The tender, from notice to contract

One idea: a tender is one record with a TN number that walks from the notice to the bid decision, the pricing, the bond, the submission and the result — and if we win, the contract is made from it and carries its cost along.



Announced
recorded with a TN number

→

Participation decision
bid / no bid

→

Preparing
price, bond, papers

→

Submitted
then the opening

→

Won
the contract is made from it

Who reads this

The sales owner, the Projects desk leader and pricer, the Finance bonds officer, the CFO and the CEO.

Where

Projects → “Tenders”, “Tender desk”, “Tender calendar”; Sales → “Tenders”; Finance → “Tenders” and “Bonds”.

What you need

The notice, its number and deadline, the issuing party (hospital or ministry) as an account on the customer register, and the bond amount if one is asked.

One number follows everything. Every bond, expense, price sheet and contract carries the tender’s TN number — so its cost is known on the day it wins and the day it loses.

Who does what and three approvals

The team on a tender record is three: the sales owner, the Projects pricer and the Finance bonds officer. Every signature happens in the decision window.

Sales owner
records it, asks for the bid decision

→

Projects pricer
the pricing sheet and technical offer

→

Desk leader
signs the bid, asks for the bond

→

Finance
signs and records the bond

→

CFO and CEO
the final word

Bid decision — a Projects desk tender

Desk member asks → **Desk leader signs** → CFO → CEO

The leader asks himself? His step is skipped — nobody signs his own request. Any amount.

Bid decision — a sales manager's own tender

Sales manager asks → CFO → CEO

An MOH tender (sector "MOH"): the CEO alone signs the bid, then the final price before submission.

Bank bond request — bid or performance

Sales manager or Projects asks BR-... → **Finance of the office** the tender's office accountant → CFO any amount →

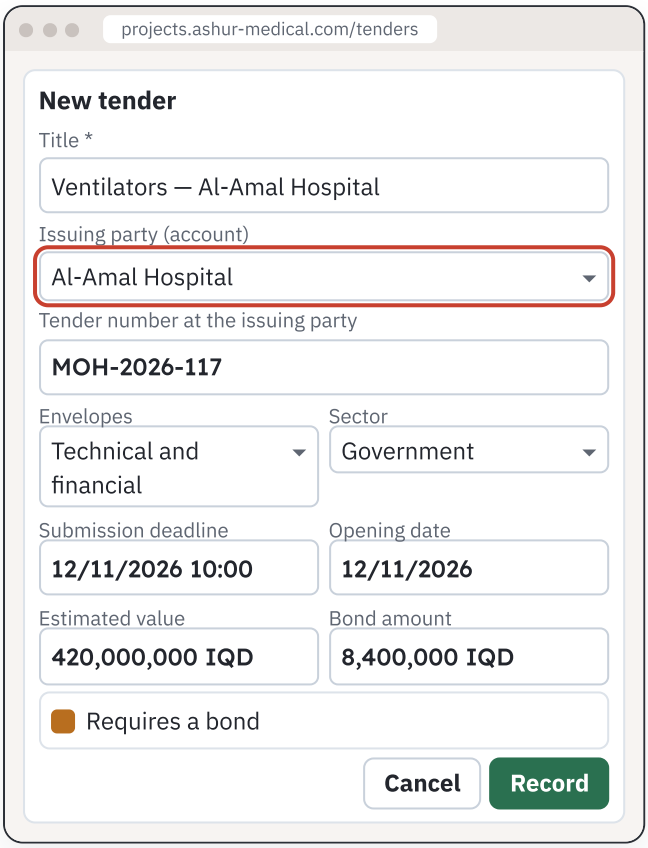
Finance records the issued bond

Step	Who presses	Who signs	Seen where
Record the tender	Sales owner or the Projects desk	—	Sales, Projects, Finance
Bid decision	Sales manager	Desk leader → CFO → CEO	Decision window
Bid bond	Sales manager or Projects	Office Finance → CFO	Finance → Tenders
Submit the bid, the result	Sales manager	—	Tender record
Contract from the tender	Projects desk	the usual contract road	Projects → Contracts

The bid decision, the bid price and submitting the bid are for the sales manager. That is the system's own message to anyone pressing a step that is not his.

Record the tender the day you see it

"New tender" in Sales or Projects. The title and the issuing party are required; with an account from the customer register the related opportunity is created automatically.



1. **"New tender"** under "Tenders" — Sales or Projects, the same form.
2. **Title** and **Issuing party (account)** — the hospital or ministry from the customer register. "Or the party name" typed is enough to record, not to make the contract.
3. Its number, envelopes, sector (**MOH** changes the signing road), publication date, submission deadline, opening date, estimated value.
4. **Requires a bond** and its amount, region, business unit, owner — then **"Record"**

Announced → **Participation decision** → **Preparing**

The record's own guidance: "Record the number, deadline and bond, then request the participation decision."

A TN number by itself

Every tender gets its **TN-2026-00012** number and appears in Sales, Projects and Finance together.

The related opportunity

"No opportunity — created when an account is selected as the issuing party". Pick an account and it opens by itself.

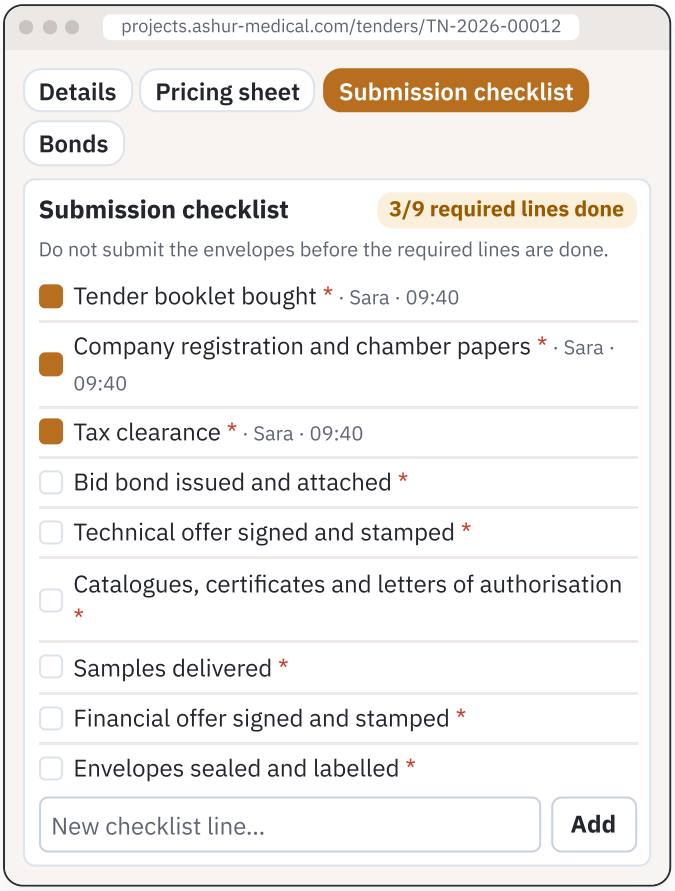
The issuer before the contract

Recorded with a typed name? A card on the record: "Choose the tender's issuing customer (the hospital or ministry) before making the contract" — "Save" or "New account", with the same duplicate check.

⚠ **No contract without an issuer on the register.** The system refuses in plain words: "Choose the tender's issuing customer … before making the contract".

The papers and the team before the envelopes

The “Submission checklist” tab comes filled with nine required lines; tick them one by one. “Team and dates” keeps the source, the names and the dates that raise alerts.



Team and dates

Source · Newspaper / Tender portal / Direct invitation / Other source

Sales owner · Projects pricer · Finance bonds officer

Tender booklet bought · Questions deadline · Site visit

Submission deadline · Opening session · Offer validity (days) · Expected result

1. The nine required lines come by themselves; add your own with **“Add”**
2. Tick a line when it is done — who ticked it and when is kept.
3. In “Team and dates” name the **Projects pricer** and the **Finance bonds officer** — the bond and deadline alerts reach them.
4. “Clarifications” is the tab for questions and answers; “Files” for the booklet and papers — and **“✦ Read the tender booklet”** fills the items from the booklet.

Progress on the record

The “3/9 required lines done” badge on the tab, and the Tender desk shows “Waiting on me today”.

Alerts from the dates

Every date you write here enters the “Tender calendar” and alerts 14 and 3 days before.

Tender expenses

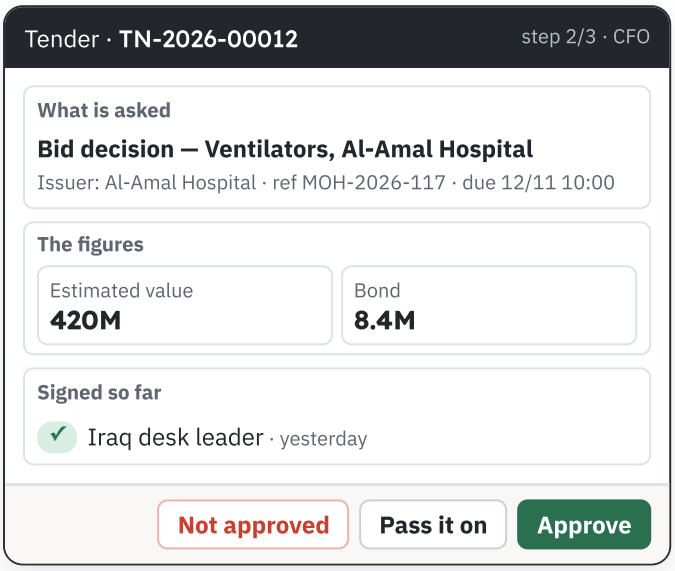
Booklet, courier, stamps, samples: an expense claim of kind “Tender expense” with “Which tender? (required)”.

Do not submit the envelopes before the required lines are done. A line marked * is required; what you add yourself is optional unless you mark it.

The bid decision in the decision window

The sales manager presses “Request participation decision”. The request walks: desk leader → CFO → CEO, at any amount. The last approval moves the tender to “Preparing”.

Announced → Participation decision → Preparing or No participation



1. On the tender record: **“Request participation decision”** — shown to the sales manager only, while the tender is “Announced” or “No participation”.
2. The toast “Participation decision request sent”; the button becomes **“In the approvals inbox”**
3. Each signer opens the decision window from his bell or inbox: **“Approve”** / **“Not approved”**
4. The last approval → “Preparing”, the decision reads “Bid”; a refusal → “No participation”, and it can be asked again.

“Preparation proceeds once the participation decision is approved from the approvals inbox” — Preparing cannot be jumped to by hand.

A desk tender

The “Sales manager” step goes to the leader of the tender’s desk (Iraq or Dubai). The leader asked? His step is skipped.

An MOH tender

Sector “MOH” → the CEO alone signs the bid. Finance and the CEO decide inside their own systems.

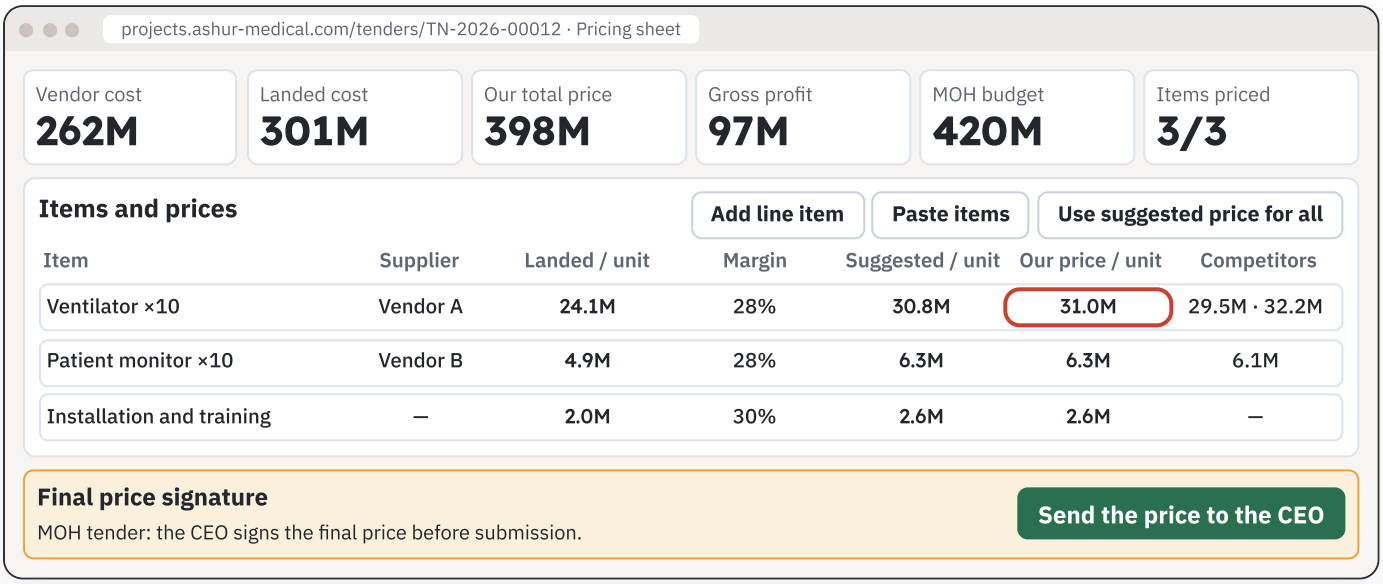
Waiting on someone for 7 days?

A notice appears on the record: “Waiting on <name> since N days · … · step 2/3”. “Remind” from the request, once every 4 hours.

Decided not to participate. The decision can be requested again if something changes. — that is what the record says after a refusal; nothing is deleted.

The pricing sheet and the technical offer

The Projects pricer fills the items: vendor cost, landed, margin, our price. Competitor prices from earlier openings sit beside each item. An MOH tender needs the CEO's signature on the price.



1. **"Add line item"** or **"Paste items"** from the booklet; "Supplier" and "Vendor unit cost" for each.
2. "Pricing settings" and "Cost lines" (freight, clearance…) make the **Landed / unit** and the **Suggested / unit**
3. **"Use suggested price for all"** or type "Our price / unit" line by line. "Competitor prices" → "Use as our price".
4. "Technical offer": MOH specification, offered model, compliance, number of samples — and "Vendor papers".

Our price on the record

"Our price — from the pricing sheet": the total moves by itself to Details, the lists and the reports.

Price chips (MOH)

"Price not signed" → "Price awaiting signature" → "Price signed" or "Price rejected" → "Send the price again".

Who sees cost

Cost and margin for those who may see cost and the Projects desk; a sales rep sees our price only.

The unit price comes from the sheet, not from memory. "Last price we offered" and "Competitors" sit beside every item so you compare before you type.

The bid bond with a BR number

The “Bonds” tab on the tender: “Request a bid bond”. The tender’s office accountant signs, then the CFO at any amount, and Finance records it when the bank issues it.

Sales manager or Projects
“Request a bid bond” → BR-...

→

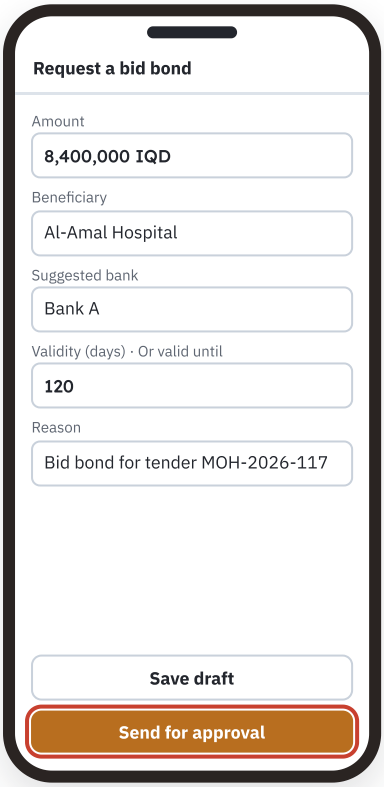
Finance of the office
the tender’s office accountant signs

→

CFO
any amount

→

Finance
“Record the issued bond”



1. On the tender → “Bonds” → **“Request a bid bond”**; amount, beneficiary, validity and reason are all required.
2. **“Send for approval”** → “Sent for approval” with the number **BR-2026-00007**; “Withdraw” while it waits.
3. Finance → “Tenders” → “Bond requests”: once approved **“Record the issued bond”** — bond number, issued on, expires, bank fee, cash margin, then “Attach the bank’s scan”.

Draft → Awaiting approval → Approved — waiting to be issued → Issued

Finance has no record of this bond — ask Finance to record it · Issued · 8.4M
The tender says “Issued” and the Finance register holds no request and no bond.

Waiting on Sara since 8 days · Bid bond BR-2026-00007 · step 1/2
Shown when a signature has waited seven days or more.

Finance’s own words

“Asked for by the sales manager or Projects; signed by Finance and then the CFO at any amount; recorded by Finance when the bank issues it.”

Five days before closing

Bond needed and not yet issued? A daily reminder to the owner, then “Bid bond LATE for the Baghdad office”.

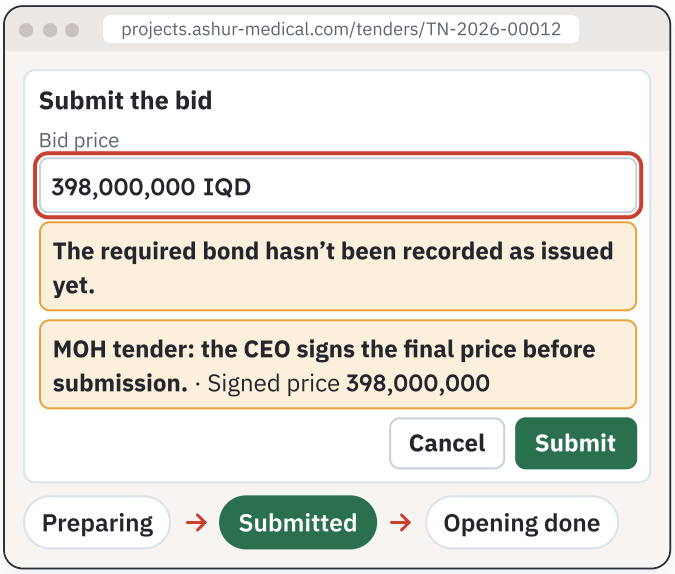
The tender’s office signs

The “Finance” step is the tender’s office chief accountant’s or accountant’s; an Iraqi office with neither signs through Baghdad — never Dubai.

A bond Finance has not recorded does not exist. The tender’s word “Issued” is not enough; the notice stays on the record and reaches the owner daily until it is recorded.

Submit the bid and the dates that alert

The sales manager presses “Submit the bid” and writes the “Bid price”. Before that: the bond recorded as issued, the required checklist lines done, and an MOH price signed.



1. **“Submit the bid”** appears while the tender is “Preparing”; write the **Bid price** then **“Submit”** → “Bid submitted”.
2. On the opening day: the ⋯ menu → **“Move to evaluation”** → “Opening done”. On the “Opening session” tab record every competitor, its price and the winner.
3. **“✦ Read the opening results”** reads the session paper and fills the competitor prices — they enter the “Competitor price archive” for next time.
4. Pulled out? The ⋯ menu → **“Cancel the tender”** with a “Reason”.

What arrives by itself

- 14 days before every date — in the morning, to the owner and the desk leaders
  submission, opening, clarification answer, bond validity, bond return, contract delivery
- 3 days before — the same alert once more
- The last week: every day, in the bell
  “Tender due in N day(s)” ... “Tender due TODAY”
- A required bond not issued 5 days before closing
  “Bid bond LATE for the Baghdad office”

Tender calendar

Projects → “Tender calendar”: Everything / Tenders / Bonds and guarantees / Contracts, with counters “Late · Within 3 days · Within 14 days”. “The owner and the desk leaders are told 14 days and 3 days before each date, in the morning.”

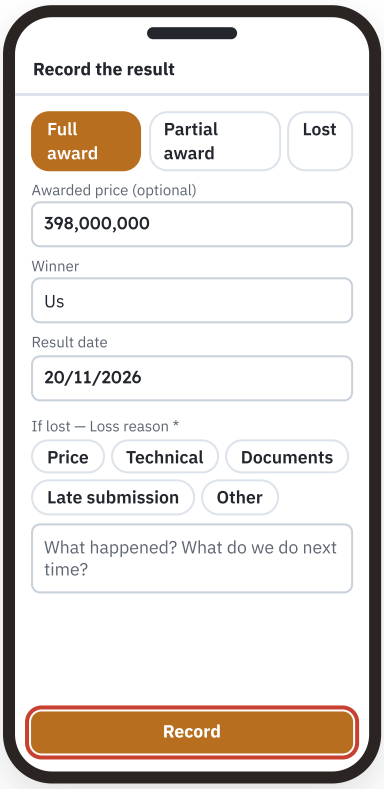
Tender desk

“Waiting on me today” with the next action word: “Ask for the bid decision”, “Get the bond back”...; “Deadlines calendar” and “Tenders by stage”.

The submission deadline is an hour and a minute, not just a day. Write it as the booklet says — every alert and the offer validity are counted from it.

The result: won or lost

"Record the result": full award, partial award, or lost with a required loss reason. A win opens the contract card and a performance bond draft; a loss tells Finance to recover the bid bond the same minute.



1. **"Record the result"** on the record, while the tender is "Submitted" or "Opening done".
2. **Full award** / **Partial award** ("Awarded qty" per item) → "We won the tender!"
3. **Lost**: "Winner's price", "Winner" and the **Loss reason** is required; "Other" needs the note. It feeds the "Loss reasons" report.

Won →

- ✓ The card "Won — make the contract from the tender": "Delivery due" then **"Create the contract"**
- ✓ The contract carries the issuer, the tender number, the sector and the bond needed
- ✓ A "Request a performance bond" draft opens by itself on the contract: "Complete and send"
- ✓ "Purchase requests — one per vendor" are asked from the desk leader

Lost or cancelled →

- ✗ Finance is told the same minute to recover the bid bond
- ✗ Open bid-bond requests are withdrawn
- ✗ Every 7 days the recovery ask repeats until it is released: "Recovery asked"
- ✗ The cost enters "Cost of lost tenders" in the reports

The contract is made from the tender, never from scratch. That is how the tender's cost, items and bond walk into the contract — then into purchase requests, shipping and delivery.

The bond's life and what the tender cost

Finance watches every issued bond each morning, and the CEO hears on its expiry day. Every dinar spent on the tender follows the contract under "Tender costs (pre-contract)".

The daily bond watch

- 30 days before expiry — reminder
  to Finance's bond keepers, the tender owner and its bonds officer
- 14 days before — reminder
- 7 days before — reminder
- 3 days before — reminder
- Expiry day — "Escalated to the CEO"
- A lost tender still holding a bid bond — "Recovery asked" every 7 days

Finance → "Bonds": three actions

Extend · "New expiry date"

Release (money back) · "Cash margin to come back"

Claimed · "Amount claimed"

To recover: "Ask the beneficiary to return the bond, then release it here."

Bonds to issue	Bonds expiring within 30 days	Bid bonds to recover
2	**1**	**1**

What the tender cost	Where it comes from	Seen where
Tender expenses (claims)	An expense claim of kind "Tender expense" — "Which tender? (required)"; the same road and approvals as every expense	The "Tender expenses" tab
Finance payments tagged to the tender	Finance tags a posted voucher from the "Tender" box on the voucher	"Vouchers tagged with this tender"
Bid bond bank fees	From "Bank fee" when the issued bond is recorded	"What bidding cost"
After a win	All of it moves to the contract under "Tender costs (pre-contract)" and enters the margin	Contract cost; CEO → "Tenders"

The cost of bidding against the wins. The tender report shows the cost of won, lost and open tenders against the value won — which is why every expense carries its tender number.

Questions that come up

What gets asked in the first week — and the answer as the system gives it.

Question	Answer
I recorded the tender with the issuer typed; how do I make the contract?	From the card “Choose the tender’s issuing customer (the hospital or ministry) before making the contract” on the record: pick the account and “Save”, or “New account”. The contract refuses without it.
I cannot see “Request participation decision”.	It shows to the sales manager only, while the tender is “Announced” or “No participation”. After sending it becomes “In the approvals inbox”.
Who signs the bid on a Dubai desk tender?	The Dubai desk leader, then the CFO, then the CEO. The leader asked himself? It starts at the CFO.
The tender is from MOH — what differs?	Sector “MOH”: the CEO alone signs the bid, then the final price (“Send the price to the CEO”); the bid is not submitted with an unsigned price. Its contract settles by letter of credit.
The record says “Finance has no record of this bond”.	The tender says requested/issued but the Finance register holds no BR request and no bond. Ask for it from the “Bonds” tab, or ask Finance to record the issued bond. The owner is reminded daily.
We lost — what about the bid bond?	Finance is told at once to recover it and open requests are withdrawn; the ask repeats every 7 days until “Release (money back)”. A missed “Bond return date” shows on the record: “The bond is past its return date”.
Where do I record the booklet and courier cost?	An expense claim of kind “Tender expense” with “Which tender? (required)”. No tender listed? “Ask the tender owner to put you on its team”.
Does the CEO see all this?	Yes, inside his cockpit: “Tenders, bonds and their costs” — won with contract and cost, then open and lost, plus “Bonds out” and “Cash held at banks”.

Three windows on the same tender

Sales sees price and result; Projects the pricing and technical; Finance the bonds and the cost.

Diwan files it by itself

The decided tender and the issued bond file themselves under “Contracts and tenders”.

Competitor price archive

“Tender reports” → “Competitor price archive”: item, tender or customer, and competitor — “Search”.

An answer not here? The “Feedback” button on any page — say what happened, with a picture of the screen.

Tender rules and help

What makes every tender seen and counted — and where to get help.

The golden rules

- Record the tender the day you see it — with the issuer's account from the register
- No preparing before the bid decision is approved
- The bond as a BR request — and Finance records the issued one
- Lost? The loss reason and the winner's price — the same day
- The submission deadline to the hour and minute, as the booklet says
- The price from the pricing sheet; an MOH tender with a signed price
- No envelopes before the required checklist lines are done
- Won? The contract from the tender, never a new one

If you need help

The Feedback button
Something broken? Tap it, say what happened, with a picture of the screen

The desk leader
For the bid decision, the purchase requests after a win, and a stuck tender

Finance
For a bond not yet recorded, its extension and recovery

The system administrator
For a temporary password, or a seat that cannot see tenders

Your first week

- [ ] Open the "Tender desk" and read "Waiting on me today"
- [ ] Name the pricer and the bonds officer in "Team and dates"
- [ ] Request a bid bond and watch its BR number in Finance
- [ ] Record one tender fully, with its issuer account and deadline
- [ ] Ask for the bid decision and follow it in the decision window
- [ ] Record one "Tender expense" on your tender

If it is not in the system... it did not happen. A tender without its TN number has no bond, no cost and no contract.