Subscriber Manual for TenderSystem 0.8

Manual for Subscribers

TenderSystem is an Internet based system to source, award and manage the total procurement process.

This tried and tested technology leverages the age-old principle of supply and demand, through reverse auction, ensuring that products are purchased at the best possible price, at a lower administration and management cost, than any other method.

Handy Terminology

- Tender - A written offer made by one party to another to supply goods at a set price.
- **Request for Quotation (RFQ)** - Invitation requesting suppliers to quote for required items.
- **Open Tenders** - Tenders that have not reached their closing time and date and therefore suppliers are still able to submit Tenders.
- **Closed Tenders** - Tenders that have reached their closing time and date or all suppliers have responded.
- **Completed Tenders** - Tenders that have been awarded to a supplier, cash settlement, invalidated or replaced at a non-tender supplier.
- **Validity Period** - Period for which supplier is willing to provide the product at the quoted price.
- **Subscriber** - User who requests a Tender. There are 3 permission levels :
    - Normal Level
    - Branch Level
    - Organisation Level.
- **Agent** - A User of a Supplier that submits quote on Tenders.
- **Supplier** - An Organisation invited to submit a quote.
- **Supplier Panel** - Group of approved suppliers.

Functionality

The diagram below illustrates TenderSystem's functionality:

Benefits when replacing products through TenderSystem

- Products are replaced at the best possible price, at a lower administration expense, than any other method:
    - Lower human resource and telephonic expenses as subscribers do not have to phone, fax or email all panel suppliers for quotes, follow

    - up responses, capture and process the information;
    - Better prices are achieved by combining clients purchasing power and leveraging the age old principle of supply and demand; and
    - The possibility of collusive fraud is eliminated.
- Improved procurement process:
    - Managing the procurement process for distributed branches through the use of 2 administrator levels; and
    - Administrators are automatically notified when a subscriber's pre-approved settlement mandate is exceeded.
- Effective management of panel suppliers:
    - Consolidation of suppliers with a wide branch network enabling subscribers to deal with selected agents;
    - Increase or decrease supplier representation as required; and
    - Enhance your supplier relationship, as the whole process is transparent.

Login

To complete any of the following functions you must be logged into TenderSystem as a **Subscriber**.

Requesting a Quotation

- Select **Request Tender** from the top menu.
- Insert the required information
    - **RFQ number**
        - Number to identify Tender
    - **RFQ reference**
        - Additional information to help identify Tender
    - **State**
        - Select the required **State**
    - **Area**
        - Select the required **Area**
    - **Attachment** - optional may not be present and not required
        - Attach a file to the RFQ
        - Click **Browse** and select the file to attach
    - **Closing date** - optional may not be present and not required
        - Set the closing date (optional)
        - RFQ will close at 12:00 on the selected date, which may not be today
        - If the date is not inserted then TenderSystem will automatically calculate the closing time
    - **Transportation**
        - Select the transportation method, either **Collected** (optional), **Delivered** or **Installed**
    - Click the **Product Category** of the required item
    - Insert the required product information
        - Provide as much information as possible when sending out a RFQ

        - This ensures that **Agents** are able to quote and quote on the correct product
        - Agents usually do not quote when insufficient information is provided or take much longer to quote than usual
        - Insert the **Budget** value - this will be included in the item description
        - Insert the **Quote** - not displayed to **Suppliers** and used to calculate the savings achieved
    - Continue adding products as required by clicking the **Product Category** buttons
        - Products already inserted are displayed in the **Shopping Basket** at the bottom of the screen
    - When all products have been inserted click the **Submit** button
    - This will display all suppliers that were requested to quote for the required items as well as any errors that might have occurred
    - Once the tender closes you will receive an email report with all the quotes submitted by the **Agents**

Completing a Tender

- Once the tender closes you will have to complete the Tender
- To complete a Tender you have to complete all it's Tender Items
- **Completing from the Control Panel**
    - Click on **Control Panel icon** above the top menu
    - Find the Tender you would like to Award and click on the **award link** on the Right
    - This will bring you too the page where you can Complete the Tender Items for the Specific Tender
- **Completing via Reports**
    - Select **Reports** from the top menu
    - Choose **Goup by Tender** as the **Report Type**
    - Insert more information
        - An easy way to view only the **Uncompleted Tenders** is to select **Uncompleted** from the **Tender Type**
        - Change the start and end dates to the required period
        - If you want to award a specific Tender enter the RFQ number in the **RFQ number** field
        - Click the **Display Report** button
        - This will bring you too the page where you can Complete the Tender Items
- **Completing Tender Items**
- There are four ways to complete a Tender Item
    - **Awarding a Tender Items**
        - Award it to a successful Agent that Quoted through TenderSystem, which generates a purchase order;
        - Check the **Award** button for the Agent to whom you want to award the Tender Item
        - **Delivery** and **Installation** fee will be included automatically

    but can be invalidated by clicking the **Don't Deliver/Don't Install** Checkbox
- **Tender Items as Cash Settlement**
    - Lodge it as a **Cash-settlement**;
    - Check the **Cash Settlement** button next to any Agent Quote
- **Tender Items as Invalidated**
    - Lodge it as a **Invalidation**;
    - Check the **Invalidation** button next to any Agent Quote
- **Tender Items as Non-Tender**
    - Lodge it as a **Non-Tender** supplier that is not on your panel and did not via TenderSystem;
    - Check the **Non-Tender** button next to any Agent Quote
- Click the **Submit** button and complete the required information
- **Purchase Orders** will automatically be generated for awarded Tender Items and email to the Agent and CC to you
- **Tip** You can complete multiple Tender Items across multiple Tenders at a time.

Supplier Search

- **Suppliers** are linked to **Companies** as not all **Suppliers** are on every Company's **Supplier panel**
- Click **Suppliers** from the **Menu**
- Insert the supplier name, area or products provided and click the **Search** button
- A list of suppliers will be **displayed**

Changing your password

- Click the **Password** link in the top menu
- Insert your **current** password
- Insert and confirm your **new password**
- Click the **Change Password** button

Viewing and editing your Profile

- Click the **Profile** link in the top menu
- Make any required changes
- Click the **Submit** button
    - Note that you can not delete yourself

Control Panel

- To view the **Control Panel** click the **Control Panel** link in the top menu
- The Control Panel will display current **Open** and **Closed** Tenders

Logout

- To **Logout** click the **Logout** link in the top menu

Reports

Select the **Reports** from the menu tab.

There are 6 different **Report Type**:

- **Audit Trail** - Useful for displaying Tender Items and all it's information
- **Group by Quote** - Used to award Tender Items and view information about Completed Tender Items
- **Closed Tenders** - Useful for displaying currently Closed Tender and information about all item Tender Items
- **Closed Tenders** - Useful for displaying currently Closed Tender and information about all item Tender Items
- **Bordereaux** - Used to display information invoices and payment
- **Balance Score Card** - Useful for displaying the ratings of Awarded Tender items.
- **Service Fees** - Useful for displaying service fees.

Subscriber Permissions

There are 3 different **permission levels** for **Subscribers**:

- **Normal Level** - may request quotes and view or award their **own** quotes, reports, profiles and suppliers
- **Branch Level** - may request quotes and view or award the **branch** quotes, reports, profiles and suppliers
- **Organisation Level** - may request quotes and view or award the **organisations** quotes, reports, profiles and suppliers

Note : **Companies** and **Suppliers** are 2 sub-types of an **Organisation**

Company Administration

You need a permission level of **Branch** or **Organisation**.

Select the **Company Admin** menu that will open a sub menu on the left.

View Company Profile

- Click **Edit/View** underneath **Company Admin**
- The **Company Information** will be displayed but you will not be allowed to edit anything

View Company Reports

- Click **Reports** underneath **Company Admin**
- This is just like clicking **Reports** from the Menu Tab

Supplier Search

- Click **Supplier Search** underneath **Company Admin**
- This is just like clicking **Suppliers** from the Menu Tab

Creating an Company Branch

- You need a permission level of **Organisation** to create a **Branch**
- Click **Create Branch**
- Insert the required information
  - Branch **Name**
  - **Dialling prefix** - country dialling prefix
  - **Phone Work** and **Phone Fax** - complete phone number including dialling code but not country dialling prefix
  - **Email address**
  - **Comment** - this comment is automatically inserted in purchase orders
  - **Country** - country where the branch is located
  - **Postal** and **Physical** address
- Click the **Create Branch** button

Editing or Deleting a Branch

- You need a permission level of **Organisation** to Edit/Delete a **Branch**
- Select the **Branch** that you want to delete from the dropdown list in the left menu
- Click **Edit/View** from **Branch Admin**
- Change required information
- To **Delete** the **Branch** check the delete tick box
- Click the **Change Branch Information** button

Creating a Subscriber

- You need a permission level of **Organisation** or **Branch** to **Create a Subscriber**
- Select the **Branch** where the user must be created from the dropdown list in the left menu
- Note: **Branch Permission Level** you will only be able to select you own branch
- Click **Create Subscriber**
- Insert the required information
  - **Username** - Username and password will be emailed to the user when created
  - **Dialling prefix** - country dialling prefix
  - **Phone Work**, **Phone Fax** and **Phone Mobile** - complete phone number not including country dialling prefix
  - **Email address** - address to which reports will be emailed
  - **Notification method** - preferred notification method
  - **Permission Level**
  - Preferred user **Theme** and **Language**
  - **Representative position**

    - **Mandate** - authorised representative mandate per tender, which send a notification to the users administrator if this amount is exceeded
- Click the **Submit** button
- A username and password will be emailed to the new **Subscriber**

Editing or Deleting a Subscriber

- You need a permission level of **Organisation** or **Branch** to **Edit/Delete another Subscriber**
- Select the **Branch** and then **Subscriber** who you want to edit or delete the dropdown list in the left menu
- Click **Edit/View** from **Subscriber Admin**
- Change required information
- To **Delete** the **Subscriber** check the delete tick box
- Click the **Submit** button

Resetting a Subscriber password

- You need a permission level of **Organisation** or **Branch** to **Reset a Subscriber Password**
- Select the **Branch** and then **Subscriber** whose password you want to reset from the dropdown list in the left menu
- Click **Password reset** from **Subscriber Admin**
- Confirm that you want to reset the **Subscriber's** password
- This will send a password reset confirmation to the **Subscriber's** by email

Tender Request on behalf of a Subscriber

- You need a permission level of **Organisation** or **Branch** to **Reset a Subscriber Password**
- Select (the **Branch** Optionally and then) the **Subscriber** for who you want to request a Tender from the dropdown list in the left menu
- Click **Tender Request** underneath **Subscriber Admin**
- **Tender Request** options are described above (Requesting a Quotation)

Firefox search plugin

- To download the plugin login as a user and click on the Firefox search plugin link. Click the OK button when prompted to install the plugin, which is dynamically created at www.tendersystem.com.
- After it has been installed successfully you will have an additional Search box (at the top right in the browser).
- To use the plugin you must be logged in as a User.
- Select the TenderSystem search box and insert the RFQ number that you want to view. Press ENTER and the RFQ audit trail will be displayed. Please note that this plugin only works in Mozilla,Firefox and Netscape and NOT IN INTERNET EXPLORER.