

Secure Source to Pay (SS2P) Sourcing – Mini Tender

December 2017



Access

To access the Mini Tender functionality:

1. Click the **Mini Tender** menu option.
2. Navigate to the tabs:
 - a. **Mini Tenders in Progress** (Check all mini tenders in progress).
 - b. **Complete Mini Tenders** (Check all mini tenders that are finished).
3. To view a mini Tender, click the title.

Create New Mini Tender

To create a new mini tender:

1. Click the **New Mini Tender** button.
2. Enter the **Title** and **Description** fields.
3. Select the **Close Date** and **Tags** options.
4. Click **Upload Attachments** to attach files, if necessary.
5. Click **Add a Note** button to add a note, if necessary.
6. Click the **Save** button.

In the **Lines** tab, you can add items you want suppliers to quote on. To do so:

1. Click the **Add a Line** button.
2. **Type:**
 - a. Item Name
 - b. Description
 - c. Unit of Measure
 - d. Qty
 - e. Historic Unit Price and Currency

Note: Historic price is buyer-only visible and will not display to suppliers.

- f. Tags
3. Add **Notes** and **Attachments**, if necessary.
4. Click the **Save** button.

To edit Item lines in the Lines tab:

1. Click the **Edit** button.
2. If necessary, add more lines by clicking the **Add a line** button.
3. Check the box to select lines and click **Create Notes for Selected Lines**.
4. Enter the **Notes** field.
5. Check the box if you want to send this note to the suppliers.
6. Click **OK**.

To add Suppliers in your Mini Tender:

You can manually add suppliers to the Mini Tender as single or multiple Supplier Users.

- To add an **Existing** supplier:
 1. Use the **Search By** box to look for a Supplier by Name, Contact Name, Tag, or Category.
 2. Once you locate a supplier, click the **Select** button.
 3. Click the **Remove** button next to a supplier to remove them from the selected list.

- To add a **New** supplier:
 1. Click the **Add New Supplier** button.
 2. Type Supplier Name, Contact Name, Email Address and/or Telephone fields.
 3. Click the **Add New Supplier** button and the supplier automatically displays in your supplier list.

[Sending a Mini Tender](#)

To send a mini tender to the suppliers:

1. Navigate to the header tab on the Mini Tender.
2. Within the actions section, click the **Send Emails** button.
3. When prompted, click the **OK** button.

[Edit a Mini Tender](#)

To edit:

1. Click the mini tender title.
2. Click the **Edit** button.

It is also possible to perform the following activities:

- **Copy Mini Tender:** Create a new mini tender by using the existing tender as a template. The system automatically pre-populates a new mini tender.
- **Cancel/Archive Mini Tender:** You can cancel the mini tender. This action cannot be undone.
- **Exit Mini Tender:** Exit the mini tender details to return to the list of all mini tenders.

[Monitor a Mini Tender](#)

To view and manage the progress and results of a mini tender:

1. Click the mini tender title.
2. Click the **Monitoring** tab to view the progress.

[Editing](#)

To edit the values and currency of a mini tender:

1. Navigate to the **Monitoring** tab.
2. Click the **Edit** button to amend price and currency details in a mini tender.
3. Edit desired details.
4. Click **Save** or **Cancel**.

[Award and Finalise a Mini Tender](#)

To award or finalize a mini tender:

1. Click **Mark as Awarded**.
2. Click **Finalize**.