

## Sourcing Optimizer Event Quick Start Guide



### Welcome to Keelvar Sourcing Optimizer

This guide covers the highest level of the process for running an event in Keelvar Sourcing Optimizer. To learn more, please visit [Keelvar University](#) (our Learning Management System) or [Keelvar Support Portal](#).

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#### Intro and Account Setup

- Login at [app.keelvar.com](#)
- Configure Account Settings as needed
- Click Create Event from landing page

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#### Design: Plan and create your event

- Overview:** Add or update event information
  - Add event details and attachments
  - Messaging settings
  - Team members
  - Currency settings
- Schedule:** Plan the event or round start and end times
- RFI:** Add and edit questions
  - Gating questions
  - Mandatory and Optional questions
- Bid Sheet:** Create the bid sheet for the event
  - Add Lots
  - Add Columns
  - Add global bid inputs
  - Add validation rules
- Cost Calculation:** Create formulas to evaluate bids
- Event Settings:** Enable, disable and configure settings

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#### Invite: Invite your bidders to the event

- Bidders:** Add and manage bidder details
  - Add bidders individually or in bulk
  - View invite status
- Messaging:** Send messages to bidders

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#### Publish: Validate and publish the event

- Validate and Publish event

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#### Bid: Review bidder activity and manage bidding

- Bidders:** See engagement details about each bidder
  - If they answered the RFI, which lots they have bid on and when their last bid was
- Activity:** See an overview of bidder activity
  - Dashboard with bid summary details
  - A timeline with historical data about the bids
  - Coverage of which lots have been bid on by whom
- Management:** Allows you to high level manage the event
  - Pause the event
  - Change the bidding duration
  - Reopen and close a round

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#### Evaluate: Where you evaluate and organize bids

- Scenarios:** Add, arrange, evaluate, edit and delete scenarios
- Bidder and Lot Groups:** Create bidder and lot groups for scenario analysis

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#### Analyze: Where you analyze results

- Bid Analysis:** Review the event bids through a table, a chart, or customizable reports
- Scenario Visualizations:** Visualize event data
- Scenario Analysis:** Review and compare scenarios
- RFI Analysis:** Download RFI response reports or file uploads from bidders

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#### Award

- Winning Outcome:** Choose a preferred scenario for the round or event