

Request for Quote Guide

Request for Quote (RFQ) enables buying organizations to request quotes for services and/or products. The selected suppliers can then reply to the request with a bid that is either accepted or rejected. Once the best price and/or terms are obtained, the quote will convert to a Requisition draft where once submitted will go through any designated financial review.

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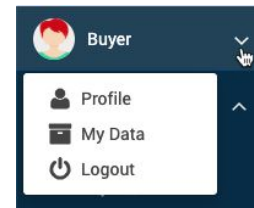
Workflows & Roles

BUYER

(Buy Route & Request for Quote Role)

Has access to both Vrooz Catalog and Vrooz Purchase. Allowed to create POs, add non-catalog items, add line items from approved PRs and release POs associated with their assigned buyer group.

- Access to Catalog content in smartOCI, is based on assigned Content Views
- Unable to administer, create, update or delete any catalogs in the Content Manager

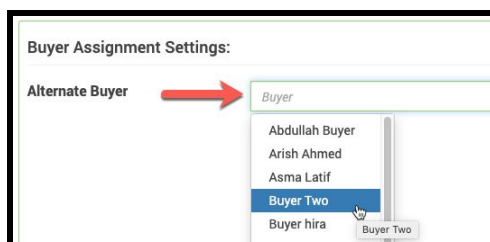


Additional Permissions:

- Ability to code/edit a PR/PO may be restricted at user creation.
- Manage Suppliers

Alternate Buyer Setting

Similar to the 'Out of Office' functionality for Financial Approvers, Buyers may set an **Alternate Buyer** to act on their behalf. When configured, in the Buyer's Profile the *Alternate Buyer* can be selected from a pre-populated list of all users with the *Buyer* role. (shown below)



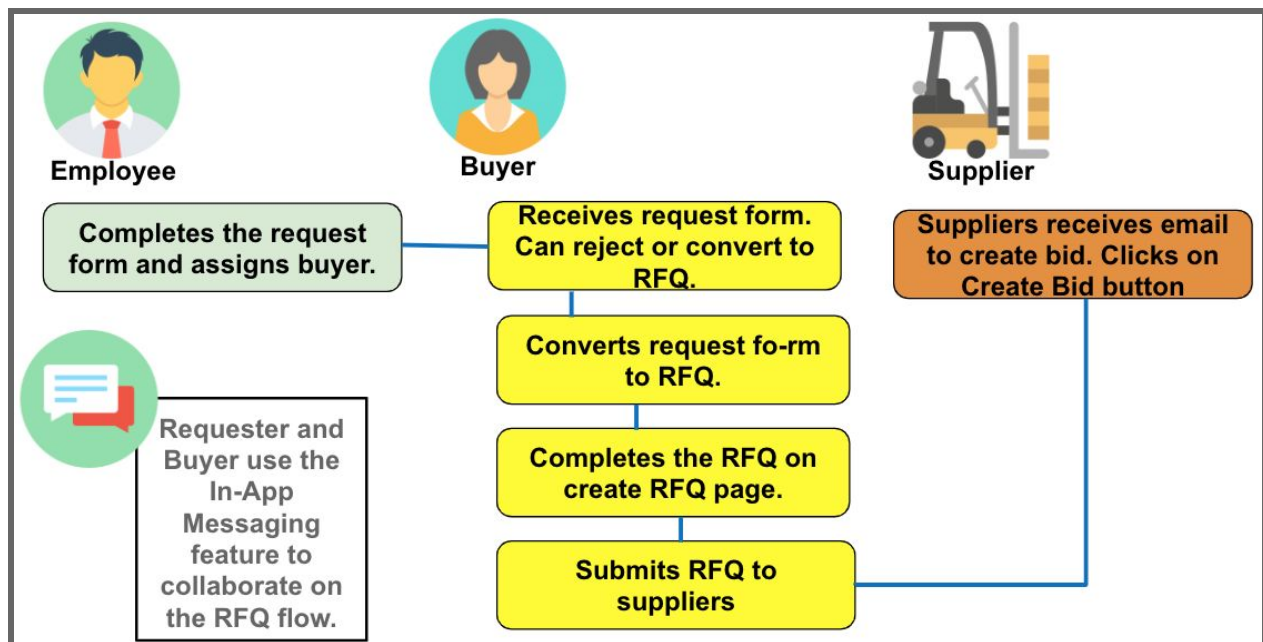
In this scenario, when an RFQ form is submitted by a Requester, both the original Buyer and designated Alternate Buyer will receive email notification of the form. Both Buyers can take the appropriate actions against it. Once one Buyer opens the form, the RFQ is then assigned to them and will be removed from the other Buyer's 'Submitted Requests' view.

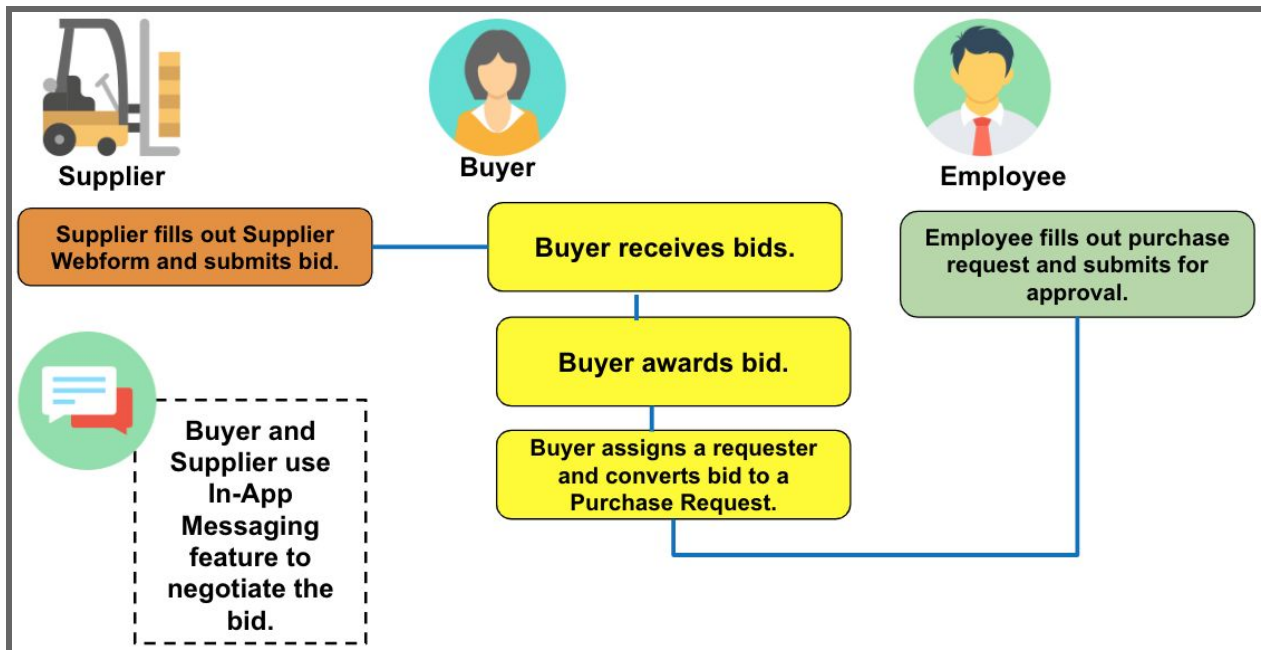
There are three **(3)** possible RFQ Workflows based on how or Requesters and Buyers are configured.

RFQ Workflow #1

Requester has permission to 'Submit Request Forms'. Buyer brings expertise to submit the request to Suppliers, approve bids and release back to the Requester.

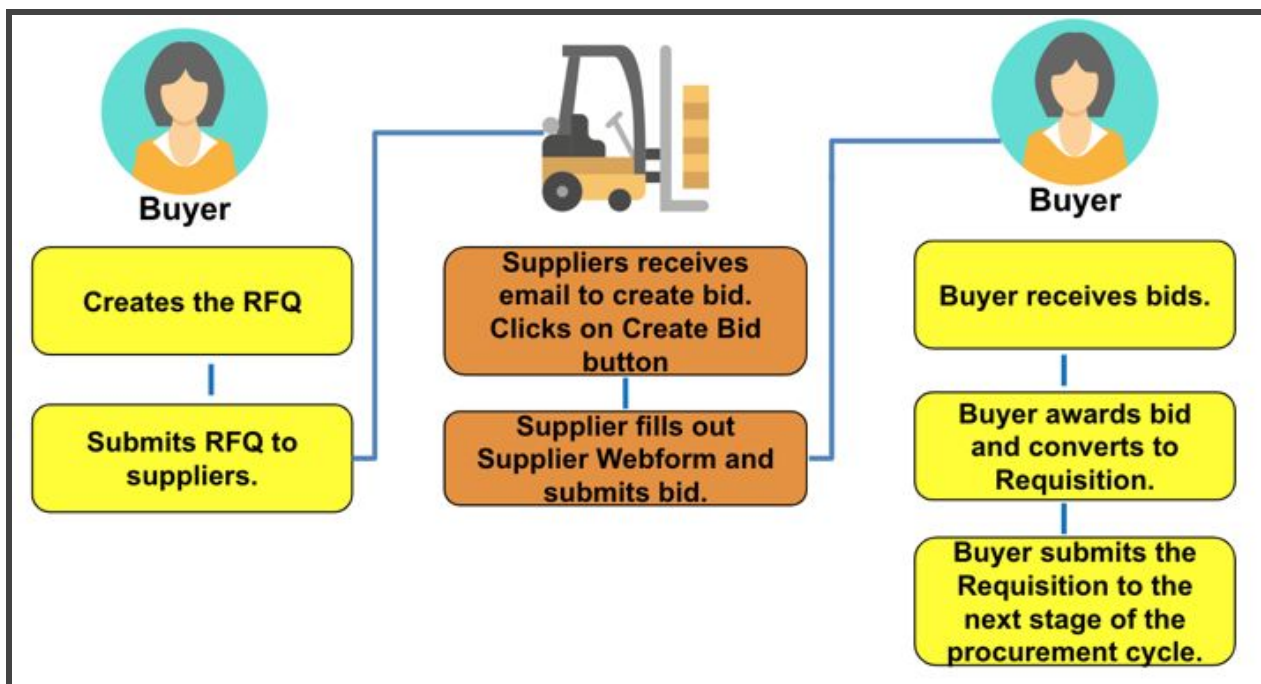
- Requester initiates the RFQ process and assigns a Buyer. The assigned Buyer reviews quote, adds additional details and submits to suppliers. Once supplier bids are received, the Buyer will accept a bid and send the Request draft back to the Requester with the accepted supplier and line item details. The Requester will then complete the Requisition, triggering the next phase in the procurement workflow; financial review if applicable or conversion to PO.



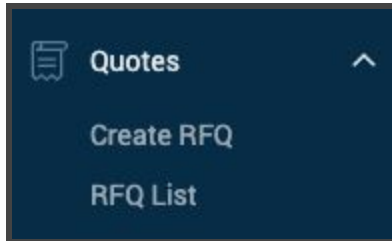


RFQ Workflow #2

Requester is able to 'Submit RFQ to Suppliers' and will incur all responsibilities associated with the Buyer in Workflow #1.

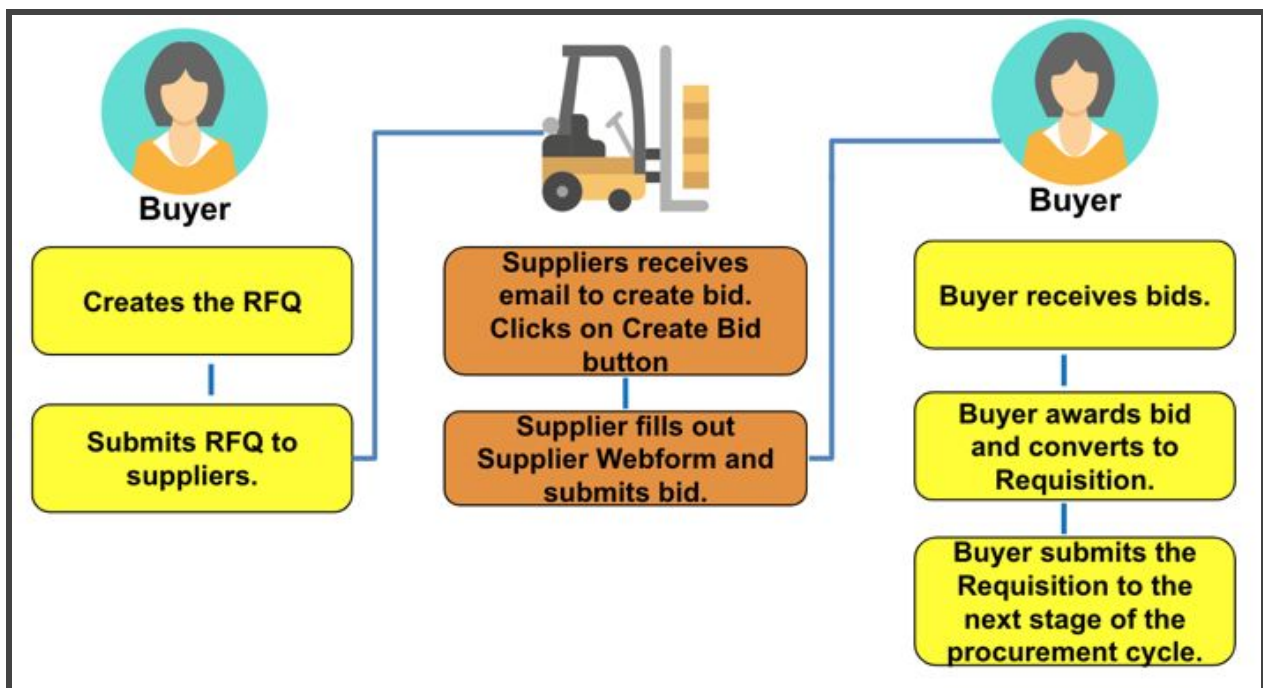


RFQ is initiated from 'Create RFQ'.



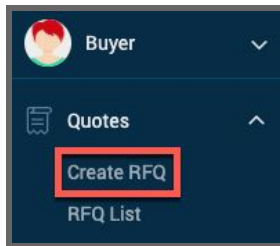
RFQ WORKFLOW #3

Ability to create RFQs is limited to only users with the Buyer or Administrator role. The Buyer initiates the RFQ process, submits to Suppliers, approves/rejects bids and converts the bid to submitted requisition is done by the Buyer.



Step by Step Workflow

The following contains Workflow #1. The Buyer or Requester role can be omitted for Workflows #2 and #3, respectively.



Requester: Creates Request Form

1. Name your request.
2. For each line item added, select Product or Service.
3. Provide a Description.

Tip: Be as specific as possible. Any additional requests about price, etc can be added in the comments field at the bottom of the RFQ.

4. Select Category (optional)

- The Category field will include a pre-defined list of categories previously created in the Vroozi system.
 - Once the category is selected, the buyers and groups listed under 'Assignment of Buyer or Buyer Group' will populate a listing of the appropriate buyer groups associated with that category.
5. Enter needed Quantify
 6. Select UOM
 7. Desired Delivery
 8. Choose suppliers to recommend.
 - This can be left empty if Employee does not have any.

Do you have any recommended suppliers?

OfficeDepot OfficeMax × Office Supply Inc × Peacock Office Furniture ×

New Supplier

- If needed, add new recommended supplier (shown below)

Add Ad-hoc Supplier ×

Company Name *
Peacock Office Furniture

Contact Name
Mike Peacock

E-Mail
mike.peacock@peacockfurniture.com

Cancel Save

9. Assign a Buyer
 - Add additional message (optional)
10. Submit

Buyer: Receives email notification of the Employee's Request. The email will include the Request Form Number the subject line and all pertinent details in the body of the email.

VROOzi

Request Name: Paint Services - Entire Building
Rita Buyer has sent you an RFQ 4000000156 for a bid.

Date Submitted 11/18/2019	Due Date 11/22/2019 12:00 PM (GMT -06:00)
Buyer Rita Buyer	Notes from Buyer

Passcode
hg9cbanw

* The above Passcode is required to authenticate your bid.

CREATE BID

Requester: The Requester will be notified via email when the Buyer edits the Request.

VROOzi

Request Name: Interior Paint - Employee Break Room Lobby and Business Offices

Rita Buyer has accepted your Request Form RF4000000137. The RFQ will be sent out to suppliers shortly.

Buyer Info Rita Buyer nichole.whitaker@shopperexpress.com ShopperExpress@vroozi.com	Converted Date 11/21/2019
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View Request Form

The request can be accessed via email by clicking 'Review Request Form' This will take the Buyer to the RFQ which will be housed under 'RFQ List' → 'Submitted Request'

- **Submitted:** Employee has submitted the Request to Buyer
- **Converted:** Buyer has converted the Request to an RFQ

Requests in Draft

Submitted Requests

RFQs in Draft

Submitted RFQs

Awarded Bids

Request #	Request Name	Requester Name	Status	Submitted Date
RF400000007	Office Chairs - New Conference Room	Nichole Training	Submitted	01/24/2019
RF4000000126	Request for iPad Air	Ivan Darring	Converted	10/09/2018
RF4000000123	Special Gloves	Ivan Darring	Submitted	09/20/2018
RF4000000121	Request for a Thermometer	Ivan Darring	Converted	09/18/2018
RF4000000119	Request for a Glucometer	Ivan Darring	Converted	09/18/2018
RF4000000118	Request for MacBook Air	Ivan Darring	Converted	09/12/2018
RF4000000113	Request for an ipod nano	Ivan Darring	Converted	09/06/2018
RF4000000111	Request for iPad Air	Ivan Darring	Converted	08/31/2018
RF4000000109	Request for a laptop pro	Darren Crittendon	Submitted	08/28/2018
RF4000000102	Request for an iPad	Ivan Darring	Converted	08/06/2018

1-10 of 45

First

1

2

3

Buyer: Views all details of the Request. If ready to move forward, selects 'Convert to RFQ.' (shown below)

Request Form

RF400000007

Submitted

Request Name

Office Chairs - New Conference Room

Submission Date

01/24/2019

Suppliers

OfficeDepot OfficeMax
Office Supply Inc
Peacock Office Furniture

Requester Name

Nichole Training

Buyer Name

Bill Bison

#	Item	Part No.	Qty	Type	UoM	Del. Date
1	Adjustable Office Chairs with		12	Product	EA	02/01/2019

NOTES FOR BUYER

Bill I'd like to stay under \$150 per chair.

Copy

Reject

Convert to RFQ

Completes required details for RFQ and edit all other details as needed.

1. End due dates for Supplier Bids
2. Select a category for each requested line item.
3. Add notes to the Supplier. (While this field is optional, this is a good location to include any pricing specifications)
4. Submit for bidding.

Create Request for Quote 4000000007 Draft

Created Date: 01/25/2019 1 Bid Due By: 01/28/2019 Time: 10:14 AM Time Zone: (GMT-8:00) Pacific Time (US) Suppliers: OfficeDepot OfficeMax, Office Supply Inc., Peacock Office Furniture

Request Name: Office Chairs - New Conference Room Requester: Nichole Training

#	Type	Description	Part No.	Category	Qty	Unit	Del. Date
1	Product	Black Adjustable Office Chairs with arms		Office supplies and	12	EA - each	02/01/2019

Add Line Item Add Attachment


Notes for Supplier: Budget is \$1500 total. 3

Delete Save Submit 4

Buyer: Once submitted the RFQ will be viewable in the 'Submitted RFQs' tab within the 'RFQ List' category.

Requests in Draft Submitted Requests RFQs in Draft Submitted RFQs Awarded Bids						
Search by Request Form #, RFQ #, Requester Name and Supplier Name						
RFQ #	RFQ Name	Requester Name	Bid Overview	Due Date	Status	Submitted Date
4000000007	Office Chairs - New Conference Room	Nichole Training	3 Bids	01/28/2019	Submitted	01/25/2019 ***

Requester: Receives email notification that the request has been submitted to Supplier(s). The email notification will include the Sourcing Approver's name and RFQ number.



Request Name: Interior Paint - Employee Break Room Lobby and Business Offices

Rita Buyer has submitted your RFQ 4000000161 to suppliers.

Date Submitted
11/21/2019

Bid Due Date
12/06/2019 10:00 AM (GMT -06:00)

Buyer
Rita Buyer
[nichole.whitaker+](#)
ShopperExpress@vroozi.com


Notes
Need projected completed by 1/2/20.
Thank you.

Items Showing 1 of 1

TYPE	DESCRIPTION	PART NO	CATEGORY	QTY	UOM
Product	Interior Paint - Employee Break Room Lobby and Business Offices - walls and baseboards.	-	Building Services - Equipment and Supplies	1	EA

[View RFQ](#)

Supplier: Receives email notification of the request for bid.



Request Name: Paint Services - Entire Building

Rita Buyer has sent you an RFQ 4000000156 for a bid.

Date Submitted
11/18/2019

Due Date
11/22/2019 12:00 PM (GMT -06:00)

Buyer
Rita Buyer

Notes from Buyer

Passcode
hg9cbaw

* The above Passcode is required to authenticate your bid.

[CREATE BID](#)

After selecting 'Create Bid' the supplier will be directed to the Quote draft where they can complete the required details. *(shown below)*

VROOzi

Acknowledged

Bid Deadline
You have 3 days 17 hours 41 minutes before this RFQ expires on 11/22/2019 12:00 PM (GMT -05:00)

Bid Information

Bid ID: 4500000109	Created Date: 11/18/2019
RFQ #: 4000000156	RFQ Name: Paint Services - Entire Building
Contact Name: Rita Buyer	Quote Due Date: 11/22/2019
Notes:	Quote Effective Date*: 12/02/2019 to 12/06/2019

#	Type	Description	Part No.	Category	Qty	Unit	Del. Date	Currency	Unit Price	Total
1	Product	11,000 square feet, primer paint with base		Building Services - Equipment and Supp...	1	EA - each	12/02/2019	USD	\$4,500.00	\$4,500.00

Total Amount: **\$4,500.00**

Add Notes
Project will require 3 painters and 5 business days. Please confirm brand and color of paint no later than 11/26.

Decline
Save
Submit

Buyer: Views bids by clicking on the bid number. If appropriate awards or rejects the bids.

- *Awarded bid* = Award status
- *Rejected bid* = Rejected status
- *Acknowledged* = Supplier has received and opened the supplier webform but not submitted it

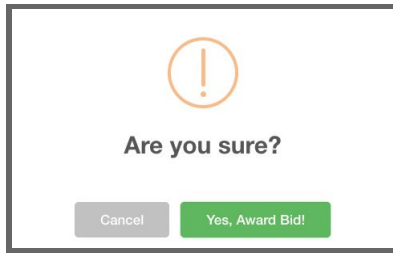
Bid Overview
Total Bids 3

Compare

<input checked="" type="checkbox"/>	#	Bid Number	Supplier	Status	Amount	
<input checked="" type="checkbox"/>	1	8000000390	A&F Catering	Accepted	\$3,400.00	Award Bid Reject Bid
<input checked="" type="checkbox"/>	2	8000000391	H&H	Accepted	\$5,235.00	Award Bid Reject Bid
<input checked="" type="checkbox"/>	3	8000000392	Supplier TEST	Accepted	\$3,900.00	Award Bid Reject Bid

Copy RFQ
Cancel Bidding
Close Bidding

- See *Compare Bids* section.



- Status of bid converts from 'Submitted' to 'Awarded'

Bid Overview
Total Bids 3

#	Bid Number	Supplier	Status	Amount
1	4500000103	TEis Inc	PR Created	\$1,000.00
2	4500000104	1Reawire	Awarded	\$1,200.00
3	4500000105	John's Consulting	Pending	

Copy RFQ

- RFQs with Awarded bids can be retrieved in the Awarded Bids tab of the 'RFQ List' category.

Requests in Draft Submitted Requests RFQs in Draft Submitted RFQs **Awarded Bids**

Search by Request Form #, RFQ #, Requester Name and Supplier Name

Bid #	RFQ #	Requester Name	Supplier	Status	Awarded Date	
4500000106	4000000139	Ivan Darrington	Apple	Awarded	10/09/2018	***
4500000096	4000000128	Ivan Darrington	Medline Industries	Awarded	09/18/2018	***
4500000103	4000000134	Ivan Darrington	TEis Inc	PR Created	09/21/2018	***
4500000087	4000000134	Ivan Darrington	CDW Inc.	Awarded	09/12/2018	***
4500000077	4000000114	Ivan Darrington	Apple	Awarded	09/06/2018	***

Buyer: The awarded bid is assigned back to the Requester to complete the PR.

Assign

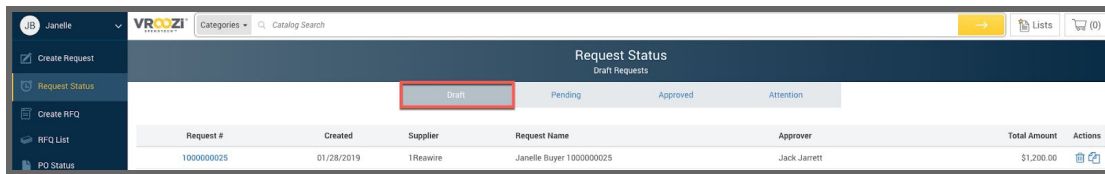
Requester *

Janelle Buyer

Cancel Submit

- This action creates the Purchase Request draft and is reflected in the status.

Requester: Retrieves the PR in 'draft' status

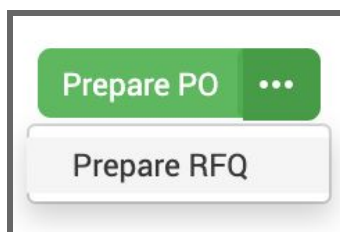
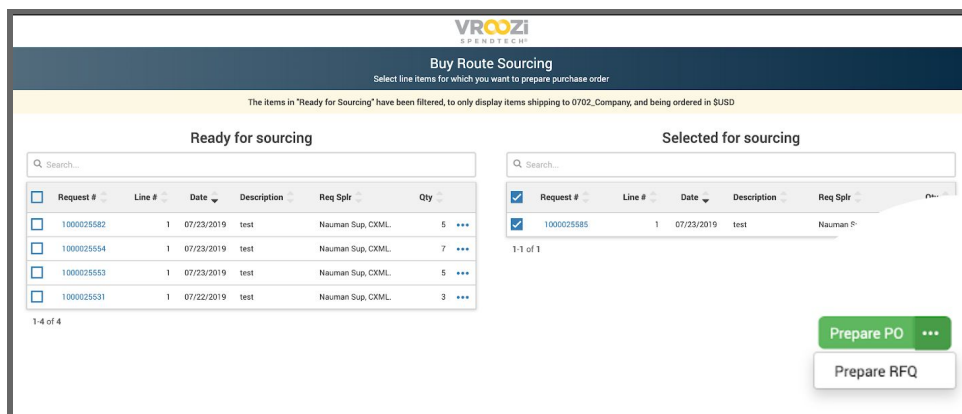


- Completes all required details and submits PR for approval.
- The completed Purchase Request will go through an approval workflow per the buying organization's configuration.

CREATE AN RFQ FROM 'READY FOR SOURCING'

From 'Ready for Sourcing, Buyers can create an RFQ.

- Once the PO(s) are selected for Sourcing. Click the ellipses to select 'Prepare RFQ'



COMPARE BIDS

Once bids have been submitted by suppliers, use the 'Compare' feature to view bids side by side before awarding one.

From the 'Bid Overview' portion of the RFQ Draft, check the box next to each Bid.

Bid Overview
Total Bids 3

<input type="checkbox"/>	#	Bid Number
<input type="checkbox"/>	1	4500000017
<input type="checkbox"/>	2	4500000018
<input type="checkbox"/>	3	4500000019

Select 'Compare.'

Compare

Award Bid	Reject Bid
Award Bid	Reject Bid
Award Bid	Reject Bid

Before acceptance, bids can be compared side by side. Once comparison is complete, close the 'Bid Comparison' screen and select your bid.

Bid Comparison			
	No image provided	No image provided	No image provided
	A&F Catering	H&H	Supplier TEST
Bid #	8000000390	8000000391	8000000392
Quote Effective Start Date	06/13/2018	06/13/2018	06/13/2018
Quote Effective End Date	06/27/2018	06/26/2018	06/26/2018
Total Cost	\$3,400.00	\$5,235.00	\$3,900.00
Notes from Suppliers	N/A	N/A	N/A
Attachments	N/A	N/A	N/A
Line Items	product description for test, macbook pro 15", monitor	product description for test, macboook pro 15", monitor	product description for test, macbook pro 15", monitor, 2 year warranty

RFQ List

As seen by *Employees* with Permission to Submit Request Forms

Provides visibility to your company's Request for Quote (RFQ) process. Within the RFQ List, the system will sort all RFQs based on their Status. Select each Status in the top tabs to review the RFQs in various stages.

Requests in Draft

This section shows all the requests that are currently open and in draft by users. These forms have not yet been submitted to the buyers for processing.

1. **Request #:** Unique number associated with each draft.
2. **Request Name:** Naming convention given at time of creation
3. **Requester Name:** User who created the drafted Request.
4. **Created Date:** Date Request draft was initiated.

RFQ List				
Requests in Draft				
Requests in Draft Submitted Requests RFQs in Draft Submitted RFQs Awarded Bids				
<input type="text"/> Search by Request Form #, RFQ #, Requester Name and Supplier Name				
1. Request #	2. Request Name	3. Requester Name	4. Created Date	
RF4000000059	N/A	Notify Vroozi	07/23/2018	...
RF4000000052	N/A	Employee User	07/06/2018	...
RF4000000048	N/A	Employee User	07/06/2018	...

Submitted Requests

This section shows all requisitions submitted from users to buyers to convert into Request for Quotes which are then submitted to specific suppliers.

1. **Request Name:** Name Requester has attached to the RFQ
2. **Status:**
 - Converted
 - Submitted

RFQ List				
Submitted Requests				
Requests in Draft Submitted Requests RFQs in Draft Submitted RFQs Awarded Bids				
Q Search by Request Form #, RFQ #, Requester Name and Supplier Name				
Request #	1. Request Name	Requester Name	2. Status	Submitted Date
RF400000083	Post Prod Sanity 2	Ubaid Ahmed Employee	Converted	09/07/2018
RF400000080	Post Prod Sanity 2	Ubaid Ahmed Employee	Submitted	08/27/2018
RF400000075	Post Prod Sanity 2	Ubaid Ahmed Employee	Converted	08/27/2018
RF400000067	Post Prod Sanity 2	Ubaid Ahmed Employee	Converted	08/27/2018
RF400000065	Post Prod Sanity 1	Ubaid Ahmed Employee	Converted	08/27/2018

Note: 'Submitted Requests' and 'Submitted RFQs' will include a Status update.

RFQs in Draft

This section shows all Request for Quotes (RFQs) that buyers are currently working and have not yet been submitted to any suppliers.

- 1. RFQ #:** Unique number associated with each RFQ.
- 2. RFQ Name:** Naming convention entered at the time of creation
- 3. Requester Name:** User who submitted the RFQ.
- 4. Created Date:** Date request was initiated.

RFQ List				
RFQs in Draft				
Requests in Draft Submitted Requests RFQs in Draft Submitted RFQs Awarded Bids				
Q Search by Request Form #, RFQ #, Requester Name and Supplier Name				
1. RFQ #	2. RFQ Name	3. Requester Name	4. Created Date	
4000000149	N/A	Notify Vrooz	09/13/2018	...
4000000148	N/A	Notify Vrooz	09/12/2018	...
4000000147	N/A	Notify Vrooz	09/12/2018	...
4000000146	N/A	Notify Vrooz	09/12/2018	...
4000000145	N/A	Ubaid Ahmed Buyer	09/07/2018	...
4000000140	N/A	Notify Vrooz	09/05/2018	...
4000000139	N/A	Notify Vrooz	09/05/2018	...
4000000138	N/A	Ubaid Ahmed Buyer	08/28/2018	...
4000000137	N/A	Ubaid Ahmed Buyer	08/27/2018	...
4000000133	N/A	Ubaid Ahmed Buyer	08/27/2018	...

Submitted RFQs

This section shows all Request for quotes (RFQs) that buyers have submitted to suppliers for bidding. In this section the Bids will have multiple statuses

(Submitted, Accepted, Cancelled, Closed), depending on the action taken by both the buyer and supplier.

- 1. Bid Overview:** A unique Bid number is created for each Supplier Bid.
- 2. Due Date:** Deadline set by the requester for Supplier(s) to submit bids.
- 3. Status:**
 - Closed - Bidding has ceased
 - Submitted - RFQ has been submitted and is now awaiting Supplier(s) bid.
 - Expired - Bid due date has passed
- 4. Submitted Date:** Date the RFQ was submitted for quotes. Does not indicate when RFQ was viewed by Supplier.

Requests in Draft Submitted Requests RFQs in Draft Submitted RFQs Awarded Bids							
Q Search by Request Form #, RFQ #, Requester Name and Supplier Name							
RFQ #	RFQ Name	Requester Name	1. Bid Overview	2. Due Date	3. Status	4. Submitted Date	
4000000142	Post Prod Sanity 2	Ubaid Ahmed Employee	3 Bids	09/07/2018	Closed	09/07/2018	...
4000000143	Testing	Ubaid Ahmed Employee	1 Bids	09/30/2018	Submitted	09/07/2018	...
4000000136	Post Prod Sanity 2	Ubaid Ahmed Employee	4 Bids	10/31/2018	Submitted	08/27/2018	...
4000000132	Post Prod Sanity 1	Ubaid Ahmed Employee	4 Bids	08/31/2018	Expired	08/27/2018	...
4000000032	Test Req	Employee User	1 Bids	08/31/2018	Expired	06/12/2018	...
4000000125	Lorem Ipsum	Employee User	3 Bids	08/31/2018	Expired	08/17/2018	...
4000000064	Req RFQ	PRFQ Employee	1 Bids	08/31/2018	Expired	06/30/2018	...

Awarded Bids

This section shows all RFQs that have been 'Awarded' to a supplier or 'Converted' into requisitions for approval and PO creation.

1. Bid #: A unique Bid number is created for each Supplier Bid.
2. RFQ #: The original RFQ from which the Bid is produced. In many cases there will be multiple Bids from the same RFQ number.
3. Requester Name: User who submitted the RFQ.
4. Supplier: Name of Supplier included in bid.
5. Status: Indicates whether the Bid has been Awarded or a PR has been created
6. Awarded Date: Date bid was converted into a PO.

RFQ List						
Awarded bids						
Requests in Draft Submitted Requests RFQs in Draft Submitted RFQs Awarded Bids						
<input type="text"/> Search by Request Form #, RFQ #, Requester Name and Supplier Name						
1. Bid #	2. RFQ #	3. Requester Name	4. Supplier	5. Status	6. Awarded Date	
4500000089	4000000142	Ubaid Basic User Req	Ubaid InfoTech TTN	PR Created	09/07/2018	...
4500000091	4000000142	Ubaid Ahmed Employee	Ubaid Hardware TTN	PR Created	09/07/2018	...
4500000088	4000000136	Ubaid Basic User	Ubaid Infotech	PR Created	08/27/2018	...
4500000073	4000000132	Ubaid Ahmed Employee	Ubaid InfoTech TTN	PR Created	08/27/2018	...
4500000074	4000000132	Ubaid Ahmed Employee	Ubaid Softwares TTN	Awarded	08/27/2018	...
4500000075	4000000132	Ubaid Ahmed Employee	Ubaid Hardware TTN	Awarded	08/27/2018	...

COPY RFQs

Users can copy the RFQ document either from the display RFQ page or the RFQ list page by clicking on the ellipsis and selecting "Copy RFQ."

RFQ List				
Submitted Requests				
RFQs in Draft	Submitted Requests	RFQs in Draft	Submitted RFQs	
RFQ #, Requester Name and Supplier Name				
Request Name	Requester Name	Status		
Test Request Read Only	Admin demo	Converted		
Test Request for International	Ubaid Ahmed EMPLOYEE	Submitted	06/23/2018	...
Test Request for KT	Ubaid Ahmed EMPLOYEE	Converted	06/22/2018	...
5/20 test	Emmitt Employee	Converted	06/20/2018	...
aa	Admin demo	Converted	06/19/2018	...

Filter items by:

Requester: Ubaid Ahmed EMPLOYEE

Created Date: 06/23/2018

Submitted Date: 06/23/2018

Copy Request Form

Reject Request Form

Convert To RFQ

Extend Bid due Date and Time: Users have the ability to extend the bid due date/time on an RFQ after an RFQ has been submitted to suppliers. This gives users the flexibility to allow for ample time for the bidding process to complete, ensuring they get the best value with each Quote they receive.

Display RFQ

4000001574

Submitted

Submission Date 07/02/2018	Delivery Date 07/30/2018	Bid Due Date 07/31/2018	Due Time (GMT +05:30) 8:45 PM	Suppliers m
Request Name m	Buyer Name Admin demo			

#	Item	Category	Part No.	Qty	Type	UoM	Delivery Date
1	m	Advertising Agency, Creative & PR Services	12	12	Product	EA - Each	07/30/2018

Notes for Buyer

Notes for Supplier

When you click on the Pencil (edit) icon, the user will receive the following modal which will allow him/her to change the bid Due Date for the selected RFQ.

Extend Bid Due Date and Time

Bid Due By *

07/31/2018

Time *

8:45 PM

Time Zone *

(GMT -8:00) Pacific Time (US & Cana)

Cancel

Yes, Extend Bid Due Date