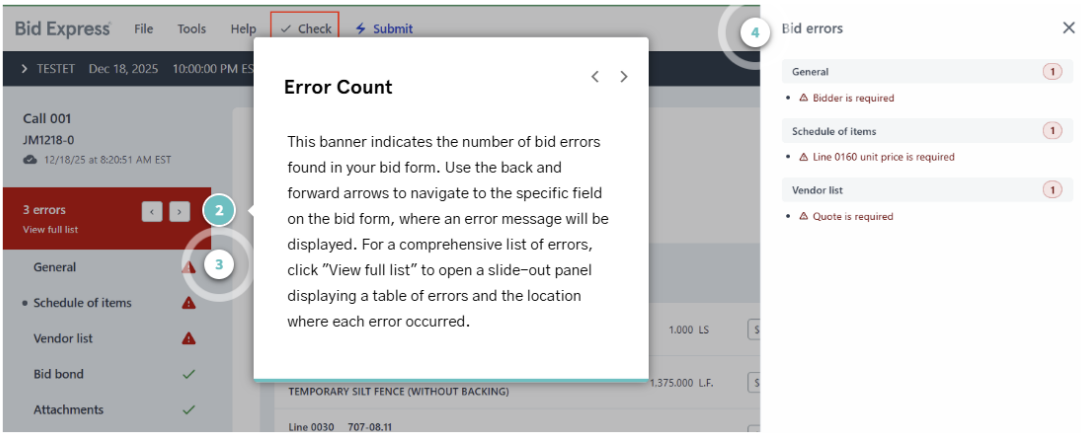
From the Vendor List tab, you can add a new vendor or remove an existing one. Select a vendor from the list, then click the **Manage** action menu. From there, choose **Change vendor** to add a new vendor or **Remove vendor** to remove the current one.

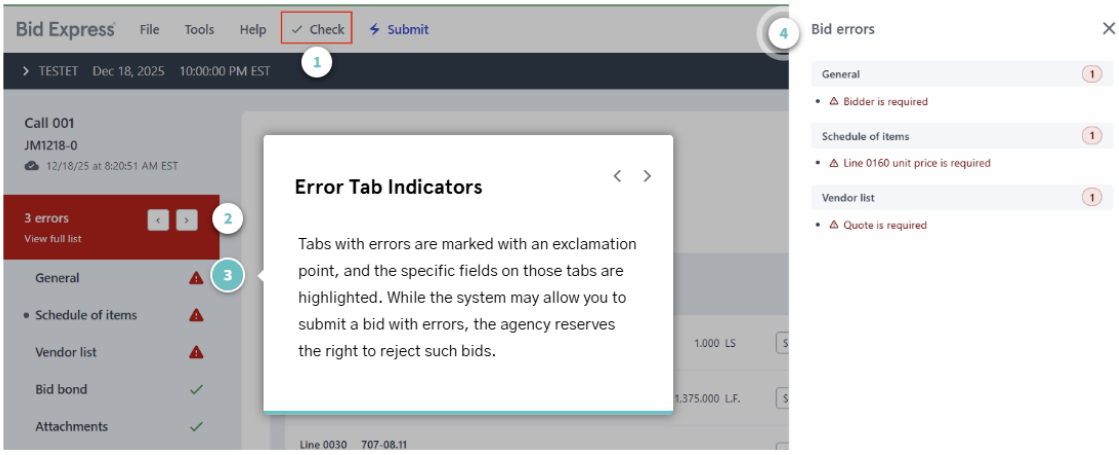
Check your Bid

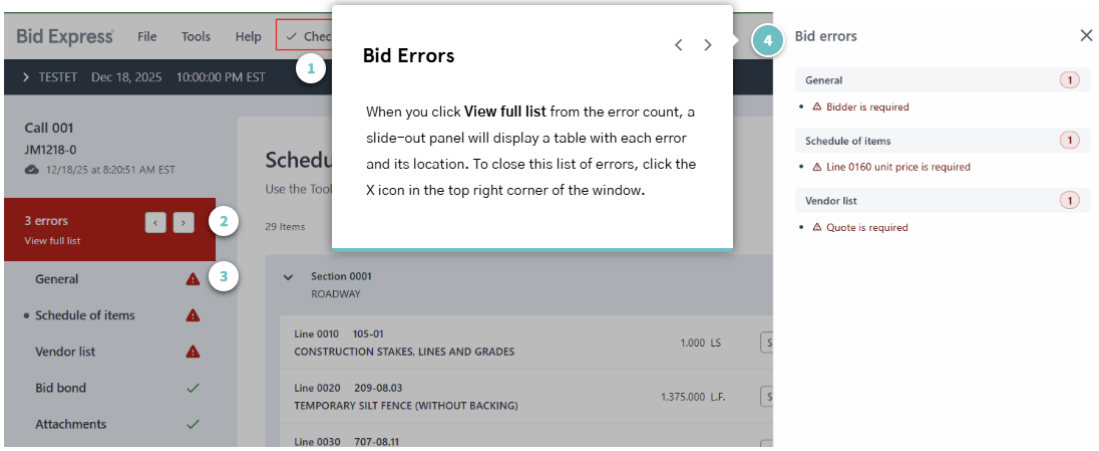
The Check Bid feature serves as a user-friendly tool that helps you quickly and efficiently identify and correct any errors in your bid. You can check your bid for errors at any time by clicking the check mark icon in the menu bar.

Error checking









After correcting all errors, the red warning icons will disappear, and a green checkmark icon will appear next to the tab, indicating that there are no errors present.

Amendments

When an agency issues an amendment, the changes are automatically applied in Bidx.com. Contractors no longer need to download and manually apply the amendment to their bid submission.

Viewing an Amendment

If an agency amends a proposal for which you've submitted a bid, you'll be notified via email. Log in to Bidx.com to review the amendment, apply any changes, and resubmit your bid.

Step 1:

Identify Invalid Bids

On the List of Lettings, the letting row is highlighted with an exclamation icon next to your submitted bid count. This indicates an invalid bid due to changes made by the agency. Click the Letting Date to view the proposals associated with the letting and ensure everything remains on track by resubmitting your bid.

Step 2:

Locate the Amended Proposal

On the Lettings page, you'll see an amendment message banner on the proposal row along with an invalid status indicator. This signifies that the agency has made changes to the proposal. Select **Open the bid form** to view the amendment changes and resubmit your bid.

Step 3:

Review the Amendment

Under the **Call Order Number**, you'll see the count of Amendments made to the proposal. Click **View all** to see the changes made by the agency.

Step 4:

Resubmit Your Bid

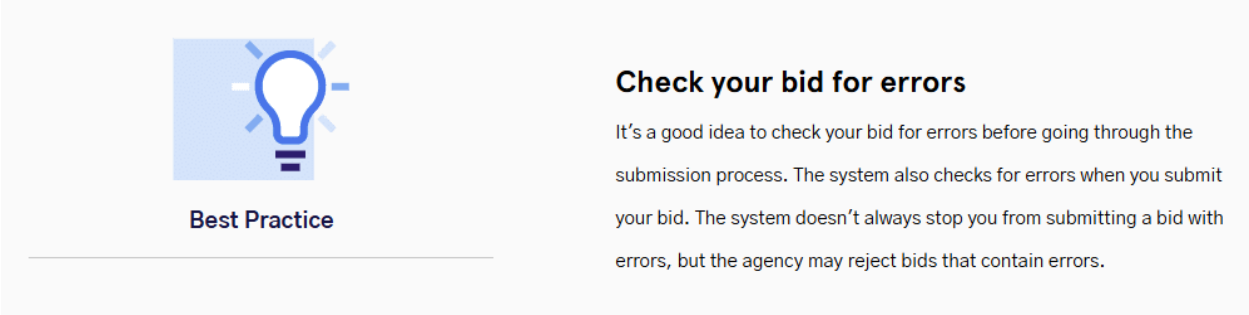
Apply any updates to your bid form and click **Submit**. The bid form status will change from Invalid to Submitted, confirming that your bid has been successfully resubmitted.

Key Takeaways:

By following these steps, you can efficiently handle amendments to proposals and ensure that your bids remain valid and up-to-date. Stay proactive and keep track of notifications to maintain a smooth bidding process.

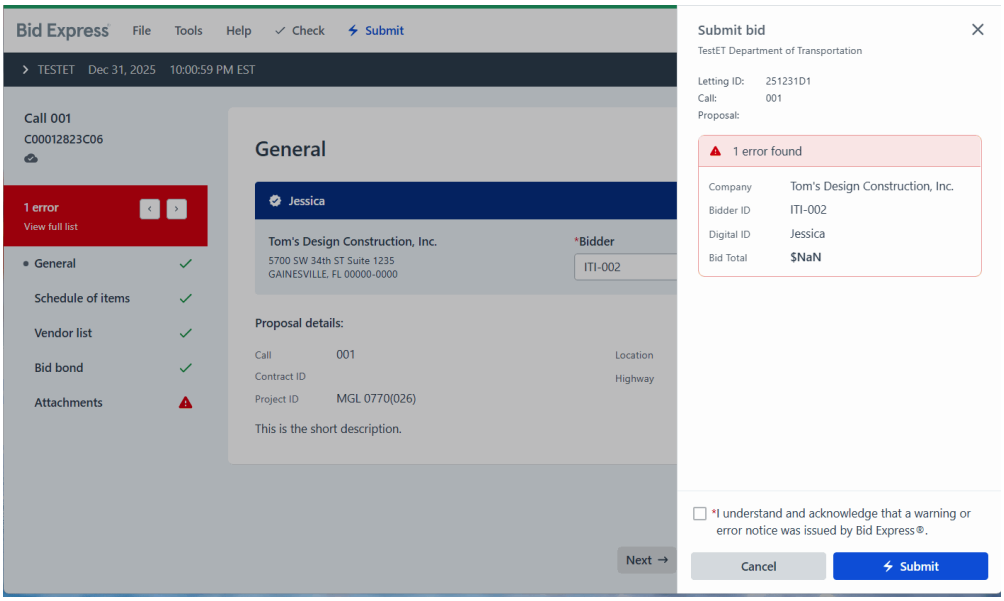
Bid Submission

When you're finished adding information to your bid and checking it for required fields, it's time to submit the bid.



Step 1:

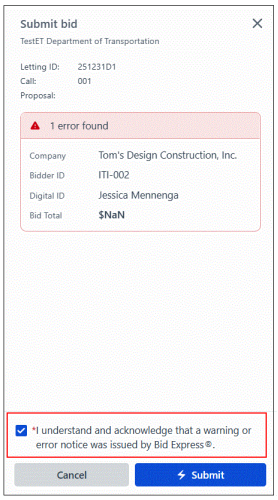
Submit Bids



Click the lightning bolt **Submit** icon from the menu bar. A **Submit Bid** slide-out panel will appear.

Step 2:

Review alerts and warnings



If your bid contains any errors, you'll get an error warning and you must select the check box to acknowledge them.

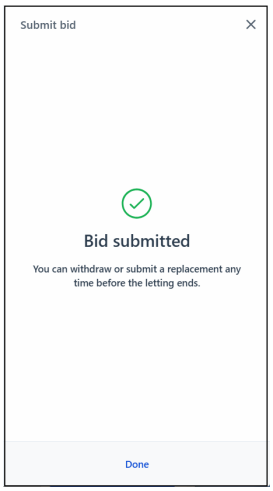
Step 3:

Click the Submit button

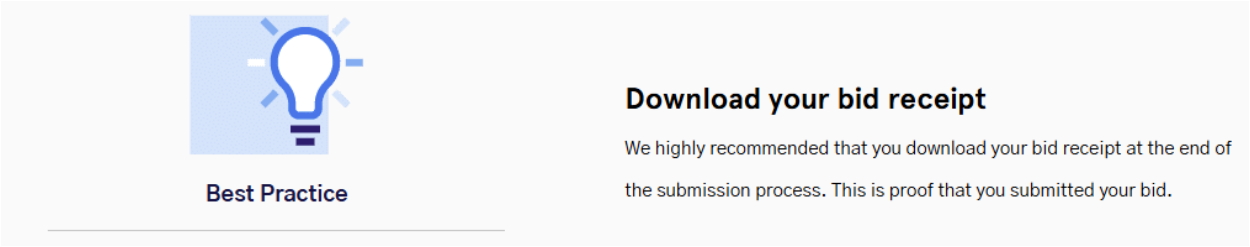
Click **Submit** to finalize the submission of your bid.

Step 4:

Submission success



Once the submission is processed, a success message will be displayed. Click **Done** to return to the bid form. A **Submitted** status indicator will be displayed on the right side of the menu bar.



Withdraw your Bid

If you have a bidder ID and Digital ID, you can view or withdraw bids submitted by any member of your company.

1. Click to expand the **Tools** menu on the bid form and select **View Active Bids.**
2. Select the Call number of the submitted bid that you wish to withdraw.
3. Click the check box to confirm that this action is permanent and can't be undone.
4. Click the **Withdraw selected bids** button.
5. A **Withdrawal complete** message will display. You may resubmit your bid any time before the letting has ended.

Next Steps

Congratulations!

You've completed the training guides. If you're eager to expand your knowledge further, we invite you to explore additional resources available in the Knowledge Center linked below.

Explore the Knowledge Center

Deepen your understanding of Bidx.com functions and workflows with these help guides available in our Knowledge Center.

Learn