

User Guide

Ultriva RFQ Application

Version 1.0

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Revisions

4

Date	Modifications	Author	Comments
9/11/2012	Created	Pushparaj S	
9/28/2012	Added additional details to supplier user section	Pushparaj S	

Symbol Legend

Description

Location



Symbol

You wanted this feature!!!

Margin

Ultriva RFQ Application

1 Ultriva RFQ Application

This document describes the new Ultriva module/Application called RFQ in the Ultriva 7.0 Suite.

First section describes the admin related tasks.

1.1 Application Admin (AppAdmin) Tasks

1.1.1 License Key

To enable RFQ application the Customer of Ultriva must contact Ultriva Sales and Support to get new license key. The same license key must be configured at Plant Level by logging in as AppAdmin.

- 1. Login as Application Administrator.
- 2. Goto Plants List (Admin -> Plant option)
- 3. Select the Plant and click Edit.
- 4. Then enter the new license key and save the changes.

1.1.2 Business Unit Level Attachments

Ultriva Application now allows administrators to add attachments to the business units like Plant and Supplier etc. Administrator can add following attachments at Plant Level.

- 1. General Terms and Conditions document
- 2. Logo.

Setting up these documents:

- 1. Login as Application Administrator.
- 2. Goto Plants List (Admin -> Plant option)
- 3. Select the Plant and click More Options.
 - a. In the More Options click on the Attachments as shown below:



b. This should list all the attachments already attached for this business unit. If this is the first time that administrator is attaching document then he or she will see status message with Add button.

Attachment I	achment List for Life Fitness Franklin Park				
Filter By	▼ Select Operator ▼ Enter Value S Go ►				
🚔 Add 🥖 Edit 🗱 Delete Crop 🤇 Back					
File Type	Title				
Torrestando and the	n Supplier Ceneral Terms and Conditions for Fived Drice Orders of				

- c. Click Add button.
- d. Pick the type of the attachment and click browse button to pick the document.
- e. And click Upload files to upload the attachment.

1.1.3 Enabling RFQ Application for Plant User

This task can be performed by both Application admins and the Plant Administrators who has access to Admin/UserList functionality.

1. After logging in to the application go to Admin/UserList.

- 2. Select the user from the User List.
- 3. Click Edit.
- 4. From the Application Access List, select the Allow option for RFQ application and Save.

Application Name	Current Access	Allow	Deny
Plant	✓	•	0
Supplier	4	•	0
т	*	0	٠
FQ	*	0	•

1.2 Plant Admin Tasks

1.2.1 Setting up Terms and Conditions (Codes and Description)

This task allows users to setup the Terms and Conditions like Payment Terms, Freight Payment Terms, Freight Terms, Delivery Terms, Header Text and Footer Text.

- 1. After logging in to the application as Plant Administrator, switch to RFQ Application and then click on Admin/Terms and Conditions menu.
- 2. Add the entries manually by clicking Add button and also selecting different tabs for each terms.

📫 Add 🖉 🖉 Edit	🚔 Add 🥖 Edit 🗽 View 🗱 Delete				
Add	Footer Text Freight Payment Term Delivery Term Transportation Term Payment Term				
Code Title	Description				
PUR- PUR- PCD0027 PCD0027	ITEM(S) LISTED ARE PURCHASED UNDER GOVERNMENT PRIME CONTRACT NUMBER WS2PIJ-09-D-0027. THE FOLLOWING TERMS AND CONDITIONS ARE APPLICABLE TO THIS PURCHASE ORDER: ATK GENERAL TERMS AND CONDITIONS (TC-I Rev 7/11) SPECIAL U.S. GOVERNMENT PROVISIONS (UNDER GOVERNMENT PRIME CONTRACT WS2P IJ-09-D-0027 REV 10/5/10) THE ABOVE TERMS AND CONDITIONS CAN BE OBTAINED AT http://www.atk.com/Suppliers_urrentyendors.asp PLEASE SELECT THE ATK ICCATION WITH WHICH YOU ARE DOING BUSINESS TO ACCESS THE SPECIFIC DOCUMENTS RELATED TO THAT LOCATION OR CONTACT THE BUYER. THE ITEMS PURCHASED HEREUNDER ARE EXEMPT FROM MISSOURI SALES/USE TAX. THE SELLER SHALL COMPLY WITH ALL APPLICABLE U.S. EXPORT CONTROL LAWS IN RECEIVING, UTILIZING AND/OR DISPOSING OF ANY ARTICLES, TECHNICAL DATA AND/O SERVICES PROVIDED BY THE BUYER IN CONNECTION WITH THIS ORDER, AND IN TRANSFERRING OR OTHERWISE DISPOSING OF ANY ARTICLES, TECHNICAL DATA AND/OR SERVICES DEVELOPED OR PRODUCED THEREFROM BY THE SELLER. AS PROVIDED IN THE TERMS AND CONDITIONS FOR THIS ORDER, NO TECHNICAL DATA OR OTHER ITEMS PUYER OR DEVELOPED OR PRODUCED THE RESON UNLESS THE BUYER OR THIS ORDER, NO TECHNICAL DATA OR OTHER ITEMS PUYED BY BUYER OR DEVELOPED OR PRODUCED BY THE SELLER. AS PROVIDED IN THE TERMS AND CONDITIONS FOR THIS ORDER, NO TECHNICAL DATA AND/O SIDE THE UNITED STATES OR TO ANY FOREIGN PERSON UNLESS THE BUYER PROVIDES WRITTEN CONSENT AND THE SELLER OBTAINS ALL REQUIRED EXPORTED. THANSFERRED OR DISCLOSED- OUTSIDE THE UNITED STATES OR TO ANY FOREIGN PERSON UNLESS FROM THE UNITED STATES GOVERNMENT. THIS IS A RATED ORDER (DOAG) CERTIFIED FOR NATIONAL DEFENSE USE, AND/OR UNLESS FROM THE UNITED STATES GOVERNMENT. THIS IS A RATED ORDER (DOAG) CERTIFIED FOR NATIONAL DEFENSE USE, AND YOU ARE REQUIRED TO FOLLOW ALL THE PROVISIONS OF THE DEFENSE PRIORITIES AND ALLOCATIONS SYSTEM REGULA NON (15CFR PART 700).	R Y			
Sorted by: Code		1			

1.2.2 Uploading Terms and Conditions (Codes and Description)

This option allows users to upload the Terms and Conditions like Payment Terms, Freight Payment Terms, Freight Terms, Delivery Terms, Header Text and Footer Text.

- 1. After logging in to the application as Plant Administrator, click on Admin and Tools menu.
 - a. Select Data Load option under Tools menu.
 - b. Then pick the respective menu to upload the code and description from the ERP System.
 - c. Expected file should contain following fields:
 - d. <<>>>

1.2.3 Setting Up Drawings, Thumbnail Image and Spec for Item Master

This option allows users to upload the drawing, specification and thumb nail image for an item record in the item master.

- 1. After logging in to the application as Plant Administrator, click on Admin/Items menu.
- 2. Select an item for which the documents being attached. Click on More Options and click on Attachments menu.
- 3. This will list all the existing documents for this item. If this first time an admin is trying to attach document then a status message and add button is shown.

Attachment List for 0017-00003-0691						
Filter By	Filter By Select Operator Enter Value Go Go					
Find File Type	ind File Type 🖓 🐴					
🖉 Edit 🗱 Delete	/ Edit Crop G Back					
File Type 🔺		Title ⊽	Picture			
Drawing		T15879.tif				
ItemImg		0017-00003-0691.jpg				
Spec		T16947C.pdf				
Sorted by: File Type 1						

4. Click Add or Edit to attach document.

1.2.4 Setting Up User Profile Picture

A Plant Administrator can attach User Profile picture.

The same can also be attached by the individual user by themselves.

Ideal size for the profile picture is 215 x 215.

1. After Logging in as a user then click on the My Account -> Change Profile menu option.

Change My P	rofile	Last modified on [09/	🛛 🗐 How do I?		
Profile Picture					
Personal Informa	ation				
* First Name:	Ultriva	MI:	* Last Name:	User]
* Work Phone:	4082489803		Mobile Phone:]
* Email:	vikramc@ultriva.com		User Locale:	Not Set	
* Time zone:	Inherit From Owner Business Unit				
* Required field				Save »	X Cancel

- 2. Then click on the Picture Tab and then click on Add button to add the profile picture.
- 3. User can always change the picture by clicking Edit button.

1.2.5 Setting Up Logo image for Supplier business unit

A Plant administrator can attach a logo for Supplier Business Unit.

1. After logging into the application as plant administrator then click Admin->Suppliers menu option.

🚔 Add 🥖 Edit 🔯 View	More Options 🔻			
	Configuration]		
External Supplier Internal Sup	Associate Supplier			
	Users		L P	
Name 🔺	Shipping Rules		Location V	Code ∀
ACORN CORRUGATED BOX	Calendar		CHICAGO	15264
AEC-MOTIONSTAR, INC.	Attachment		SCHAUMBURG	9623
ARMOUR PACKAGING TECHNOLOGY,	INC.		ITASCA	445

- 2. Select the supplier and click on More Options->Attachments option.
- 3. Add logo image by clicking the Add button.

Attachment List for ACORN CORRUGATED BOX				
Filter By Select Operator Enter Value Go				
/ Edit Crop GBack				
File Type Title Pi		Pict	ire	
Logo acomlogo.jpg				
Sorted by: File Type			1 to 1 of 1	

2 Ultriva RFQ Application – User Interaction

2.1 Switching to RFQ Application

If Plant user (buyer or administrator) has access to multiple applications in the Ultriva suite, then they must switch to RFQ application to do any RFQ related transactions.

Following screenshot shows how to switch the application.

Once user logged into Ultirva, then he/she should click on the Applications popup in the bottom right corner.

Then click on the RFQ option.



2.2 Home Page

The Home page for Plant users/buyers is similar to the Ultriva CSP module. The home page is divided into 4 panels.

- 1. RFQ Tracking Panel
 - a. RFQ Tracking Panel high lights 4 important tasks.:
 - i. Open
 - ii. Due Today
 - iii. Ready For Review
 - iv. Expired
- 2. Alerts Panel
 - a. Alerts Panel lists alerts related to RFQ Tickets alone.
- 3. Integration Status Panel
 - a. Integration Status Panel lists RFQ related integrations. There are two integrations:
 - i. RFQ Create this integration happens when an RFQ is sent to Supplier(s).
 - ii. RFQ to Purchase Order this integration happens when an RFQ gets approved and buyer enters the purchase order related details.
- 4. My Routines Panel
 - a. This panel is similar to My Routines Panel in the Ultriva CSP module.

The screenshot below shows these panels:

Q Home	🍸 Filters 🍟 Fav
RFQ Tracking	Alerts
	Date ▼ Subject ⊽
	09/12/2012 Supplier BEMIS MANUFACTURING COMPAN 🐺 🗰
	09/12/2012 Supplier BEMIS MANUFACTURING COMPAN 💱 🗰
Cards Cards Cards	09/12/2012 Supplier ACORN CORRUGATED BOX has r 🐺 🗰
Open Due Today Ready For Review Expired	09/12/2012 Supplier BEMIS MANUFACTURING COMPAN 🗊 🗰
Integration Status All Business units (Last 7 days) 📑	My Routines *
Integration Type Failure Pending Success	Daily Monthly
Integration Type Failure Pending Success	

User can drill down to **RFQ Page** when they click on numbers shown in the RFQ Tracking Panel,

2.2.1 Applying Filter to home page

Users can apply filter to the home page by clicking the Filter icon in the top right side of the page. Currently there is just one filter option which is CreatedBy. A buyer can use this filter option to just see his/her RFQs. Once it is applied then the system remembers the filter option and automatically applies to the next user session.

U	Ultriva Lean Suite (I	Ultriva Lean Suite (Dev Site) Admin My Account Help Logout		
Ho	e RFQ Reports Integration	Ultriva User Life Fitness Fr		
R	FQ Home	Created By:		
	RFQ Tracking *=	Alerts		
		Date ▼ Subject ⊽		
		09/12/2012 Supplier BEMIS MANUFACTURING COMPAN 🐺 🗰		
		09/12/2012 Supplier BEMIS MANUFACTURING COMPAN 🐺 🗰		
	Carris Carris Carris	09/12/2012 Supplier ACORN CORRUGATED BOX has r 💱 😫		
	Open Due Today Ready For Review Expired	09/12/2012 Supplier BEMIS MANUFACTURING COMPAN 🐺 🗰		
		Sorted by: Date 1 to 4 of 8 Prev Page 1 Next Next		

2.3 RFQ Page

The RFQ Page is the core of the RFQ Application where Buyer and Supplier interact with each other. The page is designed in such a way that it is extremely user-friendly and allows users to quickly navigate between various tasks that one would perform with RFQ objects.

2.3.1 RFQ Page Layout

The page has following layout:

- 1. Left Hand side top portion
 - a. Current logged in User's profile
- 2. Left Hand side Tabs/Menus
 - a. Provides access to various RFQ related activities
- 3. Right hand side shows all the RFQs related to the option chosen in the Left hand side menus. For instance if we click on Open RFQs tab/menu/button then we will see all the RFQs related that main status filter.



2.3.1.1 Filter, Sort and Tooltips

The system provides various tools and information for buyers to easily navigate and work with the criteria that bests suites their needs.

Filter Option Panel

Click the Filter icon at the top right corner to see the Filter Panel. You can click the icon to toggle to show and hide the panel.

Filter panel provides following options to filter:

- 1. Created By
- 2. Created Date Range
- 3. Item
- 4. Due Date range

		Open RFQs	🖌 Filter 🛛 💓 Favorites
F [Filter By: Created By: ultrivauser × Due Date:	Pick Buyer Filter Created Date: Item: Pick Due Date Filter Product Line: Commodity Code:	Filter Panel – click to show and close
	Today Current Week Month To Date Year To Date	All All Go Click Go to Apply Filter 1 Messages 0 Bids 2 Suppliers	Documents
RF	Previous Week Previous Month Previous Year Past 7 Days Past 3 Months	RFQH2233-LFT4D Posted on 09/14/2012 0017-00003-0691 LINE-CORD: CON 10A 250V B Qty: 45 EACH Dock Date: 10/31/2012 RFQ Due On: 10/09/2012	RFQ223D-LFT6J
	Past One Year Yesterday Date Range	Please provide your bids on or before due date. Image:	Documents

Sort option

Click the Filter icon at the top right corner to see the Filter Panel which contains the sort option drop down. You can click the icon to toggle to show and hide the panel.

	Open	FQs	V Filter	
	Filter By:			_
	Created By: ultrivauser ×	Created Date: Item:		
				LF
	Due Date:	Product Line: Commodity Code: All All		
	Sort By:			
	Create Time Desc	Go 🕨		
	Due Date Desc	🛛 🖂 1 Messages 🛛 😽 0 Bids 👤 2 Suppliers 🏾 🗾 Documents	5	
	Due Date Asc Last Action Time Desc			
FC	Last Action Time Asc			

Tooltips

System provides various tool tips:

1. Moving mouse on the RFQ Header ID would show details about this header and how many lines are in this header.

ri	iva User	Open RFQ	Move the mouse over here to see the tooltip About this RFQ YFilter	vorites
F	itness Franklin Park	RFQH2232-LF1	THV Posted on 09/14/2012	
	Details for RFQ RFQH2	2232-LFTHV		
_	Created By	Ultriva User		
۲	Open	1		
	Waiting For PO	0		
2F	Approved	0	Details about the RFQ Tickets inside this header	
	Canceled	0		
_	Under Review	0	Each status shows how many lines/tickets that are in the	
0	Total	1	respective status like Open, Approved, Canceled etc.	
	Due Date	09/28/2012		
-0	2)			

2. Moving mouse over the Qty shows the requirement schedule

RFQH2232	-LFTH	V Posted on 09/1	4/2012 -			
	001 BATT Qty Dock	7-00003-068 ERY: 6V; 2.5AH 53-EACH Date: 10/31/2012	5 Move the mouse of Schedule RFQ Due On: 09/20	over Qty 8/2012	RFQ223C-LFT62 to see the requirement	•
	Pleas	Requirement Sche	dule			
	\sim	Request Quantity	Dock Date	ers	Documents	
		23.00	10/31/2012		~	
		32.00	11/30/2012			
		<u></u>				

DEOU22221 ET4D Bastad on 00/14/2012

3. To show and hide the tab area please use the instruction given below

RFQH2232	LFTHV Posted on 09/14/2012	
	0017-00003-0685	RFQ223C-LFT62
	BATTERY: 6V; 2.5AH C Qty: 55 EACH Dock Date: 10/31/2012 RFQ Due On: 09/28/2012 Please provide your bids on or before due date.	Click this icon to toggle show and hide the Tab area
	1 Messages 💧 0 Bids 👤 2 Suppliers	Documents
	ACORN CORRUGATED BOX	US
	PEER BEARING COMPANY Sorry I will not be able to bid for this RFQ. Th	US an hour ago anks for the opportunity.
	SView Comments 🛛 🖓 Add Comment	

2.3.2 Creating RFQ (Quick Entry)

This option allows buyer (or users who have access to Create RFQ) to quickly create an RFQ with one line item and send it to suppliers.

- 1. From the left hand side options click on the Create RFQ.
- 2. This option will open up a quick data entry form similar to the one given below:



2.3.3 Creating RFQ with multiple line items

This option allows buyer (or users who have access to Create RFQ) to create RFQ with multiple line items.

- 1. From the left hand side options click on the Create RFQ. With Multiple option.
- 2. This option will open up a new page with header and detail option.
- 3. The form is pretty similar to the Quick Data Entry form except that users can pick multiple items.

lultiple Items					9	Favo
			RFQ Due Date:			
Net 45	Delivery Terms:	Shipping point 💌	Freight Payment T	erms:	Collect 💌	
UPS Next Day	Header Text	Select	Footer Text:		Select	
			Validate Entries	»	Submit Entries »	« B
	Quant	ity Dock Date	Include Item Docs?	Notes	Attachments	
		i			Ø	
		.			Ø	
		.		Đ	Ø	
		.			Ø	
		<u>i</u>			Ø	
			Validate Entries	1.8	Submit Entries L x	« L F
	Iultiple Items	Iultiple Items	Net 45 Delivery Terms: Shipping point UPS Next Day Header Text Select Quantity Dock Date	Iultiple Items Image: Net 45 Delivery Terms: Shipping point Freight Payment Tree UPS Next Day Header Text Select Footer Text: Validate Entries Include Delivery Terms: Ouantity Dock Date Include Image: Im	Iultiple Items Image: I	Iultiple Items RFQ Due Date: Net 45 Delivery Terms: Shipping point Freight Payment Terms: Collect UPS Next Day Header Text Select Footer Text: Select Validate Entries * Submit Entries * Attachments Dock Date Include term Quantity Dock Date Include Notes Attachments Docs? Image: Ima

- 4. Pick Suppliers, Due Date, Terms in the header.
- 5. In the Details/LineItems section pick item and enter qty and required dock date. Please select additional documents etc option to attach documents for each line item.
- 6. Click on Validate Entries button to make sure there is no data entry.
- 7. If no data error is found then Submit button will be enabled. And Click the button to submit the RFQ to send to Suppliers.

2.3.4 RFQ and Options shown in the RFQ page

Following screenshot shows how the RFQs are shown in the application. Each RFQ is shown in an Header and Detailed Grouped view. If an RFQ has multiple lines then each line is shown with Header ID at the top.



Each RFQ Ticket or Line Item in a Header is shown with Item Image and Requested Qty and Dock date details.

Please note that a blue color solid line separates each header. A light dotted line separates the lines with in the header.

If there are multiple schedules requested by buyer then the same is shown in a tooltip when user moves the mouse over the Qty.

RFQH222V	V-LFTN	15 Posted on 09/1	2/2012 -			
	001 LINE Qty Dock	7-00003-069 CORD: R/A; CEE7; 1 24 EACH Date: 11/15/2012	6 03" 10A 250V D RFQ Due On: 10/17/2	2012	RFQ2237-LFTNH	•
	Pleas	Requirement Schee	dule			
	\sim	Request Quantity	Dock Date	ers	Documents	
		12.00	11/15/2012		-	
		12.00	11/30/2012			
		·				

2.3.5 Communicating with Supplier on RFQ Line

The messages option shows the messages received by each supplier on a single RFQ Ticket or Line Item. Buyer can see all the messages received from respective suppliers. Suppliers can only see their communication with the buyer as explained in <u>communicating with buyer</u>.

Clicking on the Messages would show something like the screenshot shown below

RFQH222N	N-LFTWJ Posted on 09/07/2012 -	
	0017-00003-0685 RFG BATTERY: 6V; 2.5AH C Qty: 960 EACH Dock Date: 09/28/2012 RFQ Due On: 09/19/2012 We are seeking bids from our suppliers. Vector 100/100/100/100/100/100/100/100/100/100	2222N-LFTWN
	1 Messages 1 Bids 1 Suppliers Documen	its 🧖
User who Responde d From respective	ACORN CORRUGATED BOX US	
supplier	PEER BEARING COMPANY US Thanks for the opportunity Last Message that su	3 hours ago
	View Comments 🛛 🖓 Add Comment	

Viewing the messages and Responding to the messages

Ultriva RFQ Application

- 1. Click on the View Comments to view the messages and communication happened with respective supplier.
- 2. To post a message back to supplier, please click Add comment option.
- 3. (To Send a same message to all suppliers in a single click please refer suppliers tab)

RFQH222N	-LFTWJ Posted on 09/07/2012	
	0017-00003-0685 BATTERY: 6V; 2.5AH C Qty: 960 EACH Dock Date: 09/28/2012 RFQ Due On: 09/19/2012 We are seeking bids from our suppliers.	RFQ222N-LFTWN
	I Messages I Bids 2 Suppliers Image: Document Image: Acorn corrugated box Image: Document Image: Document Image: Acorn corrugated box Image: Document Image: Document Image: Acorn corrugated box Image: Document Image: Document Image: Document Image: Document Image: Document Image: Document	iments
	Ultriva User We are seeking bids from our suppliers.	5 days ago
	PEER BEARING COMPANY US Thanks for the opportunity Hide Comments	3 hours ago
	Ultriva User We are seeking bids from our suppliers.	5 days ago
	Sue Kurek Thanks for the opportunity	3 hours ago

Ultriva © Copyright 2011

🙏 Applications

2.3.6 Viewing Bids Received from Suppliers

The bids option shows all the bids that have been received so far from suppliers. From this tab one can quickly approve the bid for a single line. (Please refer <u>Compare and Approve</u> option for more detailed comparison and approving multiple lines).

~9	0017-00003-0691 RFQ2222 LINE-CORD: CON 10A 250V B	<-LFTFQ
	QLY: 10 EACH Dock Date: 10/12/2012 RFQ Due On: 10/31/2012	
	2 Messages 2 Bids 2 Suppliers Documents	
	Approve Supplier Bid PEER BEARING COMPANY	
	Supplier Name Quantity Unit Total Price Despended Time	Has Deviation
	Price Price Responded Time	
	Supplier Name Quantity Price Fotal Price Responded Time PEER BEARING CO 10.00 1.00 10.00 09/12/2012 12:41:25 PM	

The list also shows the supplier proposed schedules if any at each supplier level.

1 Messages	s 1 Bid	ls 👤	3 Supplie	ers 📡	Documents	6		
Supplier Name	Quantity	Unit Price	Tot	al Price Re	esponded	Deviation?		
PEER BEARING CO	300.00	0.98		292.50 09	/14/2012		-	
			Supplier	Bid Schedul	e		Vi	ew
			Request Quantity	Proposed Quantity	Dock Date	Proposed Date	Unit Price	Total Price
			150.00	150.00	11/30/2012	11/30/2012	1.00	150.0
			100.00	100.00	12/28/2012	12/28/2012	1.00	100.0
			50.00	25.00	01/16/2013	01/16/2013	0.95	23.75
			30.00	20.00		0111012010		

.

7	0017-00003-0 LINE-CORD: CON 10A Qty: 10 EACH Dock Date: 10/12/201	691 250V B I 12 RFG	Q Due On	: 10/31/2012	RFQ22	22X-LFTFQ
	2 Messages	s 2 Bio	is 👤	3 Suppliers	Documents	
	Thank you for your bid, w	PEEK e are happy	to inform y	you that you got	this contract	
	Thank you for your bid, w	PEEK	to inform y	ou that you got	this contract Attach Docume	nts Approv
	Thank you for your bid, w	PEEK /e are happy Quantity	Unit Price	G COMPANY you that you got Total Price	this contract Attach Documer Responded Time	nts Approv Has Deviatio
	Approve Supplier Bid Thank you for your bid, w Supplier Name PEER BEARING CO	Quantity	Unit Price	G COMPANY you that you got Total Price 10.00	Attach Documer Responded Time 09/12/2012 12:41:25 PM	nts Approv Has Deviatio

The list is automatically sorted by the lowest bid price. To quickly approve a supplier bid buyer may select a row in this Data Grid and clicking on the Approve Supplier bid link. A small form entry shows up where buyer can enter notes and click on the Approve button. To add any additional document user may click on the Attachments button.

2.3.7 Viewing all the suppliers of an RFQ and sending same message to all suppliers

The Suppliers option shows all the suppliers who received this RFQ. The option also shows following:

- 1. Supplier responded with the Bid (a \$ icon next to supplier logo)
- 2. The supplier name strike through for Supplier who declined to bid



3. To send notes to all suppliers, user may click on the Send Notes to All. User may attach documents by clicking on the Attach documents button as shown below.

RFQH222S-	-LFT75 Posted on 09/12/2012 -	
~	0017-00003-0691 RFQ222X-LFTFQ LINE-CORD: CON 10A 250V B Qty: 10 EACH Dock Date: 10/12/2012 RFQ Due On: 10/31/2012	
	2 Messages 2 Bids 3 Suppliers Suppliers Documents Send Notes To All Image: Contract of the send send send send send send send sen	2
	Please find additional documents for this RFQ Attach Documents Send Notes	
	ACTEN AGORN CORRUGATED BOX L US BEMIS MANUFACTURING COMPANY WI US	

4.

2.3.8 Viewing Documents and Terms for an RFQ

The documents option shows all the documents which had been sent to suppliers for this RFQ. Additional to the documents list, the option also shows the terms apply to this RFQ.

7	0017-00003 LINE-CORD: CON Qty: 10 EA Dock Date: 10/12/	0017-00003-0691 RFQ222X-LFT LINE-CORD: CON 10A 250V B Qty: 10 EACH Dock Date: 10/12/2012 RFQ Due On: 10/31/2012									
	2 Messages	s s 2 Bids	2 3 Suppliers Documents								
	Documents T15879.tif Terms	Æ T1	6947C.pdf								
	Documents T15879.tif Terms Terms	∑ T1 Code	6947C.pdf Description								
	Documents T15879.tif Terms Terms Transportation	Code UPSNEXT	6947C.pdf Description UPS Next Day								
	Documents T15879.tif Terms Terms Transportation Delivery	Code UPSNEXT SHIP	6947C.pdf Description UPS Next Day Shipping point								
	Documents T15879.tif Terms Terms Transportation Delivery Payment	Code UPSNEXT SHIP NET45	6947C.pdf Description UPS Next Day Shipping point 45 days payment term								

2.3.9 Compare and Approve Bids

This option allows buyers to compare the bids for each line item side by side and approve the best bids based on different criteria.

To perform this action following steps are required:

Select the RFQ Tickets (or line items) with in single header and by clicking on the check boxes. (The check boxes are shown only when the system received bids from all the suppliers or due date has been reached)

RFQH2225	S-LFT75 Posted or	• 09/12/2012 -		
~	0017-00003 LINE-CORD: CON Qty: 10 EAC Dock Date: 10/12/	-0691 10A 250V B CH 2012 RFQ Due	RFQ222X-LFTFQ On: 10/31/2012 3 Suppliers Documents	6
	Documents			
	Ø T15879.tif	<u></u> Т1	6947C.pdf	
	Terms			
	Terms	Code	Description	
	Transportation	UPSNEXT	UPS Next Day	
	Delivery	SHIP	Shipping point	_
	Payment	NET45	45 days payment term	
	Freight Payment	Collect	Collect	
	0017-00003 LINE-CORD: R/A; 9 Qty: 5 EAC Dock Date: 10/12/	-0974 96"; W/RECP S/C-C H 2012 REQ Due	RFQ222Y-LFT28 On: 10/31/2012	•
	2 Messages	S 2 Bids	3 Suppliers Documents	

Once the Tickets are selected (with in a single header) please click on the header action menu drop down button as shown below:

RFQH222S	-LFT75 Posted or	09/12/201: -		
Image: A start of the start	0017-0 LINE-CORE Qty: 10 Dock Date: 10/12/:	we RFQ d RFQ RFQ 2012 RFQ Due On	RF : 10/31/2012	Ω222X-LFTFQ
	2 Messages	s 2 Bids	3 Suppliers Documer	nts
	T15879.tif	🔎 T1694	47C.pdf	
	Terms	Code	Description	
	Transportation	UPSNEXT	UPS Next Day	
	Delivery	SHIP	Shipping point	
	Payment	NET45	45 days payment term	
	Freight Payment	Collect	Collect	
	0017-00003 LINE-CORD: R/A; 9 Qty: 5 EAC	-0974 16"; W/RECP S/C-C H 2012 RFQ Due On	: 10/31/2012	FQ222Y-LFT28
	2 Messages	s 2 Bids	3 Suppliers G Documer	nts

Then select the Approve RFQ option. This will take the user to another advanced comparison page. The following screenshot shows that the RFQ was sent to three suppliers. One of them declined to bid, and other two submitted their bid.

Compare And Approve RFG	!		Weight How								
Items Suppliers											
	ACORN CORRUGATED BOX	BEMIS MANUFACTURIN(COMPANY WI									
0017-00003-0691 LINE-CORD: CON 10A 250V B Qty: 10 EACH Dock Date: 10/12/2012 RFQ Due On: 10/31/2012	Unable to Comply	Oty 10 EACH Unit Price 1 EACH Total 10	Qty 10 EACH Outil Price 1 EACH Total 10								
0017-00003-0974 LINE-CORD: R/A; 96"; W/RECP S/C -C Qty: 5 EACH Dock Date: 10/12/2012 RFQ Due On: 10/31/2012	Unable to Comply	Qty 5 EACH Unit Price 1 EACH Total 5	Qty 5 EACH Unit Price 100 EACH Total 500								
Total Cost	0	0	0								
Total Cost	0	0	0								

The compare page is laid out as item and suppliers.

The left hand side shows the each Line Item and the requested qty and dates.

The right hand side shows the bids submitted by respective suppliers.

2.3.9.1 Selecting the best bid(s)

Buyer can pick individually the best bid for each line item or selecting the best bids across line items by selecting the radio button on each bid as shown below.

Compare And Approve RFQ												
Items	Items Suppliers											
	ACORN CORRUGATED BOX	PEER BEARING COMPANY IL IIS										
0017-00003-0691 LINE-CORD: CON 10A 250V B C Qty: 10 EACH Dock Date: 10/12/2012 RFQ Due On: 10/31/2012	Unable to Comply	Qty 10 EACH Unit Price 1 EACH Total 10	Qty 10 EACH Init Price 1 EACH Total 10									
0017-00003-0974 LINE-CORD: R/A; 96"; W/RECP S/C -C Qty: 5 EACH Dock Date: 10/12/2012 RFQ Due On: 10/31/2012	Unable to Comply	Qty 5 EACH Unit Price 1 EACH Total 5	Qty 5 EACH Unit Price 100 EACH Total 500									
Total Cost	0	0										

Once the bids are chosen a buyer can click on entering notes and click on Approve button.

2.3.10 Create Purchase Orders for Approved Bid(s)

Once the best bid is chosen the buyer will be able to convert the same through Create Purchase Order option under Waiting for Purchase Order state.

1. Click on the Waiting for PO on the left hand side options as shown below

Create RFQ
Create RFQ for Multiple
Requisitions Waiting
13 Open RFQ
➡
O Closed RFQ

2. From the Right hand side list of Approved Bids

- a. Pick the RFQ tickets by checking the check marks
- b. And then click on the Create PO option from Flyout menu as shown below.

Waiting	For PO RFQs	🖌 Filter 🛛 🎬 Favorites
RFQH222Y	-LFT24 Posted on 09/13/2012	
 	O994-0 Create PO PCKG: REC Print RFQ Qty: 50 EACH Dock Date: 09/28/2012 RFQ Due On: 09/20/2012 Thank your for your quotation. Please find the Purchase Order Number.	RFQ223A-LFTZ2
	Awarded To Supplier ACORN CORRUGATED BOX Awarded Date 09/17/2012 02:39:58 PM Awarded By U Awarded Qty 50 EACH Awarded Price 0 Total Price 12.5	Jltriva User 9.25 EACH
	2 Messages S 2 Bids 2 Suppliers D	ocuments
RFQH222N	-LFTWJ Posted on 09/07/2012 0017-00003-0685 BATTERY: 6V; 2.5AH C Qty: 960 EACH Dock Date: 09/28/2012 RFQ Due On: 09/19/2012 Thank you for the bid	RFQ222N-LFTWN
	Awarded To SupplierPEER BEARING COMPANYAwarded Date09/15/2012 11:43:15 PMAwarded ByUAwarded Qty960 EACHAwarded Price1Total Price1008CC	Jitriva User .05 EACH
	1 Messages 🚯 1 Bids 👤 2 Suppliers 🗾 D	ocuments

- 3. Now the system will take the user to Create Purchase Order screen
 - a. Following screen shows up.
 - i. Please note that if user picks multiple tickets then the PO Detail Information section shows each Ticket Item number as one tab. So, buyer can switch to each tab and enter the line level details.

Create PO for	RFQ: R	FQH222Y-LF1	F24					(2) How de
PO Header Informa	tion							
* PO #: 🔞					* PO Type: 👔		PO	
PO Status:		OPEN			* Buyer Id: 🔋		ultrivauser ×	
Supplier Name: Terms & Condition:	s	ACORN CORRU	GATED BO	x	Supplier Code:		15264	
* Payment Terms: 👔		Net 45	-		* Delivery Terms:	?	Shipping point	
* Freight Payment Term	1S: ?	Collect	•		* Transportation To	erms: ?	UPS Next Day	
Standard Text * Header Text: 👔 PO Detail Informati	on	PUR-PCD0027			* Footer Text: <table-cell></table-cell>		Footer Text 001	
0994-00K39-0012 RFQ223A-LFTZ2 Item #:	0994-001	(39-0012			UOM:	EAC	н	
Requisition #:					Sub Requisition	n#:		
Comments:	A				Deviation #: F			Add Lines »
Dock Date			Quantity		Unit Price		Total Price	Delete?
09/28/2012			50.000		0.2500		12.5	*
Total			50.000	Avg. Unit Pric	e 0.2500		12.5000	
						Validate PO	Submit PO »	« Back To RFQ

- 4. Enter Following information:
 - a. PO #
 - b. Comments
- 5. Optionally change the values:
 - a. Buyer may change the terms and conditions if he/she needs to.
 - b. Buyer may change the Line Level schedules (Qty or Price) if he/she needs to.

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PO Detail Informatio	n					
0994-00K39-0012	1					
RFQ223A-LFTZ2						
Item #:	0994-00K39-0	012		UOM:	EACH	
Requisition #:				Sub Requisition #:		
Item Revision #:	A			Deviation #: 👔		
Comments:				А. Т		Add Lines
Dock Date		Quantity		Unit Price	Total Price	e Delete?
09/28/2012		50.000		0.2500	12.	5 🗱
Total		50.000	Avg. Unit Price	0.2500	12.500	D

- i. To add additional schedule use Add Line button.
- ii. To remove a schedule use Delete icon in the row level.
- c. Once the values are entered, user must click on the Validate PO button.
 - i. System shows "Validated Successfully" status message if there are no errors. If there are errors in the data entry then system would show the respective field in the red color border.
 - ii. The Submit PO button is enabled once there are no errors.
 - 1. User can click the Submit PO button to create the PO.
 - iii. Then system shows PO Set successfully message and takes the user back to Waiting for PO section:

-	Waiting For PO RFQs		Y Filter
	PO set for RFQ RFQH222Y-LFT24 sucessfully	\boxtimes	
iv			

2.3.11 Extending RFQ

Buyer may extend the due date of an RFQ. Buyer may extend the whole RFQ Header due date or individual line.

To extend the RFQ Header due date buyer may use these instructions:

- 1. Click on the Open RFQ option
- 2. In the Action fly out menu for the RFQ that buyer wants to extend by clicking on the Extend menu option as shown below



3. Then system shows a popup window for buyer to enter the new due date and reason for extension

Ultriva User	Оре	Open RFQs									Ƴ Filter	👾 Favorites
Life Fitness Franklin Park	RFQ	RFQH222Z-LFTQL Posted on 09/14/2012										
Extend RFQ:	FTQ	L						3B-LFT	BJ			
Create RFQ New RFQ Due Da	ate											
Create RFQ fo	1SIO 4	Se	epten	nber	2012		Þ					
	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
Requisitions W	- 2	3	1	5	6	7	1					
	9	10	11	12	13	14	15		Extend RFQ »	X Cancel		
12 Open REQ	16	17	18	19	20	21	22					
opontala	F 23	24	25	26	27	28	29	09/13/2012				
	30											
Closed RFQ			То	dav				-0012		RF	Q223A-LFT	Z2
		SOLE WRAP										

To extend the due date for RFQ Ticket or Line buyer may use these instructions:

1. Select the extend menu option for line item level fly out menu as shown below

Ultriva User	Open RFQs	🏾 Filter 🖉 Favorites
Life Fitness Franklin Park	RFQH222Z-LFTQL Posted on 09/14/2012	
 Create RFQ Create RFQ for Multiple Requisitions Waiting 	0017-00003-0696 LINE-CORD: R/A; CEE7; 103" 10A 250V D Qty: 300 EACH Dock Date: 11/30/2012 RFQ Due On: 10/17/2012 Please provide your bids on or before due date. I Messages 1 Messages 1 Bids 3 Suppliers	REQ223B-I FTB.I Cancel RFQ Extend RFQ Print RFQ Hide RFQ ments
(12 Open RFQ	RFQH222Y-LFT24 Posted on 09/13/2012	

2. System shows following new due date and extend reason edit boxes. Once the values are entered please click the Extend button as shown below.

0017-00003-0696	RFQ223B-LFTBJ	•
LINE-CORD: R/A; CEE7; 103" 10A 250V D		
Qty: 300 EACH		
Dock Date: 11/30/2012 RFQ Due On: 10/17/2012		
Please provide your bids on or before due date.		
New RFQ Due Date 10/17/2012		
Reason for Extension:		
	\sim	
	Extend RFQ	

2.3.12 Canceling RFQ

Buyer may cancel a RFQ Line at any point of time before the RFQ Line is closed. To cancel RFQ Line buyer may use these instructions:

- 1. Click on the Open RFQ option
- 2. In the Action fly out menu for the RFQ Line that buyer wants to cancel please click the Cancel menu option as shown below



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- 2.3.13 Creating Requisitions
- 2.3.14 Approving and Converting Requisitions to RFQ

3 Ultriva RFQ Application – Supplier User Interaction

The interaction for supplier user starts from acknowledging the RFQs, submitting the bids, and waiting for their result. This section describes how a supplier user interacts with the RFQs.

3.1 Uploading Logo

Supplier Administrator may upload their business logo by clicking the My Account and My Business Unit menu option.

User should click the Attachments tab and click Add/Edit option to upload the logo.

View Supplier PEER BEARING COMPANY		Last modified on [10/31/2011 04:10:30 PM] by [Integration User]	🛛 🗐 How do l?
🚔 Add 🥖 Edit 🔀 Delete Crop			
Profile Attachments			
File Type	Title	Preview	
Logo	peer.jpg		
Sorted by: Name			1 to 1 of 1
			X Cancel

3.2 Uploading Catalog

Supplier Administrator may upload their services/price catalog to the system.

User should click the Attachments tab and click Add/Edit option to upload the catalog.

File Upload			How do I?
To attach a file click on the Br	owse button to locate it in your computer.		
Type Catalog			
* Attachment:	Browse		
* Required field		Upload File(s) »	X Cancel

3.3 RFQ Page

Supplier user goes to RFQ page from Actions/Supplier Actions menu option. Under Supplier Actions menu user should click the RFQ menu to interact with RFQs.

The RFQ Page is the core of the RFQ Application where Buyer and Supplier interact with each other. The page is designed in such a way that it is extremely user-friendly and allows users to quickly navigate between various tasks that one would perform with RFQ objects.

3.3.1 RFQ Page Layout

The page has following layout:

- 1. Left Hand side top portion
 - a. Current logged in User's profile
- 2. Left Hand side Tabs/Menus
 - a. Provides access to various RFQ related activities
- 3. Right hand side shows all the RFQs related to the option chosen in the Left hand side menus. For instance if we click on Open RFQs tab/menu/button then we will see all the RFQs related that main status filter.



3.3.2 Acknowledging the RFQ

Supplier must acknowledge the RFQ before they can submit their bid.

- 1. To acknowledge the RFQ supplier user logs into the system and clicks on Actions/Supplier Actions/RFQ menu.
- 2. Then the system shows all the Open RFQs for the supplier. (If all the Open RFQs been acknowledged then the No Records found message shown)
- 3. Following screenshot shows how a supplier user accepts the RFQ.
 - a. If the supplier does not want to bid for this RFQ then they must click on the Unable to Comply button.



Right Hand side – List of RFQs related to the option chosen in the Left tabs

Following screenshot shows the document attachments if any.

	RFQ223B-LFTBJ Posted On: 09/14/2012 Due On: 10/17/2012	-
203	0017-00003-0696	
	LINE-CORD: R/A; CEE7; 103" 10A 250V D	
	Qty: 300 EACH Dock Date: 11/30/2012	
	Please find the additional design documents	
	See Details 🥌 2 Comments 🖂 History 🔽 Terms	0
	Requested on 09/14/2012	
	Documents	
Documents –	🔎 Design Doc 🖉 Design Doc	
	I have read and agreed to the Terms and Conditions Accept If you wish to decline this RFQ please click Unable to Comply	

3.3.3 Acknowledging All new RFQ

Supplier may accept all the new RFQ Tickets by clicking the Accept All button. This is a quick way to accept and then later review them one at a time in the Submit Bid Options.

Open RFC	Σ	Accept All	🏾 Filter 🛛 👻 Favorites
23	RFQ223B-LFTBJ Posted On: 09/14/2012	D	ue On: 10/17/2012
	0017-00003-0696 LINE-CORD: R/A; CEE7; 103" 10A 250V D Qty: 300 EACH Dock Date: 11/30/2012 Please find the additional design documents		
	See Details 🥥 2 Comments	History 🚺 Ten	ms 📀
	Requested on 09/14/2012		
	Documents		
	🔎 Design Doc 🖉 Design Doc	🔎 Desi	gn Doc
	I have read and agreed to the Terms and Condition If you wish to decline this RFQ please click	ns Accept nable to Comply	

3.3.4 Submitting the Bid

Supplier must acknowledge the RFQ before they can submit their bid.

- 1. To submit the bid the supplier must select "Submit Bid or Acknowledged RFQ" option.
- 2. In this option each RFQ Tickets are shown in a separate easy to access view.
- 3. Select the Bid tab if the tab is not currently selected.
- 4. All the values except Price is auto filled for easy data entry.
 - a. Please note that if buyer asks for multiple schedules then the data grid shows each schedule.
- 5. Enter proposed unit Price and add any additional notes and Click Submit.
 - a. Supplier may propose different unit price for each schedule.

			Enter Quanti	tv .			Add Ad
C	Please Enter the	Bid Details:		-7			Schedu
S C	Dock Date	Required Quantity	Promised Date	Fromise Guantity	Unit Price	Extended Price	
h	11/30/2012	150	11/30/2012	150		Enter Pr	ice
d	12/28/2012	100	12/28/2012	100			
u I	01/16/2013	50	01/16/2013	50			
e s	Total:						
	Notes:						
Enter Notes 🗕	-				<u> </u>		
					▼		
iation from Design Specs	Is there any D	esign Deviation?					

3.3.4.1 Submitting the Bid with different schedules

Supplier may split the schedule that buyer asked. For instance if buyer asks 50 units for day 1 and supplier wants to supply 25 units on day 1 and supplier wants to ship the remaining 25 units on a different date then they can do so by changing the quantity and clicking Add Line as shown below.

Dock Date	Required Quantity	Promised Date	Promise Quantity	Unit Price	Extended Price
11/30/2012	150	11/30/2012	150	1	150.0000
12/28/2012	100	12/28/2012	100	1	100.0000
01/16/2013	50	01/16/2013	25	0.95	23.7500
		01/29/2013	25	0.95	23.7500
Total:					297.5000
Notes: We are happy to last schedule line	provide our bid. V	Ve wanted to let you kr	now that we split th	e *	

Please note that the added line can be removed by clicking the check box and then clicking the Delete line as shown below in the screenshot with arrow marks.

See Details	s 🔥 Bid	🥥 2 Comme	nts 🛛 🖂 Hist	tory 📑 T	erms
Please Enter the I	Bid Details:			Add Line	Delete Line
Dock Date	Required Quantity	Promised Date	Promise Quantity	Unit Price	Extended Price
11/30/2012	150	11/30/2012	150	1	150.0000
12/28/2012	100	12/28/2012	100	1	100.0000
01/16/2013	50	01/16/2013	25	0.95	23.7500
	⇔∎	01/29/2013	25	0.95	23.7500
Total:					297.5000

3.3.4.2 Expired RFQs

If RFQ due date has already passed and supplier has not responded the RFQ may still show up in the supplier Queue but the supplier user will not be able to respond to it.

3.3.5 Communicating with Buyer on RFQ Line

Supplier may communicate to the buyer at any point of time by clicking on the Comments Tab.

- 1. To add additional notes please click Add Comments.
- 2. Enter notes and attach any documents.
- 3. Press Reply button to submit the notes.



<	Ultriva User Please provide your bids on or before due date.	30 minutes ago
R	Ultriva User Please find the additional design documents	28 minutes ago
<	Jane Roe We are happy to provide our bid. We wanted to let you know that we the last schedule line into two lines.	11 seconds ago split
We can prov	ment vide additional discount 5% if the payment term is Net 30.	
Attach Add	Itional Documents	Reply

3.3.6 Viewing Terms

Supplier may view Terms and conditions attached to an RFQ Line at any time by clicking on the Terms Tab.

See Deta	ails 🔥 E	Bid 🥌 4 Comments 🔤 History 🔽 Terms
Terms	Code	Description
Payment	NET45	45 days payment term
Freight	Collect	Collect
Delivery	SHIP	Shipping point
Transportation	UPSNEXT	UPS Next Day

3.3.7 Viewing Action History

Supplier may view Action History on an RFQ Line at any time by clicking on the HistoryTab.

See Details 🛛 🔓 Bi	d 🍚 4 Comments	History	rerms	0
Requested on 09/14/20	12			
KUREKS Accepted on 09/14/2012	2			
KUREKS Responded on 09/14/20	12			

3.3.8 Printing RFQ using PDF

Supplier may Print the RFQ by clicking on the Print option shown in the on the fly Action menu as shown below. (Please note that the on the fly action drop down menu shows up when a user hovers the mouse on a RFQ)



3.3.9 Checking the result for submitted RFQ

Once Supplier submits the bid and wants to check the status of the RFQ bid then he/she may use the Bids Won and Non-Competitive Bids menu option to check the status.

3.3.9.1 Bids Won

This option shows all the bids won by the supplier. The number within the Green color shows the number of bids won by this supplier.

Ŧ



3.3.9.1 Non Competitive Bids

This option shows all the non-competitive bids submitted by this supplier. The number within the Red color shows the number of bids not awarded to this supplier.



3.3.10 Filtering the data

Each option under RFQ shows predefined set of date range data. An user can change the filter condition by selecting the filter option. The filter option is remembered in users profile so that when he or she revisits the RFQ module the same is applied.

			Bids Sub	mitteo	d				Y Filter	Favorites
	Mark B BEMIS M. COMPAN	Filter By: Requested By:		R	esponded By:					'30/2012
		Item:		PI	roduct Line:		Commodif All	y Code:		
O Open	RFQ	Due Date:		R	esponded Date:		Show: All	G	•	
O Ackno	owledge.			Lø s	ee Details S Bid	🗩 1 Co	mments	History	_6 т	erms 📀

Please note that to hide the filter please click the Go button or click on the filter icon again.

4 Alerts for RFQ Application

Ultriva RFQ Application supports various rules based alert notification. Following pre-defined alert templates are available.

These Alerts can be sent to Buyer and Supplier users.

4.1 RFQ Alert Templates

This section explains these pre-defined rule templates:

4.1.1 When a RFQ is requested

This template can be used to send an alert when a new RFQ Request has been sent to Suppliers

4.1.2 When Supplier Responds to a RFQ

This template can be used to send an alert when a supplier user responds to a RFQ with Bid details.

4.1.3 When Supplier unable to comply to a RFQ

This template can be used to send an alert when a supplier user does not want to bid for a RFQ.

4.1.4 When RFQ is canceled

This template can be used to send an alert when a RFQ has been canceled by buyer.

4.1.5 When RFQ Due Date has changed

This template can be used to send an alert when a buyer changes the RFQ due date.

4.1.6 When an user adds Notes to RFQ

This template can be used to send an alert when a user sends additional notes

4.1.7 When Buyer picks the winning Bid for RFQ

This template can be used to send an alert when buyer picks the winning bid

4.1.8 When Supplier has not submitted Bid - one day before due date

This template can be used to send a reminder alert for suppliers who have not yet submitted the Bid

4.1.9 When Winning Bid is not selected for a RFQ after Due Date

This template can be used to send a reminder alert to buyer when RFQ Due Date has expired but no winning bid is chosen

4.2 Sample Alert

In this sample the Due Date Changed rule template was used.

When the buyer changed the Due Date following notification was trigged and shown to the user in the Alerts Panel.

Following rule message is used for this rule:

--

RFQ Due Date has changed for following RFQ Ticket

```
RFQ Ticket ID: [RFQ:BPFL_GID]
```

```
Item No.: [ITM:ItemNo] Qty: [RFQ:RequestQty]
```

New Due Date: [%HDID;DS; RFQ:RFQDueDate]

Alerts		•=
Date 🔻	Subject ⊽	
09/15/2012	Supplier PEER BEARING COMPANY is un	🗊 😫
09/15/2012	RFQ Due Date has changed	
09/15/2012	Supplier PEER BEARING COMPANY has r	
09/15/2012	Supplier PEER BEARING COMPANY has r	
Sorted by: D	ate 1 to 4 of 15 Prev Page 1 -	Next

Here is how the message gets formatted.



To go to list of alerts users can use the Alerts Panel's Manage option.

Date V S	Subject ⊽	😂 Manage 🚨 Dismiss All		
09/15/2012 5	upplier PEER BEARING COMPANY	is un	ş	*
09/15/2012 R	FQ Due Date has changed		ş	×
09/15/2012 S	upplier PEER BEARING COMPANY	has r	ş	×
09/15/2012 S	upplier PEER BEARING COMPANY	has r	ş	×
Sorted by: Date	1 to 4 of 15 • Prev	Page 1 💌	Next •	•

ts Lis	t		0
Зу	Select Operator Enter Value	50 Go 🌔	Alert Message
ev N	ext 🕨 🕱 Dismiss 🗙 Dimiss All		RFO Due Date has changed for following RFO Ticket
e 🔻	Subject ⊽	SourceID ⊽	RFQ Ticket ID: RFQ223R-LFTPL
5/2012	Supplier PEER BEARING COMPANY is un	RFQ223R-LFTPL	Item No.: 0017-00003-0685 Qty: 25.0000
15/2012	RFQ Due Date has changed	RFQ223R-LFTPL	New Due Date: 10/16/2012
5/2012	Supplier PEER BEARING COMPANY has r	RFQ223D-LFT6J	
15/2012	Supplier PEER BEARING COMPANY has r	RFQ223B-LFTBJ	Click here to Login to the Application
15/2012	Supplier PEER BEARING COMPANY has r	RFQ223B-LFTBJ	
15/2012	Supplier PEER BEARING COMPANY is un	RFQ223C-LFT62	Notes: Please provide your bids on or before due date.
15/2012	New RFQ Ticket for 0017-00003-0685	RFQ223R-LFTPL	
12/2012	Supplier BEMIS MANUFACTURING COMPAN	RFQ222Q-LFTY9	
12/2012	Supplier BEMIS MANUFACTURING COMPAN	RFQ222X-LFTFQ	
12/2012	Supplier ACORN CORRUGATED BOX has r	RFQ222R-LFTAR	
12/2012	Supplier BEMIS MANUFACTURING COMPAN	RFQ222Y-LFT28	
12/2012	Supplier PEER BEARING COMPANY has r	RFQ222N-LFTWN	
12/2012	Supplier PEER BEARING COMPANY has r	RFQ222Y-LFT28	
2/2012	Supplier PEER BEARING COMPANY has r	RFQ222X-LFTFQ	
12/2012	Supplier ACORN CORRUGATED BOX is no	RFQ222X-LFTFQ	

4.3 Sample Digest Alert

Ultriva Application supports email alerts that can be sent every few hours. While doing so an administrator can configure the message body to be formatted using TABLE format for easy readability.

In this example we are configuring a rule which has to fire when a supplier responds to a RFQ with bid. We also want to send the notification every 4 hours instead of immediate delivery.

- 1. From Admin/Rules menu option, we picked Add option.
- 2. Then picked the "When Supplier responds to a RFQ" rule template.
- 3. Then in the message definition we would enter something like this:
- 4. Received responses from Suppliers on following RFQ(s).
 - {|
 - |-

!RFQ ID!Item No!Supplier Name!Requested DockDate!RFQ Quantity!Responded Qty|Unit Price

|-

|[RFQ:BPFL_GID]|[ITM:ItemNo]|[RFQ2SV:SupplierName]|[%HDID;DS; RFQ2SV:RequestDate] | [RFQ2SV:RequestQty] | [RFQ2S:ResponseQty] | [RFQ2S:ResponsePrice]

- |}
- 5. Then clicked the Preview Rule to see how the message would be formatted.

	Preview Rule:	Supplie	er Responds	to a RFQ					
Rule Wizard: Message I	From: Ultriva	Lean Suit	te					How do	
Select Rule Template Subject: Received Responses from Supplier(s)									
Message Information Received responses from Suppliers on following RFQ(s).									
* Send message via:								Rule	
Table Browser Email C	RFQ ID	Item No	Supplier Name	Requested DockDate	RFQ Quantity	Responded Qty	Unit Price		
Buyer User Purchase User	RFQ224S-	Test- 123	Test Supplier	09/16/2012	10	10	1		
ultrivauser × Message Subject: ♣ Insert Field Received Responses from Supplier Message Body: ♣ Insert Field	Click here to Logi	n to the App	plication						
				Close					
💼 👄 🍚 🛄								_	
[RFQ2S:ResponsePri }	ce]					*			
<u>Click here to Login to</u>	o the Applicati	<u>on</u>							
			Ultriva © Co	pyright 2011			In.	Applicatio	

The format looks nice so we can click next and save the rule.

The output of this email notification as shown below:

--

Received responses from Suppliers on following RFQ(s).

RFQ ID	Item No	Supplier Name	Requested DockDate	RFQ Quantity	Responded Qty	Unit Price
RFQ223A-LFTZ2	0994-00K39-0012	ACORN CORRUGATED BOX	09/28/2012	50.0000	50	0.25
RFQ223R-LFTPL	0017-00003-0685	ACORN CORRUGATED BOX	10/31/2012	25.0000	25	1
RFQ222M-LFTC6	0017-00003-0685	ACORN CORRUGATED BOX	09/28/2012	550.0000	550	1.1

Click here to Login to the Application