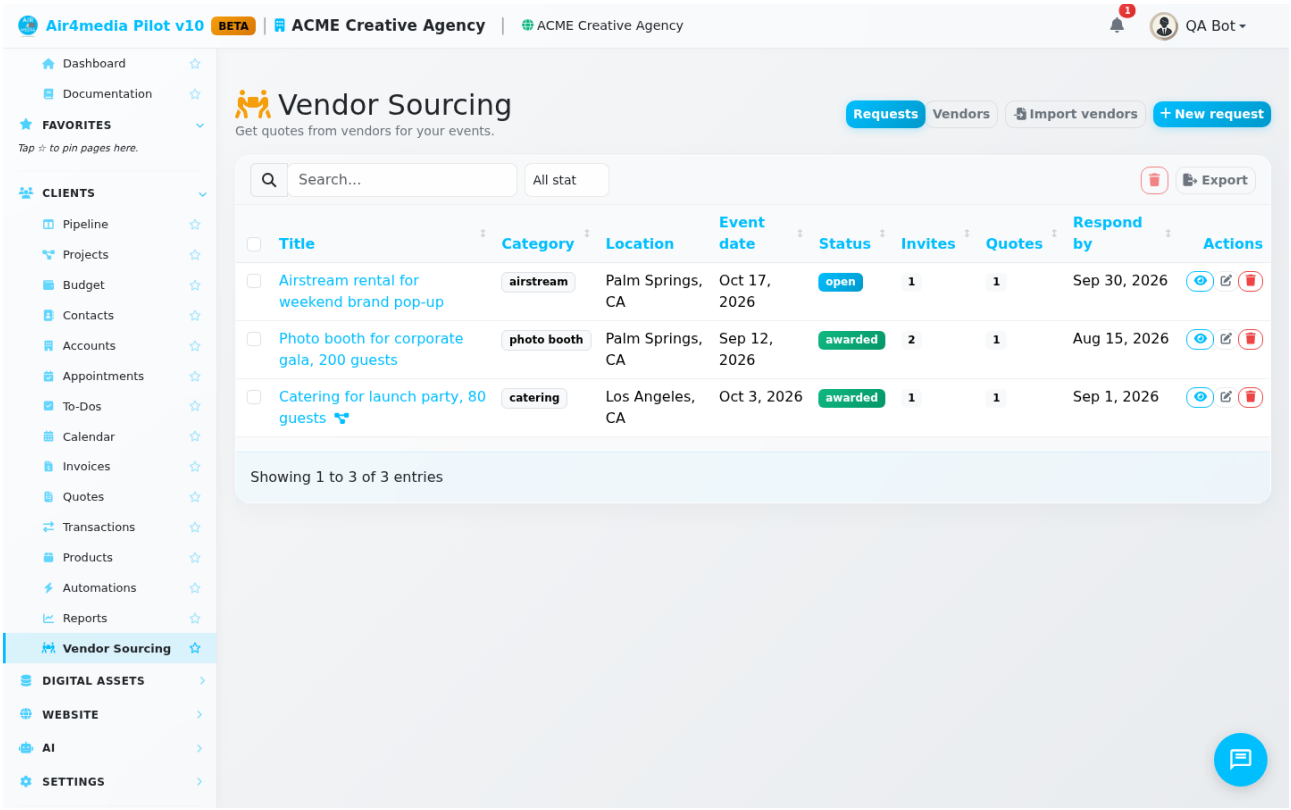

Vendor Sourcing

Vendor Sourcing is where ACME Creative Agency sends requests for quotes, compares bids, awards the work, and manages all the paperwork — in one place. Think of it as a private bidding room for each project need.

Key Features

- **Requests board**: Every sourcing need lives as a named request — for example, "Q4 Brand Activation Photographer" — with a category, location, event date, and an internal budget note vendors never see.
- **Vendor finder**: Search your contacts by keyword, city, or state. Vendors are added as draft invites — nothing goes out until you're ready.
- **Multi-channel invites**: Send by email, SMS, or both. Preview and edit every message before it leaves, or bulk-send all drafts at once.
- **Bid tracking**: See each vendor's amount, availability, and notes in one table. Shortlist or reject bids as you narrow down, then award the winner.
- **Next-steps hub**: After awarding, one-click actions let you notify the winner, pass on the others, create a client quote, place a booking order, and draft a vendor agreement.
- **Order management**: Track the confirmed booking with a PO number, dates, vendor notes,

and a status from draft through confirmed.

- **Documents**: Vendors upload proposals via a private link; you can attach agreements and confirmations — all stored and downloadable from the request.

How to Use

1. Click **New request** and fill in the title, category, scope (what vendors see), location, event date, and a respond-by deadline. Put the budget in the internal **Budget note** field under More options — vendors never see it.
2. Open the request and click **Add vendors**. Filter by keyword or city, select contacts, and choose email, SMS, or both. They land in the list as drafts.
3. Click **Send all drafts** to dispatch everything, or **Preview and send** on any row to review that message individually first.
4. Watch the Invite and Bid columns update as vendors submit quotes. Use **Shortlist** or **Reject** to manage the field; send a **Reminder** to anyone who hasn't replied.
5. Click **Award** on the winning bid. The request moves to Awarded and the next-steps panel appears.
6. From next steps: notify the winner, pass on the others, create a client quote, and place the booking order — each is a single button.
7. Upload or download supporting documents from the **Documents** section inside any request.
8. Click **Close this request** when done. You can reopen it any time.

Tips

- The scope description goes to every vendor as written — keep client name and budget out of it.
- The **Vendors tab** shows every contact you've ever invited and lets you add them to a new request in seconds.
- Vendor proposals uploaded through their private link appear automatically in Documents — no chasing email attachments.