Administrator Manual for Tendersystem 1.5.0

To complete any of the following functions you must be logged into TenderSystem as an Administrator.

Please note that there is a normal and super Administrator, with different authorisation levels.

System Settings

Select the **Settings** menu that will open a sub menu on the left with system settings under the heading **System Settings**.

General Settings

- **Theme**
- **Default Language**
- **Website header**
- **Currency**

GUI Settings

- **XSLT transformation** XML can be transformed to XHTML/HTML in 3 methods:
- Only Methods that are supported by you PHP will be show
    - **Server**
        - XSLT (sablotron - PHP 4) or XSL (libxslt - PHP5) must be enabled in PHP (Click on PHP info to determine if enabled)
- It is usually enabled, but if not find out how to activate it at www.php.net
    - **Client**
        - Client browser must be XSL capable
- Currently supported by Firefox > 1.0.1, IE > 5 and Netscape > 8
    - **Browser**
        - TenderSystem determines if it is a XSLT capable browser and if not converts it to XHTML.
- XSLT must be enabled
- **Connection** There are 2 ways of connecting to TenderSystem API
    - **Module** (Default)
        - TenderSystem API is processed as a module
- This is 3 times faster than a cURL setup and recommended for first time installations
    - **cURL**
        - cURL is a file transferring agent using URL syntax
- cURL is used for remote GUI(s) hosting that connect to a central API server or to enhance security by connecting to a non Internet accessible server or socket
- cURL must be enabled in PHP (Click on PHP info to determine if enabled)
- **API server URL** must be setup correctly
- **GUI username and password** must only be used if GUI server has dynamic IP address (Server usernames and passwords set in Security Settings)
- **Strip white spaces and compress output**
    - Strip white spaces and compress output (Decrease bandwith but does not work with all browsers)

- **Debug errors**
    - Displays the API request in the page footer when activated
- **Display Timer**
    - Displays the execution time in the page footer when activated
- **Disclaimer**
    - URL to your disclaimer
- If not set then it will not be displayed in the left frame
- **Privacy policy**
    - URL to your privacy policy
- If not set then it will not be displayed in the left frame
- **Help**
    - URL to your helpdesk
- If not set then it will not be displayed in the top menu
- **FAQ**
    - URL to your FAQ page
- If not set then it will not be displayed in the top menu
- **Menu Generation**
    - Select if Menu should be displayed from Cache or Dynamically generated every time
        - Cache is the quickest option
- Cache folder (/tendersystem/module/menu/cache) for Cache option to work
    - Select to clear the menu cache and will be re-generated with next request
- Select the display order for **Agent**, **Subscriber** and **Admin** menu
- **Left Menu HTML**
    - Enter code to be display in the left frame
        - All [will be replaced with <
- All] will be replaced with >
- {quote} will be replaced with "
- {and} will be replaced with &
- TenderSystem **Status**
    - When set to in-active then the **Status Message** will be displayed instead of the login screen
- Only **admin** will be able to login and activate the system
- TenderSystem **Input**
    - **Check Input Type** checks if input is of a valid type
- **Reformat Input** reformats input to make it more system friendly
- You can set the minimum and maximum digits in a phone number but **Check Input Type** must be yes
- **Upload setting**
    - Select upload **status**, **Upload path**, **maximum file size** and **allowable file types**
- NOTE: **Upload path** can be dynamic (start with ./) or fixed. For security fixed non-executable location is recommended.

POP Settings (POP access required to process quote submissions received back by email)

- **POP status**
- **POP IP address**
    - Use IP address and not hostname
- Ping hostname to determine the IP address
    - **Port** (default is 110)
- **Tender email username** (ie POP username)
- **Tender email password** (ie POP password)
- **Save unknown email typre**

- **Test Pop**
    - NOTE : After you have submitted the settings you can use the Test Pop to check if it's working

Security Settings

- **Error log file**
  - Where to log errors
- If not set then errors will not be logged
- If using Linux remember to grant read and write access to file (chmod)
- Location can be dynamic (start with ./) or fixed (start with /)
- **Email Error Messages**
  - Email errors to support email address based on their seriousness
- If set to Serious it will also email for Critical i.e. sliding scale
- **Log request**
  - Whether or not to log incoming API requests
- Works well for debugging
- If using Linux remember to grant read and write access to file
- **PHP log file**
  - If set it will overwrite PHP settings in php.ini
- Works well for debugging
- If using Linux remember to grant read and write access to file
- **Login sessions**
  - How many login sessions to display in the Administrator control panel
- **Logs to display**
  - How many error, request and php logs to display
- **Display limit**
  - Maximum amount of log pages (size set above) that may be displayed
- **IP tracking**
  - Whether or not to link a session with an IP address
- For security it must be **Enabled** unless users and suppliers are allocated dynamic IP addresses per different page viewed by their ISP
- **Bind address**
  - Whether or not the API should only listen to requests from specific IP addresses
- For security it must be **Enabled**
- Set the bind addresses
- **API Authentication**
  - Select if API username and password authentication is allowed
- Insert the authorised GUI **Usernames** and **Passwords**

Message Settings Applies to SMS and SMTP

- **Schedule Messages**
  - Messages are schedule to be run by the email cron
- **Attempt Immediately**
  - Should attempt sending immediately and schedule it if an error occured
- **Maximum Attempts**
  - Maximum attempts to re-send a scheduled message
- **Minimum Timeout on Resends**
  - Minimum delay before trying to re-send a message

SMS Settings (Optional SMS notification to suppliers and clients. Uses Clickatell's API gateway)

- **SMS status**
- **Default country prefix**

    - This prefix will be used whenever a prefix is not available
- SMS **ID**, **username** and password obtainable from Clickatell
- **Clickatell's URL**
    - Clickatell's API URL
- **Test SMS**
    - This will send a test sms to your profiles Mobile Phone Number

SMTP Settings (SMTP access required to send out RFQ's and reports via email)

- **SMTP status**
- **SMTP IP address**
    - Use IP address and not hostname
- Ping the hostname to obtain the IP address if not available
- **Port** (default is 25)
- **Email Transfer Encoding**
    - 7 bit
- 8 bit
- quoted-printable
- base64
- **Image Receipt**
    - Can be used to determine if user has viewed the Email
- **Test SMTP**
    - Test current SMTP Settings by emailing a Test email to your email address in your profile
- **SMTP hello command**
- **SMTP authentication**
    - SMTP server may require authentication
- Activate and set the username and password
- **Email name**
    - Name that is displayed as the sender
- **Support email address**
    - Used when TenderSystem response not required
- **Support email priority**
    - Select if email must be send high priority or normal
- **Tender email address**
    - Address used to send out and receive back RFQ's and requests
- Must not be the same as the support email
- **Tender email priority**
    - Select if email must be send high priority or normal
- **Email Disclaimer**
- **Backup Email to Database**
    - All outgoing and incoming emails will be saved in the database
- **Send email to backup address**
    - All outgoing emails will be BCC'ed to the backup address
- **Postmaster Keywords**
    - Emails that are received that contain these keywords will be email directly to the administrators

Time Configuration

- **Time Format** and **Date Format** and **Time Zone** to display on the website and emails
- **Increase / decrease server time**
    - Seconds to increase / decrease the server time
- Used when server not in same time zone as users
- **Business Hours**

        - Used to calculate closing time
- Set start time and end time to 0:00 if not business day or holiday
- **Lunch break**
    - Apparently people still take lunch breaks in some part of the world
- If you do insert the start and end time of the lunch break or 0:00 if no break
- **Validity period**
    - Inactive session validity for suppliers, users and administrators in seconds

Holiday Settings

- Used to calculate closure time
- **Date**
    - Month-Day
- **Holiday Name**

Central Module Settings

Select the Settings menu that will open a sub menu on the left with system settings under the heading **Central Module Settings**.

These are the modules that are required to ensure that TenderSystem functions correctly.

Procurement process

NOTE: These settings affect all procurement processes

- **Enable Auto RFQ Generate**
    - Select if RFQ number must be generated dynamically or if user must insert the field
- **RFQ Number**
    - Specify the format that the dynamically generated RFQ field must use
        - [u] - Username
- [ui] - User Tender Count
- [uu] - User ID
- [b] - Branch Name
- [bi] - Branch Tender Count
- [bb] - Branch ID
- [o] - Organisation Name
- [oi] - Organisation Tender Count
- [oo] - Organisation ID
- [d] - Date
- [di] - Date Tender Count
- [ti] - Tender ID
- [ii] - Next Item Number
- [ts] - Unix Time Stamp
- zeropad
            - Pads value with zeros to a certain length
- format : zeropad($value)length($size)
- **Tender Admin Log size**
    - Number of fields to display for Tender Admin
- **Allow attachments to be attached**
    - Allow users to attach files with a RFQ request
- File size and type must adhered to allowable settings under GUI settings
- **Supplier(s) needed**
    - Whether or not suppliers are required in the specific area that supply the required items for a RFQ to be requested

- **Procure Administrator Approval**
  - Must a RFQ first be approved by an administrator before it is sent to suppliers
- **Send Approval needed Email**
  - Must an email be sent to all Administrators who have an email preference when a RFQ must be approved
- **Approval search URL**
  - URL to search items when approving a RFQ
- **Client Phone Prefix**
  - Request the clients prefix when awarding a RFQ or to use the default prefix set in General Settings
- **Duplicates Compare**
  - Method used to compare if duplicate quotes were submitted
- **Duplicates Keep**
  - What to do when a duplicate quote was found
- **Quote Primary Position by**
  - Method to determine the primary quote position either according to price, time submitted, stock or validity period
- **Quote Secondary Position by**
  - Select field used for secondary quote position either according to price, time submitted, stock or validity period

Report Settings

- **Enabled Ajax**
  - Allow javascript request for RFQ number
- **Balance Scored Card**
  - Enter Start, End, and Factor Percentage for Balance Score Card Report

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Module Settings

RFQ's can be diplayed publicly without users being required to login Select the **Settings** menu that will open a sub menu on the left with module settings under the heading **Module Settings**.

Bithday Settings

- **Enabled** Enable birthday module
- **Send Admin** Select if upcoming birthdays must be emailed to Administrator with email profile

Language Editor

- **Enable Language Editor**
- **Enable Online Translation**
  - TenderSystem can use online translation services such as Google to generate the Language Packs on your behalf
- This can take up to 4 hours and must be edited afterwards

Module Loader Settings

- **Enable or Disable Module Loader**
- **Enable or Disable Export**
- **Enable or Disable Import**
- **Enable or Disable Remove**
- **Enable or Disable Upgrade**

- **Stable Upgrade URL**
  - Location of Stable Module Upgrades
- **Development Upgrade URL**
  - Location of Development Module Upgrades
- **Additional Upgrade URL**
  - Location of Additional Module Upgrades

Public Settings

- **Enable Public Module**
- **Show Tenders**
  - Allow Tender to be show publically
- **Show Quotes**
  - Allow Tender quotes to be show publically
- **Show Quotes Prices**
  - Allow Tender quotes prices to also be viewed publically
- **Tender Amount**
  - How many tenders to show publically
- **Agents may opt in**
  - Allow Agents to quote on Tenders that they have not been invited to Tender on
- **Supplier Public Registration**
  - Allow Suppliers to register themselves onto TenderSystem
- **Company Public Registration**
  - Allow Companies to register themselves onto TenderSystem
- **Admin Approve Registration**
  - Public Registration must first be approved by an administrator
- **Set Area on Registration**
  - Suppliers set that Areas on Registration
- **Set Category on Registration**
  - Suppliers set that Categories on Registration
- **Supplier Defaults**
  - Default Values for suppliers that register themselves onto TenderSystem

Tender Settings

- **Enable Tender Module**
- **Insert Valid items**
  - Whether or not quotes must be included automatically on behalf of Agents if there are any Valid Items
- **Complete Valid Items Load**
  - Select to only insert Valid Items for a Supplier if there are quotes for all RFQ items
- **Auto Close**
  - Whether or not Tenders closing time will be changed once all Suppliers have quoted
- **Expired as Default**
  - Expired Items Price used as the default price in invitation that are sent to Agents
- **Closing Reports to agent**
  - Whether or not to send closing report to Agents once a tender as closed
- **Tender Close Time**
  - Set amount of seconds to leave when auto closing
- **Tender Quote Time**
  - This Setting can be used to changed the tender closing time every time a Agent quotes

- **!** to increase (EG !100)
- **^** to decrease (EG ^100)
- **#** to set (EG #100)
- **Time Settings**
    - **Default period** must be set to the current validity period of suppliers (default either 14 or 30 days)
- **Minimum period** ensure that quotes are valid for a minimum period
- **Maximum period** ensure that quotes do not remain valid for to long period as prices may change (default 60 days)
- **Default Tender Duration** is the business minutes (i.e. only during business hours) used to set the tender closing time
  Suppliers can not quote after a tender has closed
    - **Max Tender Duration** is the maximum allowable period in minutes that a claim may remain open
- **Tender Duration Increment** Clever closure is used to provide suppliers with additional time to quote
- This is done by increasing the tender period with the **Tender Duration Increment** for every 5 products above the first 5 products
- **May users specify closing dat**
    - Select if users may select the closing time
- RFQ will close at 12:00 on the selected date
- Tender duration periods above are then not used to calculate the closing time as it is set for the date
- **Show cash settlement**
        - Select if cash settlement option is shown
    - **Show non-tender supplier**
        - Select if non-tender supplier awarding option is shown
    - **Show invalidate**
        - Select if invalidate awarding option is shown
    - **Award to self**
        - Determine if RFQ must be awarded to self or a client
- Award to self must be set if using for internal procurement
    - **Include budget value**
        - If selected budget value can be inserted when RFQ requested
- Will be displayed to supplier so that they can determine correct replacement if required
    - **Include collection option**
        - Allow users to specify that they will collect RFQ item
    - **Allow Tender Quantities**
        - Display Tender Quantity Field in RFQ request
    - **Allow Excess**
        - Display excess field when awarding RFQ
- Used by insurance companies as a minimum payment by clients
    - **Allow collect Salvage Option**
        - Display collect Salvage option when awarding RFQ
- Used by insurance companies asking suppliers to collect the wreckage
    - **Include No Quote in reports**
        - Display in email reports when a supplier submit a no-quote (NQ)
    - **Subscriber Supplier Search menu**
        - Display Search Supplier in user menu
    - **Default Transport**
        - Select the default transport option
            - An additional RFQ item will be created for Collection or Delivery option

- If Collection selected must be set to active in **Include collection option**
  - **Notification SMS limit**
    - Number of SMS'es allowed to be used in supplier SMS notification
- Will be sent to suppliers with Email and SMS profile

Logs

Select the **Utilities** menu that will open a sub menu on the left with the logs Right at the bottom.

- **Error Log**
- **Request Log**
- **PHP Log**
- **Message Log**

Task Scheduling

Inbound emails must be processed and tenders must be closed on a continual basis. This is done by scheduling the task.

Scheduling a task in Linux (Cron)

There are 2 ways to schedule PHP in Linux, depending if PHP is setup as a CGI (can run from command line) or as an Apache module. If PHP is setup as a module you will need either wget or lynx to call the URL and execute the script.

CGI scheduling

If your PHP installation is not setup as a CGI and you can not setup PHP as CGI then skip this section read the **Module scheduling** section beneath.

- Login to your system as an **Administrator**
- Type **crontab -e** in the command line and insert the following line at the bottom of the cron file

  1,11,21,31,41,51 * * * * cd /path/to/tendersystem/; php application/include/cron_email.php

- Press **ctrl** and **X** and when prompted type **Y** to save the new cron file

  This would have setup the scheduler to parse the script every 10 minutes and can be tested by sending an email to the tender email address

Module scheduling

If your PHP installation is setup as a module you will require either wget or lynx (command line email clients) to parse the script on your behalf

- Login to your system as an **Administrator**
- Type **crontab -e** in the command line and insert the following line at the bottom of the cron file (depending on if you have wget or lynx installed)

  1,11,21,31,41,51 * * * * wget http://serverhost/tendersystemdirectory/application/include/cron_email.php

  OR

1,11,21,31,41,51 * * * * lynx - dump http://serverhost/tendersystemdirectory/application/include/cron_email.php

- Press **ctrl** and **X** and when prompted type **Y** to save the new cron file

  This would have setup the scheduler to parse the script every 10 minutes and can be tested by sending an email to the tender email address

Scheduling a task in Microsoft Windows

- Login to Windows as an **Administrator**
- Go to **Start** => **Settings** => **Control Panel** => **Scheduled Tasks**
  - In Windows XP it is under Performance and Maintenance
- Double click **Add Scheduled Task**
- Select **Browse** and select **cron_email.php** under "/path/to/tendersystem/application/include/"
- Select the **Daily** radio button and click the **Next** button
- Insert 7:00 in the start time and click the **Next** button
- Enter your username, password and confirm and then click the **Next** button
- **NB!** Check the tick box next to **Open advances properties for this task when I click Finish** and click the **Finish** button
- Select **Schedule** and then click the **Advanced** button
- Click the **Repeat Task** tick box and specify every 10 minutes with a 24 hour duration
- If you require further help you can go to www.microsoft.com for support.

Category Admin

Categories are the main product categories that have sub-categories and brands are associated with them.

Select the **Category Admin** menu that will open a sub menu on the left.

Creating a Category

- Select **Create Category** in the left menu
- **Single Category**
  - Insert the Category name to be created in the **Name** field
- Click the **Submit** button
- **Multiple Categories and Sub-Categories** are generated from an excel spreadsheet
  - Download the excel template by clicking on the **Click here to download the spreadsheet** link on the right
- Follow the instructions in the spreadsheet how to create multiple categories and subcategories (worksheet => Instruction)
- Click the **Browse** button and upload the spreadsheet
- Click the **Submit** button
- **Generic Category and Sub-Categories**
  - Select the **Generic Category** that must be loaded e.g. cellphone
- Click the **Submit** button

Deleting a Category

- Select the **Category** to be deleted from the dropdown list in the left menu
- Click **Delete** from **Category Admin**
- Confirm that the **Category** must be deleted

Linking and unlinking a Brand to a Category

- Select **Category** to which brands must be linked or unlinked from the dropdown list in the left menu
- Click **Brands** from **Category Admin**
- Select the brands that must be linked or unlinked to the selected **Category**
- Click the **Change brands** button

Creating a single Sub-Category under a Category

- Select **Category** under which the new **Sub-Category** must be created from the dropdown list in the left menu
- Click **Create Sub-Category** in the left menu
- Insert the Sub-Category name to be created in the **Name** field
- Click the **Submit** button

Deleting a Sub-Category

- Select **Category** and then the **Sub-Category** to be deleted from the dropdown list in the left menu
- Click **Delete** from **Sub-Category Admin**
- Confirm that the **Sub-Category** must be deleted

Creating a Brand

- Select **Create Brand** in the left menu
- **Single Brand**
  - Insert the Brand name to be created in the **Name** field
- Click the **Submit** button
- **Multiple Brands** are generated from an excel spreadsheet
  - Download the excel template by clicking on the **Click here to download the spreadsheet** link on the right
- Follow the instructions in the spreadsheet how to create multiple brands (worksheet => Instruction)
- Click the **Browse** button and upload the spreadsheet
- Click the **Submit** button

Area Admin

States are the main states (provinces) that have areas associated with them.

Select the **Area Admin** menu that will open a sub menu on the left.

Creating a State

- Select **Create State** in the left menu
- **Single State**
  - Insert the State name to be created in the **Name** field
- Click the **Submit** button
- **Multiple Sates and Areas** are generated from an excel spreadsheet
  - Download the excel template by clicking on the **Click here to download the spreadsheet** link on the right
- Follow the instructions in the spreadsheet how to create multiple states and areas (worksheet => Instruction)
- Click the **Browse** button and upload the spreadsheet *Click the **Submit** button
- **Generic States and Areas**
  - Select the **Generic State** that must be loaded e.g. usa

- Click the **Submit** button

Deleting a State

- Select the **State** to be deleted from the dropdown list in the left menu
- Click **Delete** from **State Admin**
- Confirm that the **State** must be deleted

Creating a single Area under a State

- Select **State** to link the new **Sub-Category** from the dropdown list in the left menu
- Click **Create Area** in the left menu
- Insert the **Name** of the **Area** to be created
- Click the **Submit** button

Deleting an Area

- Select the **State** and then the **Area** to be delete from the dropdown list in the left menu
- Click **Delete** from **Area Admin**
- Confirm that the **Area** must be deleted

Organisation and User Types

There are 3 types of **Organisations**:

- **Company** - Request Tenders Items to be Quoted on
- **Supplier** - Quote on Tenders Items that where Requested
- **Admin Organisation** - Administrate the Tender Process

There are 3 types of **Users**:

- **Subscribers** - belongs to a Company and does the requesting
- **Agents** - belongs to a Supplier and does the quoting
- **Administrators** - belongs to a Admin Organisation and does the administrating

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Company Administration

There are 3 different permission levels for **Subscribers**:

- **Normal Level** - may request quotes and view or award their **own** quotes, reports, profiles and suppliers
- **Branch Level** - may request quotes and view or award the **branch** quotes, reports, profiles and suppliers
- **Organisation Level** - may request quotes and view or award the **organisations** quotes, reports, profiles and suppliers

Select the **Company Admin** menu that will open a sub menu on the left

Creating an Company

- Select **Create Company** in the left menu
- Insert the required fields
    - **Company Information**
        - **Registered Name** is the Organisation Registered name
- **Transaction Fee** is the percentage transaction fee based on the minimum lowest returned tender

- **Transaction Minimum Fee** is the minimum transaction fee per item
- **User Fee** is the monthly fee per user
- **SMS Fee** is the SMS fee for messages sent to clients
- **Reg #** is the company registration number
  - **Representative Information** : Representative is the main representative for the **Company**
    - **Username** - Username and password will be emailed to the user when created
- **Dialling prefix** - country dialling prefix
- **Phone Work**, **Phone Fax** and **Phone Mobile** - complete phone number including dialling code but not country dialling prefix
- **Notification method** - preferred notification method
- **Permission Level**
- **Representative position**
- **Mandate** - authorised representative mandate per tender, which send a notification to the users administrator if this amount is exceeded
  - **Branch Information**
    - Insert the branch information to generate the **default branch**
- Branch **Name**
- **Dialling prefix** - country dialling prefix
- **Phone Work** and **Phone Fax** - complete phone number including dialling code but not country dialling prefix
- **Email address**
- **Comment** - this comment is automatically inserted in purchase orders
- **Country** - country where the branch is located
- **Postal** and **Physical** address
- Click the **Submit** button
- This will generate the **Organisation**, **Branch** and first **Subscriber**

Editing or Deleting an Company

- Select the **Company** to be edited from the dropdown list in the left menu
- Click **Edit/View** under the dropdown list of the Companies
- Change required information
- To **Delete** the **Company** check the delete tick box
- Click the **Change Organisation Information** button

View Company Reports

- Select the **Organisation** whose reports you want to view from the dropdown list in the left menu
- Click **Reports** under the dropdown list of the Companies
- Report options are described in the User Manual
- Click the **Display** button

Organisation Supplier Search

- **Suppliers** are linked to **Organisations** as not all **Suppliers** are on every **Organisation's** panel
- Select the **Organisation** whose suppliers you want to view from the dropdown list in the left menu
- Click **Supplier Search** from **Organisation Admin**
- **Supplier Search** options are described in the User Manual
- Click the **Search** button

Supplier Panel

- **Supplier** are linked to a **Company**

- Select the **Company** whose **Supplier Panel** you want to update from the dropdown list in the left menu
- Click **Supplier Panel** under **Company Admin**
- Select all **Supplier** that the **Company** will request items for
- Click the **Change Organisation** button

Creating an Branch

- Select the **Company** for whom you want to create a branch from the dropdown list in the left menu
- Click **Create Branch**
- Insert the required information
    - Branch **Name**
- **Dialling prefix** - country dialling prefix
- **Phone Work** and **Phone Fax** - complete phone number including dialling code but not country dialling prefix
- **Email address**
- **Comment** - this comment is automatically inserted in purchase orders
- **Country** - country where the branch is located
- **Postal** and **Physical** address
- Click the **Create Branch** button

Editing or Deleting a Branch

- Select the **Company** and **Branch** that you want to delete from the dropdown list in the left menu
- Click **Edit/View** from **Branch Admin**
- Change required information
- To **Delete** the **Organisation** check the delete tick box
- Click the **Change Branch Information** button

Creating a Subscriber

- Select a **Company** and then a **Branch** from the dropdown list in the left menu
- Click **Create Subscriber**
- Insert the required information
    - **Username** - Username and password will be emailed to the user when created
- **Name** and **Surname**
- **Dialling prefix** - country dialling prefix
- **Phone Work**, **Phone Fax** and **Phone Mobile** - complete phone number including dialling code but not country dialling prefix
- **Email address** - address to which reports will be emailed
- **Notification method** - preferred notification method
- **Reports** - Daily, weekly or monthly reports (TenderSystem PRO)
- **Permission Level**
- Preferred **Theme** and **Language**
- **Mandate** - authorised representative mandate per tender, which send a notification to the users administrator if this amount is exceeded
- Click the **Submit** button
- A username and password will be emailed to the new **Subscriber**

Editing or Deleting a Subscriber

- Select the **Company** (and **Branch** Optionally) and then **Subscriber** who you want to edit or delete the dropdown list in the left menu
- Click **Edit/View** under **Susbscriber Admin**
- Change required information

- To **Delete** the **Susbscriber** check the delete tick box
- Click the **Submit** button

Resetting a Subscriber password

- Select the **Company** (and **Branch** Optionally) and then **Subscriber** whose password you want to reset from the dropdown list in the left menu
- Click **Password reset** from **Subscriber Admin**
- Confirm that you want to reset the **Subscriber's** password
- This will send a password reset confirmation to the **Subscriber** by email

Tender Request on behalf of a Subscriber

- Select the **Company** (and **Branch** Optionally) and then **User** for who you want to request a Tender from the dropdown list in the left menu
- Click **Request Tender** from **Subscriber Admin**
- **Tender Request** options are described in the User Manual

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Supplier Administration

There are 2 different Permission Level for **Agents**:

- **Normal Level** - may submit quotes and view or award their **own** quotes, reports, profiles and suppliers
- **Super Level** - may submit quotes and view or award the **Supplier's** quotes, reports, profiles and suppliers

Select the **Supplier Admin** menu that will open a sub menu on the left.

Creating a Supplier

- Select **Create Supplier** in the left menu
- Insert the required fields
    - **Supplier Information**
        - **Registered Name** is the Organisation Registered name
- **User Fee** is the monthly fee per Agent
- **SMS Fee** is the SMS fee for messages sent to clients
- **Reg #** is the company registration number
    - **Representative Information**
        - Representative is the main representative for the **Supplier**
- **username** - username and password will be emailed to the Agent when created
- **Dialling prefix** - country dialling prefix
- **Phone Work**, **Phone Fax** and **Phone Mobile** - complete phone number including dialling code but not country dialling prefix
- **Email address** - address to which tenders will be emailed
- **Notification method** - preferred communication method
- **Reports** - Daily, weekly or monthly reports (TenderSystem PRO)
- **Permission Level**
- Preferred Agent **Theme** and **Language**
- **Representative position**
- **Mandate** - authorised representative mandate per tender, which send a notification to the Agents administrator if this amount is exceeded
    - **Branch Information**
        - Insert the branch information to generate the **default branch**
- Branch **Name**
- **Dialling prefix** - country dialling prefix

- **Phone Work** and **Phone Fax** - complete phone number including dialing code but not country dialing prefix
- **Email address**
- **Comment**
- **Country** - country where the branch is located
- **Postal** and **Physical** address
- Click the **Submit** button
- This will generate the **Supplier**, **Branch** and first **Agent**
- Remember to update the **Supplier Areas**, **Supplier Categories** and **Company Panel** for the **Supplier**

Editing or Deleting a Supplier

- Select the **Supplier** to be edited from the dropdown list in the left menu
- Click **Edit/View** from **Supplier Admin**
- Change required information
- To **Delete** the **Supplier** check the delete tick box
- Click the **Change Supplier Information** button

View Supplier Reports

- Select the **Supplier** whose reports you want to view from the dropdown list in the left menu
- Click **Reports** from **Supplier Admin**
- Report options are described in the Supplier Manual
- Click the **Display** button

Supplier Areas

- **Areas** are linked to a **Supplier**
- Select the **Supplier** whose **Areas** you want to update from the dropdown list in the left menu
- Click **Supplier Areas** under **Supplier Admin**
- Select all **Areas** where the **Supplier** can Tender
- Click the **Change Areas** button

Supplier Categories

- Product **Categories** are linked to a **Supplier**
- Select the **Supplier** whose **Categories** you want to update from the dropdown list in the left menu
- Click **Categories** from **Supplier Admin**
- Select all product **Sub-Categories** that the **Supplier** provides
- Click the **Change Categories** button

Company Panel

- **Company** are linked to a **Supplier**
- Select the **Supplier** whose **Company Panel** you want to update from the dropdown list in the left menu
- Click **Company Panel** from **Supplier Admin** *Select all **Company** that the **Supplier** will quote items for
- Click the **Change Organisation** button

Item Admin

- When a **Supplier** quotes and is willing to provide a product for a specific period the item remain valid until the expiry date has been reached.
- Valid items are automatically included in a RFQ if it is setup in **Tender Settings**
- Valid Items features are discussed in the Supplier Manual

Creating a Branch

- Select the **Supplier** for whom you want to create a branch from the dropdown list in the left menu
- Click **Create Branch**
- Insert the required information
    - Branch **Name**
- **Dialling prefix** - country dialling prefix
- **Phone Work** and **Phone Fax** - complete phone number including dialling code but not country dialling prefix
- **Email address**
- **Comment**
- **Country** - country where the branch is located
- **Postal** and **Physical** address
- Click the **Create Branch** button

Editing or Deleting a Branch

- Select the **Supplier** and **Branch** that you want to delete from the dropdown list in the left menu
- Click **Edit/View** from **Branch Admin**
- Change required information
- To **Delete** the **Supplier** check the delete tick box
- Click the **Change Branch Information** button

Creating an Agent

- Select the **Supplier** and **Branch** for where the Agent must be created from the dropdown list in the left menu
- Click **Create Agent**
- Insert the required information
    - **username** - username and password will be emailed to the Agent when created
- **Name** and **Surname**
- **Dialling prefix** - country dialling prefix
- **Phone Work**, **Phone Fax** and **Phone Mobile** - complete phone number including dialling code but not country dialling prefix
- **Email address** - address to which reports will be emailed
- **Notification method** - preferred communication method
- **Reports** - Daily, weekly or monthly reports (TenderSystem PRO)
- **Permission Level**
- Preferred **Theme** and **Language**
- Click the **Create Agent** button
- A username and password will be emailed to the new **Agent**

Editing or Deleting an Agent

- Select the **Supplier** (and **Branch** optionally) and then **Agent** who you want to edit or delete the dropdown list in the left menu
- Click **Edit/View** from **Agent Admin**
- Change required information
- To **Delete** the **Agent** check the delete tick box
- Click the **Submit** button

Resetting an Agent's password

- Select the **Supplier** (and **Branch** optionally) and then **Agent** whose password you want to reset from the dropdown list in the left menu
- Click **Password reset** from **Agent Admin**

- Confirm that you want to reset the **Agent's** password
- This will send a password reset confirmation to the **Agent** by email

Tender Submission on behalf of an Agent

- Select the **Supplier** (and **Branch** optionally) and then **Agent** for who you want to submit a Tender from the dropdown list in the left menu
- Click **Submit Quote** from **Agent Admin**
- **Tender Response** options are described in the Supplier Manual

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Language Administration

Select **Utilities** and then **Language Editor** from the left menu

Creating a Language

- Click on the **Create Language** in the Main Window
- Select the **Language** that you want to create. The ISO 639 (2 letter) language code will be displayed in the **ISO format** field.
- Click on the words **Click here to instantiate the language files**
- This is the long tendious part, you have to go through **all the inactive modules**
    - Click on an Inactive Section
- Translate the Sentence/Words by putting in the translated value
- Click Submit
- The Section should no longer be inactive
- move onto the Next Inactive Section
- You have created a new language for tendersystem

Removing

- Select the language that you want to remove and click on **Remove**.
- Never Remove all Languages and make sure no is on the current language pack before removing

Exporting

- Select the language that you want to export and click on **Export**.
- Insert the language translator's name in the **Translators** field.
- Click the **Export** field and select were to save the language pack.

Importing

- Select **Browse** next to the **Filename** box.
- Select the language pack on your local computer.
- Click the **Import** field.
- View the Information on the Language Pack.
- Click the **Import** Again.

Messenger

Select **Utilities** and then **Messenger** from the left menu

Sending Messages

- Select either the **Company**, **Branch** or **User Type** to whom you want to send the message or leave blank to send to all users.
- Click the **Send Message** button.

- Select which users must be **excluded** from receiving the message.
- Insert the **Subject** (email only and ignored for SMS'es).
- Type the message in the body field.
- **Tip:** To include the user name, organisation, branch, telephone and fax number or user's email address click on the link above.
- **Tip:** You can also bold, italic or underline text and include a hyperlink through the links above (email only and ignored for SMS'es).
- Click the **Send email**, **Send SMS** or **Send Prefer** button.
- Note : **Send Prefer** will send the message to the user in their preferred method i.e. email, SMS or email and SMS.
- Note :SMS'es are limited to 3 SMS'es i.e. 480 characters to prevent depleting your SMS account. Truncating of messages is done on the message gateway side i.e. Clickatell as it automatically links the messages together in a large single SMS.

Module Loader

Modules can be imported and loaded as required

Select **Utilities** and then **Module** from the left menu.

Importing a Module

- Select **Browse** next to the **File** box.
- Select the module to be imported on your local computer.
- Click the **Import**.
- **View** the Information about the module.
- Click the **Import**.

Removing a Module

- Under **Install Modules** Heading find the module you want to remove.
- Click on the remove icon.
- **View** the Information about the module.
- Select if you would like the **tables removed**.
- Click the **Remove**.

Export a Module

- Under **Install Modules** Heading find the module you want to export.
- Click on the export icon.
- **View** the Information about the module.
- Select the **languages** you would like to include in the export.
- Click the **Export**.