ACCESSING THE PACKAGES INBOX

1. Click `Document / Dashboard ⌄` ▶ **Packages** ▶ **Inbox**

ADDING A TENDER PACKAGE

1. Click the ⊕ ⌄ **icon** ▶ **Tender Package**
2. Enter mandatory fields and/or additional fields

* Package ID:	* Package title:

3. You must nominate a **Tender Close Date**

Note: If checkbox is selected to Automatically close Submissions at Scheduled Tender close time, you will not have to manually close the tender package

3. Click **Save**

ADDING DOCUMENTS

1. In the Documents tab, click the ⊕ **icon**
2. Enter In the Search Criteria ▶ **Search**
3. Select the checkboxes to add document/s ▶ **Save**

ADDING TENDER SUBMISSION CRITERIA

1. In the Submission Criteria tab, click the ⊕ **icon**
2. In the Criteria tab, enter Title, File format/s and Max. file size
   Note: You can edit the Default Submission Attributes

ADDING RECIPIENTS

1. In the Recipients tab, click the ⊕ **icon**
2. Select a company from the drop down
3. Select the user/s ▶ select the arrow ➡ ▶ **Save**

MAIL DISTRIBUTION

Note: You will only see this if **Available in TenderDocs** is selected in Mail Types (If you have Admin access it can be found here: **Mail Inbox > Actions > Admin > Configure mail workflow > TQ**)

Edit Workflow of Tender Query

* Mail type	* Mail Type Title	Base Template
TQ	Tender Query	

- ☑ Enable File attachments
- ☑ Available in TenderDocs
- ☐ Response mail type only. Do not show in New Mail menu
- ☐ Carry forward Orig. Ref No when Replying / Forwarding the mail
- ☑ Allow users to modify the Orig. Ref No
- ☑ Single Mail Reference Number with Response / Forward Counters

1. Select the Distribution List icon ✎
2. You can add/edit Contacts to have access to the package ▶ **Save**
   Note: If there are contacts that aren't visible but need access, check they have been included in the security group settings (only available to Admins)

Contacts given access package			Clear allocated
Recipients added to: **To**			
Name	Email	HC	
MAM 01 (QA Software Pty. Ltd.)	☑	☐	⊖

PACKAGE SECURITY

1. Click on the Package Security tab
2. Select one option:
   ○ All users in my company   ○ Selected users in my company
3. Select the user ▶ select the arrow ➡
4. Choose view and/or edit ▶ **Save**

Note: Revising or adding documents is the same process as Standard Packages

RELEASING A TENDER PACKAGE

1. In the Details tab, click **Release**
2. Enter a message

Tender invitation date   Tender closing date

Monday, Jul 18, 2022

* Subject:

Notification of Invitation to Tender

* Message:

Arial ⌄	13 px	*I*	U	☰

3. Select **Send**

Note: Once package has been released, the tenderers will receive an email notification with instructions on how to log into the Tender Portal.