

# Tender Management: Comparing supplier responses & creating purchase orders

Version 1.1 091110 mod Craig- typos

#### **Review**

We're assuming that you've already done the following steps

- 1. Created a new tender
- 2. Quantified how much you need to order, and added these lines and quantities to the tender
- 3. Decided which suppliers to send the tender to, and added those suppliers to the tender
- 4. Sent out the tender
- 5. Entered Quotations from a supplier

Now we need to compare prices and choose a preferred supplier for each item

#### **Open the tender**

Once you have the tender open, go to the "Enter items and compare responses" tab Double-click the first item in the list.

			Edi	t Tender					
Description: Tender 2	2010 Tender 7(26/08/09 15:17:10)								
reation Date: 26/08/0	09 Issue Date: 01/09/09	Response	By Date: 15/1	0/09	Status: SG	•	Locked 8	ased on 24	months usag
Our ref: Kiribatil	harm2010								
Comments: Tender 3	2010 Auto generated tender created	on 26/08/09	a 15 17 10 b	r loana with 25	1 items.				
	(								
	Items and Compare	Prices Not	es Choose	Suppliers and	Enter respons	es su	andard conditions		
R. C.	Accept selected Print internal report				Show: All		•		
in Code	ltem name	Pack	Pack Size	Total quantity:	PO total	Unit	Preferred Supplier	Item Cond	Comment
1 Acetaz A	kcetazolamide 250mg tab	30	100	3000	0.00	each	Not chosen		Automatically gene
2 Acyeo A	ciclovir 3% eye oint	5	1	5	0.00	each	Not chosen		Automatically gene
3 Acriraw A	criflavin powder BP powder (g)	2	5000	10000	0.00	grams	Not chosen		
4 All1 A	Jlopurinol 100mg tab	130	100	13000	0.00	each	Not chosen		Automatically gene
S Amosyr A	imoxycillin 125mg/5ml susp (100mL)	67000	1	67000	0.00	each	Not chosen		Automatically gene
6 Amo250 A	moxycillin 250mg cap	1534	1000	1534000	0.00	each	Not chosen		Automatically gene
7 AmoSOO A	imoxycillin S00mg cap	1270	1000	1270000	0.00	each	Not chosen		Automatically gene
8 Amclav A	moxycillin+Clavulanate 500mg+125mg	160	100	16000	0.00	each	Not chosen		Automatically gene
9 AmpS A	mpicillin 500mg vial	85700	1	85700	0.00	each	Not chosen		Automatically gene
10 Haemoint A	intihaemorrhoid 30g oint	1200	1	1200	0.00	each	Not chosen		Automatically gene
11 Asp3 A	spirin 300mg tab	652	1000	652000	0.00	each	Not chosen		Automatically gene
12 nAut19m A	utoclaving tape 18mmx50m	50	1	50	0.00	each	Not chosen		Automatically gene
13 8	andage Adhesive Elastic 10cm x (1m - 5	100	1	100	0.00	each	Not chosen		Automatically gene
14 nBcrp84 B	andage crepe 8cm x 4m	100	1	100	0.00	each	Not chosen		Automatically gene
	andage crepe elastic 7.5cm x (1m - 5m	3000	1	3000	0.00	each	Not chosen		Automatically gene

### **Compare prices for each item**

In this example we have 4 prices submitted. The **Adj Cost** column is the important one- it allows you to compare prices based on a number that has evened out differences in pack size, currency and freight.

When we compare prices, mSupply colours the cheapest quote **Blue.** In this case, the second supplier quote (row 2) is the cheapest.

You can click the "Adj cost" row header to sort entries so the cheapest is at the top of the list.

Before marking this item immediately as preferred, you should consider any other factors apart from





price that might influence the decision:

- 1. Had the supplier met all the tender conditions?
- 2. Is the proposed delivery schedule acceptable?

**3.** Is there anything about product quality, manufacturer, or other factors that might cause you to disqualify this item? If you decide to disqualify an item, click the **Disq** colum checkbox for that item.

Note: if you want to see more information about an item, double-click it's row to view the full quote details. You may want to fill out the quote comment to record any decisions you made (such as reasons for disqualification).

Once you have made a decision, check the **Pref** checkbox next to the winning item.

Proceed to the nex item by clicking the **OK & Next** button and repeat the process. When you're finished click **OK** or **Cancel** to return to the list.

## **Once you've made choices**

On the item list you'll notice that the preferred supplier is now filled out for items for which a winning supplier has been chosen.

## Setting up Purchase order preferences

Once you have awarded all items, you now need to start to generate Purchase Orders.

The first step is to go to the **Preferences** tab.

There are two methods of creating purchase orders. Here we are going to use "Distribute tender quantity evenly" which implies you don't want to re-calculate the quantity to order.

With this option chosen, you can ignore the "Based on" preference.

Purchase order				
PO calculation method	d Distribute Te	nder quantiity evenly		
Based	en 24 📦 me	onths usage		
Invitation letter				
Drint item descript	ion instead of iter	n name		



## **Adding blank Purchase orders**

Go to the Purchase Order tab. Click the Create blank POs button

#### **Choose suppler(s)**

Highlight the supplier(s) you are going to make purchase orders for.

Enter the expected delivery date.

Click OK

(Hold down the control key as you click to highlight more than one supplier)



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## Fill purchase order(s)

Back in the Purchase Order list, highlight the Purchase Order(s) to fill (Use the control key if you want to highligh more than one)

Items and Com	pare Prices Notes Choose Suppliers and Enter re-	ponses Standa	rd conditions Purchase	order Reference documents	Tender preferences
Create Blank POs	Delete PO				
PO number	Supplier	Status	Requested delivery date	Total in PO	Target days

Cancel

OK

#### Click Fill Quantities

#### **Confirm PO creation**

Note that you'll actually have to click Yes with your mouse to proceed.

Once the order is filled, you can double-click a Purchase Order to see what it contains.



#### Convert Purchase Order(s) to "sg"

The last step is to convert the Purchase Order to status "SG" (Suggested).

Highlight the purchase order and click the "Convert to

Items and Com	pare Prices Notes	Choose Suppliers and Enter respon	nses Standa	rd conditions Purchase of	order Reference documents	Tender preferences
Create Blank POs	Delete PO Fill qu	antities Convert to SG				
PO number		Supplier	Status	Requested delivery date	Total in PO	Target days

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SG" button Confirm that you want to proceed. Now the Purchase is visbile in the Suppliers > Show purchase orders list as normal, and it can not be edited within the tender any more.

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