18.10. Supplier instructions for submitting tenders via Excel

As a supplier, you may be invited to participate in a tender managed using mSupply. The client may send you a tender template Excel document in xlsx format, which you are expected to complete and submit for evaluation.

> You must use Microsoft Excel to view and edit the tender template. Microsoft Excel 2016 or newer has been tested to work with the tender template xlsx file. Theoretically Microsoft Excel 2007 should be fine, but this has not been tested.

The tender template will look something like this. You can also download a reference template from here:

supplier_tender_reference_template.xlsx

The **yellow** section contains the item that you may bid for. **Do not modify any contents of the yellow section.**

The **blue** section is where you can enter the price for the items you wish to bid on.

The currency and the manufacturer column should appear as a dropdown list. View currency pop down list If this doesn't work, please make sure you are using Microsoft Excel and that the version supports xlsx file format. Contact the client if you suspect that the xlsx file is wrong.

Do not change the cell format. If the cell is set to text or number, then it must be left as it is. Changing the cell to a different format will cause issues later with information potentially being lost.

The Excel file has the header row frozen, allowing you to scroll down the list and enter data while still being able to view the corresponding header.

The three worksheets

The Excel template contains three worksheets. **Do not modify the name of the worksheets.**

- **TenderItems:** Main worksheet containing the tender items.
- **ManufacturerList:** Contains the manufacturers that populate the manufacturer dropdown list in the main worksheet. Do not add to the list of manufacturers manually as this list needs to come from your client.
- **CurrencyList:** Contains the available currencies that populate the currency dropdown list in the main worksheet. Do not add to the list of currencies manually as this list needs to come from your client.

Supplier Tender Response file format

A more detailed information regarding the excel column and cell is mentioned below.

Serial number	Column	Field	Description
1	1(D)	Organization name	**Pre-filled**, display the organization name of logged in store, cannot be changed
2	2(D)	Supplier code	**Pre-filled**, Cannot be changed
3	3(D)	Supplier Name	**Pre-filled**, cannot be changed
4	4(D)	Supplier ID	**Pre-filled**, cannot be changed
5	5(D)	Tender ID	**Pre-filled**, cannot be changed

Serial number	Column	Field	Description
6	10(A)	Internal Line ID	**Pre-filled**, cannot be changed
7	10(B)	Line #	**Pre-filled**, cannot be changed
8	10(C)	Item Code#	**Pre-filled**, fixed by the tender and cannot be changed
9	10(D)	Item Name	**Pre-filled**, fixed by the tender and cannot be changed
10	10(E)	Requested Number of Packs	**Pre-filled**, 30 alphanumeric characters
11	10(F)	Requested Pack size	**Pre-filled**, The pack size requested and cannot be changed
12	10(G)	Requested Total Qty	**Pre-filled**, cannot be changed
13	10(H)	Units	**Pre-filled**, The unit the item is to be measured in e.g. Tablet, Each, ml, g, bottle, vial, Ampoule
14	10(I)	Offered Pack Size	**Mandatory**, number greater than zero (default=1) The pack size (number of single items in one pack) this quote is for.
15	10(J)	offered price per pack [DAT - Deliver at Terminal]	**Mandatory**, amount you have entered/offered divided by the number of packs for the item line
16	10(K)	Currency	**Mandatory**, The currency the Price is in. Choose the required currency from the drop down. If the currency does not exist, enter the new currency, mSupply will create it.
17	10(L)	Expiry Date	**Mandatory**, The date this quote will expire. Note date can be simple text.
18	10(M)	Delivery time	**Mandatory**, estimated period of time between the consignment leaving the supplier's premises and delivery to the customer.e.g; 5 months
19	10(N)	Supplier item code	**Optional**, Supplier item code if any.
20	10(O)	Manufacture Name	**Optional**, manufacturers list from the mSupply tender portal Note that new manufacturer will be created if they don't exist.
21	10(P)	Comments	**Optional**, note if any

Currency

This sets the default currency for your quote. Use the available currencies from the dropdown list.

> If the currency drop down list shows, the it is a good sign that your Microsoft Excel is OK.

If the currency of your choice is missing, it means that the client has never handled this currency before. You may enter the new currency in this column using the appropriate three letter abbreviation from this link :Currency Abbreviation.

The image above shows that Canadian dollars (CAD) is being used for the quote. The excel will present you with an alert and you may continue with the new currency.

> 💡 Chances are on your next tender with the same client, you currency of choice will be present on the excel.

Manufacturer

The name of the manufacturer can be chosen from the drop-down list. Typing the first few characters of the manufacturer's name will show a list of matching manufacturers. Click to select one.

> ℹ️ If the manufacturer drop down list shows, the it is a good sign that your Microsoft Excel is OK.

If the manufacturer does not exist, this means that the client has never processed drugs from the manufacturer that you wish to bid with. Similar to the currency column enter the new manufacturer name and the excel will confirm if you want to continue.

> Chances are on your next tender with the same client, you manufacturer of choice will be present on the excel.

Entry rules

- Leave the row empty / unfilled if you choose not to bid for the item.

- Multiple bids for the same item is allowed by copying and pasting the entire row. The "Internal Line ID" must be part of the copy as it is very important.

- Line number is not important and doesn't need to be in any order.

Tender Submission

Enter your bid, save it and email the xlsx file to the client as guided.