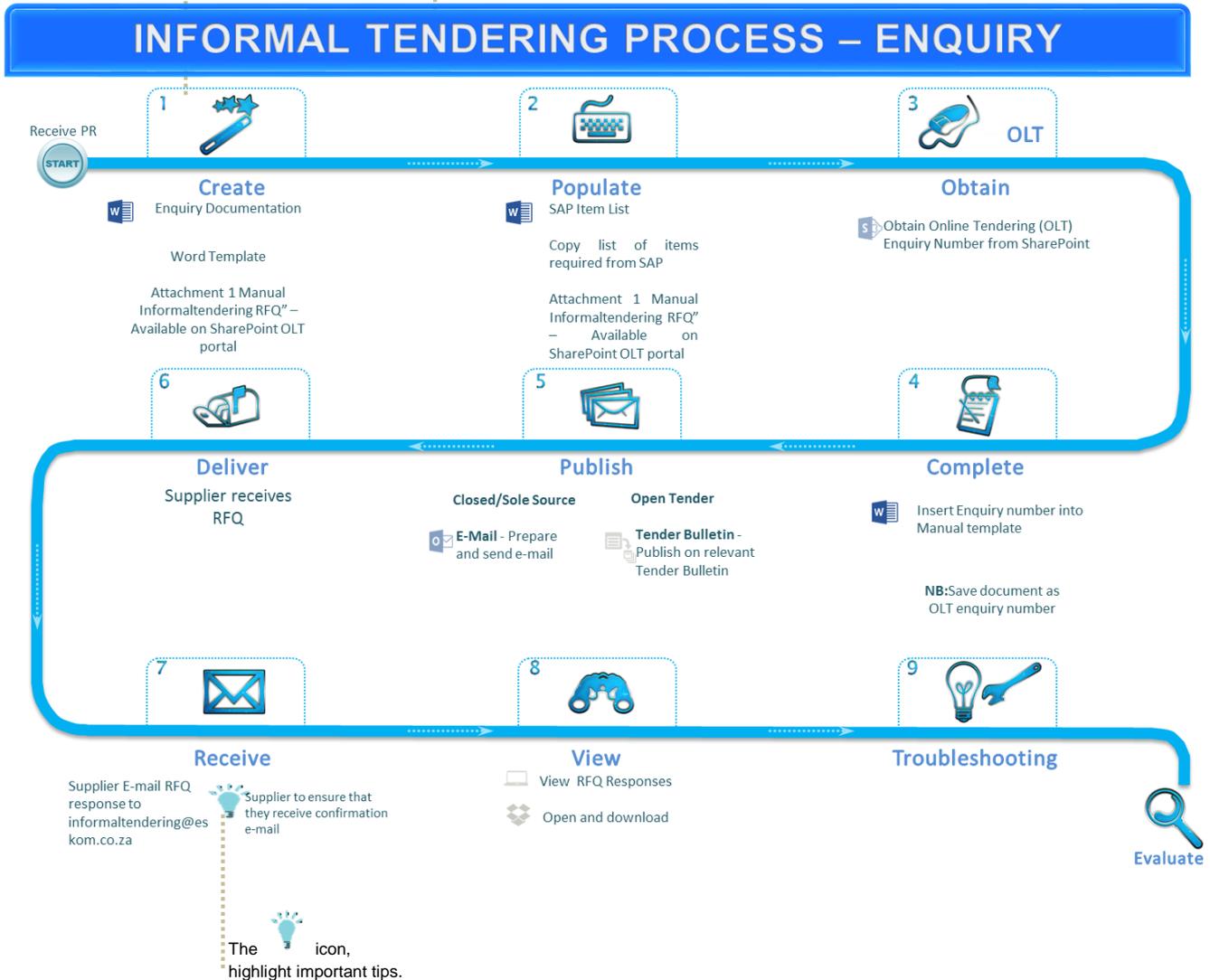


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Click on each Icon to navigate to section.

You can navigate back to this page by selecting both "ctrl & home" keys on your keyboard



Important points:

- An Enquiry number must always be created when conducting an informal tendering process.
- Only the correct OLT enquiry number must be copied into the e-mail subject line.
- Clarifications are sent directly to the procurement practitioner.
- RFQ attachments as well as the Standard Conditions of Tender / Eskom General Conditions of Purchase should be included in the email.
- Suppliers RFQ responses are non-responsive if incorrect enquiry number is used.
- Suppliers RFQ responses are non-responsive if any other Eskom e-mail is copied in on their response e-mail

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To: Procurement Practitioners

Date: 01 September 2016

From: Procurement Trend Analysis
Business Enablement

Introduction

What is the purpose of this guide?
Why is the Informaltendering process necessary?

Process Questions

How do I create enquiry documentation manually? Step 1 - 4
How do I issue an RFQ to the market? Step 5 - 6
How does the supplier respond to an RFQ? Step 7
How do I view my RFQ'S? Step 8
How do I edit an enquiry? FAQ's
How do I re-issue an enquiry? FAQ's
How do I escalate an enquiry? FAQ's
Supplier confirmed submission but I can't view it? FAQ's
I can't see any submissions? FAQ's

Navigation

Know your site
How to download documentation

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Purpose

The purpose of this help guide is to increase the responsiveness of RFQ submissions. This is achieved by providing a step by step guide, suggest best practice workflow and providing a troubleshooting guide.

Why is the Informal Tendering process necessary?

Procurement and Supply Chain Management Procedure 32-1034 requires that a mechanism be in place for the purposes of recording, tracking and monitoring, and for distribution of RFQs when conducting an informal tendering process. Please refer to 32-1034 in regard with the process for Informaltendering.

Eskom, as a Schedule 2 PFMA entity, is required to apply the PPPFA and its Regulations when applying the formal and informal tendering processes.

RFQs are the only types of enquiries issued when executing informal tendering, but may also be used when executing formal tendering.

SharePoint is the platform on which this will be monitored. It is mandatory that an enquiry number is obtained from the system to track all emails going out and the responses from the suppliers to be logged in one database.

 Under no circumstances should a RFQ be submitted to the buyers e-mail address. All RFQ's will be viewed through the Informaltendering portal.

 Setup: Create a folder on your desktop named RFQ (or other identifiable name). Download the following documents from the Informaltendering Portal to the folder created – Attachment 2, 3 and 4. You will also save your prepared enquiry document in this folder. Please refer to downloading documents section.

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Step 1 - Create RFQ 

Option 1 - SAP/Manual

Download Relevant Document –refer to “download document”

Color Coded – Yellow – Changes to be made by supplier, Green – Changes to be made by buyer

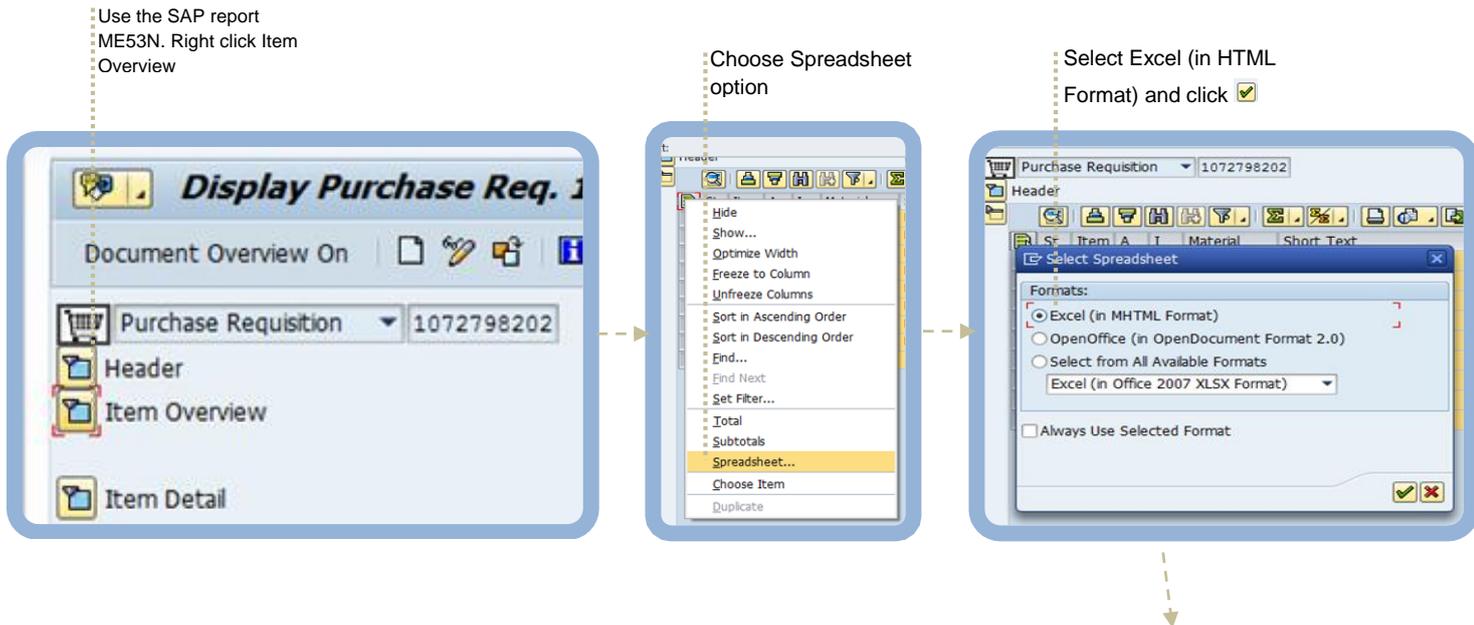
Informal tendering enquiry number (e.g. OLT1234567) must be inserted in the Document header text.

	Invitation to Quote/Request for Quotation (RFQ) For transactions up to R1M			Unique Identifier	240-75269736	
				Revision	Rev. 3	
				Revision Date	July 2015	
				Group Technology and Commercial		
				Enquiry number	[OLT100xxxx]	
To	[Insert registered full legal name of the supplier]	Date	[Insert the date you send the invitation out]			
Attention	[Insert the name of the contact person at the above supplier]	Tel No	[Insert tel no of the contact person]			
E-mail address	[Insert e-mail address of the contact person]					
OLT No	As per header text.	Closing date	[Insert the closing date for receiving offers]	Closing time At (South African Standard Time)	[Insert time in the format xxhxx]	
Validity period of offers	30 days Please be advised that NO late offers will be considered and all offers must be sent to informaltendering@eskom.co.za					
Eskom contact person	[Insert the name of the procurement practitioner]	Tel No	[Insert tel no of the procurement practitioner]			
E-mail address	[Insert e-mail address of the procurement practitioner]	Fax No	[Insert the fax no. of the procurement practitioner]			

Step 2 – Populate RFQ documentation

Sap/Manual

Copy list of items required from SAP. The details may be provided in separate Document if the list is more than a single page. Else, and preferably, complete the table with the relevant/applicable columns.



5. DETAILED LIST OF ITEMS REQUIRED
Procurement Practitioner to populate item details below. Tenderer to insert the prices. Insert more lines if needed.

Item no.	Stock no.	Description	Quantity	Measurement	Unit price	Total price	VAT
1.	[if applicable, insert applicable stock no.]	[insert detailed description of required item]	[insert the quantity required]	[insert the unit of measurement to be used e.g.]	[insert the price per unit]	[insert the total price]	[insert the VAT amount]

Copy excel into template list.
 The buyer can also attach a separate file with a complete list of requirements

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Step 3 – Obtain Enquiry Number

Navigate to Informaltendering Portal -Click create enquiry. Refer to Know your site.

INFORMAL TENDERING RFQ BOOKING FORM

ENQUIRY NUMBER OLT1003000

Status
 active - above R30K ▼

Closing date

2016/07/01

23:00:00

As determined by the Procurement Practitioner.

Booking date

2016/08/25

11:43

Defaulted date booked by the Procurement Practitioner.

PR Number

SAP generated number. For multiple PR numbers press enter then add the next PR.

SAP RFQ:

Commercial Department:

* ▼

Tender Accessibility

Gao Seleka ;

Add names of People that can view your enquiry e.g. line manager, senior manager etc.

RFQ Description:

Submit

Close

Eskom employees who can view tender on SharePoint. Mandatory to insert Supervisor/Managers name. No one will access the enquiry if you have not granted them access. You can add a team members name to assist in your absence.

Click submit to generate enquiry number

Click to close after copying enquiry number

Default Value is active
– Above R30k. Please change accordingly

Copy OLT number after clicking on Submit button below

Ensure closing Date and time is the same as SAP closing date and time. Closing Date can only be extended. Recommendation: Close enquiries between 21:00 and 23:00. No changes can be made after closing date.

Mandatory - Enter multiple PR numbers using ";" to separate them.

Add names via outlook address book.

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Step 4 – Complete Enquiry Document

Insert Enquiry number into Enquiry document.

Manual – Manual Template Header

	Request For Quote	Page: 1 of 3 Number: OLTXXXXXX Date: Thursday, September 01, 2016 11:47:00 AM
---	-------------------	---

Dear Valued Supplier]

Eskom hereby invites you to provide a quotation for the above mentioned enquiry. Please complete attached documentation.

Extremely important to note - not adhering to this will render your submission non-responsive!
ALL COMPULSORY FIELDS SHOULD BE COMPLETED AND FAILURE TO COMPLY WILL RESULT IN YOUR QUOTE BEING NON-RESPONSIVE AND WILL NOT BE EVALUATED.

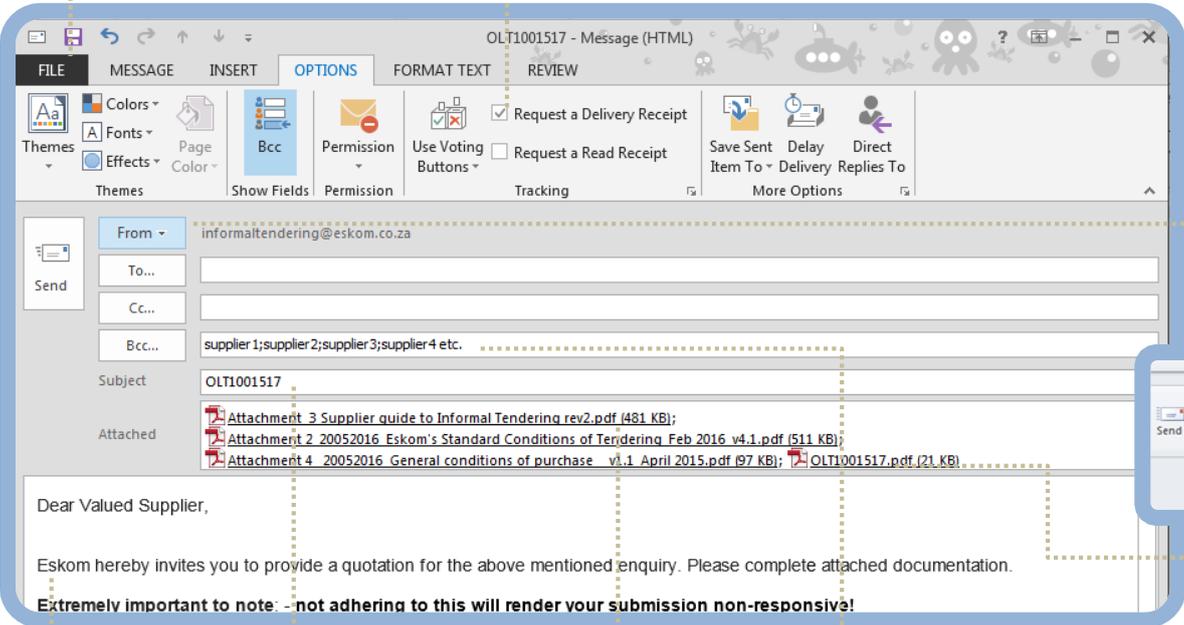
Insert OLT enquiry number obtained from SharePoint in step 3 above.

Close file and save (paste) OLT number as file name

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Step 5 – Issue

Closed Tender/Sole Source E-Mail



Open "New eMail" from Outlook

Always Tick

Change to `informaltendering@eskom.co.za`

Enquiry document saved as OLT enquiry number

Dear Valued Supplier,

Eskom hereby invites you to provide a quotation for the above mentioned enquiry. Please complete attached documentation.

Extremely important to note: -not adhering to this will render your submission non-responsive!

- Copy from Completed Enquiry – up to "Suppliers Must Comply with Eskom's Life Saving Rules while on site"
- Correct OLT enquiry number only. Paste into e-mail subject field. Number consist of prefix OLT and seven numbers e.g. OLT1234567
- Always download SharePoint portal
- BCC field – Suppliers invited – Obtain list from Central Supplier Database -CSD

Open Tenders

The buyer will publish the enquiry documentation on the relevant tender bulletin. The buyer will indicate on the tender bulletin that suppliers will forward their submission to informaltendering@eskom.co.za

Step 6 – Deliver

Ensure that RFQ is delivered to all e-mail addresses are relevant. Check non-delivered error messages.



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Step 7 – Respond (Supplier)

Supplier e-mail preparation.

After Sending, ensure that you receive a "Response Received" confirmation. Please see Correct Response below



Only Eskom address. No other Eskom address to be copied on response. This will be a breach of protocol and will deem your response non responsive

Ensure that you receive a delivery receipt from Eskom



Attach Completed RFQ response Clarifications are sent directly to the procurement practitioner.

The screenshot shows an email composition window with the following details:

- From:** dKlerk-Q@eskom.co.za
- To:** informaltendering@eskom.co.za
- Subject:** OLT1001517
- Attachment:** OLT1001517.pdf (21 KB)
- Body:**

Good Day,
Please find attached quote.
Kind Regard,
Supplier

From: informaltendering
Sent: 19 October 2016 09:32 AM
Subject: OLT1001517

Dear Valued Supplier,

Eskom hereby invites you to provide a quotation for the above mentioned enquiry. Please complete attached documentation.

Extremely important to note: - not adhering to this will render your submission non-responsive!
ALL COMPULSORY FIELDS SHOULD BE COMPLETED AND FAILURE TO COMPLY WILL RESULT IN YOUR QUOTE BEING NON-RESPONSIVE AND WILL NOT BE EVALUATED.

NB: ALL QUOTES HAS TO BE SUBMITTED WITH CSD (NATIONAL TREASURY) NUMBER. For CSD registration: Please register at <https://secure.csd.gov.za/>

NB: Specify line prices at lines where prices are submitted and indicate no quote at lines where no price is submitted.

1. Please complete attached documentation and submit to informaltendering@eskom.co.za only. E-mails to any other address will not be accepted.

Respond to original e-mail if possible. Will ensure that enquiry number is correct

Attach Completed RFQ response

Use the correct Enquiry number. Only the OLT enquiry number. No spaces, nothing else. Number 2 in RFQ document. Number consist of prefix OLT and seven numbers

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Correct Response



Contact buyer before closing date and time, if you do not get an auto response

Response Received.

Forward this response and above sent e-mail (without attachments) to buyer as proof of submission

Wed 2016/10/19 09:36 AM

informaltendering

RFQ - Response Receipt

✓

To: Quintin De Klerk

Dear Valued Supplier,

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. Should you have further enquiries, please contact the buyer.

This e-mail only confirms receipt of your RFQ response.

Please note your response will only be evaluated under the following circumstances:

1. The e-mail subject line only contains the correct OLT Enquiry number. The total Enquiry number length should be 10 characters, OLT and then seven numbers (e.g. OLT1234567) no spaces or any other characters.
2. Response received before the closing date and time.
3. Attached the required RFQ returnables.

Kind Regards,

Eskom Informal Tendering

Ensure that you adhere

Incorrect Response

Use correct OLT enquiry number. Refer to above

Wed 2016/10/19 09:36 AM

informaltendering

RFQ - Incorrect Enquiry Number

✗

To: Quintin De Klerk

Message Attachment: 3 Supplier guide to Informal Tendering rev2.pdf (484 KB)

Dear Valued Supplier,

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. Should you have further enquiries, please contact the buyer.

Please note that your submission is non-responsive.

You are receiving this automated response because of an incorrect enquiry number in the e-mail subject field. The total Enquiry number length should be 10 characters, OLT and then seven numbers (e.g. OLT1234567) no spaces or any other characters.

Please refer to point number 2 on the RFQ documentation you received.

Please note the following:

1. Do not use the RFQ 6000 number in the e-mail subject field.
2. Do not type in the description of the RFQ in the subject field.
3. Do not send clarifications to this e-mail address. Clarifications should be forwarded directly to the buyer.
4. Do not forward invoices or any other correspondence except for RFQ responses

Our system utilise the OLT enquiry number in the e-mail subject field to allocate your RFQ to the buyer. If you do not respond correctly, your RFQ responses is non-responsive. Please adhere to this for future reference. Please communicate this to all personnel that will respond to Eskom RFQ's. Please refer to attached guide.

Kind Regards,

Eskom Informal Tendering

Step 8 - View Responses

VIEW TENDERS

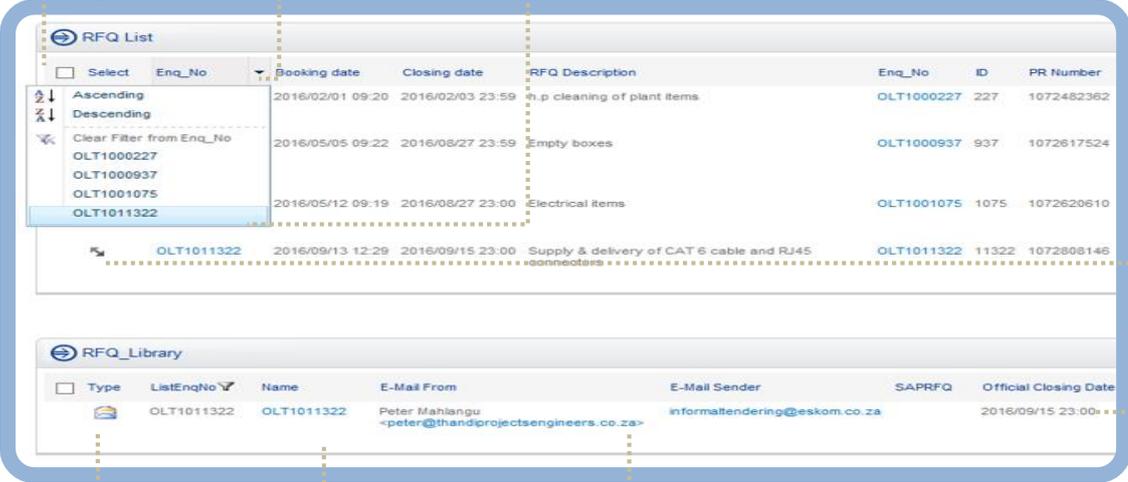


Go to the homepage of [Informal Tendering](#) and click

All submissions received before the closing date will be displayed in the library.

Hover over Enq_No, click on arrow

Select Enquiry Number



Click on arrow. Must be highlighted.

Submissions will be archived on all items older than 1 month from the closing date. Please ensure that you have downloaded your documentation.

Only e-mails will be displayed. Please refer to view e-mail attachments below

OLT number same as list item above

Submissions can be viewed 30 min after closing time

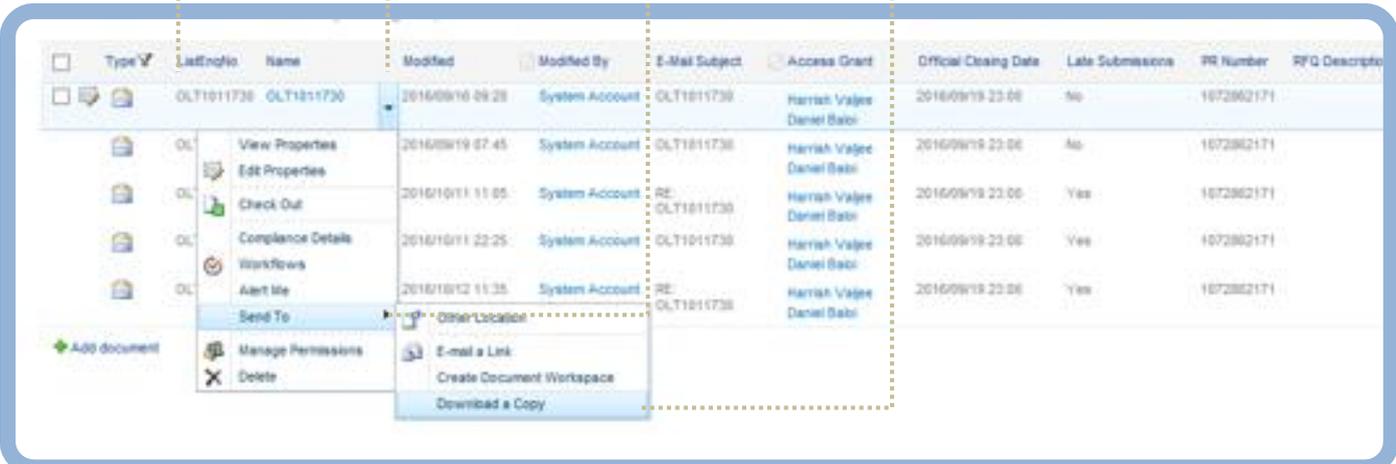
Open e-mail and view attachments

Select Relevant e-mail

Scroll over name. Click on drop down arrow

Scroll over name. Click on drop down arrow

Download and open in outlook.



Do you want to open or save OLT1011730.eml (357 KB) from commercial.eskom.co.za?

Open Save Cancel x

Open in outlook.

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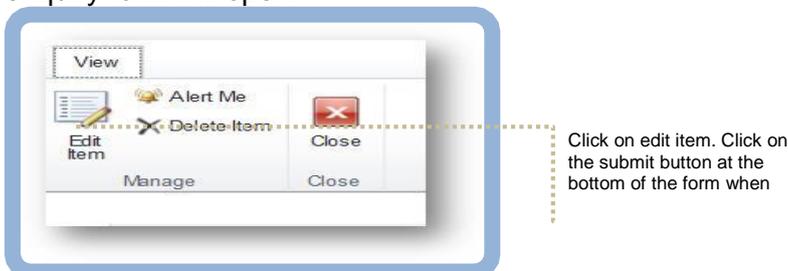
Frequently Asked Questions

? How do I edit an Enquiry to extend the closing date or update one of the other fields?

Answer – Please note that you can only make changes before the closing date.

A form may be edited after submission. However, it is important to note that time extension may only be done before the closing date.

Please refer to step 8 in the help guide on how to select an enquiry number. Click on the number and the enquiry form will open.



? – I can only see the e-mails, where is the documents

Answer – You need to open the e-mail and download the attachments. Please refer to step 8 above.

? – I can't see any/some responses

Answer – Step by step troubleshoot guide

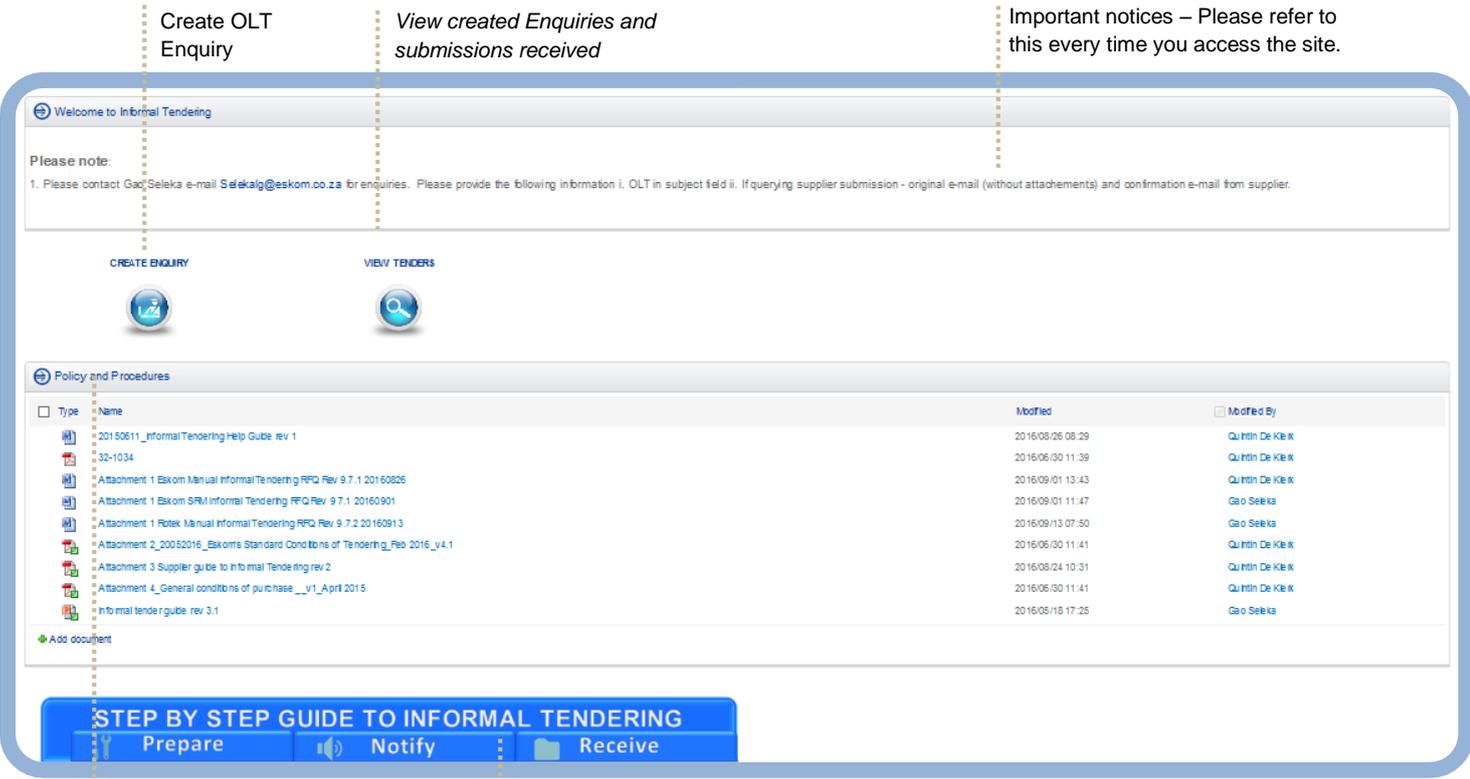
1. Ensure you are viewing responses correctly. Follow step 8 in order to ensure that you are viewing the enquiry correctly.
2. Please verify with suppliers if they responded. Ask supplier for original send e-mail (without attachments) and confirmation e-mail. Please note that under no circumstances should the supplier send RFQ submission directly to a buyer. The supplier will receive a confirmation e-mail. If not received then Eskom did not receive the e-mail. Please refer to screenshot in step 7.
3. Log a call with Business Enablement – Stating that steps one and two where followed. Include information in step 2 with your call.

? – How do I record late submissions on buyers file

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Know your Site

Landing page – Three Options -1. [Click here](http://commercial.eskom.co.za/sites/rag/informaltendering/SitePages/Home.aspx) 2. Copy and paste this in your browser and set as a favourite: <http://commercial.eskom.co.za/sites/rag/informaltendering/SitePages/Home.aspx> 3. Links: Eskom Intranet →Business Communities →Group Commercial→



The screenshot shows the 'Welcome to Informal Tendering' page. At the top, there are three main options: 'Create OLT Enquiry', 'View created Enquiries and submissions received', and 'Important notices – Please refer to this every time you access the site.' Below these are buttons for 'CREATE ENQUIRY' and 'VIEW TENDERS'. A 'Policy and Procedures' section contains a table of documents. At the bottom, there is a 'STEP BY STEP GUIDE TO INFORMAL TENDERING' with sub-sections: 'Prepare', 'Notify', and 'Receive'.

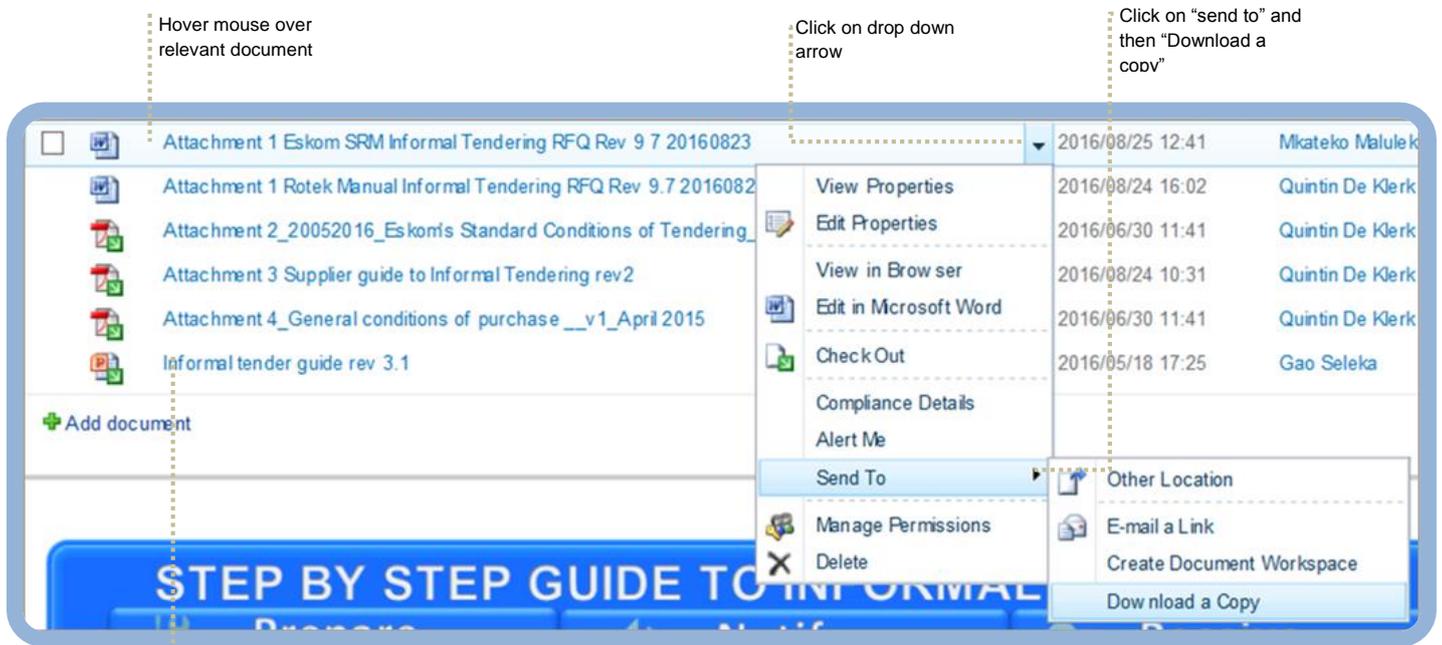
Type	Name	Modified	Modified By
	20150611_InformalTenderingHelpGuide rev 1	2016/06/06 08:29	Quintin De Klerk
	32-1034	2016/06/30 11:39	Quintin De Klerk
	Attachment 1 Eskom Manual Informal Tendering RFQ Rev 9.7.1 20160826	2016/09/01 13:43	Quintin De Klerk
	Attachment 1 Eskom SRM Informal Tendering RFQ Rev 9.7.1 20160901	2016/09/01 11:47	Gao Selekia
	Attachment 1 Rotek Manual Informal Tendering RFQ Rev 9.7.2 20160913	2016/09/13 07:50	Gao Selekia
	Attachment 2_20052016_Eskom's Standard Conditions of Tendering_Feb 2016_v4.1	2016/06/30 11:41	Quintin De Klerk
	Attachment 3 Supplier guide to Informal Tendering rev 2	2016/06/24 10:31	Quintin De Klerk
	Attachment 4_General conditions of purchase__v1_April 2015	2016/06/30 11:41	Quintin De Klerk
	Informal tender guide rev 3.1	2016/05/18 17:25	Gao Selekia

Documents Required. This will be updated on a regular basis

Process overview of System

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Download documents



Hover mouse over relevant document

Click on drop down arrow

Click on "send to" and then "Download a copy"

Attachment 1 Eskom SRM Informal Tendering RFQ Rev 9.7 20160823

Attachment 1 Rotek Manual Informal Tendering RFQ Rev 9.7 20160823

Attachment 2_20052016_Eskom's Standard Conditions of Tendering_

Attachment 3 Supplier guide to Informal Tendering rev2

Attachment 4_General conditions of purchase __v1_April 2015

Informal tender guide rev 3.1

+ Add document

View Properties

Edit Properties

View in Browser

Edit in Microsoft Word

Check Out

Compliance Details

Alert Me

Send To

Manage Permissions

Delete

2016/08/25 12:41

2016/08/24 16:02

2016/06/30 11:41

2016/08/24 10:31

2016/06/30 11:41

2016/05/18 17:25

Mkateko Malulek

Quintin De Klerk

Quintin De Klerk

Quintin De Klerk

Quintin De Klerk

Gao Seleka

Other Location

E-mail a Link

Create Document Workspace

Download a Copy

STEP BY STEP GUIDE TO INFORMAL

 **NB:** Always open attachments from the portal. All attachments are subject to change at any time. Please ensure to download the latest version every time.