Overview

This document is meant to guide users in the various actions that they need to take to create and manage the Tendering process.

Tenders are a sort of Auction, initiated buy a Customer.
A customer in need of a specific service or product, can send a request to one or multiple providers.
The providers will be then choose to participate or not in the process and then provide their proposal.
The customer will then be able to choose one of the proposal presented by the providers.

Lifecycle of a Tender

A customer can initiate a Tender by formalising the offer and inviting providers to the tenders.
During the drafting process, the Tender object is represented by a Quote of category "Coordinator" and in status draft, in this status, the tender is only visible to the customer.
During the draft, the customer can set the dates of start and end of the tendering, invite providers to the tender and remove providers already invited. The pdf with the request of the customer also need to be uploaded in this stage.

Once the customer is satisfied the Tender can be moved in the Pre-Launched state, in this stage, the providers gets notified of the invitation they received .

During the Pre-Launch period, the customer is able to navigate to the tender dashboard and see all his Tenders.
Tenders in draft can be edited, those that are already moved on from the draft state, can be expanded and a list of the quotes associated to the tenders will be presented, one for each invited providers, with its relative actions and state.

The providers during this period, can access the dashboard on the provider side, and see only one quote if they have been invited and at this point they can only decide to partecipate in the tender or decline the invitation.
Accepting the invitation will move the quote into status "inProgress".

The Tender then moves into status Launched.
At this point it's not possible for providers to join the process if they haven't already accepted.
Providers during this time, can submit their proposal by uploading a PDF on the quote that they see on their dashboard.

The customer is able to monitor who has uploaded a proposal from his side of the dashboard.
At this point is up to the customer to Reject the proposal that aren't acceptable and Accept the one that it's preffered.
Also, once a quote get accepted, all the other become automatically rejected.

The tender moves then into Closed state.
Once a tender is closed, or a customer accept a proposal, no further action can be taken by other providers.

This completes the Tender process

For further details on the quote, it is available the full guide here Quote Guide.

Chat

Once a tender is no more in status Draft, the chat funcionality is available.
Customer and provider can chat with each other 1 on 1 via their shared Quote; otherwise the Customer can broadcast a message to all the provider in a Tender.

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