

15.05. Tender reference documents

While managing a tender, several documents may be consulted - for example, the quotations received from bidding suppliers, quality assurance documents, or pre-qualification documents. These documents, provided they are in electronic form (or have been scanned into electronic form if they were supplied as paper copies), may be uploaded and conveniently stored so that they may be readily consulted.

To access this functionality, open a tender by choosing **Supplier > Show Tenders...** from the menus and double-click on the tender you want (or create a new one) to add reference documents to. Finally, click on the **Reference documents** tab:

The screenshot shows the 'New Tender' window with the 'Reference documents' tab selected. The window contains several input fields for tender details and a table for managing reference documents. The table has columns for File Name, Created by, Created on, Saved on, and Version no. Above the table are buttons for Upload document, Delete document, and Download document, and a 'Show: Show All' dropdown menu.

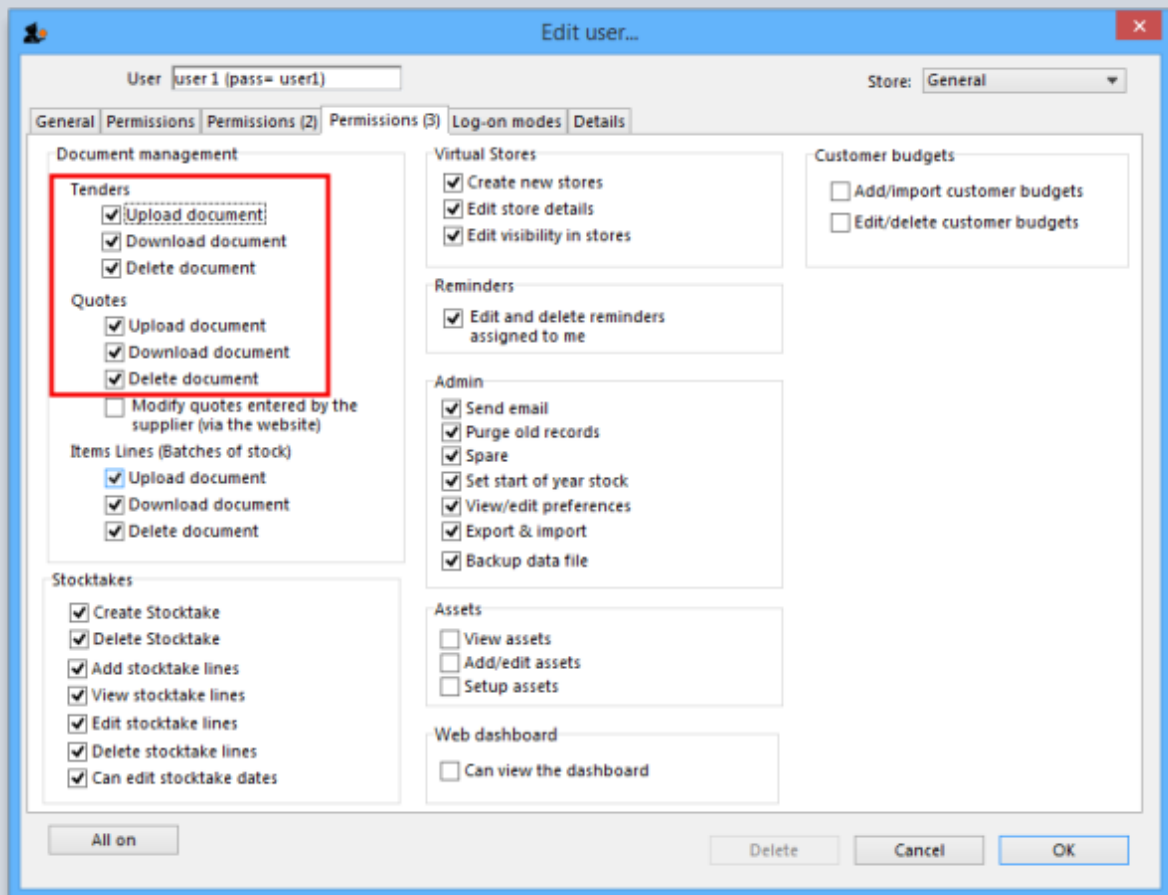
Upload document button: Click on this to store a document in the tender. You will be shown a window allowing you to browse to the required document. Double-click on the document or click on it and click the **Open** button to add it to the tender (called “uploading” it). Once it has been successfully uploaded it will appear in the list of documents below the buttons.

Delete document button: Click on a document in the list to select it and click on this button to delete the file and remove it from the tender. You will be asked to confirm the deletion.

Download document button: This will allow you to save one of the files in the list to your computer (called “downloading” it) so that you can view or edit it. Click on the file you want to view or edit to select it in the list then click on the **Download document** button. You will be shown two options: click on *Download* to just save the file on your computer or *Download and open* to save the file on your computer and open it for viewing or editing. A window will open for you to select the location to save the file on your computer. Browse to the folder you want to save it in then either double-click on the folder or click on it to select it then click on the **Open** button. The file will be saved in the location you chose. If you selected the *Download and open* option the file will also be opened for you to view or edit.

If you want any edits you make to the document to be saved to the tender, when you have finished editing, you must upload the edited version to the tender using the **Upload document** button. Don't forget or your edits will only exist on your computer, not on the tender! It is not necessary to change the document's name so that you don't overwrite the original, as mSupply will recognise that changes have been made, and will save it as a new version (and keep the old version too). The file's version number will appear in the *Version no* column. The **Show** drop down list above that column allows all versions to be displayed, or only the latest one.

The ability of users to upload and download documents to and from tenders is covered by permissions. To set these permissions choose the **File > Edit users...** menu item, double-click on the desired user, and set their permissions on the *Permissions(3)* tab:



The screenshot shows the 'Edit user...' dialog box with the 'Permissions (3)' tab selected. The 'Tenders' section is highlighted with a red box, indicating the permissions for document management. The 'Tenders' section includes the following permissions:

- ☒ Upload document
- ☒ Download document
- ☒ Delete document

Other sections visible in the dialog include:

- Quotes:** ☒ Upload document, ☒ Download document, ☒ Delete document, ☐ Modify quotes entered by the supplier (via the website)
- Items Lines (Batches of stock):** ☒ Upload document, ☒ Download document, ☒ Delete document
- Stocktakes:** ☒ Create Stocktake, ☒ Delete Stocktake, ☒ Add stocktake lines, ☒ View stocktake lines, ☒ Edit stocktake lines, ☒ Delete stocktake lines, ☒ Can edit stocktake dates
- Virtual Stores:** ☒ Create new stores, ☒ Edit store details, ☒ Edit visibility in stores
- Reminders:** ☒ Edit and delete reminders assigned to me
- Admin:** ☒ Send email, ☒ Purge old records, ☒ Spare, ☒ Set start of year stock, ☒ View/edit preferences, ☒ Export & import, ☒ Backup data file
- Assets:** ☐ View assets, ☐ Add/edit assets, ☐ Setup assets
- Customer budgets:** ☐ Add/import customer budgets, ☐ Edit/delete customer budgets
- Web dashboard:** ☐ Can view the dashboard

Buttons at the bottom: All on, Delete, Cancel, OK.

See [Managing users](#) if you need more detail.

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