Request for Quote (RFQ)

SIMMS Inventory Management Software 8.0

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Request for Quote (RFQ)

A request for quote (RFQ) is an invitation to your vendors to give their cost for the goods or services you want to purchase from them. The purpose of an RFQ is to source the lowest cost for the goods or services you want to purchase.

The first step in the RFQ process is to create an RFQ. Next, you submit that RFQ to your vendors for their response. Once you have received your vendor’s responses, you compare them to determine which vendor offers the best price for the items that you want to purchase. Finally, you award the sale to one or more of your vendors.

Use SIMMS’ RFQ module to perform all the necessary tasks in the RFQ process, such as creating an RFQ and a purchase order.

Included with SIMMS’ RFQ module is an optional web component — the RFQ Submission Portal. Use this portal to automate the communication between you and your vendors, thereby further streamlining the RFQ process.

Creating an RFQ

Creating an RFQ is a three step process: (1) select the items you want on your RFQ, (2) select the vendors you want to have bid on those items, and (3) assign the vendors to the specific items they are to bid on.

After you have created your RFQ, you need to close it. Only, a closed RFQ can be submitted to your vendors for a response and further processing.

Select the Items for an RFQ

1. On the SIMMS Menu, open the Purchasing menu, and then click RFQ Manager.

   The RFQ Manager window opens.

2. In the RFQ Manager window, click New RFQ.

   The RFQ Creation window opens.
3. In the **RFQ Creation** window, click the **Category** check box, and then select your item’s category from the adjacent list.

![Category check box and list](image)

4. In the **Item** list, select an item to add to your RFQ.

5. In the **Description** text box, type a description for your RFQ.

6. In the **Deadline** box, select the date your RFQ closes.

7. If you purchase your item in a different unit of measure than your standard unit of measure, in the **U/M** list, select the purchase unit of measure for your item.

   **Note:** If you have not defined a relation between your item’s standard unit of measure and its purchase unit of measure, only your item’s standard unit of measure appears in the U/M list.

8. In the **Quantity** box, type the quantity of the item you want to purchase.

9. Click **Insert**.

   Your item is inserted in the grid.

**Select the Vendors for an RFQ**

After you have selected the items for your RFQ, you select the vendors who will bid on those items.

1. Click the **Vendors** tab.
2. Under **Available Vendors**, click the vendor you want to include in your RFQ, and then click **Add Vendor(s)**.

![Figure 2: Selecting vendors for an RFQ.](image)

Your vendor is added to the **Vendors included in the RFQ** list.

**Assign Vendors to Items on an RFQ**

You have selected the items and vendors for your RFQ. Now you assign (match) the vendors to the specific items they are to bid on. You do not need to assign every vendor to every item on the RFQ, but every item must have at least one vendor assigned to it.

1. Click the **Items-Vendors** tab.
2. Under **Items included in RFQ**, select an item.

![Figure 3: Assigning a vendor to an item.](image)

Select an item, and then select a vendor you want to bid on that item. Click Assign.

Your item/vendor assignment is listed in the grid.
3. Under **Vendors in the RFQ**, select the vendor you want to assign to your selected item, and then click **Assign**.

Your item/vendor combination is added to the list under Item - Vendor assignment.

4. Click **Save**.

If every item on the RFQ has at least one vendor assigned to it, SIMMS displays the Close RFQ button.

You close an RFQ when you have completed assigning vendors to items and you are ready to send the RFQ to your vendors for their response.

5. To close your RFQ, click **Close RFQ**.

**Edit an RFQ After It Is Closed**

You can edit your RFQ after you close it. But if you have added a vendor response to your RFQ or submitted it to your vendors through the RFQ submission Portal you can no longer edit your RFQ.

1. On the **SIMMS Menu**, open the **Purchasing** menu, and then click **RFQ Manager**.

   The RFQ Manager window opens.

2. In the **RFQ Manager** window, click **Search**.

   Your RFQs are listed in the grid.

3. Select the closed **RFQ** you want to edit, and then in the **Action** list, select **View/Edit**.

   ![Figure 4: Selecting the View/Edit action to edit a closed RFQ.](image)

4. Click **Load RFQ**.

   The RFQ Creation window opens.

5. In the **RFQ Creation** window, click **Unclose RFQ**.

6. After editing your RFQ, click **Save**, and then click **Close RFQ**.
Print an RFQ
1. On the SIMMS Menu, open the Purchasing menu, and then click RFQ Manager.
   The RFQ Manager window opens.
2. In the RFQ Manager window, click Search.
   Your RFQs are listed in the grid.
3. Select the RFQ you want to print.
4. Click Print.
   The Report window opens.
5. Click the Print icon on the toolbar.

Processing an RFQ
The first step in processing your RFQs is to list them in the RFQ Manager window. Next, you open the RFQ in the RFQ Response Processing window. In this window you enter your vendors’ quoted prices, analyze your vendors’ responses, and create a purchase order for one or more of your vendors.

List Your RFQs in the RFQ Manager Window
1. On the SIMMS Menu, open the Purchasing menu, and then click RFQ Manager.
   The RFQ Manager window opens.
2. In the RFQ Manager window, click Search.
   Your RFQs are listed in the grid.

Filter Your List of RFQs
By default SIMMS list all your RFQs in the RFQ Manager window’s grid. You can filter your list of RFQs by the date it was created, the deadline for responses, RFQ Status, RFQs in use, or RFQs with recent updates.

For example, to list only the RFQs with the status of Closed for Awarding, in the RFQ Status list, select Closed for Awarding, and then click Search. The RFQs with the status Closed for Awarding are listed in the grid.

Enter a Vendor’s Quoted Price
After sending your RFQ to your vendors, they respond to the RFQ, quoting their prices for the items on the RFQ. If you are not using SIMMS’
RFQ Submission Portal, you need to manually enter your vendors’ responses into SIMMS.

1. In the RFQ Manager’s window, select the RFQ for which you want to enter a vendor’s quoted price, and then click Load RFQ.

   The RFQ Response Processing window opens.

2. In the RFQ Response Processing window, click the Vendor Responses tab.

   ![Figure 5: Entering a vendor’s quoted price.](image)

   Select a vendor. The items corresponding to your chosen vendor appear in the grid on the right. Type your vendor’s quoted price in the Quoted Price column.

3. Under Vendors in the RFQ, select a vendor.

4. Under Items corresponding to the selected vendor, in the Quoted Price field, type the vendor’s quoted price for the item, and then press the Enter key.

**Print the Vendors’ Responses to an RFQ**

You can print a report that lists all your vendors’ responses to an RFQ. Use this report to compare their quoted prices.

1. In the RFQ Response Processing window, click the Vendor Responses tab, click Print.

   The Report window opens.

2. Click the Print icon on the toolbar.

**Exclude a Vendor from the RFQ Process**

If a vendor has not responded to your RFQ, you may want to exclude that vendor from the RFQ process.
1. In the **RFQ Response Processing** window, click the **Status** tab.

   ![Click the check box to exclude a vendor from the RFQ process.]

2. In the **Exclude from RFQ Process** column, click the check box for the vendor you want to exclude from the RFQ process.

### Enter Comments for an RFQ

You can comment on a vendor’s response to your RFQ. A comment field is available for each item on the RFQ.

1. In the **RFQ Response Processing** window, click the **User Comments** tab, under Comments, type the comment you want associated with a vendor’s quote.

2. Press the **Enter** key.

### Analyze Quotes

- In the **RFQ Response Processing** window, click the **Analyze Quoting** tab.

On the Analyze Quoting tab, SIMMS lists your vendor’s quoted price for each item on the RFQ. In the bottom grid, SIMMS lists which vendor gave the least expensive quote and which vendor gave the most expensive quote for the items on the RFQ.
Score Vendor Quotes
The vendor scoring feature of the RFQ module is being enhanced, and will be available soon.

Create a Purchase Order
After evaluating your vendor's responses to your RFQ, you create a purchase order for the vendor(s) you want to purchase your items from.
You can purchase all the items on your RFQ from one vendor, or split your purchase between multiple vendors.

1. In the RFQ Response Processing window, click the Generate PO tab.
2. Under **Vendors that have responded**, select a vendor.

![Select a vendor. The items the vendor quoted on appear in the grid on the right.](image)

![After selecting your vendor, click the Include In PO check box, for any item you want to include on your purchase order.](image)

![Figure 8: Creating a purchase order.](image)

3. Under **Available item to include in PO**, in the **Include In PO** field, click the check box for the item you want to purchase from this vendor.

4. In the **Required date** box, select the date you require the items on the purchase order.

5. In the **Contact** list, select your contact person at the vendor.

6. In the **Agent** list, select your company’s purchasing agent responsible for the purchase order.

7. Click **Generate PO**.

   SIMMS creates a purchase order for your selected vendor.

---

**View a Purchase Order Created from an RFQ**

After you create your purchase order, you can open that purchase order from the RFQ Response Processing window.

1. In the **RFQ Response Processing** window, click the **Generate PO** tab.

2. In the **PO List**, select a purchase order number, and then click the **OpenPO** link.

   Your purchase order opens in the Purchase Order Manager.
Automated RFQ Submissions and Responses
If you have installed SIMMS' RFQ Submission Portal, you can automate the communication between you and your vendor.

After you submit your completed RFQ, the RFQ is available for your vendor at the RFQ Submission Portal. SIMMS notifies your vendors by e-mail that you have submitted an RFQ for them.

Your vendors enter their prices for the items on the RFQ directly in the RFQ Submission Portal. After they have submitted their response to your RFQ, you then upload the responses directly into SIMMS.

Submit an RFQ to Your Vendors
1. On the SIMMS Menu, open the Purchasing menu, and then click RFQ Manager.

   The RFQ Manager window opens.

2. In the RFQ Manager window, click Search.

   Your RFQs are listed in the grid.

3. Select the RFQ you want to submit to your vendors, and then click Submit.

   Your vendors are sent an e-mail that invites them to respond to your RFQ. Each e-mail contains a link to the RFQ Submission Portal, a unique password that the vendor uses to login to the portal, and the deadline to respond to the RFQ.

Check for Vendor Responses to an RFQ
1. On the SIMMS Menu, open the Purchasing menu, and then click RFQ Manager.

   The RFQ Manager window opens.

2. In the RFQ Manager window, click Check for Updates.

   SIMMS lists in the grid the RFQs for which your vendors have responded.

3. Select an RFQ, and then click Load RFQ.

   Your RFQ opens in the RFQ Response Processing window.

4. In the RFQ Response Processing window, do any of the following:

   • Click the Vendor Responses tab to view the prices quoted by a vendor.

   • Click the Vendor Comment tab to view any comments a vendor has made.
The Vendor Comment tab only appears if a vendor has entered a comment as part of their RFQ response.

**Vendor Quoting Using the RFQ Submission Form**

If you are using SIMMS RFQ Submission Portal, your vendor logs into the portal to view and respond to your RFQ. The following procedures describe how a vendor uses the RFQ Submission Portal to submit a quote.

*Note: The following procedures are written for your vendors. Provide them these instructions to help them respond to your RFQ using the RFQ Submission Portal.*

**Login to the RFQ Submission Portal**

1. In your e-mail client (such as Microsoft Outlook), open the RFQ sent to you by your customer.
   
The e-mail includes a link to the RFQ Submission Portal, a password, and the deadline for your RFQ response.

2. Make note of the password sent to you in the e-mail, and then click the **RFQ Submission Portal** link.

   The portal’s login page opens in your web browser.

3. In the **Username** text box, type your e-mail address.

4. In the **Password** text box, type the password included in the e-mail sent to you, and then click **Login**.

   The RFQ Details page opens.

**Enter Your Response to an RFQ**

You enter your response to your customer’s RFQ directly in the RFQ Submission Portal. Your response includes your prices for the items on the RFQ and any comment you want to associate with your response.

1. In the **RFQ Details** page, under **Please select an RFQ**, click the RFQ you want to respond to.

   A table listing the items in the RFQ appears.

2. Under **Items in RFQ**, click the **Edit** link.
3. In the **Price** text box, type the price of your item.

![Type your price for the item in this text box.](image)

4. In the **Comment** text box, type any comment you want to include in with your response.

   You can add a comment for each item on the RFQ.

5. Click the **Update** link, and then click **Submit**.

   Your RFQ response is sent to your customer.

---

**Setting Up SIMMS’ RFQ Submission Portal**

Setting up the RFQ Submission Portal involves adding a web site to IIS, restoring the WEBRFQ database, and adding your SMTP server to

The following procedures describe how to set up SIMMS RFQ Submission Portal in Windows 7 Professional operating system using Microsoft’s SQL Server Management Studio.

*Note:* Setting up SIMMS’ RFQ Submission Portal is a complicated task, and should be done by someone who is able to add a web site to IIS, restore a database, and knowledge of the Simple Mail Transfer Protocol (SMTP)

**Prerequisites for SIMMS RFQ Submission Portal**

The following are required to setup SIMMS RFQ Submission Portal:

- SIMMS version 7.3 or higher
- WebRFQ.zip
- One of the following: SQL 2005 Express, SQL 2008 Express, or full version of SQL 2008
- Window Internet Information Service (IIS)
- Active Server Pages (ASP)
Add the WEBRFQ Folder to Your Webroot Folder

1. Unzip the WEBRFQ.zip file to your desktop.
2. Drag the WEBRFQ folder from your desktop into the www-root folder (located at C: > inetpub > wwwroot).

Restore the RFQ Database

1. Open Microsoft’s SQL Server Management Studio.
2. In the Object Explorer pane, right click the Databases folder, and then click Restore Database.
   The Restore Database window opens.

   ![Figure 10: Restoring the WEBRFQ database.](image)

3. Under Source for restore, click the From device option, and then click the Ellipsis button.
   The Specify Backup dialog box opens.
4. In the Specify Backup dialog box, click Add.
   The Locate Backup File dialog box opens.
5. In the Locate Backup File dialog box, select WEBRFQ.bak (located at C: > inetpub > webroot > WEBRFQ > SQL), and then click OK.
   Your database is listed in the Specify Backup dialog box.
6. In the Specify Backup dialog box, click OK.
   Your database is listed in the Restore Database window.
7. In the Restore Database window, in the Restore column, click the check box for the WEBRFQ database.
8. In the To Database list, select WEBRFQ, and then click OK.

Add a Web Site to IIS

1. Open the Control Panel, click System and Security, and then click Administrative Tools.

2. Click the Internet Information Services (IIS) Manager shortcut.

3. Expand the menu (left) until you see the Sites folder, and then open the Sites folder.
   The Sites folder contains the web sites installed on the server.

4. Right click the Sites folder, and then click Add Web Sites.
   The Add Web Site dialog box opens.

   ![Figure 11: Adding a web site to the IIS.](image)

5. In the Add Web Site dialog box, in the Site name text box, type your site name.

6. Click the Ellipsis button next to the Physical path text box.
   The Browse For Folder window opens.

7. In the Browse For Folder window, select your web site’s folder, and then click OK.

8. Click Connect as.
   The Connect As dialog box opens.
9. If not selected, click the Application user (pass-through authentication) option, and then click OK.

10. In the IP address list, select the IP address for your server.

11. In the Host name text box, type the host name for your site.
   The host name for your web site must be a fully qualified domain name.

12. Click OK.

**Edit the Web.config File in Notepad**

1. Right click your `web.config` file (located at C: > inetpub > wwwroot > WEBRFQ), point to Open with, and then click Notepad.

2. Replace `SERVER NAME\SQL_INSTANCE` with your actual SQL server name and SQL instance.

   \[
   \text{Replace SERVER NAME\SQL INSTANCE with your actual SQL server name and SQL instance.}
   \]

   \begin{verbatim}
   <connectionStrings>
   <add connectionString="Data Source=SERVER NAME\SQLINSTANCE;Initial Catalog=WEBRFQ;Integrated Security=true" name="WebDBCnn"></add>
   </connectionStrings>
   \end{verbatim}

   \[Figure 12: Editing the server name and SQL instance.\]

3. If you use system administrator (sa) authentication, remove the line `Integrated Security=true` and replace it with `UserID=sa;Pwd=SQLPASSWORDHERE` (replace `SQLPASSWORDHERE` with your actual SQL password).

   \begin{verbatim}
   <connectionStrings>
   <add connectionString="Data Source=SERVER NAME\SQLINSTANCE;Initial Catalog=WEBRFQ;User ID=sa;Pwd=SQLPASSWORDHERE" name="WebDBCnn"></add>
   </connectionStrings>
   \end{verbatim}

   \[Figure 13: Adding sa authentication.\]
Enable Automated RFQ Submissions and Responses

1. On the SIMMS Menu, open the Purchasing menu, and then click RFQ Manager.
   The RFQ Manager window opens.
2. In the RFQ Manager window, click RFQ Settings.
   The RFQ Web Service and E-mail SMTP Server Setup dialog box opens.

3. In the Server address text box, type the domain name of the IIS Server hosting your RFQ web site. Include after your domain name rfqws.asmx.

   Your server address should look like this: http://domain.com/rfqws.asmx.

   Note: Your domain name must be a valid domain name and you must include rfqws.asmx after the domain name.

4. In the Username text box, type admin (the default user name).
5. In the Password text box, type admin (the default password).
6. In the PIN text box, type SI (the default PIN).
7. In the SMTP Server text box, type your SMTP address.
8. In the Port text box, type the port your SMTP server connects to.
9. Do one of the following:
   • If your SMTP server requires authentication, in the Username text box, type a user name, and then in the Password text box, type a password.
If your SMTP server does not require authentication, click the Anonymous login check box.

10. Click Save, and then click Test Connection.

If everything is correct the message Connection Successful displays.

Add an Administrators Profile

1. Open your web browser (such as Internet Explorer).

2. In the address bar, type the web address for your RFQ portal and include /admin.aspx?isadmin=1 at the end.

   The address should look like this:

3. Press Enter on your keyboard, and then click the Load Data button that appears (top left).

4. Click New.

   A row is added to the table.

5. Click the Edit link.

6. In the appropriate text boxes, type the PIN, user name, password, and client (your company name) for the administrator.

7. Click the Update link.

About an RFQ Status

Your RFQ is given a status such as Closed for Awarding or All Items Assigned. Each status indicates the stage in the RFQ process an RFQ is at. This helps you to determine what has been done and what needs to be done to complete your RFQ.

See Table 1: RFQ Status for an explanation of each status.

Table 1: RFQ Status

<table>
<thead>
<tr>
<th>RFQ Status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under Assignment</td>
<td>This status is given when none or only some items on an RFQ have a vendor assigned to them. You cannot close an RFQ with this status.</td>
</tr>
<tr>
<td>RFQ Status</td>
<td>Explanation</td>
</tr>
<tr>
<td>-------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>All Items Assigned</td>
<td>This status is given when all items on the RFQ have at least one vendor assigned to them, but not all vendors are assigned to all items on the RFQ. You can close an RFQ with this status.</td>
</tr>
<tr>
<td>Fully Assigned</td>
<td>This status is given when all vendors are assigned to all items on the RFQ. You can close an RFQ with this status.</td>
</tr>
<tr>
<td>Closed for Awarding</td>
<td>This status is given when you close an RFQ. You cannot close an RFQ unless all items on the RFQ have at least one vendor assigned to them.</td>
</tr>
<tr>
<td>Awaiting Vendor Quoting</td>
<td>This status is given after you submit an RFQ to the RFQ Submission Portal and until a vendor responds to your RFQ.</td>
</tr>
<tr>
<td>Partial Vendor Quoting</td>
<td>This status is given when some, but not all your vendor quotes are received.</td>
</tr>
<tr>
<td>Full Vendor Quoting</td>
<td>This status is given when all vendor quotes for an RFQ are received.</td>
</tr>
<tr>
<td>Partially Awarded</td>
<td>This status is given when only some of the items on an RFQ are added to a purchase order.</td>
</tr>
<tr>
<td>Fully Awarded</td>
<td>This status is given when all items on an RFQ are added to a purchase order.</td>
</tr>
</tbody>
</table>