PÖTTINGER

Documentation

SRM Invitation to Tender

CHANGE SERVICE

Revision	Chapter/Page	Description of the change and name of the person responsible	Date
A		First version for release	

To create a tender, the supplier must log on to the system.
The supplier navigates to the following overview by clicking on the "Invitations to tender" button.

All tenders are listed in this overview.
For the supplier, it is obvious at first glance for which tender a quote should be submitted. A missing entry in the "Quote number" column or the "No quote created" quote status simplifies the search.

Before the supplier submits a quote, the content of the invitation to tender can be viewed.
The request for quotation is opened by clicking on the tender number highlighted in yellow.

The "Tender information" tab contains general data and linked documents.

In the "Items" tab, the articles for which a quote should be created are listed.
In the overview, the material number, the material short text and the number of units can be seen at first glance.
To call up further information, select any line and click on the "Details" button to view it.

In addition to the information from the overview, the item data also shows the revision status.
Further information can be found in the "Questions", "Notes and attachment" tabs.
The basic data text, which specifies the material in its entirety, can be found in the "Notes and attachments" tab.

The supplier can still start various actions using the buttons highlighted in yellow.

- Participate: This button informs the purchasing department of the intention to participate in the tender.
- Do not participate: Information to the purchasing department that no quote will be submitted.
- Conditionally: The tenderer reserves the right to participate in the tender procedure.
- Create quote: This button is one of 2 possibilities to create a quote.

It is also possible to create a quote from the "Web tenders - All" overview.
If a row is selected, the "Create response" button is automatically ready for use.

By clicking on the "Create response" button, a new window is opened.
The information to be found in the respective tabs "Tender information", "Items", etc. has already been explained.

Under the "Items" tab, prices are maintained per article or item.
To do this, select the first line and switch to the detailed view by clicking on the "Details" button.

Several fields must be filled in the item data.

1. Price - please maintain price per unit of measure
2. Incoterm clause - can be maintained at item level in a different way to the specifications from the tender information
3. Supplier product number
4. Delivery time for samples - specification in working days
5. Delivery time for serial requirements - specification in working days, the delivery time can be used to differentiate from competitors.

In order to know the full content of the request, it is necessary to check the information from the "Questions" and "Notes and attachments" tabs.
The basic data text, which specifies the material in its entirety, can be found in the "Notes and attachments" tab.

If the quote has been completed by the bidder, it can be transmitted to the purchasing department.
Use the "Send" button to do this. The quote can still be checked in advance.
The quote is checked for completeness by clicking the "Check" button.
If the quote is to be sent at a later date, it can be saved by clicking the "Save" button.

The quote status can be seen in the "Web tenders - All" overview.

To transmit a secured quote, it is opened by clicking on the quote number. Then click on the "Edit" button.

Then the "Send" button is available and the quote can be sent to the purchasing department.