

Use the full purchasing process for all purchases that cannot be made using Quick PO i.e.

- for purchases that require more than 1 Verbal Quote

The process allows oversight of the entire procurement workflow via the following 3 key steps

**Create Request**

And add a line for each item being purchased

**Create Quote Request**

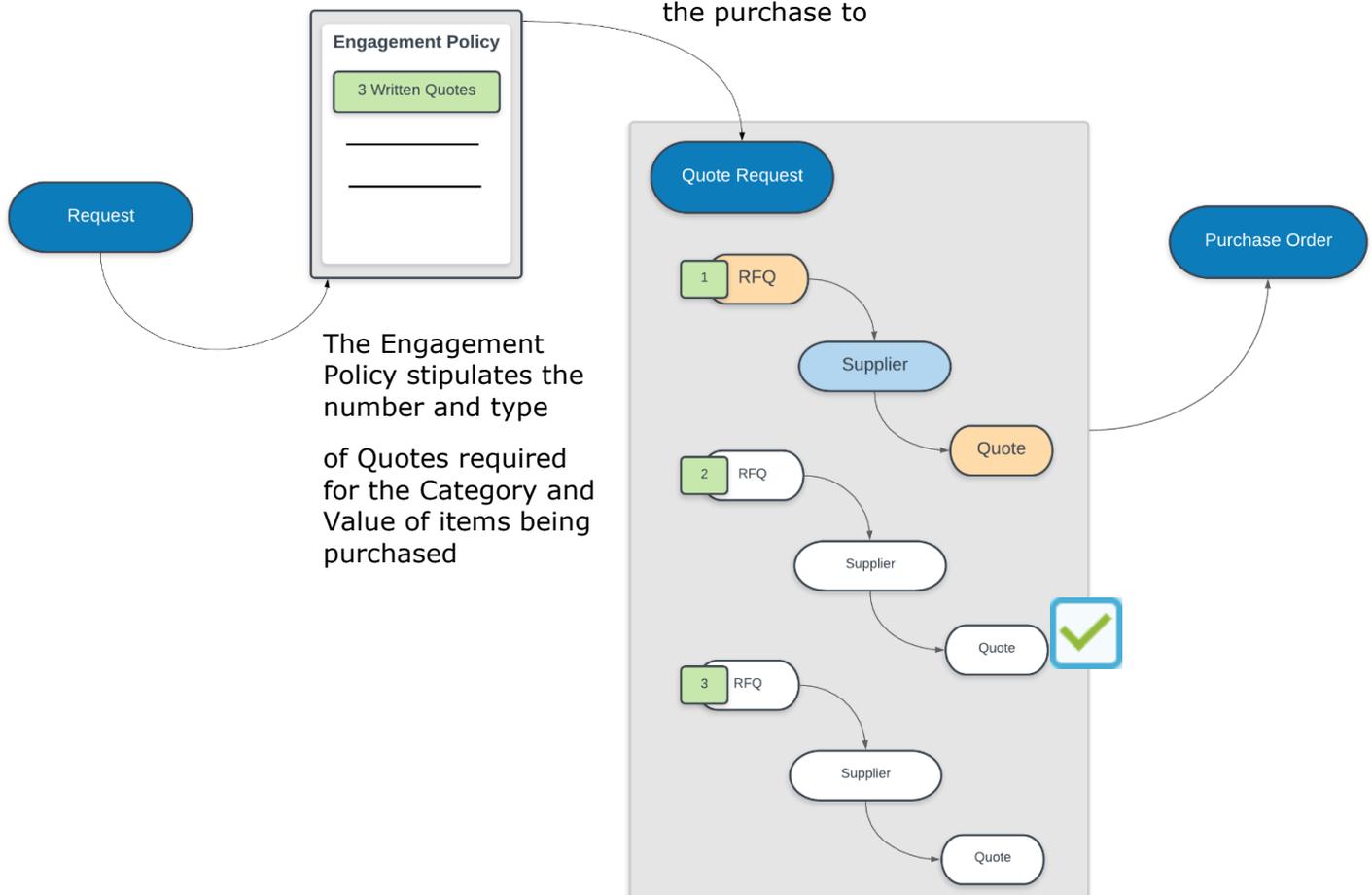
1. Select Supplier/s
2. Send a Request for Quote (RFQ) to each Supplier

Suppliers return their Quotes

3. Assess the responses
4. Select which Supplier to award the purchase to

**Create PO**

Email or Print a Supplier/ Office Copy of the PO



To start the full purchasing process – complete the steps on the next page.

Open your browser and log into Altus (<https://www.altus.net.au>) then navigate to Procurement > Procurement

### Raise a Request

1. Navigate to the **Requests** screen
2. Click

**ADD NEW REQUEST**

### Fill in the following summary details

Either select an available option from the drop down or click in a field and type in the required data.

NOTES:

1. All fields marked with an \* are mandatory.
2. Each Request can only include 1 Category of items

Project - can be left blank. If necessary the Request can be linked to a Project later (below).

Requested By - defaults to the logged in user's name. NOTE: Only officers assigned to a User Group that is linked to the 'ChangeRequester' Action Group can change the Requesting Officer.

Contact Officer defaults to the logged in user's name but could be changed to the Authorising Officer for example. The phone number defaults to your Company's phone number (set in Tenant Settings > Company Details) but can typed over with a different number if required.

Category - mandatory

Sub Category - shows a list of Sub Categories that are available for the selected Category as a check that the correct Category was chosen to ensure when adding line items to the Request (in the next step) the correct Sub Categories are available to choose from.

## Procurement



Requests



Quotes



Orders



Projects



Policies



Reports



Settings

### Request

**RETURN**

Project	-
Requested By *	Jane Doe
Contact Officer *	Jane Doe (08) 93157000
Category *	Roads
Sub Category	Sub-Category of Roads
Description *	Dixon Road Resurfacing
Required By Date *	19/05/2020 04:00 PM
Quotes Due *	15/05/2020 12:15 PM
Standing Order	<input type="checkbox"/>
Special Instructions	
Delivery Address	Dixon Road (West)

[select from list](#)

**SAVE**

**CANCEL**

Description - specifies what you are ordering. The description is printed on the Request for Quote document sent to the Supplier not on the Purchase Order

Required By Date - the date and time the goods are required by.

Quotes Due - the date and time all related quotes are required to be submitted by.

The above 2 fields will default to the current date/time unless the option to determine the date/time is selected in Procurement Settings. Generally the Quotes Due date should be sometime prior to the Requested By Date to allow time to review the Quotes.

Standing Order - tick if applicable -- refer to the separate [Full Purchasing Process - Creating Standing Orders](#) Quick Reference Card for the specific process that applies to Standing Orders

Special Instructions - this is a free form field, equivalent to the Notes field in SynergySoft

Delivery Address – either:

- select a Location from the drop down list (the list of available options are set up in Settings) or
- click **add manual entry** and type the address in manually. Adding the Address this way does not save it for future use. If needed again, request that a user with the relevant permissions create the Address in Settings

3. Click **Save**

### Add a line for each item to be included on the Request

To add the first item's details:

1. Click **ADD NEW REQUEST LINE**

2. Update the fields as prompted:

Description - the text entered will be included on the PO (in Altus and SynergySoft where it will also show in your 'List of Accounts Due & Submitted to Committee' Report)

Sub Category - select an available option from the drop down list

Account - type the number in manually or use the search icon to search on the Account's description (for assistance with selecting an Account see the [Account Picker Quick Reference Card](#)).

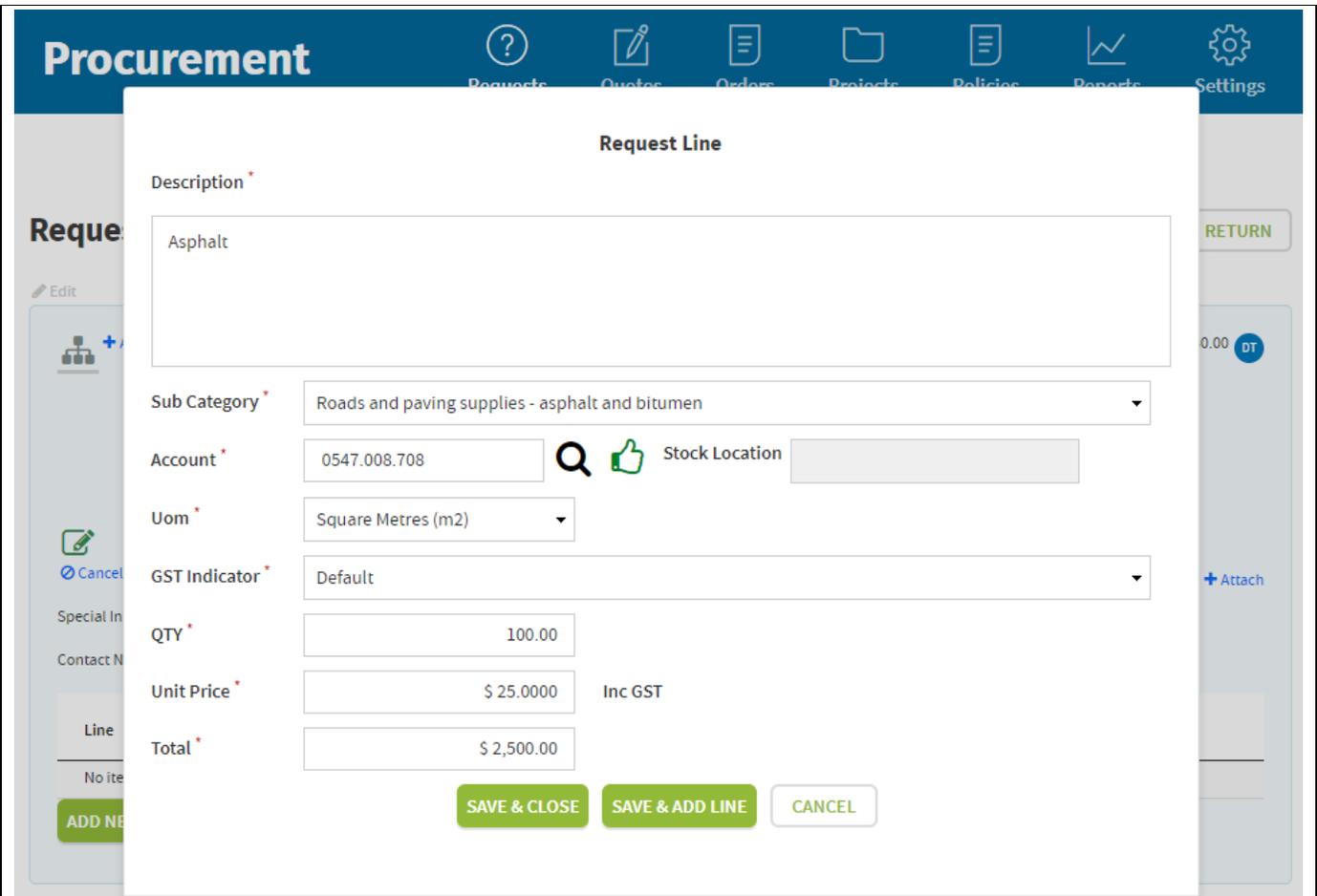
TIP: When linking a Request to a Stock item, go to the Stock Location field and select a relevant SynergySoft Stock Location code from the drop down list.

Uom - defaults to Each (ea) but can be changed to one of the other system defined options

GST Indicator - leave blank to use the default GST indicator assigned to the selected GL Account/Job or select an alternative from the drop down menu

QTY - enter the quantity of items required

Either enter the Unit Price - including GST and the Total will calculate automatically, or enter the



**Procurement**

Request Line

Description \*  
Asphalt

Sub Category \*  
Roads and paving supplies - asphalt and bitumen

Account \*  
0547.008.708    Stock Location

Uom \*  
Square Metres (m2)

GST Indicator \*  
Default

QTY \*  
100.00

Unit Price \*  
\$ 25.0000 Inc GST

Total \*  
\$ 2,500.00

Total and the Unit Price will calculate automatically.

3.To:

- add more Items to the Request click **Save & Close**
- add another Line Item to the Request click **Save & Add Line** and fill in the Item's details (as above).

### Check the Summary details displayed

Notice how the system has automatically determined (based on the Category and Value of items being purchased) the Purchasing Engagement Policy it will enforce for the purchase.

If an Engagement Policy of 'Panel Purchase' applies to the purchase, refer to the separate [Panel Process Quick Reference Card](#) for the steps. For all other purchases, continue below.

TIPS:

- once a Request is accepted, if any details initially entered on the Request need to be changed, you can click **Edit (1)** to update them
- to link the Request to a Project, click **+ Add (2)**
- to change a Line Item's details click the pencil to the right of the Line Item **(3)**

## Request

RETURN

Edit **1**

+ Add **2**

RQ2020-3

Roads

\$5,500.00 DT

Dixon Road repairs

Created On: 12/05/2020 12:03:53

Required By: 19/05/2020 00:00:00

Quotes Due: 15/05/2020 12:15:00

Quote: -



2 Written Quote(s)

Cancel Request Delete

ACCEPT

OVERRIDE

+ Attach

Special Instructions

Delivery Address

Contact Name: Jane Doe

Contact Detail:

Line	Description	Sub Category	Account Code	QTY	Uom	Unit Price	Total	GST
1	Asphalt	Roads and paving supplies - asphalt and bitumen	0547.008.708	100.00	Square Metres	\$55.0000	\$5,500.00	<b>3</b>

ADD NEW REQUEST LINE

### Start the Quote process

For this example the system has determined from the Purchasing Policy that the number and type of Quotes required is 2 Written Quotes. Either:

- **Accept** the suggested engagement model and proceed to obtain the required number of Quotes - skip to page 7

or

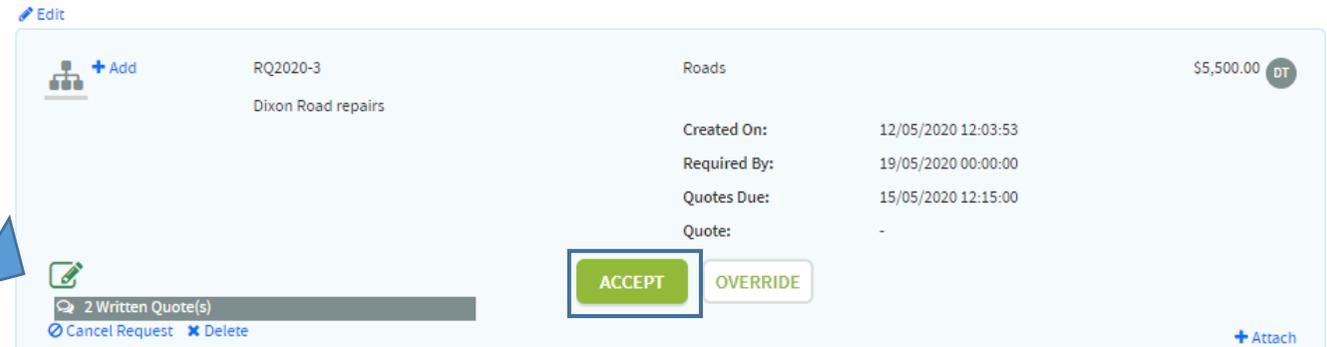
- **Override** the suggested engagement model - in usual circumstances where for example the items are needed urgently and the number/type of Quotes required needs to be changed to speed up the procurement process:

Click the **Override** button (you must be setup with the Power User or Administrator Role to see the button) then refer to the steps below.

If the 'Engagement Override Authority is required' Setting is:

- **OFF**, simply change the terms (for this example change it from 2 to 1 Written Quote) Provide a Reason why the standard engagement model is not being adhered to **Accept** the override. The engagement model will change. On Accepting the Request (next page), the Quote Request will be created.
- **ON**, you must submit an override request to an officer with the relevant authority. For details please refer to the separate [Altus Procurement Override Authorisation process](#) Quick Reference Card.

### Request



**Request** RETURN

[Edit](#)

**+ Add** RQ2020-3 Roads \$5,500.00 DT

Dixon Road repairs

Created On: 12/05/2020 12:03:53  
 Required By: 19/05/2020 00:00:00  
 Quotes Due: 15/05/2020 12:15:00  
 Quote: -

**2 Written Quote(s)** + Attach

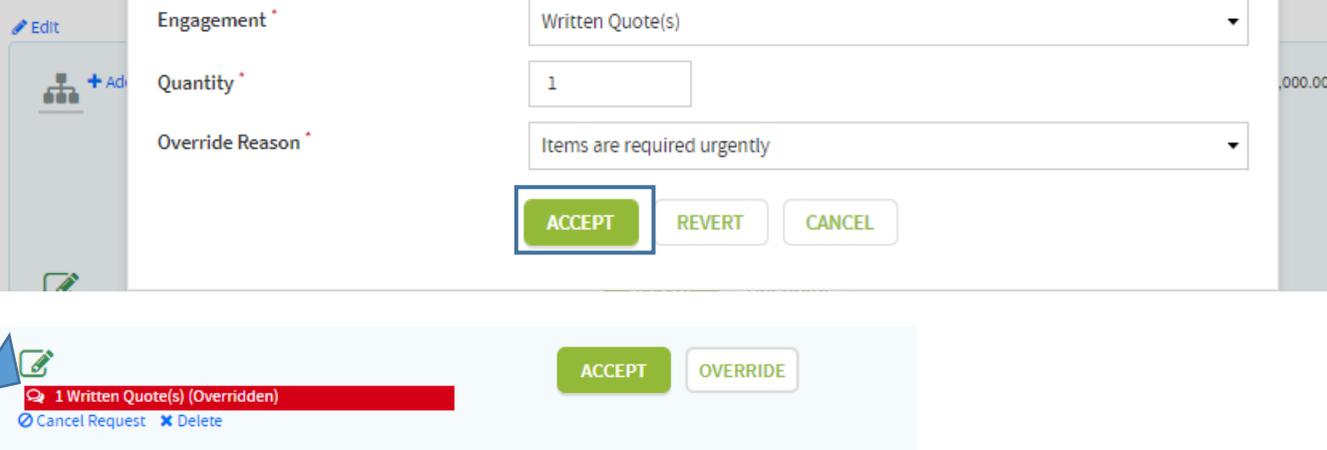
[Cancel Request](#) [Delete](#) **ACCEPT** **OVERRIDE**



**2 Written Quote(s)**

[Cancel Request](#) [Delete](#) **ACCEPT** **OVERRIDE**

### Request



**Request** RET

[Edit](#)

**Engagement \*** Written Quote(s) .000.00

**Quantity \*** 1

**Override Reason \*** Items are required urgently

**1 Written Quote(s) (Overridden)** + Attach

[Cancel Request](#) [Delete](#) **ACCEPT** **REVERT** **CANCEL** **OVERRIDE**

On Accepting the Request:

**Scenario 1** - If the 'Request Authorisation Required' Setting is:

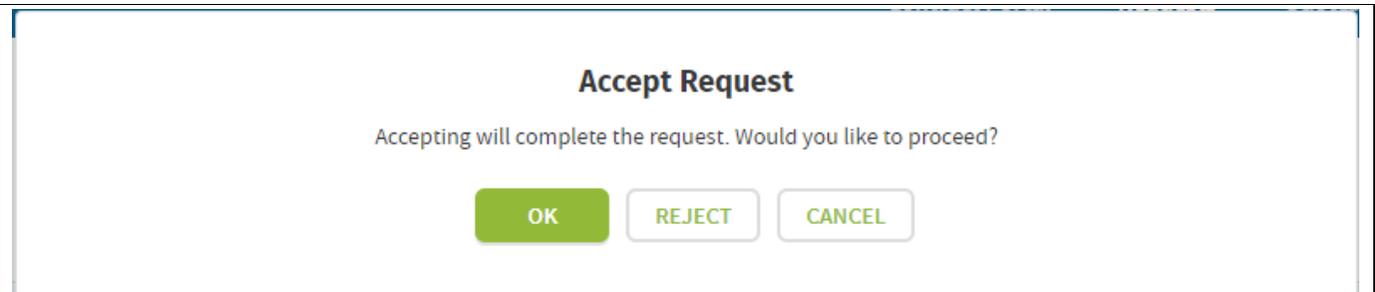
- OFF and you are able to approve the Request, a popup will display prompting you to confirm that you wish to continue. Click **OK** to do so and the required number of Quote Requests will automatically be created.

**TIP:** If you do not have sufficient authorisation value to complete the ordering process, the system will advise you at this point but will not prevent you from progressing further:

If the option to perform a Budget Check is selected (by enabling the 'Check Request Against Budget' option in Settings), a form similar to that on the right will display to allow a check that sufficient funds are available for the purchase:

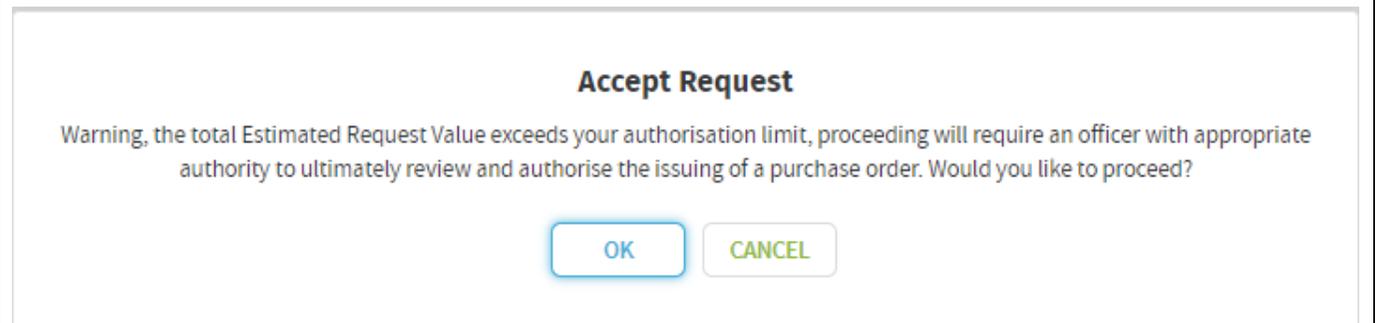
Where the Request includes multiple items that have been allocated to different Accounts, the Budget Check screen will include separate details for each Account.

If the option to perform the Budget Check at IE code level is selected (i.e. the 'Check Budget at Account Level' option is not enabled in Settings) for each Account a separate line will show per IE code.



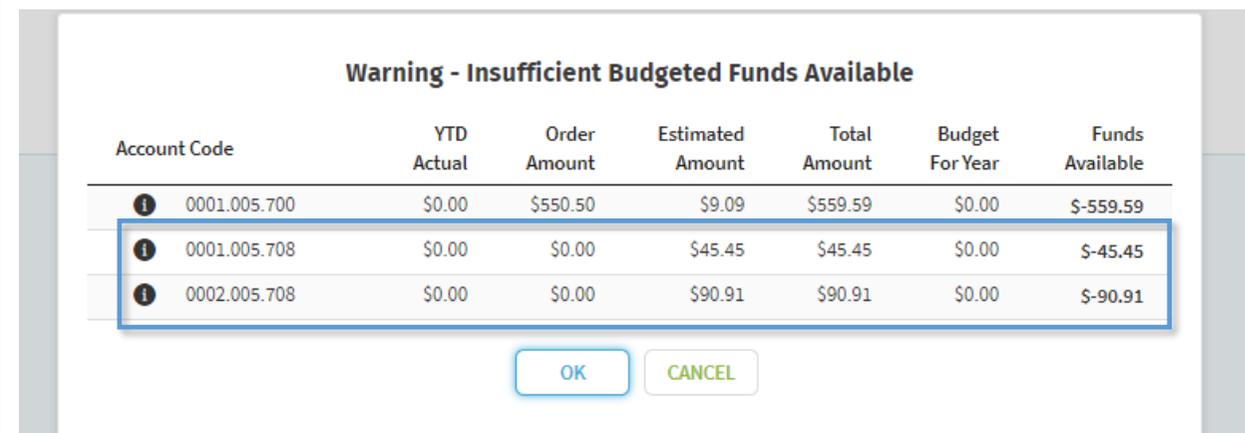
**Accept Request**

Accepting will complete the request. Would you like to proceed?



**Accept Request**

Warning, the total Estimated Request Value exceeds your authorisation limit, proceeding will require an officer with appropriate authority to ultimately review and authorise the issuing of a purchase order. Would you like to proceed?



**Warning - Insufficient Budgeted Funds Available**

Account Code	YTD Actual	Order Amount	Estimated Amount	Total Amount	Budget For Year	Funds Available
0001.005.700	\$0.00	\$550.50	\$9.09	\$559.59	\$0.00	\$-559.59
0001.005.708	\$0.00	\$0.00	\$45.45	\$45.45	\$0.00	\$-45.45
0002.005.708	\$0.00	\$0.00	\$90.91	\$90.91	\$0.00	\$-90.91

In the Budget Check screen the columns include the following:  
 YTD Actual – shows the YTD Actual value for the selected Account/s recorded in and pulled through from SynergySoft

Order Amount – includes committed costs (i.e. the value of any Orders that have been allocated to the Account that are yet to be paid)

Estimated Amount = value of the current Order (the amount is GST exclusive to allow a direct comparison to the Budget For the Year which is shown GST exclusive)

Total Amount = the sum of the Order + Estimated Amount, which is then compared to the Budget For the Year

Funds Available – shows how much of the budget is remaining after allowing for the current purchase

**Scenario 2** - If the 'Request Authorisation Required' Setting is:

- ON and you are not able to approve the Request (as you are not setup as an Authorising Officer in SynergySoft and/or the purchase is outside your limit) the form on the right will display from which to select an:

**Authorising Officer** – to approve the Request. When Extended Security is:

- ON, the system will check your Officer record in SynergySoft and will include any officers flagged as an Authorising Manager for you that have a Capital/Operating Value Limit equal to or greater than the value of the purchase
- OFF, the list will include any Authorising officers with an Authorisation Limit equal to or greater than the value of the purchase

**Reason** – for requesting the purchase

Click **Send Request**. An email will automatically be sent to the selected authorising officer requesting their approval and a Task will be added to their Task list.

### Authorising Officer Selection

i The quote is above your limit or you are unable to approve your own.

Authorising Officer Jane Doe ▾

Reason Replacing used stock

SEND REQUEST
CANCEL

The Request is automatically set to a state of 'Awaiting Approval'.

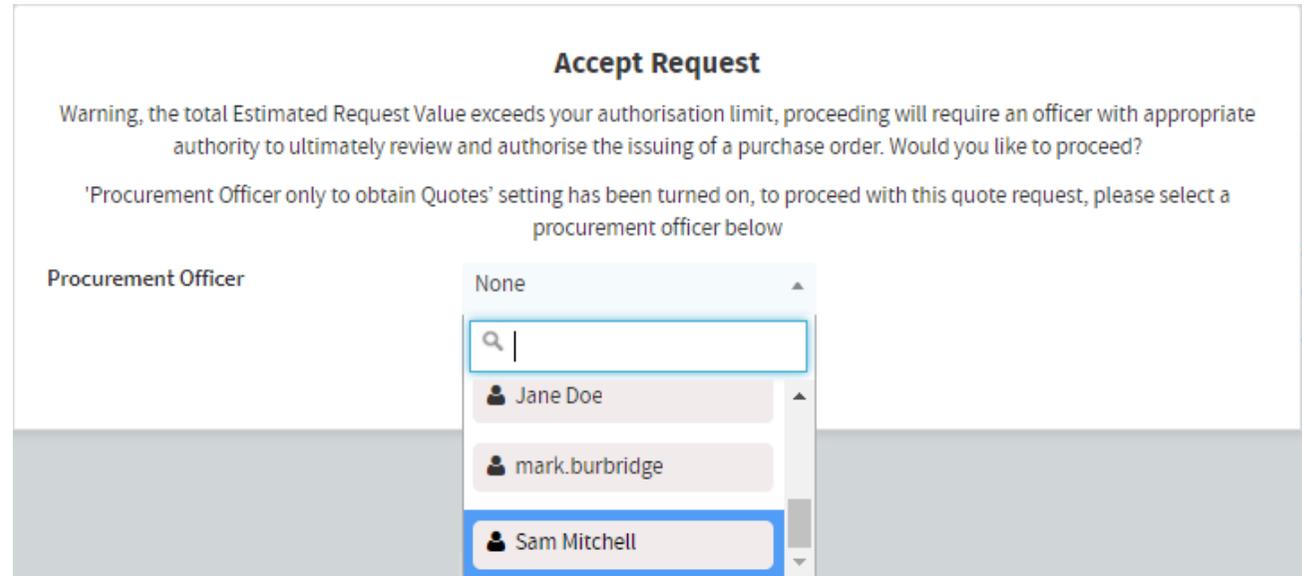
The Authorising Officer can click the link in the email they receive or the Task to go directly to the Request. On reviewing the Request they click **Accept** and when prompted click **OK** to create the Quote Request.

**Scenario 3** – if the setting to allow 'Procurement Officer only to obtain Quotes' is ON, on clicking **Accept** the Quote Request will be created as usual but the following form will then display from which the requesting officer must select a Procurement Officer to complete the next steps in the procurement process:

TIP: The Procurement Officer drop down list will only include the names of those officers that have been assigned the *ProcurementOfficer* Action.

Click **OK**

The Procurement Officer will receive an email and Task notifying them that the Quote Request has been assigned to them to action.



**Accept Request**

Warning, the total Estimated Request Value exceeds your authorisation limit, proceeding will require an officer with appropriate authority to ultimately review and authorise the issuing of a purchase order. Would you like to proceed?

'Procurement Officer only to obtain Quotes' setting has been turned on, to proceed with this quote request, please select a procurement officer below

Procurement Officer

None

Jane Doe

mark.burbridge

Sam Mitchell

### Request converts to a Quote Request

When a Request is Accepted:

- a **Quote Request** (e.g. Q2020-46) is created and linked to the **Request** (e.g. RQ2020-46). TIP: If you exit the process, to return and continue the process later:
  - Go to the menu and select **Quotes**
  - Search using the Quote Request number (Q2020-46).

### Choose which Suppliers to obtain Quotes from

- If the 'Procurement Officer only to obtain Quotes' Setting is:

ON - A Procurement Officer must complete all steps from the Supplier Selection to Respond Stage. For the requester and other officers the Quote Request is "locked down" and the option to select Suppliers is greyed out:



The Quote Request cannot progress until the Procurement Officer selects which Suppliers to obtain responses from, creates the Quotes, and enters the Supplier responses. After that, normal access returns – the requester and other officers can review the responses received and Award the Quote Request (the Award icon will only be available against those Suppliers the Procurement Officer has entered responses for) – skip to page 21.

OFF – choose which Suppliers you would like to obtain Quotes from - see below

On creating a Quote Request, the system will automatically display a list of any Suppliers that have been linked to the Category of goods being purchased.

(Additional) Suppliers can be added to the list:

Click **Add Suppliers**



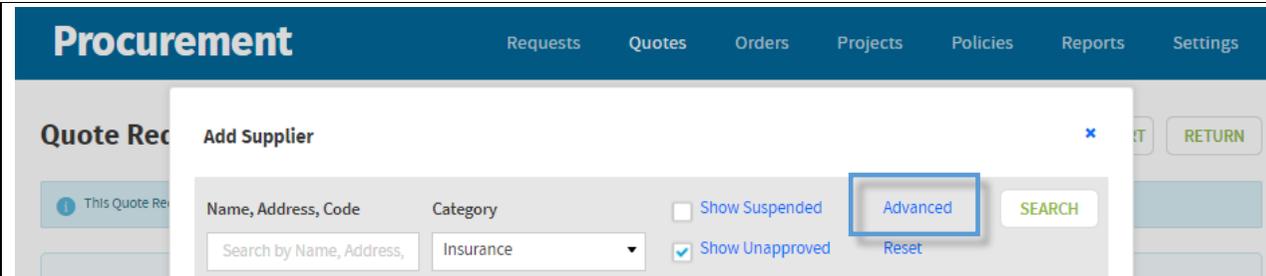
The form to the right will display from which to search for the required Supplier/s.

Enter your search terms into the fields provided or click the Advanced Search option.

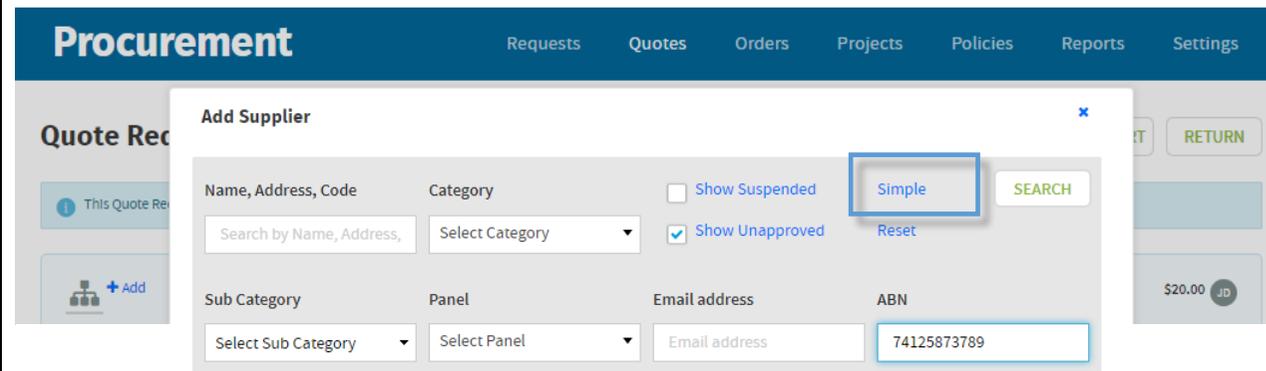
Notice the option's label changes to Simple (Search). Simply click the option to switch back to a Simple search.

To increase the chance of finding a match when in Simple or Advanced search mode and searching using the Name, Address, Code field, the search will also search on any Keyword Search terms (e.g. acronym, former/trading names etc) that have been recorded on the Supplier's record. (To see how to add Keywords for a Supplier refer to the Suppliers Quick Reference Card.)

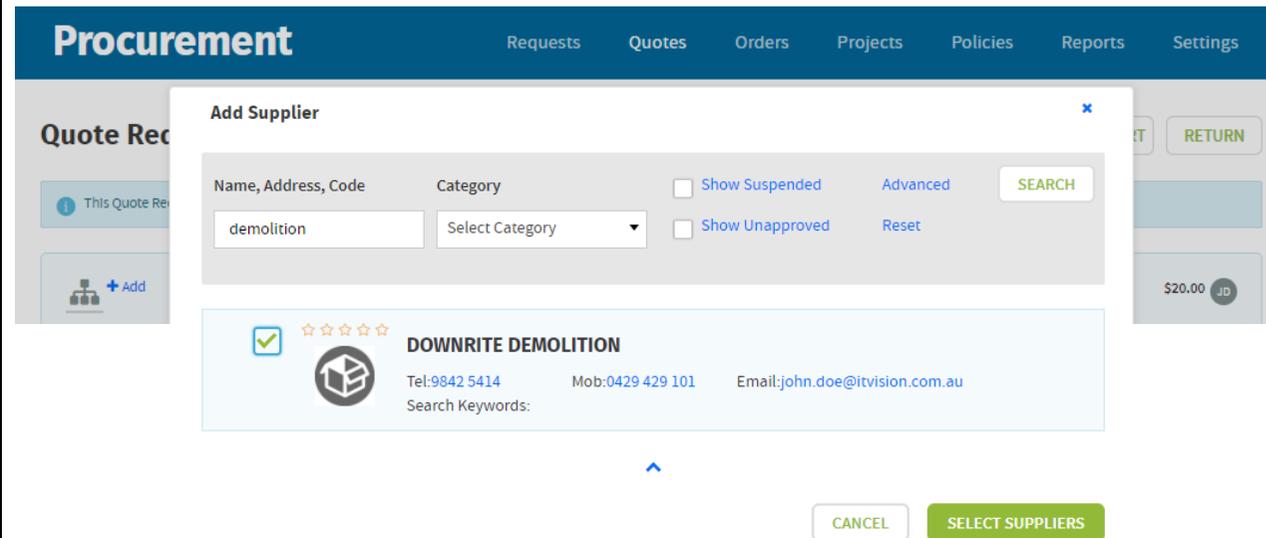
In the list of matching Suppliers found, tick to select the required Supplier/s. TIP: Suspended Suppliers can be added, however they will need their Status changed before a PO can be assigned to them.



The screenshot shows the 'Add Supplier' form with the 'Advanced' search mode selected. The search criteria include 'Name, Address, Code' with a search box containing 'Search by Name, Address,' and 'Category' set to 'Insurance'. There are checkboxes for 'Show Suspended' (unchecked) and 'Show Unapproved' (checked). A 'SEARCH' button is visible.



The screenshot shows the 'Add Supplier' form with the 'Simple' search mode selected. The search criteria include 'Name, Address, Code' with a search box containing 'Search by Name, Address,' and 'Category' set to 'Select Category'. There are checkboxes for 'Show Suspended' (unchecked) and 'Show Unapproved' (checked). Below this, there are fields for 'Sub Category', 'Panel', 'Email address', and 'ABN' (containing '74125873789'). A 'SEARCH' button is visible.



The screenshot shows the 'Add Supplier' form with search results for 'demolition'. The search criteria include 'Name, Address, Code' with a search box containing 'demolition' and 'Category' set to 'Select Category'. There are checkboxes for 'Show Suspended' (unchecked) and 'Show Unapproved' (checked). The search results list 'DOWNRITE DEMOLITION' with a 5-star rating, a checkmark, and contact information: Tel: 9842 5414, Mob: 0429 429 101, Email: john.doe@itvision.com.au. A 'SELECT SUPPLIERS' button is visible.

TIP: To avoid dealing with a 'bad' Supplier, check the stars to see the Supplier's score (which is based on any feedback officers who have previously dealt with the Supplier have given).



- indicates no feedback has been provided
- indicates the score given - hover your mouse over the stars to display a popup showing the actual score (from 1 to 5).

Supplier Selection

Select

ADD SUPPLIERS

Show Suspended



HAVOC BUILDERS PTY LTD



Tel:(08) 98415835

Mob:0407 798 188

Email:john.doe@itvision.com.au

Search Keywords:



CREATE QUOTES



A.D. ENGINEERING INTERNATIONAL PTY LTD



Tel:08 9248 6990

Mob:

Email:john.doe@itvision.com.au

Search Keywords:



Ensure the number of Suppliers you have selected to receive a Quote from meets those required under the engagement model, as a minimum.

If you would like Quotes from more Suppliers than those required under the engagement model e.g. 2 Verbal Quotes instead of 1, click **Add Suppliers** and add the extra Supplier to the list then simply select them as well.

TIP: The icons indicate if the Supplier has the appropriate (current) Qualifications and if they are a member of a Panel - see the [Altus Procurement Icons](#) Quick Reference Card for details.

### Seek Quotes from each selected Supplier

#### 1. Click **Create Quotes**

The button will only be visible when the number of Suppliers selected matches the number of responses required (under the engagement model for the current purchase).



HAVOC BUILDERS PTY LTD



Tel:(08) 98415835

Mob:0407 798 188

Email:john.doe@itvision.com.au

Search Keywords:



CREATE QUOTES



A.D. ENGINEERING INTERNATIONAL PTY LTD



Tel:08 9248 6990

Mob:

Email:john.doe@itvision.com.au

Search Keywords:



2. **Obtain the required number of responses**

When doing so, update each Supplier to record you have contacted them and have received their response. Suppliers can:

- Respond by phone (where a Verbal response is permitted under the engagement model)
- Respond via email, they can
  - respond electronically directly from the RFQ email they receive and their response will be recorded directly in the purchasing system, or
  - email their response directly to an officer
- Refuse to Quote - see below

TIP: Notice the following Information banner at the top of the Quote Request screen:

# Procurement

## Quote Request Detail

CREATE SUMMARY REPORT

RETURN

 This Quote Request cannot progress until Suppliers responses have been recorded.

An Information banner (blue) and Warning banner (yellow) will display when a Quote Request is waiting for a particular user action to be completed in order to proceed to the next step or a Quote Request has been stopped e.g. Cancelled.

**By phone**

Click the **Phone** icon

After updating the Supplier:

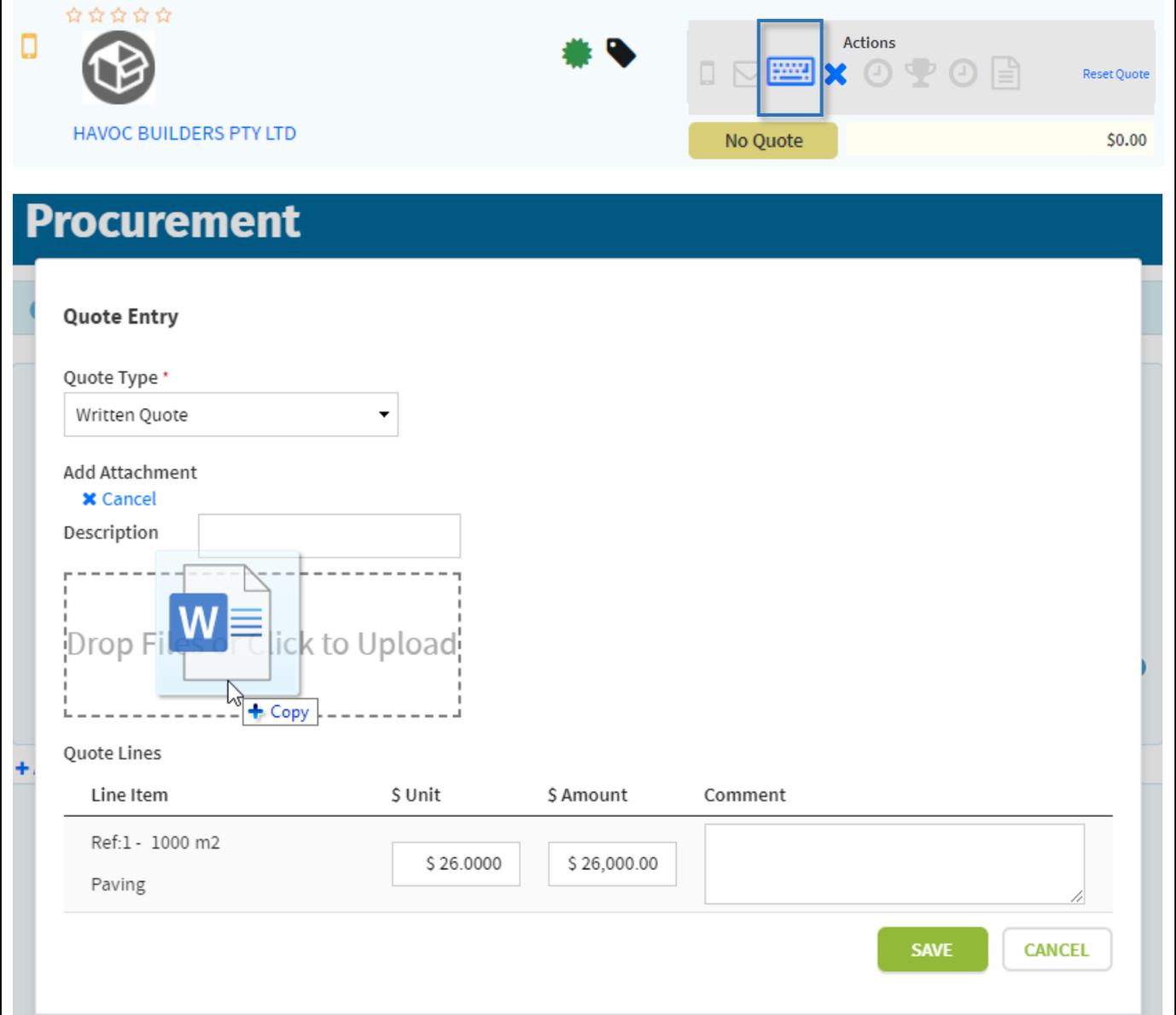
- they drop to the bottom of the list so the next Supplier to update is then at the top
- the Supplier's Status (top left) is updated (to show they have been called):

TIP: The Status is useful for checking at any given point how far along the Quote Request is in the process.



Click the **Enter Response** icon – and record what the Supplier has quoted using the fields provided.

- Select the Type of Quote provided (Verbal/Written) – for a Written response you must attach the response – click **+ Attach** then either click and drag the response into the field provided or click in the field and navigate to and Open the required file
- Enter the \$ value per Unit or \$ Amount the Supplier has quoted
- Optionally use the Comments field to record any comments the Supplier has provided or any comments that may assist when assessing the different Supplier's responses.



The screenshot shows the 'Quote Entry' form for 'HAVOC BUILDERS PTY LTD'. At the top, there are navigation icons and a 'No Quote' status with a value of '\$0.00'. The form includes a 'Quote Type' dropdown set to 'Written Quote', an 'Add Attachment' section with a 'Cancel' button, and a 'Description' field with a file upload area. The 'Quote Lines' table contains one entry: 'Ref:1 - 1000 m2 Paving' with a unit price of '\$ 26.0000' and a total amount of '\$ 26,000.00'. The form concludes with 'SAVE' and 'CANCEL' buttons.

Line Item	\$ Unit	\$ Amount	Comment
Ref:1 - 1000 m2 Paving	\$ 26.0000	\$ 26,000.00	

The Supplier's Status (indicated by the icon top left) is updated to record that their response has been entered and the label indicates a Written Quote was provided:

TIP: Once a response has been entered for a Supplier an option to Reset Quote will display. Click the option if the response was entered incorrectly. Doing so will clear the existing response so you can enter the response again with the correct details.

After updating the Supplier:

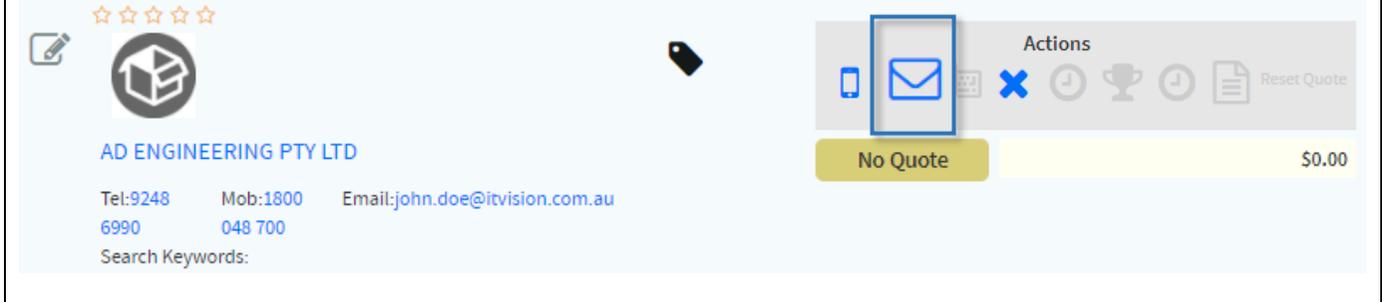
- the option to **Award** the purchase to the Supplier will be available (if the required number of responses has been received)



The screenshot displays two supplier cards for HAVOC BUILDERS PTY LTD. The top card shows a status of 'Entered' with a keyboard icon, and the bottom card shows a status of 'Awarded' with a trophy icon. Both cards display contact information and a 'Written Quote' of \$26,000.00. The 'Actions' menu for the top card includes a 'Reset Quote' option.

### By email

Click the **Email** icon



The screenshot displays a supplier card for AD ENGINEERING PTY LTD. The card shows a status of 'No Quote' with an envelope icon. The 'Actions' menu includes an 'Email' icon, which is highlighted with a blue box. The card displays contact information and a 'No Quote' of \$0.00.

Ensure the Supplier's email address is showing in the **To** field. Multiple addresses can be entered using a semi colon to separate them.

Enter any text you want included in the body of the email the Supplier receives

Select which Signature details to include in the email

Click **Send**

A message will display top of screen advising that the Quote Request has been sent and the following icon will display to show the email has been sent:

The Supplier will receive an email with the Quote Request (pdf) attached.

### Supplier Email

**CANCEL**

**TO**

**From**

**Subject**

**Body**

Select Signature

- Personal
- Role
- Company

Jane Doe



Level 3, 15 Ogilvie Rd  
Applecross WA 6153  
Phone: (08) 9123 4567  
Email: support@itvision.com.au

**CANCEL** **SEND**

 **Sent** 

AD ENGINEERING PTY LTD

Actions:         [Reset Quote](#)

**No Quote** **\$0.00**

**If the Supplier sends their response from within the Procurement system**

To enter their response they simply click the link provided in the email. A Supplier Quote Response screen similar to that on the right will display.

TIP: Notice the screen includes a reminder to Suppliers that Quotes must be GST inclusive:

The Supplier can include a Comment and send attachments with their response if they wish:

On sending their response, the Supplier's Status is automatically updated to 'Received':

TIP: To see what the Suppliers has quoted, click + Show Detail:

If the required number of responses required has been received the option to **Award** the purchase to the Supplier will be available.

## Procurement

### Supplier Quote Response



#### NATSPEC CONSTRUCTION

PO BOX 1527  
QVB NSW 1230  
Tel:02 9321 7200 Mob:

Quote No Q2020-4

You are quoting for the following items, please enter your response and attach any associated documents. **Note: Pricing should be GST inclusive as appropriate.**

Dixon Road Resurfacing

#### Quote Items

Line	Description	Qty	Unit	Unit Price (GST inc)	Amount	Comment
1	Asphalt	220.00	m2	\$ 30.	\$ 6,600	Grade A



Received

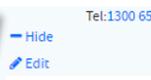
**BORAL CONSTRUCTION MATERIALS GROUP LIMITED**

Tel:03 9508 7282 Mob: Email:

[+ Show Detail](#)

\$300.00

[+ Attach](#)



Award

**BORAL CONSTRUCTION MATERIALS GROUP LIMITED**

Tel:1300 654 099 Mob: Email:john.doe@itvision.com.au

[+ Show Detail](#)

\$300.00

[+ Attach](#)



Received

**BORAL CONSTRUCTION MATERIALS GROUP LIMITED**

Tel:03 9508 7282 Mob: Email:

[+ Show Detail](#)

\$300.00

[+ Attach](#)



Award

**BORAL CONSTRUCTION MATERIALS GROUP LIMITED**

Tel:1300 654 099 Mob: Email:john.doe@itvision.com.au

[+ Show Detail](#)

\$300.00

[+ Attach](#)

**If the Supplier emails their response directly to an officer** instead of clicking the link in the email sent to them (thereby bypassing the system), their response must be:

1. added as an attachment and
2. flagged as a Written Quote

To enter the response:  
Click the keyboard icon

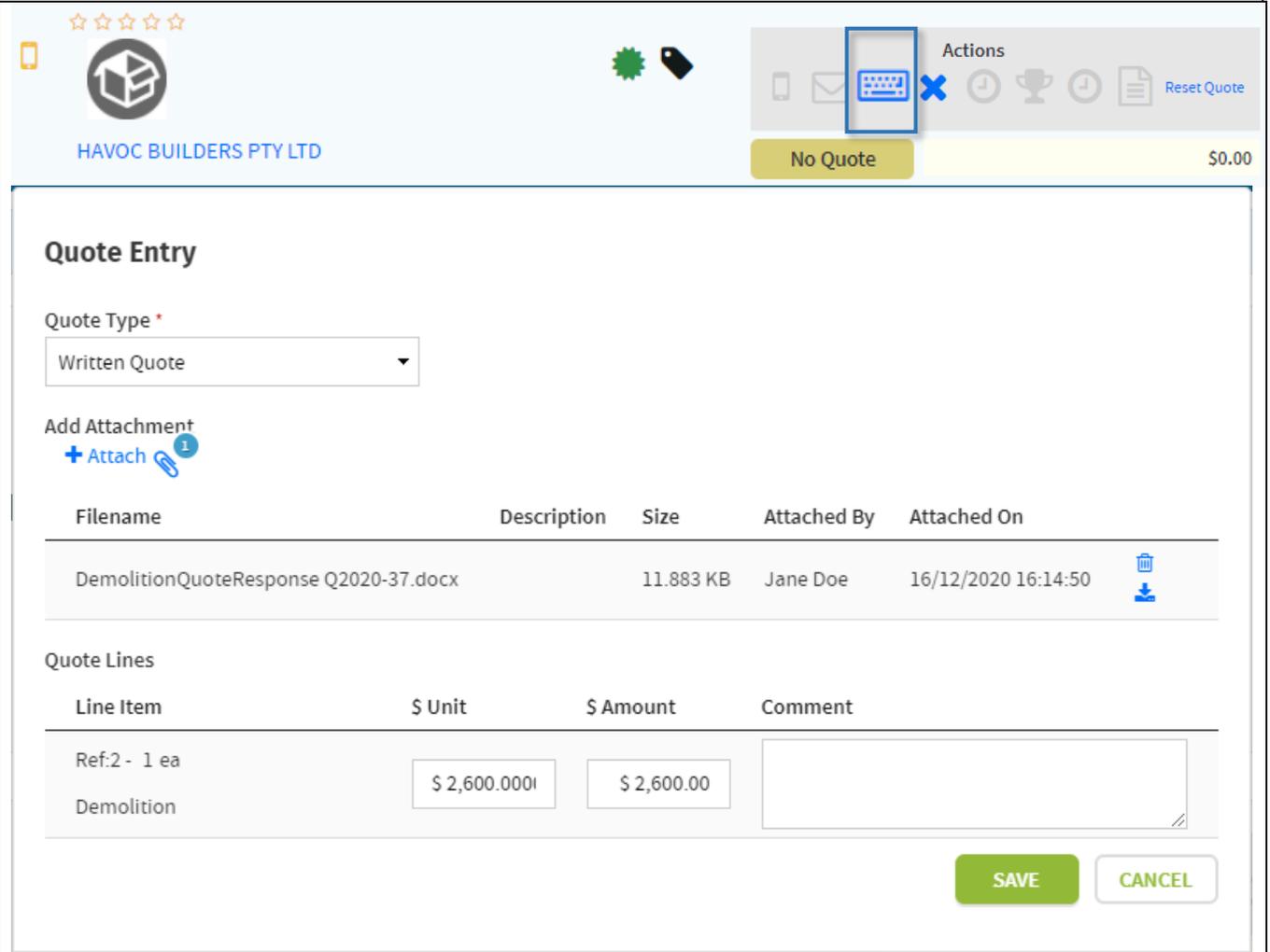
Update the form displayed, ensuring you select a response type of 'Written Quote'

Click **+ Attach** then either click and drag to attach the Suppliers response or click in the field provided (i.e. within the dotted outline) and navigate to and Open the required file

Enter the \$ value per Unit or \$ Amount the Supplier has quoted

Optionally use the Comments field to record any comments the Supplier has provided or any comments that may assist when assessing the different Supplier's responses.

Click **Save**



5 stars

HAVOC BUILDERS PTY LTD

Actions

No Quote \$0.00

### Quote Entry

Quote Type \*

Written Quote

Add Attachment

+ Attach

Filename	Description	Size	Attached By	Attached On
DemolitionQuoteResponse Q2020-37.docx		11.883 KB	Jane Doe	16/12/2020 16:14:50

### Quote Lines

Line Item	\$ Unit	\$ Amount	Comment
Ref:2 - 1 ea	\$ 2,600.000	\$ 2,600.00	
Demolition			

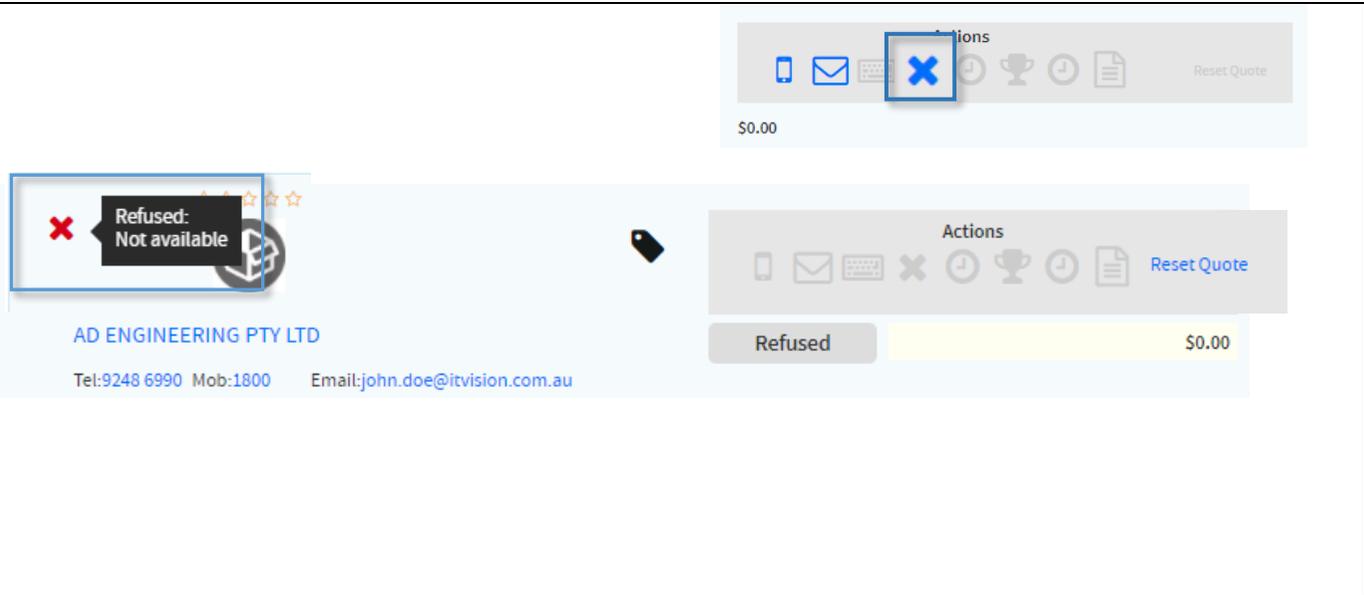
SAVE CANCEL

### Refused to Quote

If a Supplier indicates they do not wish to Quote, click the icon to the right and record the reason why a Quote was not submitted.

The icon and message to the right will show that the Supplier did not Quote and the reason. All Actions will be greyed out as the Supplier is excluded from the remainder of the process.

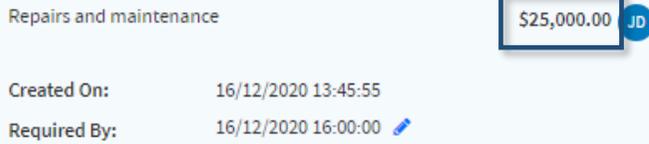
If a Supplier initially chooses not to quote then subsequently changes their mind, or an officer accidentally flags that the Supplier refused to quote, simply click the Reset Quote option to restart the Quote Request process for the Supplier. TIP: The option is also useful where the Supplier has lost the initial Request for Quote email. After resetting the Quote Request you can then click the Email icon to resend the email.



### Review Supplier responses

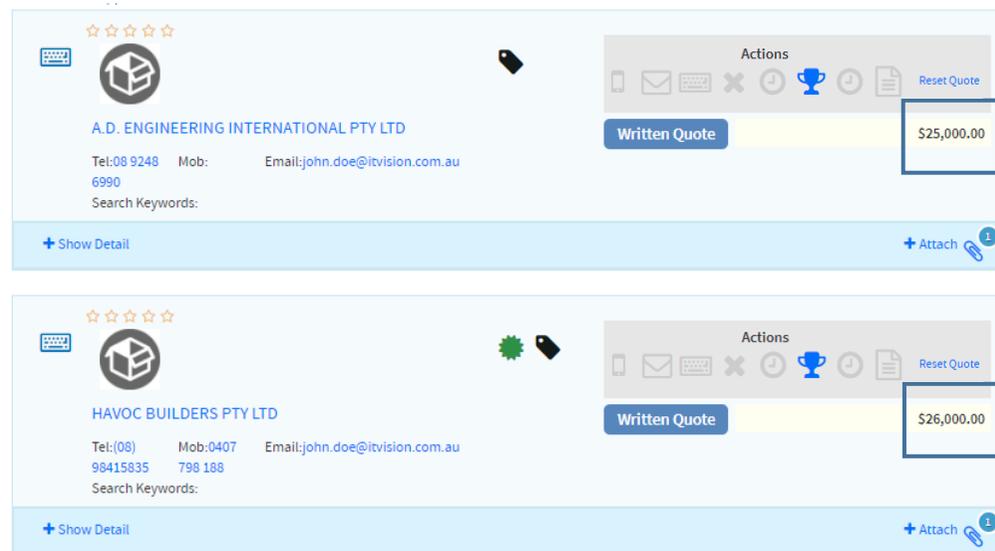
Responses will be listed in price order (least expensive at the top).

The price each Supplier has Quoted can be compared to the Request's Estimated value (top right of screen):



Where a Quote Request includes multiple items, to see what the Supplier has quoted for each, click **Show Detail**, then click **Hide** once done.

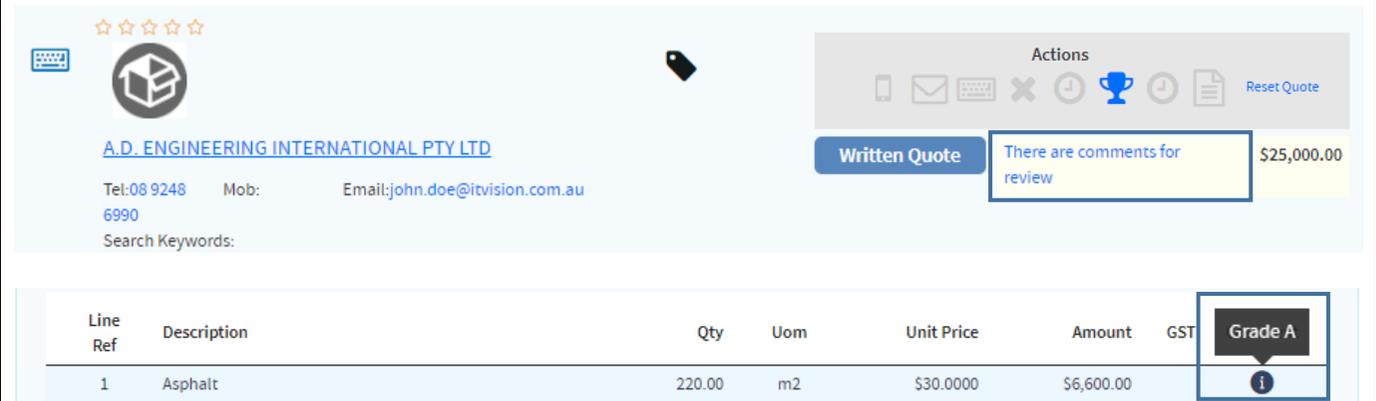
On clicking Show Detail, an option to Edit the response will display. Use the option to make changes to the response e.g. change the \$ Amount or add a Comment. (To completely clear



the existing response click the Reset Quote option to the right of the response instead.)

If the Supplier included any Comments on their response, the link (to the right) will show:

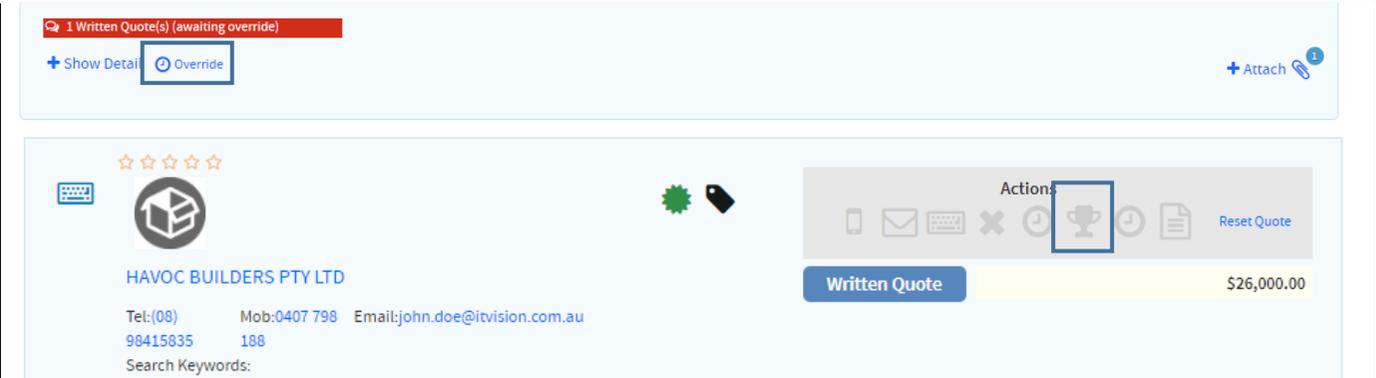
Clicking the link will display each line item, the same as clicking **Show Detail** (above). To see the Comment, go to the line items grid and hover over the icon on the right:



Line Ref	Description	Qty	Uom	Unit Price	Amount	GST
1	Asphalt	220.00	m2	\$30.0000	\$6,600.00	

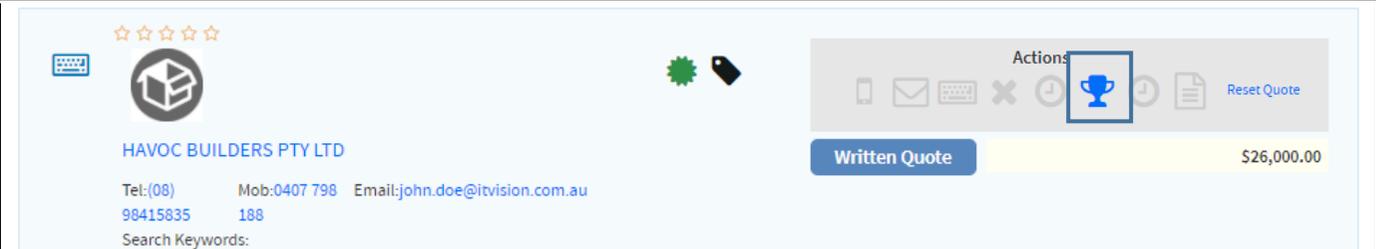
If the required number/type of responses (set out in the engagement model) have not been received:

The Award icon will be greyed out against each Supplier, and the option to Override will be enabled to change the engagement policy if there is a legitimate reason why the number/type of responses required should not match those actually obtained.



If the required number/type of responses (set out in the engagement model) have been received:

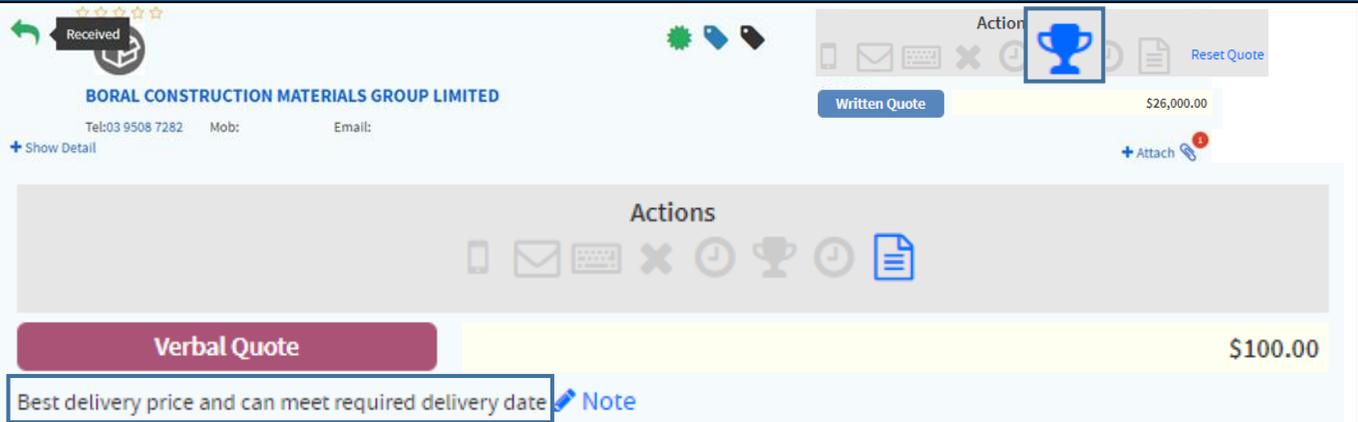
The Award button will be available against the Supplier/s a response has been entered for:



**Award the purchase to the selected Supplier**

Go to the Supplier you wish to award the order to and click the **Award** icon.

Add a Note to clarify, if required, why the order was awarded to the Supplier (particularly if they were not the cheapest).



The screenshot shows a quote card for 'BORAL CONSTRUCTION MATERIALS GROUP LIMITED'. The quote value is \$26,000.00. Below this, a 'Verbal Quote' for \$100.00 is displayed. A note is attached to the verbal quote: 'Best delivery price and can meet required delivery date'. The 'Award' icon (a trophy) is highlighted in the top right corner of the quote card.

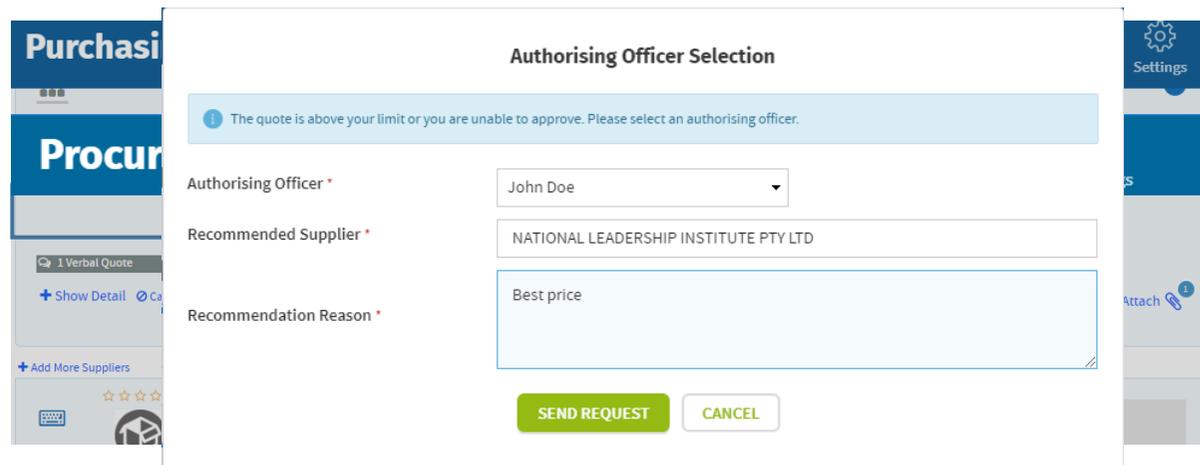
On clicking Award if:

**Scenario 1 - Segregation of Duty enabled**

1. your Officer record in SynergySoft does not show you are set up as an Authorising Officer and/or
  2. the items being purchased are outside the Authorisation Limit on your Officer record and/or
  3. the Setting to 'Allow Requisition Officer as Authorising Officer' is not enabled in SynergySoft
- the form on the right will display:

**Authorising Officer** - select an officer to authorise the purchase (if Extended Security is OFF, the list will include any officers with an officer record in SynergySoft that has the 'Authorising Officer' flag ticked and an Authorising Limit greater than or equal to the value of the Request

**Recommended Supplier** - will display the name of the Supplier you selected to Award the Quote Request to



The screenshot shows a modal dialog titled 'Authorising Officer Selection'. A message at the top states: 'The quote is above your limit or you are unable to approve. Please select an authorising officer.' The form contains three fields: 'Authorising Officer' with a dropdown menu showing 'John Doe', 'Recommended Supplier' with a text input showing 'NATIONAL LEADERSHIP INSTITUTE PTY LTD', and 'Recommendation Reason' with a text input showing 'Best price'. At the bottom, there are two buttons: 'SEND REQUEST' (green) and 'CANCEL' (white).

**Recommendation Reason** - provide a reason why you chose the above Supplier

Click **Send Request**

The Quote Request is given a Status of 'Awaiting Authorisation' (indicated by the clock).

The authoriser will receive an email and Task notifying them that the Quote Request is awaiting their authorisation:

Status	Reference	Description	Project Name	Category	Created By	Created On	Requested By	Estimated Value
	Q2019-272	Test	Roads		Bob TesterPeople	27/11/2019 01:46:19	Bob TesterPeople	\$500.00
Awaiting Authorisation	269	test	Business services		Melissa Kendall	26/11/2019 18:57:51	Bob TesterPeople	\$5,000.00

**Procurement**

Requests | Quotes | Orders | Projects | Policies | Reports | Settings

### Quote Request Detail

Q2019-272

Test

Roads

Created On: 27/11/2019 01:46:19

Required By: 27/11/2019 01:44:25

Quotes Due: 27/11/2019 01:44:25

Request: RQ2019-306

Purchase Order: -

**Tasks assigned to you**

[Award Authorisation Request](#)

A user has requested that a QuoteRequest be awarded

Assigned: 26/11/2019

Notes: Award the Quote Request or Cancel the process

DONE RELEASE

The Authorising Officer can click the button in the email they receive or the item in their Task list to go directly to the Quote Request to view then approve (click the clock icon) if appropriate: On clicking the clock icon the Budget Check will display, allowing the authorising officer to ensure sufficient funds are available before authorising the purchase  
NOTE: this is a warning only and will not prevent the record progressing




NATIONAL LEADERSHIP INSTITUTE PTY LTD

Tel:1300 886 629 Mob: Email:

Actions









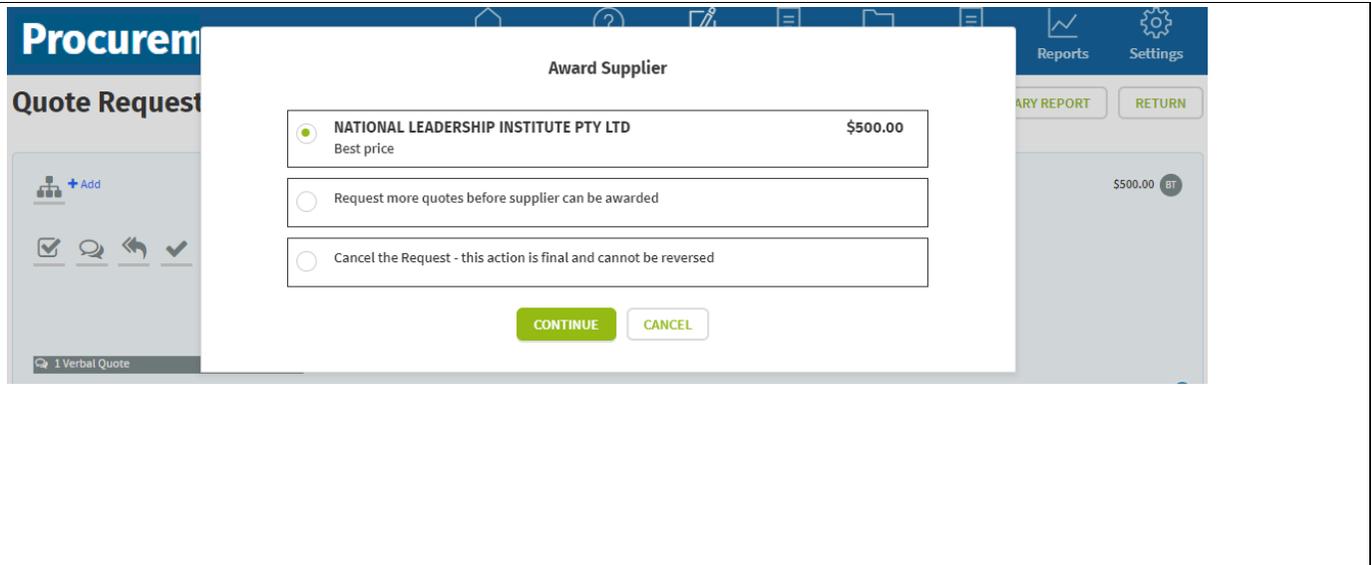

\$500.00

The following form then displays from which the authorising officer can then select to either:

- **Continue the process** by Awarding the Quote Request to the Recommended Supplier
- **Request more quotes** in order to select a different Supplier
- **Cancel the Request** altogether

An email will be sent to the requester advising whether the Quote Request has been approved/rejected.

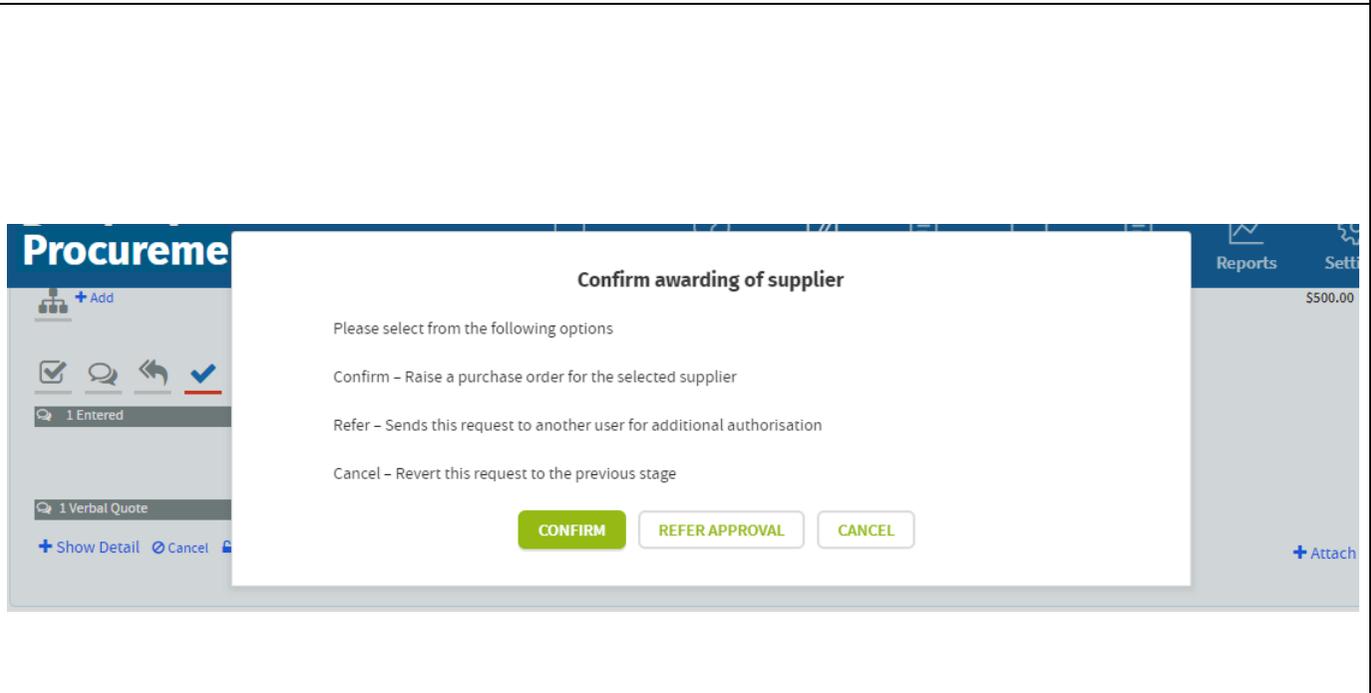
If approved they can click the link included in the email to go directly to the Quote Request from where they can then raise the PO (see below for the steps).



**Scenario 2 - Segregation of Duty disabled**  
If:

- you are setup as an Authorising Officer in SynergySoft and
  - the purchase is within your spend limit and
  - the Setting to 'Allow Requisition Officer as Authorising Officer' is selected in SynergySoft.
- the form on the right will display.  
Click:  
**Confirm** to raise a Purchase Order for the selected Supplier or  
**Refer Approval** to refer the request to another officer for approval – the option would be used where a conflict of interest exists for example or  
**Cancel** to exit the process without generating a PO for the selected Supplier

If you select Confirm, you can then proceed to raise a PO for the selected Supplier (below).



TIP: On a Quote Request:  
If the date passes and not all Suppliers have managed to respond within the timeframe the Supplier can be contacted by phone to check if they are still wanting to submit a Quote. If so, extend the dates – this will reactivate the links from the original email set to the Supplier.  
To update a date, click the pencil icon, enter the new date and **Save**

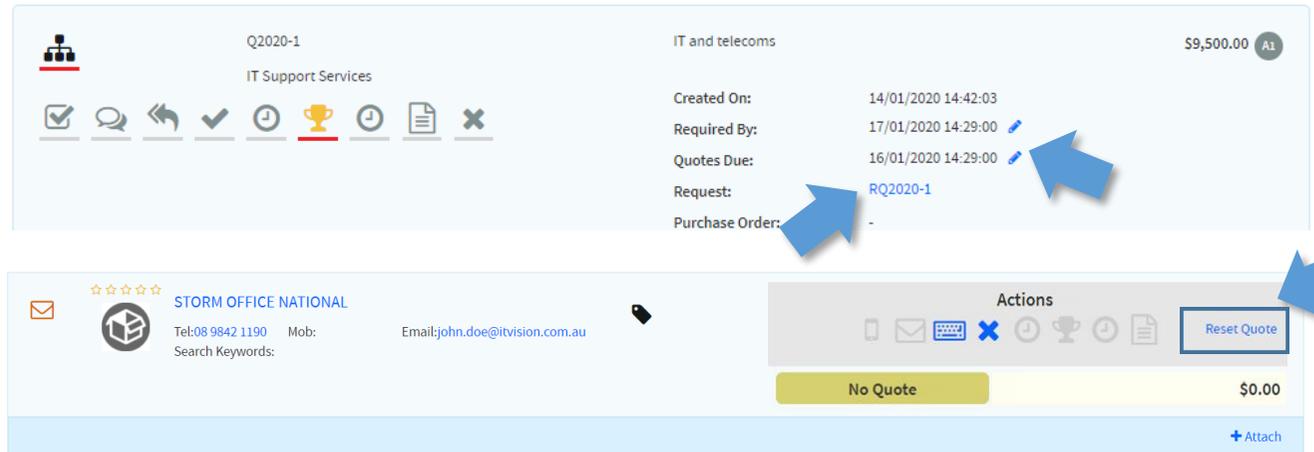
Alternatively, If the Supplier cannot find the email, click Reset Quote and resend the email to the Supplier (NOTE that the body of the email will need to be retyped as the system will not remember/recall what was sent previously).

If the incorrect Description/GL Account/GST Indicator was selected for a particular line item when the Request was added, it can be corrected up to the point the purchase is awarded (after that no changes are permitted):  
Click the Request number to open the Request  
Click the pencil to the right of the line item to edit it and make the necessary changes, then Click **Save & Close**

### Quote Request Detail

[CREATE SUMMARY REPORT](#)

[RETURN](#)



Q2020-1  
IT Support Services  
IT and telecoms  
\$9,500.00 A1

Created On: 14/01/2020 14:42:03  
Required By: 17/01/2020 14:29:00  
Quotes Due: 16/01/2020 14:29:00  
Request: RQ2020-1  
Purchase Order: -

STORM OFFICE NATIONAL  
Tel: 08 9842 1190 Mob: Email: john.doe@itvision.com.au  
Search Keywords:

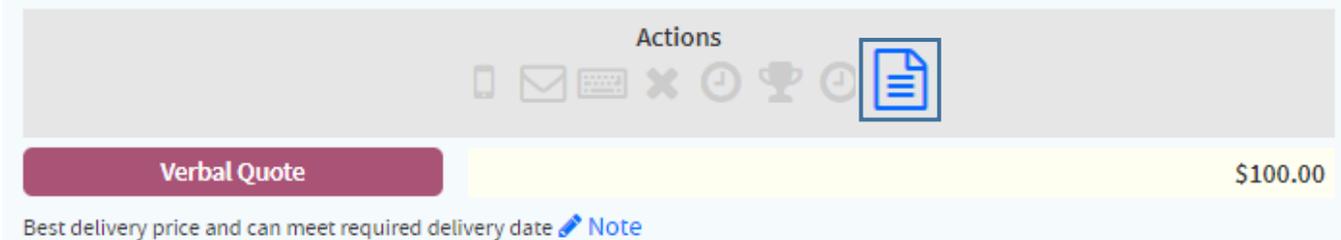
Actions  
Reset Quote

No Quote \$0.00  
[+ Attach](#)

### Create the PO

Click the **PO** icon to create the PO.

If the option is enabled the system will display the Budget Check form to allow a final check that the required funds are available for the purchase.



Actions

Verbal Quote \$100.00

Best delivery price and can meet required delivery date [Note](#)

If OK to proceed, the PO will then be created automatically.

TIPS:

- The PO number is displayed in the summary (top right of screen). Clicking the link will open the Order.
- When the PO is raised it is also copied to SynergySoft (searching on the PO number in SynergySoft will find the matching PO). It can then be processed the same as any other PO.
- If the purchase has been held up (while for example awaiting approval) and the Required By date has passed, the PO will still be created. As SynergySoft won't allow a PO to be created if the Required By date has passed the Required By date shown on the Order will be updated automatically to the current date. NOTE that the system will only update dates in the past. Future dates will not be changed.

Click **Email** to email the PO to the Supplier.

TIP: Tick to exclude the costs from the PO if you wish:

Subject   
 Omit Costs

or

Click **Download PO**

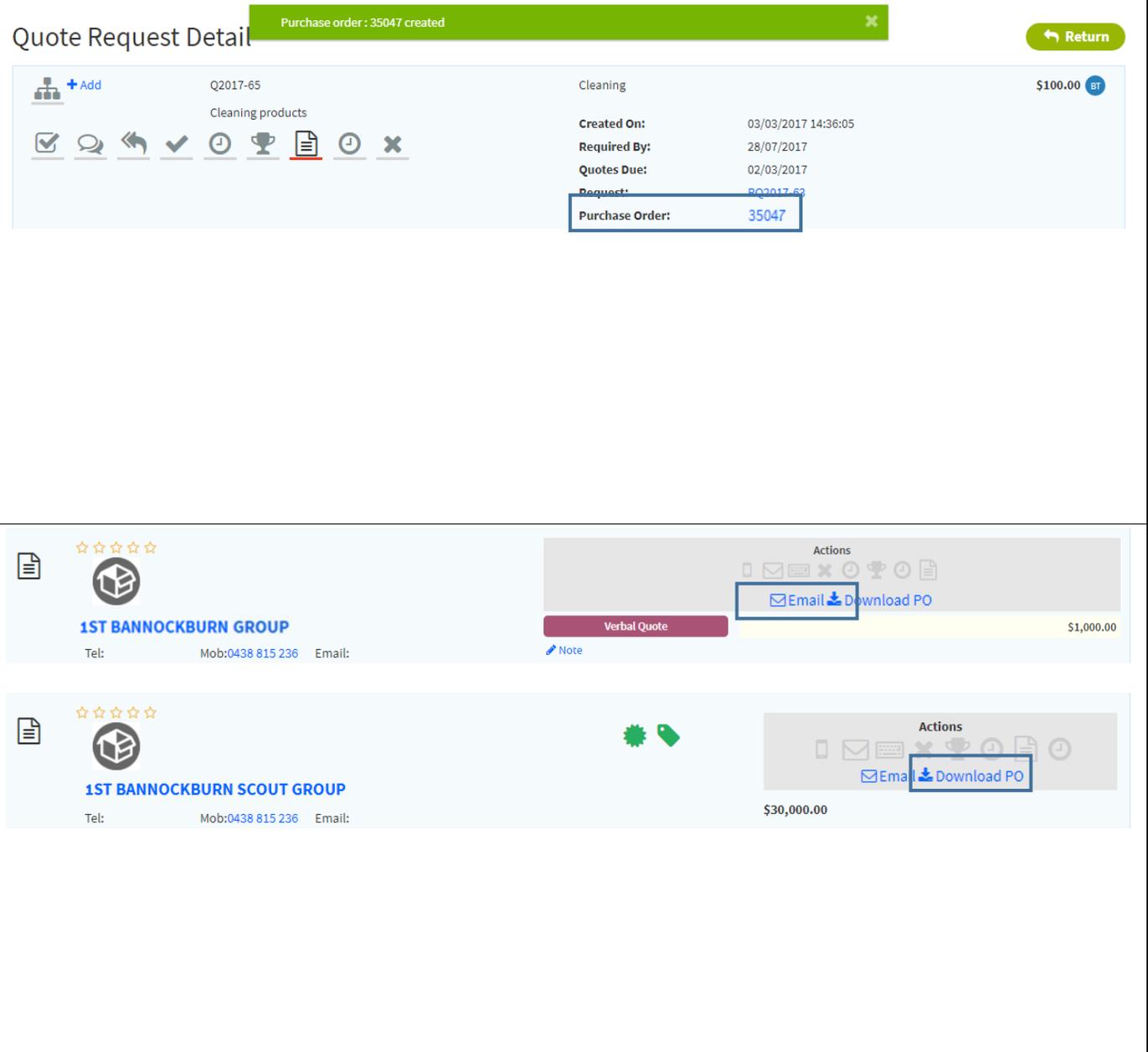
To download an Office Copy:

- Tick to exclude headers – optional (headers typically include your organisation's logo and address details)
- Click **Download Office Copy**

or

To download the PO

- Tick to exclude the Costs from the PO if you wish
- Click **Download Supplier Copy**



**Quote Request Detail** Purchase order: 35047 created Return

+Add	Q2017-65	Cleaning	\$100.00 <span>BT</span>
	Cleaning products		
		<b>Created On:</b> 03/03/2017 14:36:05	
		<b>Required By:</b> 28/07/2017	
		<b>Quotes Due:</b> 02/03/2017	
		<b>Request:</b> RQ2017-63	
		<b>Purchase Order:</b> 35047	

★★★★★

**1ST BANNOCKBURN GROUP**

Tel:                      Mob:0438 815 236    Email:

**Verbal Quote** \$1,000.00

[Email](#) [Download PO](#)

★★★★★

**1ST BANNOCKBURN SCOUT GROUP**

Tel:                      Mob:0438 815 236    Email:

**\$30,000.00**

[Email](#) [Download PO](#)

The UoM is included on the Purchase Order (Supplier and Office Copy) plus Orders screen to ensure Suppliers know the correct UoM to supply and to assist officers when checking the items delivered match those requested (e.g. 6 pallets as opposed to 6 boxes).

Download a PDF copy of the purchase order

Exclude headers from Office Copy <input type="checkbox"/>	<a href="#">Download Office Copy</a>
Omit Costs from Supplier Copy <input type="checkbox"/>	<a href="#">Download Supplier Copy</a>

[close](#)