## **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.

File	HOME	CONTACTS	RESOURCES INVENT	DRY QUOTES	PURCHASING	ORDERS	JOBS/SCHEDULING	INVOICING	QUALITY	
New	Save	Copy Cut I Paste Pui	Rew rchase	nase Delivery Purc Print Inve Purch	thase Purcl pice Outsta	hase Materi nding Auto Or	al Sub Contract der Purchase	Material Issue	Edit Issu Rick for ue/Pick	
ſ	💷 Purchase (A	ctive Material Or	nly) - <new entry=""></new>					- • •		
	Purchase No:       RFQ:         8171       Image: Code interval									
	Date Entered: Date Required: Attention: Deliver To:									
	Currency:	Emp No:	Emp Name (entered):							
		Emp No:	Emp Name (signature)	i:	Orig Due	Show Weigh	t Show Sell Pr	ice ⊠Rev □RFQ Notes		
	Mat	U	Description	JOD IIC JOD	Qty Act Qty	Unit Price Tax	lotal Unit Due Dat	e 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 <u>OK</u>.

Purchase (Active Material Only) - <new entry=""></new>								
Purchase No:	RFQ:			Supplier Code	Attention	Quote Req		
8171	⊠ Req	uest for Quot	e	BOBBEAR	Robert Bear			
Orig		Show Notes	Mat Cert Req.					
Details More I	Info							
Date Entered:	Date Required:	Attention:		Deliver To:				
05/02/2019	08/02/2019		-					
Currency:	Emp No:	Emp Name (entered):						
-	1 👻	Robert JONES						
Div:	Emp No:	Emp Name (signature):		Orig Due	Show Weight S	how Sell Price Rev		
1 -	1 👻	Robert JONES	••	Not Confirmed Pr	ice	REO Notes		
Mat 00-000-000	EAC substitute	Description	Job Tic Job	Qty Act Qty U .0000 1.0000	Jnit Price Tax Total Unit .0000 .0	Due Date Acc Rev 0 08/02/19 5-1200		
<ul> <li>Required bef</li> <li>Non-Inv with</li> </ul>	ore due Shi h stock	o Via:			•	Use Clt Order		
<ul> <li>Stock Availat</li> <li>Uom2 used</li> </ul>	ble Tota	(Ex): \$.00	Тах:	\$.00 Total (Ir	nc): \$.00			

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.

Info	
	Do you want to print next Quote Request
	Yes No

## 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.

Purchase (Ac	tive Material Only) -	<new entry=""></new>					×
Purchase No: 8172	<sup>RFQ:</sup>	est for Quote		Supplier Code BOBBEAR	Attention Robert Bear	Quote Req	Ø
Details More I	nfo	for NCR 0	DNLY			·	
External Info:							^
REO Info:							¥
Ni Qinio.							$\sim$
Internal Notes:							^
							~
C	Payment Done:	Cash	Notes:		Amount:		
File Attachme	nts Description			Filename		Ema	il
Invoice Notes							O

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 <u>OK</u>. Edit the *Act Qty* and *Unit Price* columns as necessary and **press <F9>** to save the Purchase Order.

💷 Purchase (Ac	tive Material Only	) - <new entry=""></new>							• ×
Purchase No:	RFQ: Job Group	: <u>Supplier Code:</u>		Supplie	er Name:			S	ub WC: 🖉
8172		- BOBBEAR	-	BOB'S	BEARING SU	IPPLIES			- 🔹
Orig		Show Notes	Mat Cert Req.						
Details More	Info			-					
Date Entered:	Date Required:	Attention:		Delive	er To:				
05/02/2019	08/02/2019		•						
Currency:	Emp No:	Emp Name (entered):							
<b>•</b>	1 🗸	Robert JONES							
Div:	Emp No:	Emp Name (signature):		Ori	g Due	Show Weight	Sho	w Sell Price	🗹 Rev
1 🗸	1 👻	Robert JONES	••	No	t Confirmed	Price			RFQ Notes
Mat		Description	Job Tic Ja	h Ohr	Act Obv	Unit Price Tay	Total Unit	Due Date	Acc Boy
00-000-000	EAC substitut	e material	100 110 10	.0000	1.0000	.0000 6	.00	08/02/19	5-1200