TENDER PACKAGES ESSENTIALS



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



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 \bigcirc 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

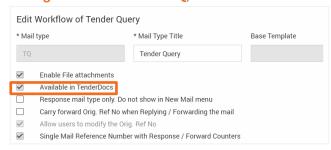
Note: You can edit the Default Submission Attributes

ADDING RECIPIENTS

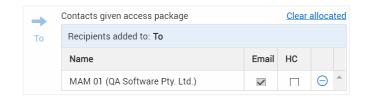
- 1. In the Recipients tab, click the (+) icon
- 2. Select a company from the drop down
- Select the user/s ► select the arrow → ► Save

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 > TO)



- 1. Select the Distribution List icon 🏻 🗹
- 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)



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 →
- 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

Enter a message

Tender invitation date

Monday, Jul 18, 2022

* Subject:

Notification of Invitation to Tender

* Message:

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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.