




cdcnews > Lead Manager™ Invitation To Bid Pro™

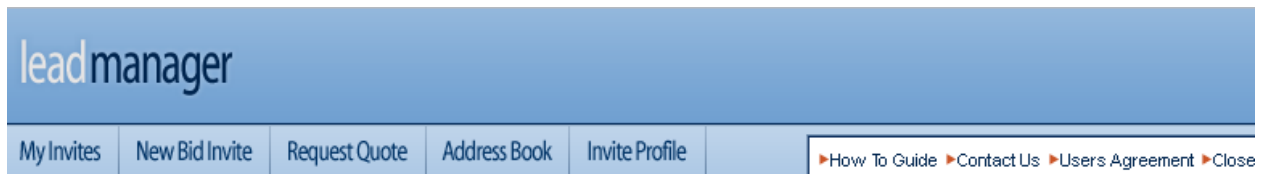
How-To-Guide

Lead Manager Toolbar:




The new Lead Manager ITB toolbar is now divided into easy-to-use tabs:
Home | Search | Track | Calendar | Address Book | Manage | ITB Pro™ | Resources


Click  on the Lead Manager toolbar to access the **Invitation To Bid Pro™** features. The following toolbar opens on a new tab in your browser window:





Invitation To Bid Pro™


Lead Manager Invitation To Bid Pro™ Toolbar Functions

Click  for a complete listing of your previously created personal Invitations-To-Bid, Request for Quotes and Project Invites. Each of these projects can be edited and resent from this page.

Click  to create a new bid invite and enables you to communicate with companies in your address book and in our Free Directory.

Click  to create a new RFQ and enables you to communicate with companies in your address book and in our Free Directory.

Click  to open your CDCNews Address Book

Click  to view or update your Bid Invite Profile



Invitation To Bid Pro™

My Invites

My Invites

Click [My Invites](#) for a complete listing of your previously created Invitations-To-Bid, Request for Quotes and Project Invites.

My Personal ITB's / RFQ's

Project Title	Due Date	View Invite	Edit	Delete	View/Add Recipients
Test	8/2/2011	View	Edit	Delete	(0)

Click View to View a Personal ITB / RFQ

Click Edit to Edit a Personal ITB / RFQ

Click Delete to Delete a Personal ITB / RFQ

Click to View / Add Recipients

My Project ITB's / RFQ's

Project Title	Due Date	View Project	Delete	View/Add Recipients
FIVE GUYS BURGERS & FRIES	8/2/2011	View	Delete	(1)

Click View to View Project details

Click Delete to Delete a Project ITB / RFQ

Click to View / Add Recipients

New Bid Invite

New Bid Invite

Click [New Bid Invite](#) to create a new bid invite and enables you to communicate with companies in your address book and in our Free Directory.

Enter contact information. Fields marked with an asterisk (*) are required. If you have an Invite Profile completed, your contact information will automatically be entered in the **Company Information** section and can be edited.

Select either ☒ Invite (pre-selected by default) OR ☐ Quote

Enter Project or Quote information. Fields marked with an asterisk (*) are required.

Click to enter **Optional Information**.

Click **CREATE** to create New Bid Invite OR **CANCEL** to cancel.



Invitation To Bid Pro™

Review Bid Invite (opens in new page)

Invitees From My Address Book

Click **INVITE FROM ADDRESS BOOK** to invite project recipients from your **CDCNews Address Book**

Your **CDCNews Address Book** opens where you can check the recipients you would like to invite

Click **INVITE FROM DIRECTORY** to invite project recipients from the **CDCNews Directory**

Search Contacts opens where you may perform a contact search to select from to invite.

Click **ADD NOTE** to add a note to your invitation or quote

Click **PROOF & SEND** to proof / review and send invitation or quote

Proof & Send Invite (opens in new page)

Your project and selected recipients are listed in a preview page.

Enter a note in the text box provided that will appear on the invite email. **NOTE:** This note will not be saved and is individual to this mailing.

Review Bid Invite or Quote

Edit (if Necessary)

Click **APPROVE & SEND**

The following confirmation statement is displayed:

YOUR BID INVITATION HAS BEEN SENT

Next Steps

Click [Invite additional companies/ contacts to THIS project](#) to invite additional recipients for this project

Click [Create a new personal Bid Invite](#) to create a new invitation.

[Request Quote](#)

Request Quote

Click [Request Quote](#) to create a new RFQ and enables you to communicate with companies in your address book and in our Free Directory.

Enter contact information. Fields marked with an asterisk (*) are required. If you have an Invite Profile completed, your contact information will automatically be entered in the **Company Information** section and can be edited.

Select either ☒ **Invite** (pre-selected by default) **OR** ☐ **Quote**

Enter Project or Quote information. Fields marked with an asterisk (*) are required.

Click **+ -** to enter **Optional Information**.



Invitation To Bid Pro™

Click **CREATE** to create New Bid Invite OR **CANCEL** to cancel.

Review Bid Invite (opens in new page)

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Click [Invite additional companies/ contacts to THIS project](#) to invite additional recipients for this project

Click [Create a new personal Bid Invite](#) to create a new invitation.

Address Book

Address Book

Click  to open your CDCNews Address Book

Please refer to the Step-By-Step instructions provided in the CDCNews Address Book



Invite Profile

Click [Invite Profile](#) to view or update your Bid Invite Profile

View/Update Your Bid Invite Profile

When first viewing Invite Profile the information listed is the current account data CDCNews has for your Lead Manager account. Verify the information entered and edit any incorrect information and add any additional information in the form provided as follows:

View/Update Your Bid Invite Profile

Below you may add or update your Bid Invite profile. This profile is only seen by companies you invite to bid. You may update or change this profile at anytime.

Company Information:

*Company	<input type="text" value="CDCNews"/>	*Your Title	<input type="text"/>
*Contact Name	<input type="text" value="Lead Manager User"/>	*Phone	(<input type="text" value="800"/>) <input type="text" value="652"/> - <input type="text" value="0008"/>
*Contact Email	<input type="text" value="leadmanager@cdcnews.com"/>	Fax	(<input type="text"/>) <input type="text"/> - <input type="text"/>
*Address	<input type="text" value="address"/>		
*City	<input type="text" value="city"/>	*State	<input type="text" value="US"/>
*Zip	<input type="text" value="99999"/>		

example: ABC Company In Business for more than 25 years. We specialize in precast concrete and site.....

You have 256 characters remaining for the company blurb...

UPDATE

CANCEL

Click [UPDATE](#) to Update or Enter your Invite Profile

Click [CANCEL](#) to Cancel any changes or updates without saving

NOTE: Your Invite Profile may be updated / edited at any time and will only display in any Personal Bid Invites, Request for Quotes and Project Invites. The Invite Profile does **NOT** display in CDCNews project listings in Lead Manager.