15.09. Using web tenders

A web tender is one that is uploaded to our remote tender server and is made accessible to suppliers to enter their responses. This greatly reduces the load on you to input all the responses from all suppliers and means there will be far less data entry errors.

Setup

To use web tenders, there are several setup steps that only need to be done once:

1. Contact Sustainable Solutions to arrange a user account. We'll send you your account details.
2. In **File > Preferences…**, on the Tender tab, enter the account details Sustainable Solutions sent you. See General preferences, Tenders section for details.
3. Link each of your suppliers with the Supplier's master record on the tender web site. For further information see Adding and editing names, Master ID and Master name fields.
4. Tell Sustainable Solutions about any of your suppliers that are not in the tender web site list. We will then add them, and you can link the remaining suppliers.

The process

The following steps describe the whole remote tender process:

1. Carry out the setup steps given above.
2. In mSupply, create a new tender.
3. Set up tender name, reference number, opening and closing date.
4. Add items to the tender. Make sure you add a quantity and pack size for each item.
5. Add suppliers to the tender.
6. Go to the *Synchronise* tab on the tender details window and click on the **Upload tender to web site** button to upload the tender to the tender server. You will be given an error message if the upload is not successful. If you get stuck, contact Sustainable Solutions for further assistance. For a tender to upload successfully:
   - Each supplier must be linked. You will be warned if they aren't.
   - Your internet connection must be working.
   - You must have entered the user name and password correctly in the mSupply preferences Tender preferences (see above).
7. Inform suppliers by sending physical or electronic tender documents (both can come from mSupply) and send them a link to the Supplier instructions for using the tender submission web interface
8. The suppliers enter their bids into their part of the remote tender server web site.
9. After the tender has closed, download the tender by going to the *Synchronise* tab on the tender details window and clicking on the **Download tender from web site** button. You will be given an error message if the download is not successful. If you get stuck, contact Sustainable Solutions for further assistance. For a tender to download successfully:
   - Your internet connection must be working.
   - The tender closing date must have passed.
10. Compare prices and print appropriate reports for the tender committee or others.

11. Award each item to a supplier.
12. Create purchase orders.
13. Send the purchase orders to the suppliers.
14. Sit back, relax and give yourself a pat on the back. Nice going.

> **Uploading the tender is final…**
>
> mSupply records when a tender has been uploaded, and will no longer allow the editing or deletion of tender lines on that tender. So make sure your tender is correct and complete before you upload it!