



Tender Management: Comparing supplier responses & creating purchase orders

Version 1.1 091110 mod Craig- typos

Review

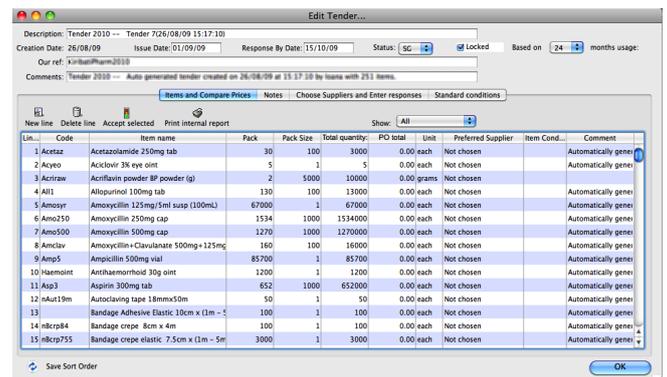
We're assuming that you've already done the following steps

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.



Compare prices for each item

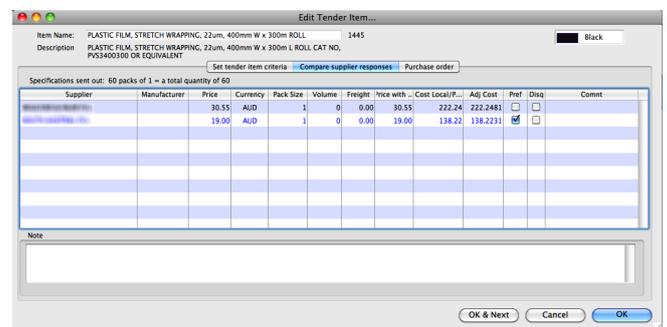
In this example we have 4 prices submitted.

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** column 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.

Items and Compare Prices | Notes | Choose Suppliers and Enter responses | Standard conditions | Purchase order | Reference documents | **Tender preferences**

Purchase order

PO calculation method: Distribute Tender quantity evenly

Based on: 24 months usage

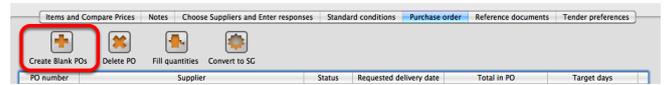
Invitation letter

Print item description instead of item name



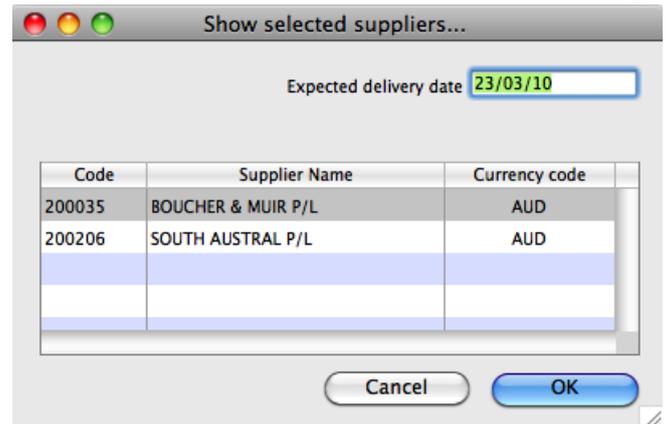
Adding blank Purchase orders

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



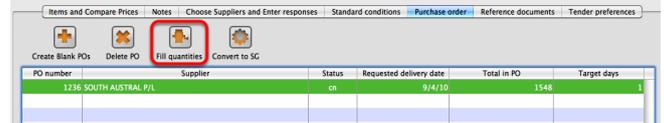
Choose supplier(s)

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)



Fill purchase order(s)

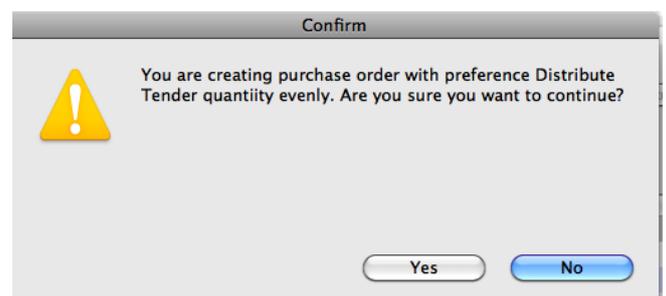
Back in the Purchase Order list, highlight the Purchase Order(s) to fill (Use the control key if you want to highlight more than one)



Click **Fill Quantities**

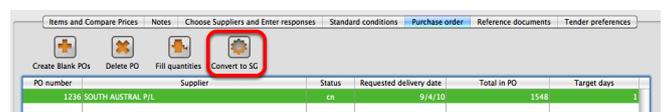
Confirm PO creation

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





SG" button

Confirm that you want to proceed.

Now the Purchase is visible in the Suppliers > Show purchase orders list as normal, and it can not be edited within the tender any more.