

# RFQ

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# Introduction

# Introduction

## **Introduction**

A request for a quote is a formal process that companies use when they want to order products or services for their projects. It is a business document that invites vendors to provide their best prices and payment terms.

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## **Business Example**

RFQ will be raised by purchase department to order products or services. Against that RFQ Supplier/Vendor will Share Quotation.

# Tabs

# RFQ Header

Home (63) Summary \*RFQ \*

RFQ

Inserted

Client: Kconnect Demo Organization: [dropdown]

Document No: [text]

Name: [text]

Description: [text]

Comment/Help: [text]

☒ Active

Sales Representative: [dropdown]

RFQ Topic: [dropdown]

RFQ Type: [dropdown]

☐ Quote All Quantities

☐ Invited Vendors Only

☒ Responses Accepted

☒ Self-Service

Response Date: [text]

Currency: INR [dropdown]

Work Start: [text]

Delivery Days: [text] 0

Work Complete: [text]

Business Partner

Business Partner: [text]

User/Contact: [dropdown]

Partner Location: [dropdown]

Margin %: [text] 0.0

Order: [text]

☐ Processed

## Critical Fields

1. Name: This field contains the RFQ's name, as entered by the user accordingly.
2. Sales Representative: This field is used for sales rep updating purposes, It will display from the employee master when the sales rep field is checked
3. RFQ Topic: This field is for RFQ Topic Which is a Master data Where user can create dufferent RFQ Topics to select here.

4. RFQ Type: RFQ Types are as follows

4.1.Quote All Lines: This is the type of RFQ where all lines will be quoted.

4.2.Quote Selected Lines: This is the type of RFQ where selected lines will be quoted.

4.3.Quote Total only: This is the type of RFQ where total lines will be quoted.

5. Response Date: Date that the vendor or supplier must respond by, as well as the RFQ document's validity date

6. Currency: This field is used to maintain different currency and the system will populate default currency from client master.Also, you can change the currency before saving the document.

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## **Critical & one-time setup fields**

1. Organization: This field is used to choose the organization where this document will be presented to.

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## **Non-Critical Fields**

1. Description: Use to note specifics and describe any info Which is required with this document

2. Comment/Help: Use to note Comments/Help item Which are required with this document

3. Active: To maintain Active or In-active status of document

4. Quote All Quantities: Check box to Quote All quantities

5. Invited Vendors Only: Check box to invite vendors only

6. Quote Total Amount: Check box to quote total amount

7. Responses Accepted: Check box to accept responses

8. Self service: Check box for Self service

9. Start: Work start date

10. Delivery days: Delivery days in numeric

11.Work Complete: Work completed date

12.Business Partner: This field is used to keep Business Partner information for current and new clients, respectively.

13.Partner Location: This field is used to select Business Partner Location

14.User/Contact: User/Contacts available at user end.

15.Margin %: Percentage Margin

16.Order: Sales order details if RFQ is against Sales order

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## **Zoom condition's**

1. RFQ Response

# RFQ Line

## Critical Fields

- ## Non-Critical Fields

1. Attribute Set Instance: This field is used to select attributes of products for Example Brand, Colours, Specification etc.
2. Description: Use to note specifics and describe any info which is required with this document
3. Comment/Help: Use to note Comments/Help items which are required with this document
4. Work Start: Work start date
5. Delivery Days: Delivery days in numeric
6. Work Complete: Work completed date



# RFQ Line>Quantity

Home (63) Summary \*RfQ: 1000011 RFQ-Raw Mate... ✕

RfQ > Line > Quantity

Inserted

Client  Organization

RfQ Line

☒ Active

UOM

☒ RFQ Quantity

☒ Purchase Quantity

☒ Offer Quantity

Quantity

Benchmark Price

Best Response Amount

Offer Amount

Margin %

## Critical Fields

1. UOM: Unit of measurement
2. Quantity: Quantity of Product
3. Benchmark Price: Price of product

## Non-Critical Fields

1. RFQ quantity: This field is for RFQ quantity
2. Purchase quantity: This field is for Purchase quantity
3. Offer quantity: This field is for offer quantity
4. Offer Amount: This field is for amount of offer (Upon selecting the offer quantity check box, this field will become visible.)
5. Margin %: Percentage Margin (Upon selecting the offer quantity check box, this field will become visible.)

# Process

# RFQ Process

## **Create & Invite**

Create (missing) RfQ Responses and optionally send EMail Invitation/Reminder to Vendors to respond to RfQ

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## **Rank Responses**

Invalid responses are ranked with 999 per Quantity. The Quantity Responses are ranked among each other and the RfQ Best Response updated. The response Lines is marked as Selected winner, where the line quantity purchase quantity is selected. A total winner is only selected, if the RfQ type is "Quote All Lines" or "Quote Total only". Then the rankings of all Quantity Responses are added for the total ranking of the response. The response with the lowest total ranking is marked as Selected Winner.

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## **Create Sale order**

A Sales Order is created for the entered Business Partner. A sales order line is created for each RfQ line quantity, where "Offer Quantity" is selected. If on the RfQ Line Quantity, an offer amount is entered (not 0), that price is used. If a margin is entered on RfQ Line Quantity, it overwrites the general margin. The margin is the percentage added to the Best Response Amount.

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## **Create Purchase order**

Create purchase order(s) for the response(s) and lines marked as Selected Winner using the selected Purchase Quantity (in RfQ Line Quantity) . If a Response is marked as Selected Winner, all

lines are created (and Selected Winner of other responses ignored). If there is no response marked as Selected Winner, the lines are used.

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## **Copy line**

Copy Lines from another RfQ

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## **Close RFQ**

To close RFQ

# Validation

# Validation

## **Save**

1. System will check all mandatory fields.
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## **Delete**

1. System will delete the order and its historical details.

# Video

Video

# Video



# Reports

# Reports

**Report is well Complied set of data according Scenario**

Sr.no	Report Name	Report Purpose
1	RFQ Response	Detail RfQ Responses Lists detail Responses of active RfQs (not closed/processed) where the Response is marked as complete.
2	RFQ Unanswered	Outstanding RfQ Responses Lists Responses of active RfQs (not closed/processed) where the Response is not marked as complete.

# Preceding and Succeeding Window

Preceding and Succeeding Window

# RFQ Connected Window

## Preceding Window

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## Succeeding Window

RFQ Response :- RFQ Response