

What you do from here depends on whether you enter the supplier responses manually or import them from a spreadsheet.

## Entering responses manually

The **Date sent** field may be edited if necessary. You should enter the date the supplier responded, and in the **Valid till** field, the expiry date of the quotation. Also, enter the reference that the supplier is using for their own records (to be quoted in future correspondence) in the **Their reference** field, and, importantly, the currency in which the supplier has responded (on the *Edit Quote* tab). If you have previously set a default currency for this supplier, this drop-down list will already be set to that currency. Otherwise, your own default currency will appear.

The freight charge per cubic metre [m<sup>3</sup>] should be entered; if the volume of each item's pack is known, this can also be entered (at a later stage), allowing a more accurate total cost of each item to be evaluated.

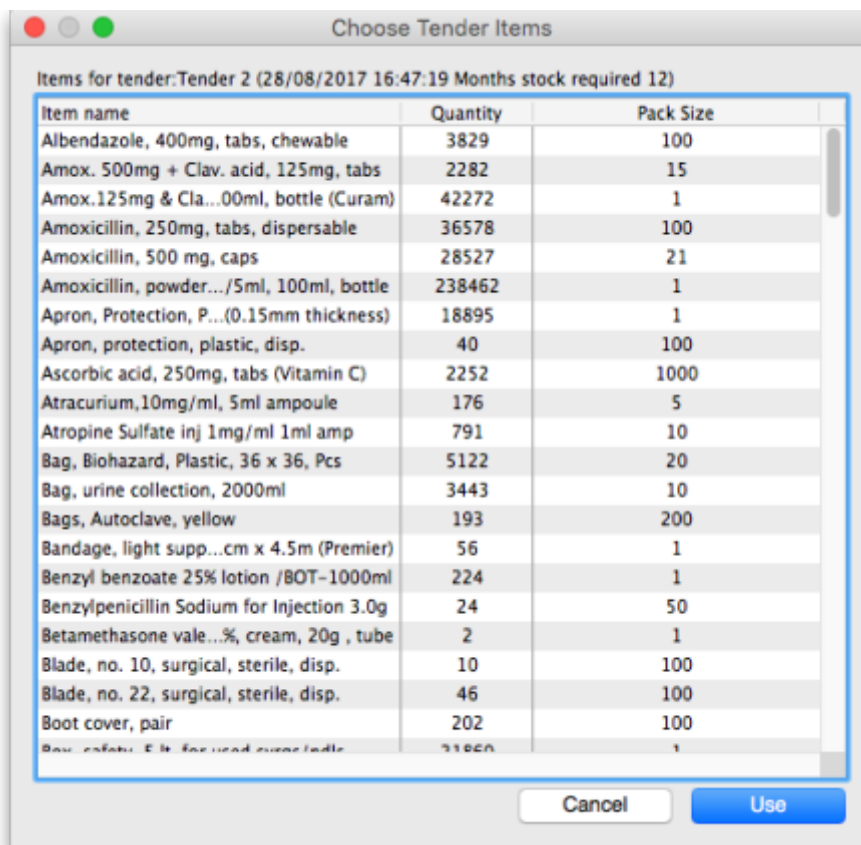
## Multiple currency tender quotations

A quotation may be received from a supplier which has used one currency for some items, and another currency for others; or has submitted more than one quotation for the same item, each one in a different currency (e.g. Euros and US dollars). Should this occur, it is strongly recommended that you process the quotation as two or more separate quotations, each one restricted to a single currency. That is, enter the supplier twice in the list of suppliers, then add a comment to the quotations to distinguish which quotation is in which currency. We have designed mSupply like this so

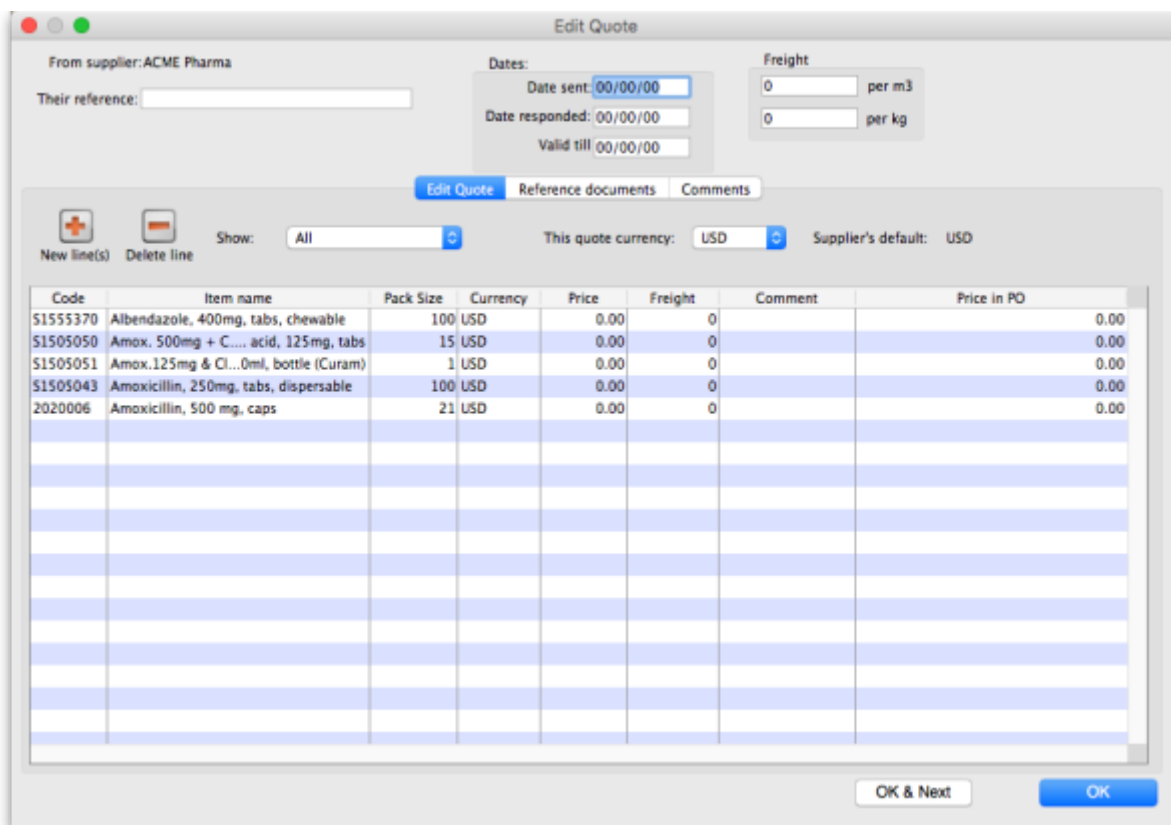
that when Purchase Orders are created, a single Purchase Order only uses one currency. Mixing currencies on a Purchase Order is likely to cause confusion and errors.

### Adding quotation lines

Now you can add the supplier's quotation line by line. On the *Edit Quote* tab, click on the **New line(s)** button. A window will open showing you a full list of all the items on the tender:



Select from the list all the items you want to enter quotes for. You can use the usual Control+click (Cmd+click on Mac) to add/remove an item to your selection, Shift+click to add/remove a range of items from your selection or Control+A (Cmd+A on Mac) to select all items. Now click on the **Use** button and all the items you have selected are added to the quotation with zero cost. In this example we chose to add the first 5 items in the tender:



To add the same item twice to a quotation from a supplier, click the **Add lines(s)** button and choose the item a second time. You will be shown a warning that the item is already on the quotation, and be asked if you want to add it again. You might need to do this if the supplier has supplied two prices for the same item based on differences in packaging or other specifications. Note that if you entered an item twice in a single tender to account for such differences, it will appear twice in the list and you won't need to carry out two selections.

In the event that the currency of the quote from the supplier is not the same for each line, mSupply allows each line's currency to be edited, and the appropriate one selected.

## Entering prices for each quotation line

When you have added all the items you want to the quotation, it's time to add the prices and other details of the supplier's quotation. To do this, double-click on the first quote line to open the *Edit Tender Response Item* window:

You will note that this form is very similar to the form for ad-hoc quotes; the related tender is shown at the top, and the item and supplier fields are filled in automatically. Enter the price and other details the supplier has provided - enter as much as you can because you'll use this information when comparing quotes from different suppliers.

**Manufacturer:** Type the first few characters of the manufacturer's name and press the Tab key on the keyboard to see a list of matching manufacturers. Select the one you want.

**Price:** Very important, the price you enter is the price for **ONE PACK** of the packsize shown in the **Pack** field.

**Valid until:** The date this quote will expire.

**Pack:** The pack size (number of single items in one pack) this quote is for.

**Currency:** The currency the **Price** is in.

**Rate:** The rate used to convert the **Currency** of this quote line to the currency you are using in your datafile.

**Rate to use:** You can use a different rate to convert the **Currency** of this quote line to the currency you are using in your datafile if you like - just enter it here.

**Disqualified:** Check this if the quote line is disqualified for any reason (excluded manufacturer, for example).

**Preferred:** Check this if this is the quote you want to accept as the best - see later sections on comparing quotes from different suppliers for more on this.

**Cost Local/Pack:** The quoted cost per pack in your local datafile currency when converted from the

quote line currency using the rate entered in the **Rate to use** field.

**Comment:** Enter anything you need to remember or need others to know when comparing this quote with those from other suppliers.

**Price breaks:** You can also add price break information that the supplier has provided you in the *Price break* section. A price break is a reduction in price when you order over a certain quantity. The **Price Break quantity** is the number of items at which the reduction occurs and **Discount** is the percentage reduction that will apply to the price entered in the **Price** field once the **Price break quantity** is reached.

**Freight:** If you are calculating freight based on volumes or weight, or using a freight factor, enter that information in this section.

**Supplier:** Enter any extra details about the supplier in this section.

When you have finished entering details for the quote for this item, click on the **OK & Next** button to move to the next item or **OK** to save the current quotation line, close the window and go back to the *Edit Quote* window.

When you have finished adding all suppliers' quotes to the tender we recommend that you set the tender's status to confirmed (on the *Edit tender* window at the top).



If you're finding that entering all the supplier's quotes is too much work then there's help for you! The remote tender module is what you need, where the suppliers all enter their own quotations and, when the tender closing date has passed you can simply download them to mSupply. See [Uploading and downloading web tenders](#) for details and give Sustainable Solutions a call if you're interested.

## Deleting an item from a supplier's quotation

If you wish to delete an item from the quotation, click on the line to highlight it, then click the **Delete line** button. Note that this action deletes the selected item from the quotation only, not from the tender!

## Reference documents tab

This is used for saving documents which refer to the Supplier's quote, not the whole tender - use the Reference documents tab on the *Edit tender* window to do that (see [Reference documents](#) for more details). You might want to use this to save a scanned version of a paper copy of the supplier's quotation, for example.



This is used for adding comments from you or the supplier, things that need to be remembered or considered later.

The screenshot shows a web application window titled "Edit Quote". At the top, it says "From supplier: ACME Pharma". Below that is a text input field labeled "Their reference:". A horizontal tab bar contains three tabs: "Edit Quote", "Reference documents", and "Comments", with "Comments" being the active tab. The main content area has two text input boxes: "My Comment" and "Supplier comment". At the bottom right, there are two buttons: "OK & Next" and "OK".

Simply type the comments you want to save in the appropriate box. When you click the **OK** or **OK & Next** button the comments (and all other changes to the tender) will be saved.

To view comments saved on the quote, simply view this tab.

## Importing responses from a spreadsheet

Code	Item name	Pack Size	Currency	Price	Freight	Comment	Price in PO

Previous: **18.03. Adding suppliers to a tender and inviting responses** | | Next: **18.05. Tender reference documents**

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