

How to Add Items in the Master:

To Add Items in the Tender Enquiry you will have to create the Item in the Item Master. The following process may be followed for the same.

- ✓ Click “Master(s)”
- ✓ Click Item
- ✓ Input the Item code
- ✓ Mentioned the Item specification in details.
- ✓ Click “Save”.

How to attach drawings for items or specifications for items:

You can attach drawings for items or big specification of items as attachment, before attaching the same you need to create an item and then follow the process as below

- ✓ Click “Master
- ✓ Click Item
- ✓ Input the Item code
- ✓ Click “Get item”
- ✓ Click “Browse”
- ✓ Attach Files (PDF, Word & Excel are acceptable)
- ✓ Click “Save”.

Process flow for Creation of RFQ by Buyer Login:

Step-1

- ✓ Click Tender
- ✓ Click Add
- ✓ Select Procurement category

Step-2 (Main Screen display & Fill up the following details)

❖ RFQ/NIT Header Detail

- ✓ RFQ/NIT Reference Code : Input Tender Reference No
- ✓ Currency : Select Currency
- ✓ RFQ/NIT Type : Select Limited or Open Tender
- ✓ Number of Bid Parts : Input One or Two
- ✓ Brief Description : Brief description of RFQ
- ✓ Detailed Description : Description mention in details
- ✓ Minimum Bid Required : Input as per requirement.
- ✓ Is Multiple Currency Bid Submission allowed:
- ✓ Is RA Enabled :
- ✓ Should Price Bid given in EPS prior to RA :

❖ RFQ/NIT Date Detail

- ✓ Bid Start Date : Input BID/Tender Start Date
- ✓ Bid Due Date : Input BID/Tender Due Date
- ✓ Bid Open Date : Input BID/Tender Opening Date
- ✓

Bid start date and time cannot be previous date and time but can be current date and future time.

❖ Payment Details

- ✓ *Participation Fee* :
- ✓ *EMD: Payee* :

❖ *RFQ/NIT Attribute Detail(s)*

- ✓ Delivery Schedule :
- ✓ Evaluation Basis :

❖ *RFQ/NIT Term Detail*

- ✓ Fill in Special Terms (If you need more rows click ADD ROW)
You can attach documents such as annexure if necessary for a particular RFQ by clicking “ADD ATTACHEMENT(s)”

Click “SAVE & GO TO ITEM(s)”

Step-3

❖ *RFQ /NIT Reference Code*

- ✓ *RFQ /NIT Item Code* : Input item codes individually as required.
- ✓ *Item Description* : The item description field will be populated automatically
- ✓ *Qty* : Please input item Qty of each item.
- ✓ *RFQ /NIT U.O.M* : Select Unit
- ✓ *Offer U.O.M* : Select Unit (The RFQ U.O.M and Offer U.O.M should be same)

Click “SAVE & GO TO RFQ/NIT”.

Step-4

❖ *If you Select RFQ/NIT type as Limited Tender*

- ✓ Click ADD SELLER
- ✓ Click Enter
- ✓ Select Supplier from All Seller(s) list
- ✓ Click Continue

Click “BACK TO RFQ”

Step-5

Before activation check the RFQ/NIT thoroughly.

Select status as “ACTIVE” for Activation & Click “SAVE”.

Incase if you want to modify:

- ✓ Click Tender
- ✓ Click View
- ✓ Click Enter
- ✓ Select RFQ type to Limited or Open Tender
- ✓ Select Status to “ Draft RFQ/NIT”
- ✓ Click Enter
- ✓ Click the RFQ Reference Number that is to be edited
- ✓ Click “Modify - RFQ/NIT Detail(s)”
- ✓ Make the necessary changes as per requirement
- ✓ Select status as “ACTIVE” for Activation & Click “Save”.

(Please note that once the enquiry is activated and saved you will not be able to edit the enquiry, hence check before making the status active).

How to Edit RFQ/tender enquiry:

Tender enquiry can be edited only if it is in Inactive mode only

- ✓ Click Tender
- ✓ Click View
- ✓ Click Enter
- ✓ Select RFQ type "Limited or Open Tender"
- ✓ Select Status "Draft RFQ/NIT"
- ✓ Click Enter
- ✓ Click the RFQ Reference Number that is to be edited
- ✓ Click "Modify - RFQ/NIT Detail(s)"
- ✓ Make the necessary changes as per requirement
- ✓ Select status as "ACTIVE" for Activation & Click "Save".

Procedure for Due Date extension for RFQ in EPS

- ✓ Click Tender
- ✓ Click View
- ✓ Click Enter
- ✓ Select RFQ type "Open Tender"
- ✓ Select Status "Closed Quotation(s) Not Evaluated "
- ✓ Click Enter
- ✓ Click the RFQ Reference No
- ✓ Scroll down and click on **ADD - RFQ Date Corrigendum** Button in "Date & Time Detail(s)" Section
- ✓ Select Bid due date & time as per requirement
- ✓ Click Submit and click Close Button
- ✓ Then Click Publish all Corrigendum Button
- ✓ Click the Check Box beside the "Final Publish for RFQ Date" and Press Publish Button(twice)
- ✓ Click Close Button

How to evaluate quotations and view the Comparison statement:

In EPS Tender enquiry is segregated into two parts.

Under Part I you can evaluate the commercials

Under Part II you will evaluation will consist of the basic price, net rate and landed rate.

You will be able to evaluate part II only after evaluation of Part I

Part I Evaluation

- ✓ Click Quotation
- ✓ Click View
- ✓ Click Enter
- ✓ Select RFQ type "Limited or Open Tender"
- ✓ Select Status "Closed Quotation not opened not evaluated",
- ✓ Click Enter
- ✓ Select the RFQ you want to evaluate by clicking on "O" button beside the Tender Enquiry
- ✓ Click on Evaluate Quotation.
- ✓ A pop up will appear to ask you to confirm x + 2 criterion. Click OK.
- ✓ Select the vendors, you wish to debar, and select the reason of rejection
- ✓ Save & Choose Trail Supplier
- ✓ Click Save and Go to Evaluation
- ✓ Click "View Evaluation" Link
- ✓ Click Quotation
- ✓ Click View
- ✓ Click Enter
- ✓ Select RFQ Type "Limited or Open Tender"
- ✓ Select Status "Closed Quotation opened not evaluated"
- ✓ Select the RFQ you want to input loading value
- ✓ Click "LOAD" link (extreme right in the screen)
- ✓ After input loading value, Click "Quotation"
- ✓ Click View

- ✓ Click Enter
- ✓ Select RFQ type “Limited or Open Tender”
- ✓ Select Status “Closed Quotation opened evaluated”
- ✓ Select the RFQ you want to evaluate.
- ✓ Click “View Quotation evaluation”
- ✓ Save the evaluated file.(In Excel Format)
- ✓ Take print out

Part II Evaluation

- ✓ Click Tender
- ✓ Click View
- ✓ Click Enter
- ✓ Select RFQ type “Open/Limited Tender”
- ✓ Select Status “ Closed Quotation Evaluated ”
- ✓ Click Enter
- ✓ Click the RFQ Reference No for which Part II is to be evaluated
- ✓ Scroll down and click on **ADD- RFQ Bid Part Detail(S) Button**
- ✓ Select Bid due date & time as per requirement
- ✓ Select Allow Bid evaluation as “No”
- ✓ De-select the vendors that you do not wish to view part II evaluation by clicking on the square box provide beside the each vendor.(By default all vendors who have submitted will be selected mode)
- ✓ If you want to Reject the particular supplier based on item basis, click on “**Reject Item**” Button
- ✓ Select the Item (De select the corresponding checkbox)
- ✓ Choose the Rejection Reason from dropdown list
- ✓ You may provide comment in Comments Box(optional)
- ✓ Click on Save Button
- ✓ Click on Close Button
- ✓ Click submit
- ✓ NB: Please note that the deselected vendors price details will not appear in the CS you click submit
- ✓ After the Bid evaluation time has elapsed,
- ✓ Click Quotation.
- ✓ Click View
- ✓ Click Enter
- ✓ Select RFQ Type Limited or Open Tender
- ✓ Select Status “Closed Quotation not opened not evaluated”
- ✓ Click Enter
- ✓ Select the RFQ you want to evaluate by clicking on “O” button beside the Tender enquiry for which you want to evaluate part II
- ✓ Click on Evaluate Quotation
- ✓ A pop up will appear to ask you to confirm x+2 criterion. Click “OK”.
- ✓ Another pop up will appear asking for confirmation on opening quotes. Click “OK”.
- ✓ Click View Evaluation
- ✓ Click on “Load”.
- ✓ Scroll down and Click Confirm
- ✓ Click Quotation
- ✓ Click View
- ✓ Click Enter
- ✓ Select RFQ Type “Open Tender”
- ✓ Select Status “Closed Quotation Opened evaluated”
- ✓ Click Enter
- ✓ Select the RFQ by Clicking on “O” button provided beside the enquiry no against **Bid Part No 2**
- ✓ Click “View Quotation”
- ✓ Save the Excel Sheet & take print out of CS.

Process flow for Creation of Purchase Order by Buyer Login:

Step-1

- ✓ Click Order
- ✓ Click Add

Step-2 (Main Screen display & Fill up the following details)

❖ Order Header Details

- ✓ Order Reference Code : Input Order No
- ✓ Currency : Select Currency
- ✓ Order Date :Input Order Date
- ✓ Description :Brief description of PO
- ✓ Inspection Group :Select Inspection Group

❖ RFQ & Quotation Order Header Details

N.A

❖ Seller user Details

- ✓ *Role Supplier : Select Supplier (Order to be placed on)*
- ✓ *Payee : Select Supplier (Payment to be made on, same as above if supplier & payee are same)*

❖ Attributes

- ✓ Organization Name : *order to be Placed on*
- ✓ Currency : Same as in Order Header details
- ✓ Order No : Same as in Order Header details
- ✓ Order Date: : Same as in Order Header details
- ✓ Description: : Same as in Order Header details
- ✓ Number of Items : Input Total no of Items in PO
- ✓ Order value : : Input Purchase order value (Basic Price +Taxes)
- ✓ Inspection Group: :Same as in Order Header details
- ✓ RFQ Reference Code : Input
- ✓ RFQ Date : Input RFQ Date
- ✓ Quotation Reference Code: Input Quotation Reference of supplier to whom order is being placed
- ✓ Supplier : Same as in Seller User details
- ✓ Payee :Same as in Seller User details
- ✓ L.O.I No : Input Letter of Indent No (LOI issued to Supplier before PO issue)
- ✓ L.O.I Date: : Input Date
- ✓ Indent Number : Input Purchase Requisition No (issued by Indenter)

You can attach documents such as annexure /Drawing of the PO by clicking ADD ROW adjacent to Attachments.

Click “SAVE & GO TO TERM”

Step-3

❖ Order Term Attributes

Price Basis : Input Total Basic Price of purchase order

Please fill Commercial Terms as applicable and select either “Value” or “Percentage” for each.

If not applicable please select “Not applicable” and put “0.00” in value field.

Click **“SAVE & NEXT”**

Step-4

❖ Order Term Attributes

- ✓ Item Code : Please input item codes individually as required.
- ✓ Item Description : The item description field will be populated automatically
- ✓ Qty : Please input item Qty of each item.
- ✓ Unit : Select Unit
- ✓ Rate : Input Rate
- ✓ Delivery Date Details : Mention PO Start & End Date.

Click **“SAVE & GO TO ORDER”**

Step-5

Before activation check the purchase order thoroughly.

Click **“SUBMIT ORDER” for Activation & display on EPS.**

Incase if you want to modify:

- ✓ Click Order
- ✓ Click update
- ✓ Select the Order Reference code
- ✓ Click “Modify Draft Order”
- ✓ Please modify as per requirement
- ✓ Click **“SUBMIT ORDER” for Activation & display on EPS.**