



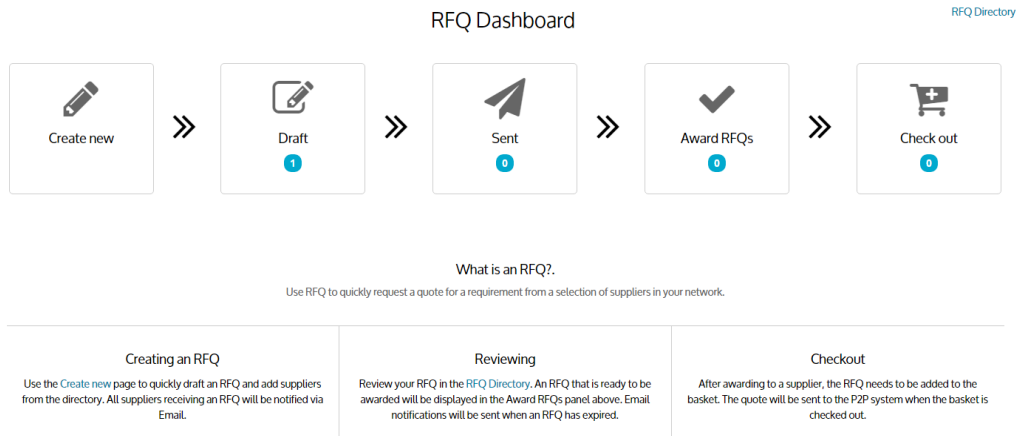
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Summary

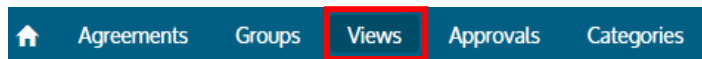
Quick Quote is a lightweight quoting tool designed for simple RFQ competitions.

- The RFQ dashboard provides an overview of the RFQ workflow, where RFQs can be created and reviewed.
- Emails and alerts will notify the buyer when quotes are received or when RFQs have expired.
- Awarded quote line items can be checked out to the P2P in the same way as regular catalogue items.
- RFQ options and user access can be managed using Views.



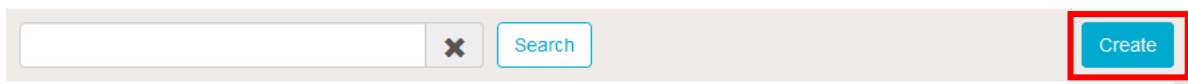
Managing RFQ options and user access - required

Before users can access the Quick Quote feature, configuration is required. A **View** (with the type **'Sourcing'**) will need to be created. Navigate to the View menu:



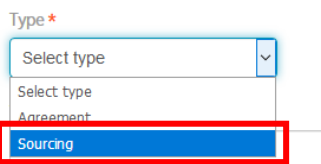
If there is no existing 'Sourcing' View, click on 'Create':

View directory



Select 'Sourcing' as the type:

Create View

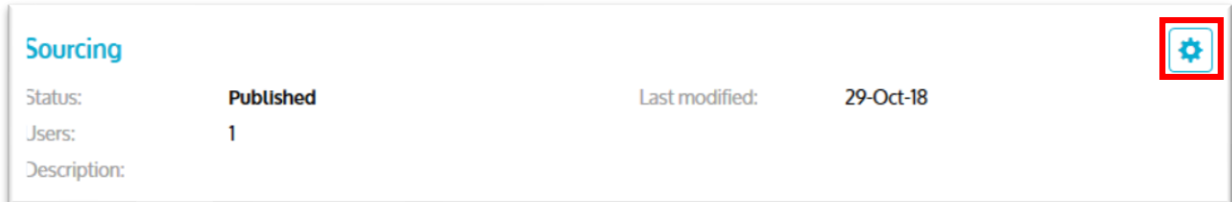


After inputting the name and description, click on the 'save' button to save the View. If the View cannot be saved, a Sourcing View may have already been created (only a single sourcing View is permitted).

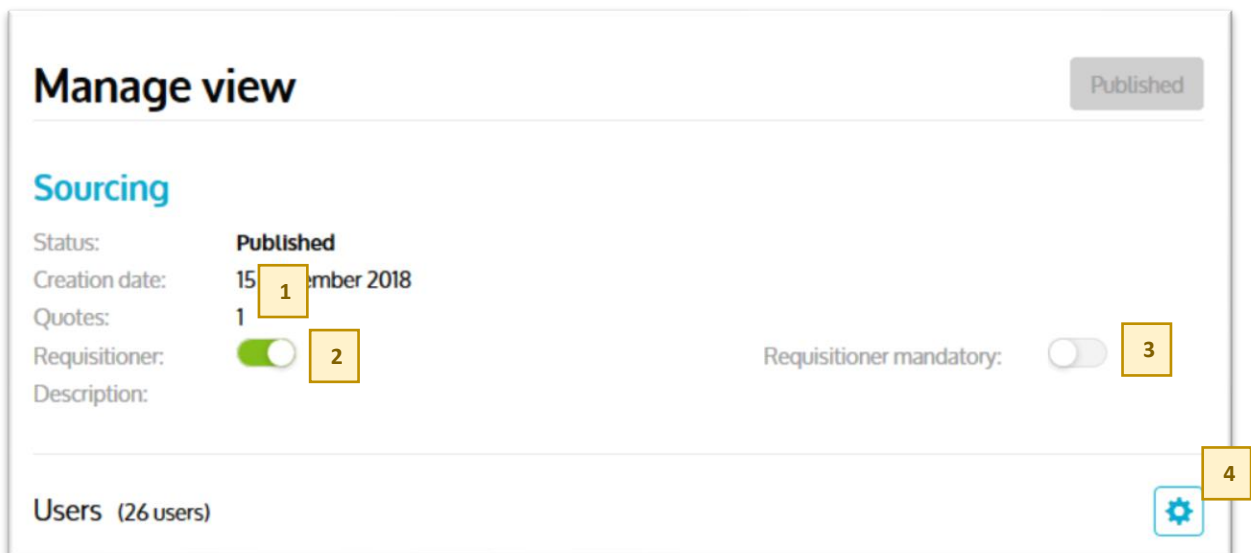
If a Sourcing View has already been created, locate the View in the Views directory (note: a Sourcing View can be located easily by clicking on the 'Sourcing' filter in the Views directory:



Once the View has been located, click on the 'cog' button to open the 'Manage view' page:



The 'Manage view' page is where RFQ options and user access can be configured:

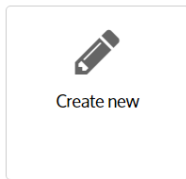


1. **Quotes** – this is the minimum required quotes required before an RFQ can be awarded. For example, if '3' is selected, at least 3 quotes must be received before the RFQ can be awarded.
2. **Requisitioner** – Switching this on allows an RFQ to be assigned to another user (requisitioner) who does not have access to an RFQ (and cannot create them themselves).
3. **Requisitioner mandatory** – If this is enabled, the requisitioner must be assigned when the RFQ is first created. If more flexibility is required regarding who is assigned an RFQ, leave this disabled.
4. **Users** – Clicking on the 'cog' button will allow individual users to be added to the View. Only users added to the View will be able to create and manage RFQs.

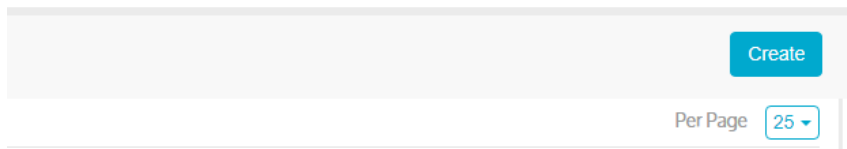
Once the desired options have been selected and the users have been added, you can start creating and managing RFQs.

Creating an RFQ

An RFQ can be created by clicking on the 'Create new' panel on the dashboard:



or by clicking on the 'Create' button on the RFQ directory page:



The RFQ **header** specifies information such as RFQ title, expiration date, and currency. The RFQ ID is automatically generated when the RFQ is saved, and can be used to uniquely identify the RFQ. Up to three files can be attached; PDFs, Microsoft Word and Excel documents are permitted.

An RFQ can be set as **'restricted'**. A restricted RFQ is only visible to the user who created it. This feature can be used when an RFQ contains sensitive information.

Header details

RFQ Title: *	<input type="text" value="New laptops for design team"/>	Expiration Date: *	<input type="text" value="30-11-2017"/>
RFQ ID:	0000001869	Expiration Time: *	<input type="text" value="17:00"/>
Attachments:	<input type="button" value="Choose file"/> No file chosen	Currency: *	<input type="text" value="GBP"/>
		Restricted:	<input type="checkbox"/>

The **Requested Product Details** section specifies the details of the requirement. To ensure that accurate quotes are returned, provide as much detail as possible in the description field.

The order unit field will only allow valid unit values, and will attempt to auto-complete when text is inputted.

The Maximum price is an optional field, and can be used to indicate a fixed budget.

Requested Product Details


Name: *	<input type="text" value="Laptop X445"/>	Quantity:	<input type="text" value="5"/>
Description: *	<input type="text" value="2 GB of Ram, 500GB HD."/>	Order unit:	<input type="text" value="Each"/>
		Maximum price:	<input type="text"/>

The Delivery Details section provides the supplier with contact and delivery information. As delivery information will also be provided when sending a Purchase Order, the information here is optional.

Buyer's Guide to Quick Quote



Delivery Details

Email address: *	<input type="text" value="demo.user@basware.com"/>	Target Delivery Date:	<input type="text" value="30-11-2017"/>
Phone Number:	<input type="text"/>		
Address:	<input type="text" value="London office"/> 		
	<div style="border: 1px solid #ccc; padding: 5px;">120 Old Broad Street London EC2N 1AR United Kingdom</div>		

Addresses can be saved and reused. Clicking on the cog icon will open a form to create a new address. To view or delete stored addresses, click on the ['Manage'](#) link.

There are currently 2 out of 50 permitted stored addresses. [Manage](#)

Alias *	<input type="text"/>
Deliver to address *	<div style="border: 1px solid #ccc; height: 50px;"></div>
City/town *	<input type="text"/>
County	<input type="text"/>
Country *	<input type="text" value="United Kingdom"/>
Post Code *	<input type="text"/>
	<input type="button" value="Cancel"/> <input type="button" value="Done"/>

Adding suppliers

To send an RFQ to a group of suppliers, they must be added to an RFQ before it is sent. Click on the 'Add' button in the 'Suppliers' section on the RFQ page to select from the list of suppliers who have registered in your community.

Suppliers
<div style="border: 1px solid #ccc; padding: 5px;">Name: <input type="text"/></div> <div style="border: 1px solid #ccc; padding: 5px;"><input type="button" value="Add"/></div>
One-off Suppliers
<div style="border: 1px solid #ccc; padding: 5px;">Name: <input type="text"/></div> <div style="border: 1px solid #ccc; padding: 5px;"><input type="button" value="Add"/></div>

An RFQ can also be sent to a supplier who has not registered with Basware. Click on the 'Add' button in the 'One-off Suppliers' section to open the 'Invite one-off Supplier' screen:

Invite one-off Supplier

[Cancel](#) [Add](#)

Contact name: *

Company name: *

Email address: *

Email message: *
Dear Supplier,
Procserve Holdings Limited has sent you a Request for Quote (RFQ).

The following text will be added to the email before being sent:

To review the RFQ and supply a quote, please visit [URL] using the access code below:
Access Code: [*****]
Thank you,
The Basware Team

Saving a draft

To save an RFQ without sending it, click on the 'save' button on the create/edit page:

[Cancel](#) [Save](#) [Send](#)

RFQs which are saved but not sent can be viewed in the RFQ directory by clicking on the 'Drafts' filter:

Show me

- All
- Needs attention
- Draft
- Open
- Ready
- Awarded
- Expired

Sending an RFQ

Once the required fields have been inputted and the suppliers have been added, the RFQ is ready to be sent. Click the 'Send' button on the RFQ screen to send the RFQ to the suppliers attached. Once an RFQ has been sent, the status is changed to **open**, and can be found in the RFQ directory by clicking on the 'Open' filter.

Withdrawing

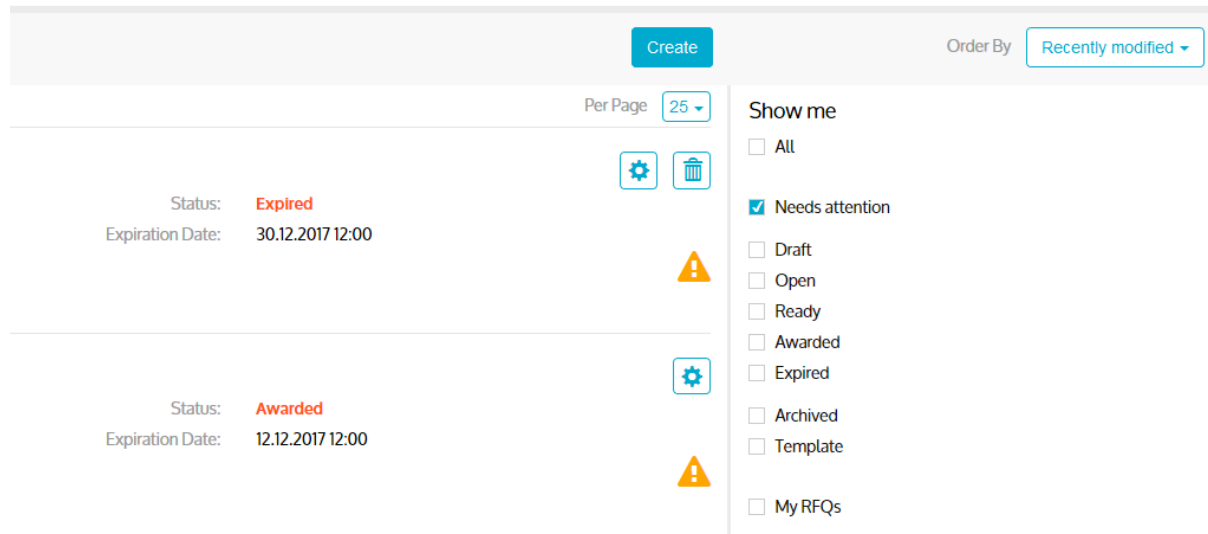
After an RFQ has been sent, it can be withdrawn, even if quotes have been supplied. The status is automatically changed to **archived**, and any suppliers who have submitted a quote or marked the RFQ as **watched** will receive an email notification.

Reviewing RFQs

RFQ Directory

All RFQs are found in the **RFQ directory**. Filters can be used to show RFQs by status. **Archived** RFQs are hidden in the 'All' filter and can only be viewed when using the 'Archived' filter.

RFQs that have recently expired or been awarded will display an alert icon. The 'Needs attention' filter will display all RFQs that require user input.



The screenshot shows a user interface for managing RFQs. At the top, there is a 'Create' button and an 'Order By' dropdown set to 'Recently modified'. Below this, there is a 'Per Page' dropdown set to '25'. The main area displays two RFQ entries:

- Expired RFQ:** Status: Expired, Expiration Date: 30.12.2017 12:00. It has a gear icon and a trash icon.
- Awarded RFQ:** Status: Awarded, Expiration Date: 12.12.2017 12:00. It has a gear icon and a warning icon.

On the right side, there is a 'Show me' filter panel with the following options:

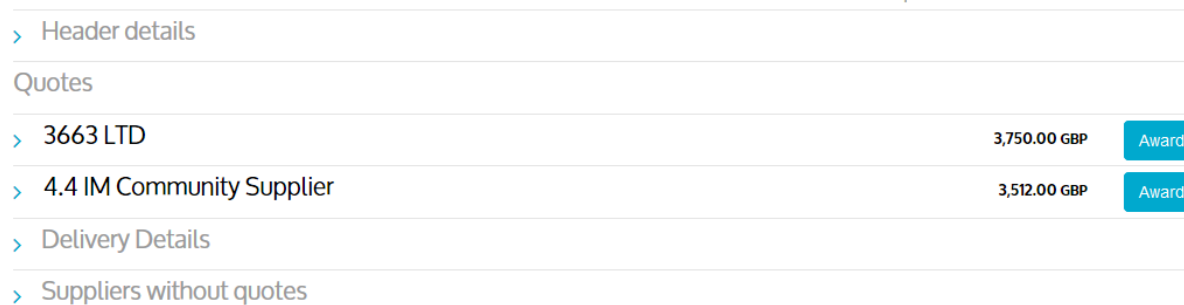
- All
- Needs attention
- Draft
- Open
- Ready
- Awarded
- Expired
- Archived
- Template
- My RFQs

The 'My RFQs' filter will display all RFQs that have been created by the current user.

Awarding an RFQ

An RFQ can be awarded when one or more quotes have been supplied. If all the suppliers have submitted a quote, or the RFQ expires with one or more quotes, the status is changed to **Ready**.

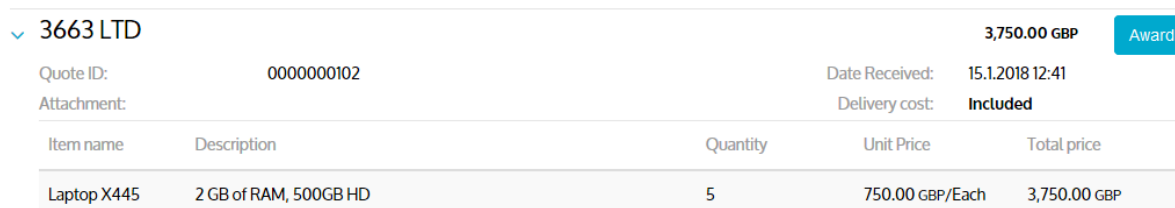
When viewing quotes on the 'View RFQ' page, the quote amounts are displayed next to supplier name.



The screenshot shows the 'View RFQ' page with the following sections:

- > Header details
- Quotes
 - > 3663 LTD 3,750.00 GBP [Award](#)
 - > 4.4 IM Community Supplier 3,512.00 GBP [Award](#)
- > Delivery Details
- > Suppliers without quotes

Each quote can be expanded to see more information including line item level detail.



The screenshot shows the expanded details for the quote '3663 LTD' (Total price: 3,750.00 GBP, [Award](#) button).

Quote ID: 0000000102 Date Received: 15.12.2018 12:41
 Attachment: Delivery cost: **Included**

Item name	Description	Quantity	Unit Price	Total price
Laptop X445	2 GB of RAM, 500GB HD	5	750.00 GBP/Each	3,750.00 GBP

Clicking the award button will open a pop-up box where the email notification text sent to participants (successful and unsuccessful) can be edited.

Notify winner:

Dear Supplier,

Congratulations, your quote for the Request for Quote (RFQ) '0000001869' has been awarded by Procserve Holdings Limited.

The following text will be added to the email, in the supplier's language, before being sent:


To review the RFQ, please visit the URL:
[URL]

Thank you,
The Basware Team

Checking out a quote

Once a quote has been awarded, the button on the RFQ changes to an 'add to basket' button and the RFQ is moved to an **awarded** state.

Each line will then need to have a UNSPSC code added for classification. Clicking the 'cog' icon will allow the user to assign the UNSPSC code.

Quantity	Unit Price	Total price	Classification
5	750.00 GBP/Each	3,750.00 GBP	43211503 

The quote lines can then be added to the shopping basket by clicking the 'add to basket' button:



RFQ quote line items can be checked out of the basket to the P2P system in the same way as regular catalogue items.

Assigning awarded RFQ

Assigning an RFQ to a 'requisitioner' is a useful feature, allowing dedicated users to manage RFQs on behalf of colleagues (requisitioners) who request products and services that require a sourcing event. Once an RFQ has been awarded, the winning quote can then be assigned to the 'requisitioner' user, who can then use it to generate a requisition in the P2P system.

Before an RFQ can be assigned, ensure that the 'Requisitioner' option is enabled in the Sourcing View (see above).

When an RFQ is created, if the 'Requisitioner mandatory' option is enabled, the email address of the requisitioner must be entered when the RFQ is first created. Enter the email address in the Requisitioner field. If the email address is found, a green 'tick' icon is displayed. If a red 'cross' icon is shown, the user has not been found in the system. Note: if a user is not found, request the user to punch in to Marketplace, and a user will be created automatically

Buyer's Guide to Quick Quote



Create RFQ

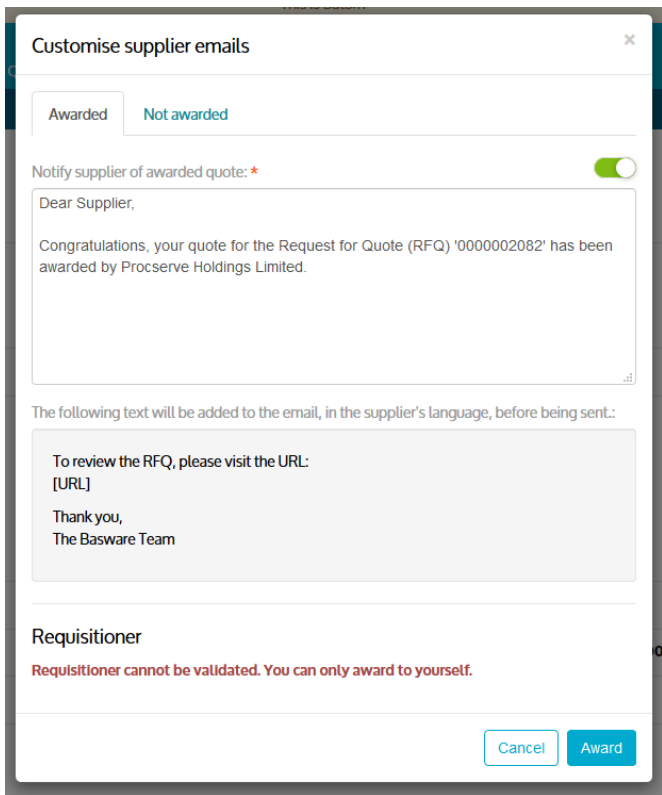
Header details

RFQ Title: *

RFQ ID:

Requisitioner:

Once an RFQ is ready to award, click on the 'award' button to view the 'award' popup screen. If the requisition email address entered has not been found in the system, the warning message below will be displayed. In this case, it is only possible to award the RFQ to yourself and check out the quote into your own basket.



To rectify this, click 'cancel' and expand the 'Header' section of the RFQ and enter an email address into the Requisition field. If the user is found (and a green tick is shown) then it will be possible to award and assign to the requisitioner.

View RFQ

Business cards

Status: **Quotes received**

> Requested Product Details

Header details

RFQ Title: Business cards

RFQ ID: 0000002082

Requisitioner: ✓

Currency: GBP

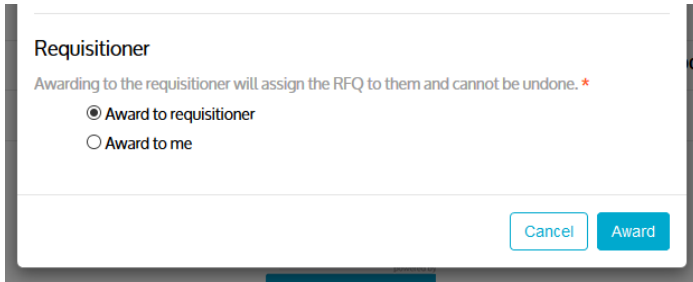
Attachments:

Quotes

Buyer's Guide to Quick Quote

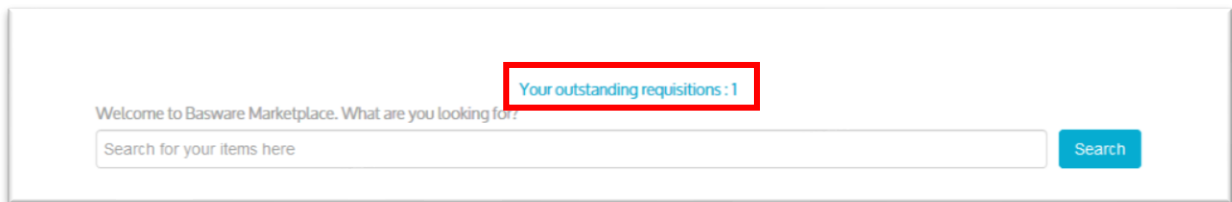


If a valid email address is used, the award dialog should have an option to award the RFQ to yourself or to the requisitioner:

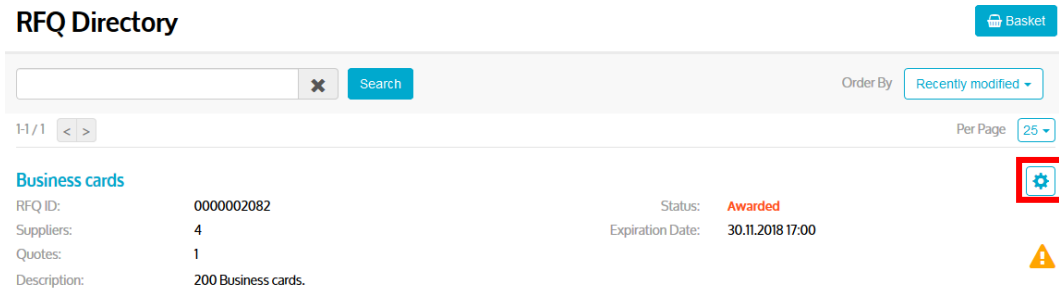


Receiving an assigned RFQ

Once an RFQ is assigned to the requisitioner, the next time the requisitioner user logs in, they will see a message on their homepage notifying them that they need to open the awarded RFQ and check it out to their basket:



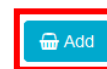
Clicking on the link will take the user to the RFQ directory (only showing assigned RFQs). Click on the 'cog' button to open the RFQ:



Once the RFQ has been opened, the 'add' button should be visible. Click the button to add the awarded quote to the basket. This can then be checked out to the P2P system.

[Back to My quotes](#)

View RFQ



Business cards

Stat **Awarded**
US:

Email notifications

Notification emails are sent to the [buyer](#) in the following scenarios:

- An RFQ expires without quotes
- An RFQ expires with one or more quotes
- A supplier submits a quote

Notification emails are sent to the [supplier](#) in the following scenarios:

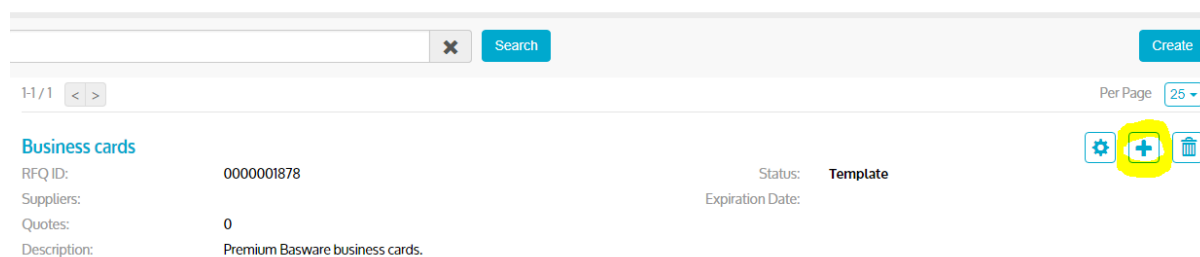
- An RFQ has been sent
- An RFQ has been awarded (this is only sent to the awarded supplier)
- An RFQ that has been quoted for has been closed or awarded to another supplier
- An RFQ 'watched' by the supplier is closed or withdrawn

Using Templates

Templates can be used if similar RFQs are frequently raised or if mandatory file attachments need to be attached to all RFQs. To create an RFQ template, click on the 'Templates' filter in the RFQ directory, then click on the 'Create' button.

After creating or editing a template, click the 'Save' button to save the RFQ in the directory. Saved templates can be viewed by clicking the 'Templates' filter in the directory. To generate an RFQ using a template, click on the 'Plus' button:

RFQ Directory



The screenshot shows the RFQ Directory interface. At the top, there is a search bar with a 'Search' button and a 'Create' button. Below the search bar, there is a pagination control showing '1-1/1' and a 'Per Page' dropdown set to '25'. The main content area displays a list of RFQs. The first RFQ is highlighted with a yellow circle around the plus icon. The details for this RFQ are:

Business cards			
RFQ ID:	0000001878	Status:	Template
Suppliers:		Expiration Date:	
Quotes:	0		
Description:	Premium Basware business cards.		

RFQ statuses

RFQ statuses explained:

- **Draft:** The RFQ has been created but not sent
- **Open:** The RFQ has been sent, but has not yet expired or received all possible quotes
- **Ready:** The RFQ has either expired with one or more quotes received, or has received all possible quotes
- **Awarded:** The RFQ has been awarded to a supplier
- **Expired:** The RFQ has expired with no quotes received
- **Archived:** The RFQ has been closed (includes awarded, withdrawn, and expired RFQs)