

## Request for Quote

### Overview:

The Request for Quote feature enables the user to request a quote for materials purchased from multiple suppliers. The request may be due to a change in supplier stock availability, a better service required or price.

### To Create a Request for Quote

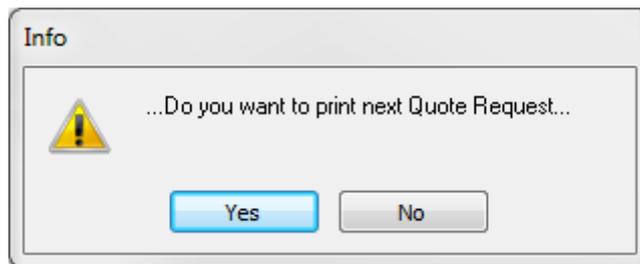
From the OPTO ribbon, select the 'Purchasing' tab and **click** on the 'New Purchase' icon. **Click** in the **RFQ** box to tick and the window will change.

Mat	U	Description	Job Tic	Job Qty	Act Qty	Unit Price	Tax	Total Unit	Due Date	Acc	Rev

In the table on the top right of the window, enter the Supplier Code then **press <TAB>** to display the **Attention** field, repeat for other suppliers if necessary. The **Quote Req** field is to record the supplier quote number when it has been received. Enter the required information in the **Date** fields and in the **Emp No** fields. **Click** in the **Mat** column and **press <F2>** then select the materials required from the pop-up list and **click** on **OK**.

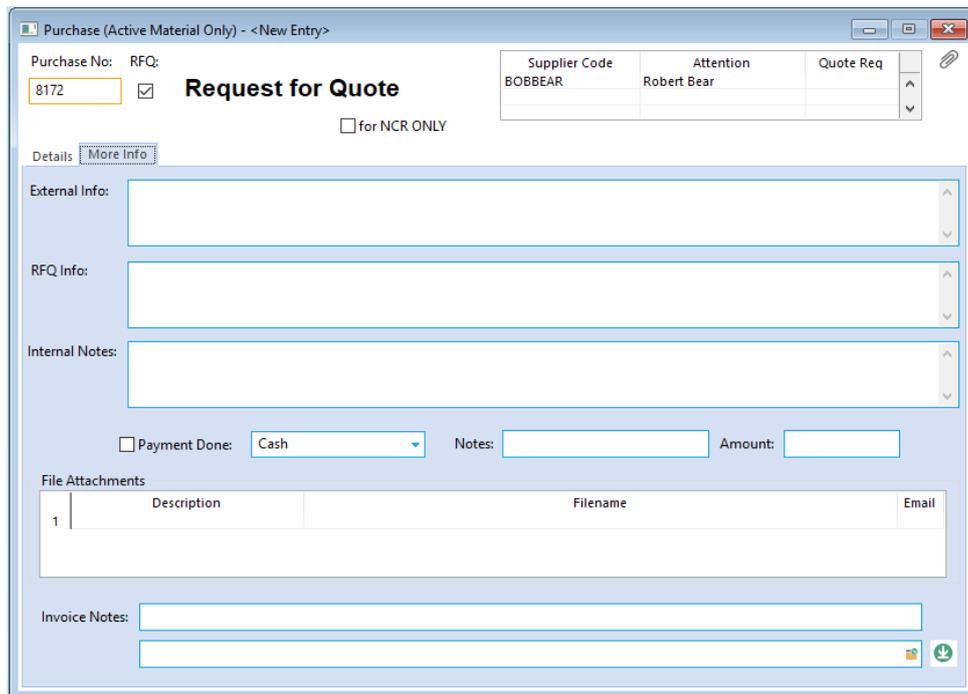
Mat	U	Description	Job Tic	Job Qty	Act Qty	Unit Price	Tax	Total Unit	Due Date	Acc	Rev
00-000-000	EAC	substitute material		.0000	1.0000	.0000		.00	08/02/19	5-1200	

Save the Request for Quote by **pressing <F9>**. Print the RFQ as required, if multiple suppliers are used on the RFQ a message will appear in front of the 'Print Preview' window, select the required option.



### The 'More Info' Tab

Text entered in the "External Purchase Info" field appears on the purchase order when it is printed. Text entered in the "RFQ Info" appears on the Quote Request when it is printed. Text entered in the "Internal Info" area appears when completing a Material Delivery. Text entered in the "Invoice Notes" field appears in a pop-up message when the user opens the Purchase Invoice for the purchase.



When a quote has been accepted open the Request for Quote via the 'Edit Purchase Order' feature and **click** on the **RFQ** box to un-tick. In the **Supplier Code** field **press <F2>** and select the required supplier from the pop-up list then **click** on **OK**. Edit the **Act Qty** and **Unit Price** columns as necessary and **press <F9>** to save the Purchase Order.

