Request for Quotation (RFQ)

Once the Material Request is approved, and authorized to purchase, it should be recommended to purchase.

1. Click image_1659118109177.png to proceed to next action of creating Request for Quotation (RFQ) from approved suppliers. image_1659118325073.png
2. Click to confirm Recommended To Purchase, a RFQ with unique key for tracking will be created automatically for the MR. See below RFQ table.
image_1659118591415.png
3. The status of the MR is changed to “Created RFQ".
image_1659118742205.png

Request for Quotation (RFQ)

Once RFQ is created, it can be accessed in the MR detail page or thru Procurement - > RFQ where all RFQs are listed. In RFQ, the purchase officer will send all the appropriate suppliers with a request for quotation. The quotation requests will be managed in this section.

image_1659119362593.png

1. Click the RFQ key in the RFQ list page or in the MR detail page RFQ table, the RFQ detail page opens, see below:image_1659119696019.png
2. Click image_1659119944809.png (Add Quotation Request button) and the below window opens.
image_1659120178625.png
3. Select a supplier from the supplier dropdown list.
4. Select the items that we want to ask for quotation from the supplier. By default all the items in the
MR are selected. Company can request for quotation for different items from different suppliers.
5. Click image_1659120607001.png to create the RFQ for the supplier. The below quotations for different suppliers are created.image_1659120779405.png
6. The RFQ can be sent to suppliers by two ways:
   - Click the image_1659121120075.png (print button) to generate the RFQ which can be saved as PDF and sent to the supplier (make sure the Pop up is not blocked by web browser so that it can be viewed in the browser. If blocked click on the red cross icon in the browser to allow opining the pdf RFQ)
image_1659121588110.png

   - Click image_1659121201329.png to email the RFQ to suppliers directly from cuteOffice system (make sure to inform Cutech team to configure sender email

address). Click to enable "Send email directly?", and the email template will open.

image-1659122304476.png

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Check and fill up required information and click to send email.

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image-1659121785016.png

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7. Once sent, the status of the RFQ is changed to Sent to Supplier. Once we receive quotation details from suppliers, we can enter the details in quotation.
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image-1659122563716.png

8. Click Image not found or type unknown to open quotation page to enter details received from suppliers.
image-1659122655723.png

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9. Enter Quotation reference number, Quotation validity. The Payment terms, contact details are will appear automatically. Enter the price quoted and other details such as tax, discount etc. Click Update to save quotation details entered.
10. Once all the quotations are received and entered in the system, the purchaser will request the
image-1659122784062.png
Quote selection authorized personnel to select the Quote. This can be done by clicking

up.
image-1659122828388.png

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11. Click Confirm. This action creates a new **RFQ Quote Selection** section in the RFQ see image-1659122932772.png

below.Image not found or type unknown

12. The authorized persons who can do the selection of quotes can perform this action will see this
image-1659123048393.png
button. Click Image not found or type unknown the selection button and the below window opens up.
image-1659123107974.png

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13. The suppliers price along with the delivery due date are shown. The lowest price will be highlighted in
grey color. Click the supplier of choice for each item. The color will change to green color. Click Submit to confirm the selection of vendors for purchasing.
image-1659127790432.png

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image-1665545008903.png

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Note: Added the above screen shot from Qa3.

14. Click Yes when the confirmation message is prompted. This will trigger the notification to the
approver.
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image-1659123048393.png
15. The status of the RFQ is **Quote Selected**. Click the Image not found or type unknown to approve the quote selection.
image-1659127910894.png

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16. Once the quote selection is approved, the system gets updated as below and shown in transaction.
Also the status in the RFQ list is changed to Quote Selected.
image-1659128005414.png

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image-1659128044890.png

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17. And a PO will be created automatically with **Pending PO status** and shown in the RFQ page as below. And it is ready for PO preparation.
image-1659128139778.png

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