18.09. Using web tenders

NOTE: This page details the process for using our remote tender module. This module is being replaced by our new Health Supply Hub. See the Health Supply Hub Documentation Website for more details.

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

A tender cannot be deleted when it has been uploaded to the Health Supply Hub.

Setup

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

- 1. Contact The mSupply Foundation 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 16.01. General preferences for details.
- 3. Link each of your suppliers with the Supplier's master record on the tender web site. For further information see the 5.01. Names: using, adding and editing page.
- 4. Tell Sustainable Solutions about any of your suppliers that are not in the Health Supply Hub 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.

Last update: 2023/07/10 tender_management:using_web_tenders https://docs.msupply.org.nz/tender_management:using_web_tenders?rev=1688968174 05:49

| | | Edit Tende | | | | |
|-----------------------------|---|----------------------------|----------------|---------------------|--------------------|-----------------|
| Description Tender 84 (08/ | 06/2021 15:49:31 Months stock required | 31 | | | _ | |
| Creation date 08/06/2021 | Issue date 08/06/2021 Respo | nse by Date/Time 08/07/ | /2021 00:00 | GMT Status | sg 🔁 🗌 Loc | ked |
| Serial Number: 84 | Our reference AUT084 | | | | | |
| Comment Auto generated | tender created on 08/06/2021 at 15:49:3 | 11 by Sussol with 89 items | i. | | | |
| ns and Compare Prices Notes | Choose Suppliers and Enter responses | Standard conditions | Purchase order | Reference documents | Tender preferences | Synchronise Log |
| S | 5 | | | | | |
| upload tender to web site | Download tender from web site | | | | | |
| promo terrori to area area | | | | | | |
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You will be given an error message if the upload is not successful. Note: any lines that have 0 quantity (possible with certain options when automatically generating a tender) will not be uploaded to the Health Supply Hub but you will be told that there are some before the upload takes place so you can fix or remove them before the upload if you wish. Also, after successful upload a tender will be changed to confirmed status (if it has not already been changed to this) so that items and quantities cannot be changed. If you get stuck, contact The mSupply Foundation for further assistance. For a tender to upload successfully:

• Each supplier must be linked. You will be warned if they aren't.

- You must have set a *Response by date* (see the 18.01. Introduction to tender management page). If it is not set you will be told to set it before you can upload the tender.
- $\circ\,$ Your internet connection must be working.
- You must have entered the user name and password correctly in the tender preferences (see above).
- 7. **Note:** When a tender has been uploaded to the Health Supply Hub, it will appear in *DRAFT* status so that you can review it before finally publishing it.
- 8. 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
- 9. The suppliers enter their bids into their part of the remote tender server web site.
- 10. 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.

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| • • • | | Edit Tender | | |
|--------------------------------|--------------------------------------|-----------------------------|------------------------------|------------------------------------|
| Description Biden Pharmacy | r Tender 2014 | | | |
| Creation date 04/10/2013 | Issue date 21/10/2013 Respon | nse by Date/Time 21/11/2013 | 04:00 GMT Status | sg 😑 🛃 Locked |
| Serial Number: 36 | Our reference Biden Tender 2014 | | | |
| Comment Biden Tender 20 | 014 | | | |
| Items and Compare Prices Notes | Choose Suppliers and Enter responses | Standard conditions Purcha | se order Reference documents | Tender preferences Synchronise Log |
| Upinad tender to web site | Dewnload tender from web site | | | |
| | | | | Cancel OK |

You will be given an error message if the download is not successful. If necessary, mSupply will download from the Health Supply Hub the suppliers and manufacturers that are used in the tender responses that are not in mSupply. Progress bars will show you progress that has been made through the process. 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.
- 11. Compare prices and print appropriate reports for the tender committee or others.
- 12. Award each item to a supplier.
- 13. Create purchase orders.
- 14. Send the purchase orders to the suppliers.
- 15. 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!

A note about currencies

If a quote from a supplier in the Health Supply Hub uses a currency that doesn't exist in mSupply, when you try to download the tender to mSupply you will be shown an error and the download will fail.

The way to correct the problem is to add the currencies that are shown in the error message to mSupply and then try the download again. For information on adding currencies to mSupply, see the 26.10. Currencies page.

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After uploading the tender to the Health Supply Hub

When the tender has been uploaded to the Health Supply Hub it can be easily viewed by clicking on the **View on HSH** button seen on the *Items and compare prices* tab as shown below:

| | Annual tender 2022, 12 months of stor | | | | | | | | | | |
|----------------|--|----------------|-------------|---------------------|--------------|-------------|----------------------|------------------|----------|-----------------------------------|----------|
| Creation date | reation date 05/04/2023 Issue date[05/04/2023 Response by Date/Time 05/05/2023 00:00 GMT Status: sg Locked | | | | | | | Locked | | | |
| Serial Number: | 2 Our reference | | | | | | | | | | |
| Comment | 1 | | | | | | | | | | |
| | ompare Prices Notes Choose Suppliers | and Fatara | and freed | and an addition of | Barria | and an R | formers day | Terra | | famous familiaria | |
| news and Co | Choose Supplier | | | | | orders Ka | ererence doc | uments ren | der pre | sterences synchronis | e Log |
| | | | T | Incoterm (| None | | | | ۳ | | |
| New line Dele | ete line Print Reports Coni | firm View o | in HSH Sear | rch items | | | | | | Show All | |
| C-d- | | d of Doda | Deals Class | Tatal | C | Original | Ordeland | 50 is set | 1 in the | Burlinson of Compliant | Dame Com |
| 1 alb400tc | Item name Albendazole 400mg, tabs, chewable | # of Packs 500 | | Total quan 50000 | | | Original 1,570.00 | PO local 0.00 | Unit | Preferred Supplier ACME Pharma | Item Con |
| | Amoxycillin S00mg | 600 | 1000 | | | 0.00 | | | | No bids | |
| | Ciprofloxacin 500mg | 1000 | 100 | 100000 | | 0.00 | 0.00 | | | Not selected | |
| 4 GHSC0355 | Darunavir 600mg | 5000 | 10 | 50000 | | 0.00 | 0.00 | 0.00 | Tablet | Not selected | |
| 5 GHSC80103 | Ethambutol 100mg tablet | 500 | 100 | 50000 | | 0.00 | 0.00 | 0.00 | Tablet | Not selected | |
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| | | | 1 | Total for Tende | er quantitie | \$ 1.570.00 |) | | | | |

The button will be visible as soon as you have entered the remote server details in the preferences (see step 2 in the Setup section above). If you click it before the tender has been uploaded a message will be shown telling you that this is the case.



