How to Use Quick Quotes

web3 allows you to create and run quick quotes to get a simple price submission from either existing or temporary suppliers. This guide will show you how to:

» Create a Quick Quote

» Help Suppliers Respond

» Monitor Supplier Responses

» Use the Quick Quote dashboard

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How to Access Quick Quotes

Once you've accessed **web3**, you'll be able to navigate to Quick Quotes by following the instructions below.

1 Select the Quick Quote menu option.

2 You will then have access to the following 3 sub-menu items:
Dashboard – This will take you to the Quick Quote dashboard, giving you visibility of all quick quote KPIs, widgets and quicklinks.
All Quick Quotes – This will take you to a screen displaying all quick quotes in the system with top-level information displayed.
Create Quick Quote – This will take you to the quick quote creation screen and begin the process of creating a quick quote.

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The Quick Quote Dashboard

The Quick Quote dashboard is the central hub of all quick quote information in the system. It allows you to view KPI's, drillable widgets and use quicklinks to navigate to different system screens. To use the dashboard, follow the steps below:

1 Use the quicklinks to navigate to key areas of your system. To edit the quicklinks shown, click the **Edit Quicklinks** button and follow the steps on 'How to Edit Quicklinks'.
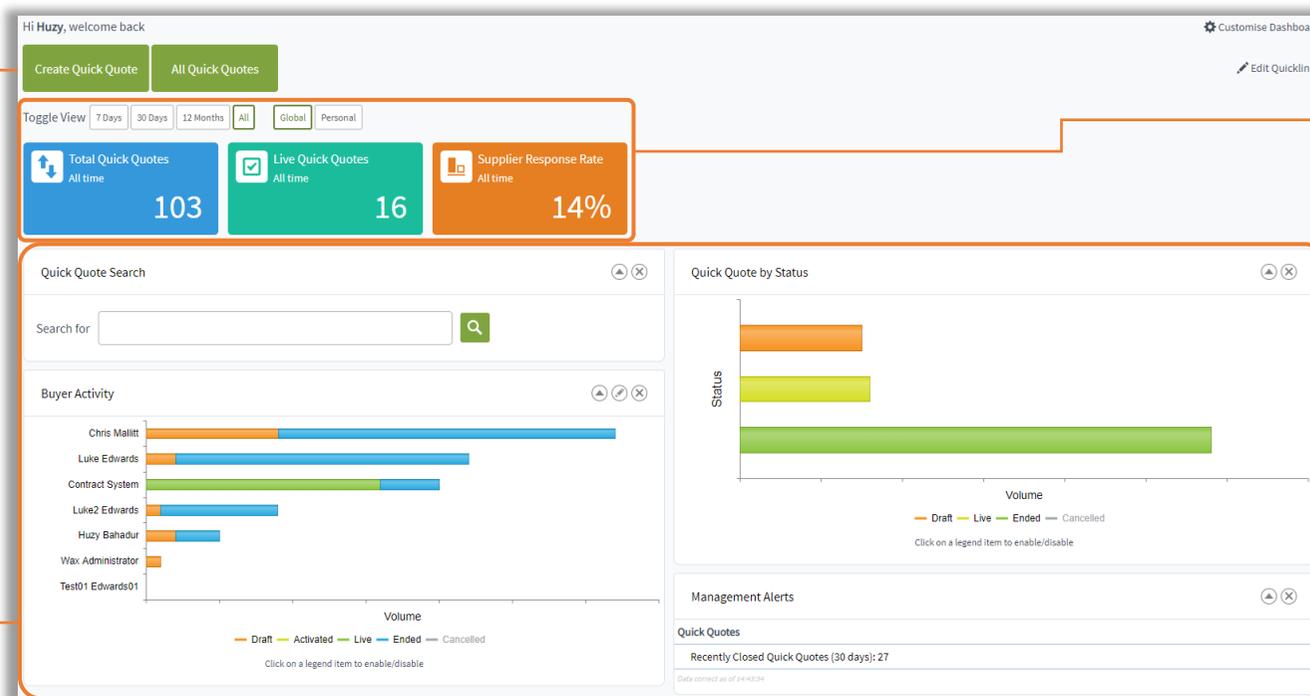
2 Use the toggles to alter the information displayied by the KPI boxes. You can place time filters, as well as selecting whether to just display your own or all system quick quote information.

Hi **Huzy**, welcome back

Customise Dashboard

Create Quick Quote All Quick Quotes

Edit Quicklinks

Toggle View | 7 Days | 30 Days | 12 Months | All | Global | Personal

Total Quick Quotes
All time
103

Live Quick Quotes
All time
16

Supplier Response Rate
All time
14%

Quick Quote Search

Search for [   ] 🔍

Quick Quote by Status

Buyer Activity

Chris Mallitt
Luke Edwards
Contract System
Luke2 Edwards
Huzy Bahadur
Wax Administrator
Test01 Edwards01

Volume

— Draft — Activated — Live — Ended — Cancelled
Click on a legend item to enable/disable

Status

Volume

— Draft — Live — Ended — Cancelled
Click on a legend item to enable/disable

Management Alerts

Quick Quotes

Recently Closed Quick Quotes (30 days): 27

Data correct as of 14:48:34

3 Dashboard widgets show key information and provide functionality to help you view the data that you want. The widgets include a free text search, a view of quick quotes by status, quick quotes by status and user and a management alerts widget.

To edit the widgets shown, click **Customise Dashboard** and follow the steps on 'How to Customised your Dashboard'.

How to Customise your Dashboard

The dashboard can be customised on a user by user basis. To do so, firstly click customise dashboard as explained above and then follow the steps below. Doing this will only edit your dashboard and not the dashboard of other users.

1 Use the switches to choose whether the branding banner and quicklinks are shown or hidden on your dashboard.

Customise Dashboard ⊗

Banner	Hide ⬤ Show
Quick Links	Hide ⬤ Show

Quick Quote

Buyer Activity	☑
Quick Quote by Status	☑
Management Alerts	☑
Quick Quote Search	☑
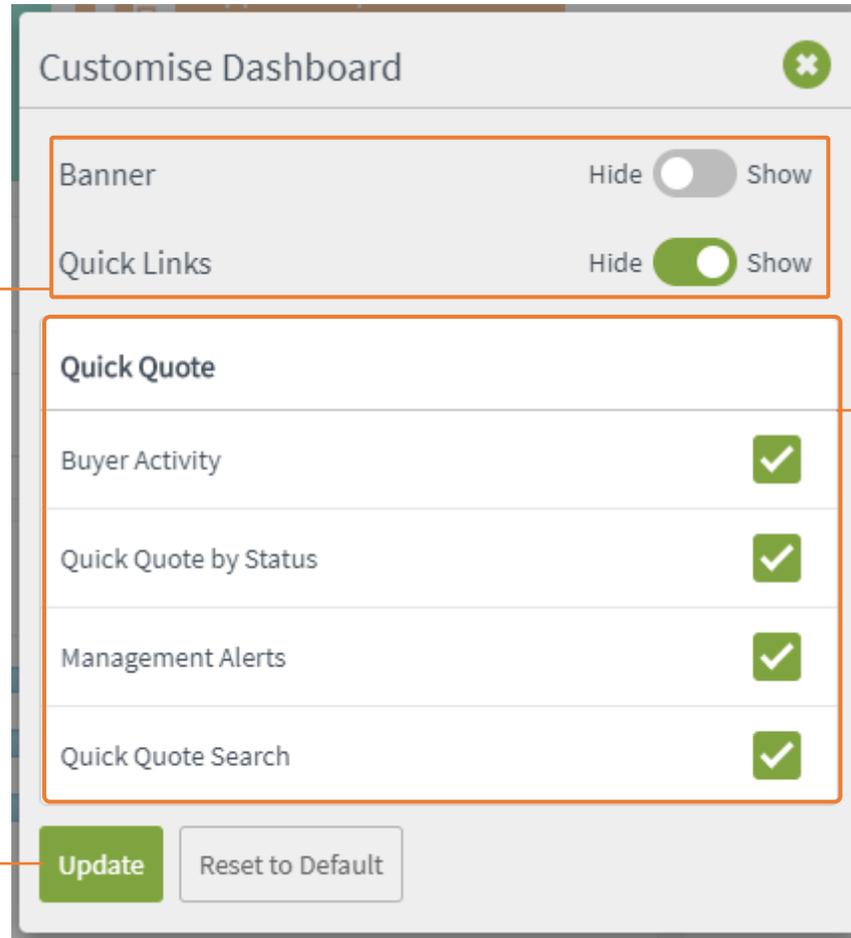
2 Use the tick boxes to choose which widgets you want displayed on your dashboard.

3 Click **Update** to change your dashboard to the selected options or **Reset to Default** to return to the standard dashboard view.

Update   Reset to Default

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How to Edit your Quicklinks

Quicklinks can also be customised on a user by user basis. To do so, firstly click Edit Quicklinks as explained above and then follow the steps below. Doing this will only edit your quicklinks, and not the quicklinks of other users.

1 Use the tick boxes to select or unselect the quicklinks you wish to appear on your dashboard.

2 Click **Update** to change show the selected quicklinks on your dashboard.

Edit Quicklinks

Create Mini Tender	☐
Quick Quote	
Dashboard	☐
All Quick Quotes	☑
Create Quick Quote	☑
Approvals	
Manage Approvals	☐
Approvals Admin	☐
Libraries	
Questionnaire Library	☐
My Email Templates	☐
Supplier Info	
Supplier 360	☐
Supplier History	☐
Supplier Overview Dashboard	☐
Supplier Search	☐

Update

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How to Create a Quick Quote

There are several ways in which you can begin creating a quick quote. To do so, follow the steps below:

Hi **Huzy**, welcome back

Create Quick Quote | All Quick Quotes
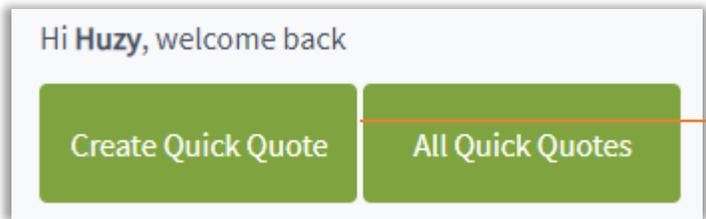
1 Click the **Create Quick Quote** quicklink if you have made it available on your dashboard.

1 Click the **Create Quick Quote** menu option.

⇅	Quick Quote	▶	Dashboard
✓	Approvals	▶	All Quick Quotes
📖	Libraries	▶	Create Quick Quote
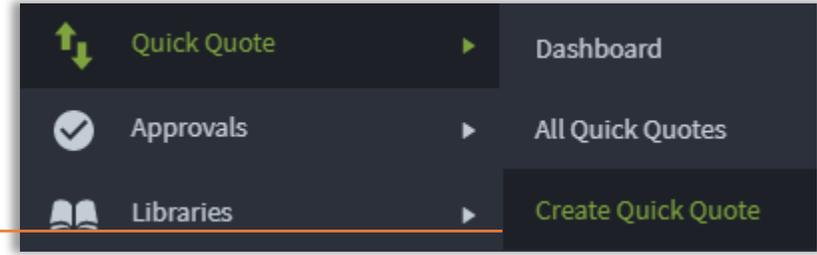
1 Click the **Create Quick Quote** button from the All Quick Quotes screen.

All Quick Quotes ⊕ Create Quick Quote

Search for [   ] 🔍

Set View: Active & Ended Quotes ▼   Items Per Page 20 ▼   Page 1 of 4 of 75 records returned.

| Ref. | Title | Description | Status | Created By | Responses | Entity | Close Date |

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Once you choose any of the options above, you'll be taken to the quick quote creation screen. Follow the steps below to continue the process.

2 Enter a **Title** and **Description** that explain what the quick quote is for. This will be visible to invited suppliers and so should be correctly worded and clear.
You should also select the **Business Entity** that this quick quote is for.

3 Enter an **Open Date and Time** and **Close Date and Time**. This can be indicative in the first instance and edited prior to making the quick quote live.

4 You can set an **Indicative Value** of what you want to achieve from the quick quote. You can also select the base **Currency**. Exchange rates can be set for quick quotes and instructions on how to do this are in this user guide.

5 **Price Breaks** allow suppliers to break the quote down and specify different prices for different quantities. Use this tick box to say whether you want suppliers to be able to do this.

Title: ★
User Guide printing

Description:
Quick quote for the printing of user guides

Entity: ★
Wax User Group ▼

Allow Price Breaks:
☑

Tags:
❌ Printing

Open Date: ★
05/08/2019 13 ▼ 00 ▼

Close Date: ★
08/08/2019 13 ▼ 00 ▼

Indicative Value:
250

Currency: ★
GBP - Pound sterling ▼

Save Cancel

6 Search for and add **Tags** as required.

7 Click **Save**. The quick quote will now be created in draft status.

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How to Use the Quick Quote Screen

Once you've created the quick quote in draft mode, you'll be taken to the quick quote screen. Follow the instructions below to use this screen:

Quick Quote 'User Guide printing'

Activate | Exchange Rates | Copy | Delete

Header | Lines | Suppliers | Responses | Journal

Quick Quote Information   Edit

Reference:
QQ00127

Title:
User Guide printing

Description:
Quick quote for the printing of user guides

Entity:
Wax User Group

Allow Price Breaks:
Yes

Tags:
Printing

Status:
Draft

Open Date:
05/08/2019 13:00

Close Date:
08/08/2019 13:00

Indicative Value:
250.00

Currency:
GBP

Attachments

Notes

1 The tabs breakdown the quick quote information. Click on the tabs to navigate to that area and follow the instruction in this guide on how to use each tab.

2 Actions for the quick quote can be found here. Further instructions on how to activate and set exchange rates can be found further on in this guide. The copy function allows you to create a copy of the quick quote to speed up the process if you're creating a similar quote. Whilst in draft mode you can delete the quick quote.

3 The header tab is broken down into sections. You can use the arrow on each section to expand or collapse that section. To edit the header information, click edit on the **Quick Quote Information** tab.

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How to Add Attachments

Both supplier and buyer, or just buyer visible attachments can be added to a quick quote. To do so, follow the steps below:

1 Either click Browse and select a file or drag and drop your file to attach it. Doing so on the left-hand side means the attachment will be visible to suppliers, doing so on the right side means the documents will only be visible to internal users.

Attachments

Supplier Visible Attachments

Attachments added here will be visible both externally and internally

Drag Files Here
Or Click "Browse" To Add

Browse

📄 Generic RFP.xls ✖

Internal Attachments

Attachments added here will be visible internally only

Drag Files Here
Or Click "Browse" To Add

Browse

There are currently no attachments
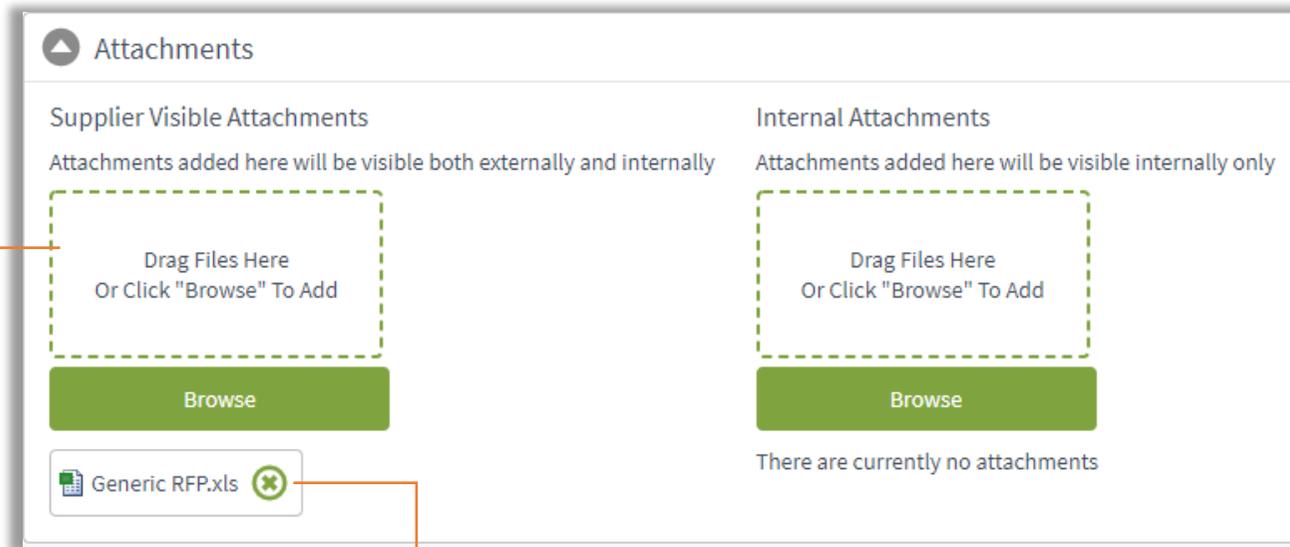
2 Once you've attached a document, it will appear under the side that you added it on. Click the X to remove the document.

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How to Add Notes

Both supplier and buyer, or just buyer visible notes can be added to a quick quote. To do so, follow the steps below:

1 Click **Add Note** to create a new note. Doing so on the left-hand side means the note will be visible to suppliers, doing so on the right side means the notes will only be visible to internal users.

Notes

Supplier Visible Notes

Notes added here will be visible both externally and internally

[Add Note]

There are currently no notes

Internal Attachments

Attachments added here will be visible internally only

[Add Note]

This quote needs to be finalised by 10/08/2019 to ensure the user guides are printed off in good time.
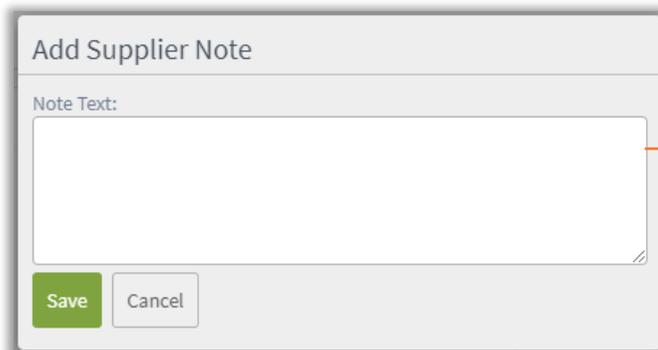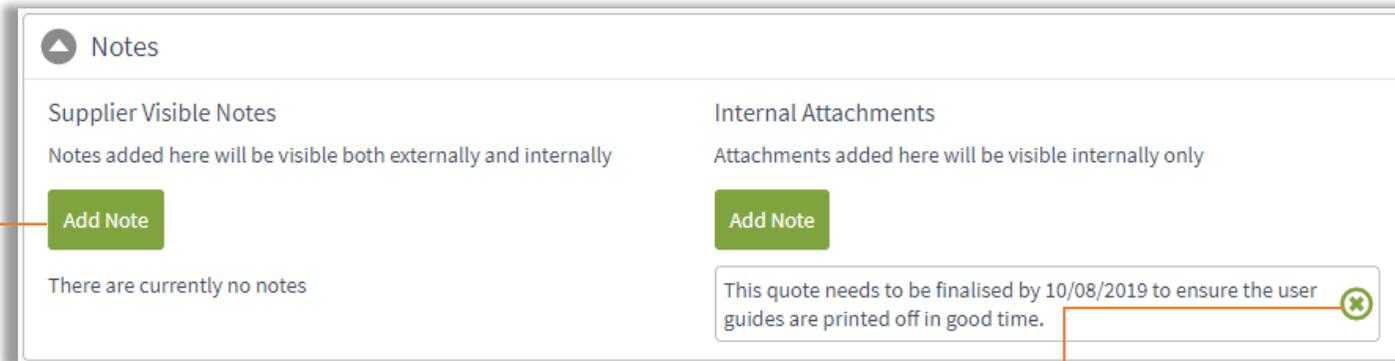
2 Enter your text for the note and click **Save** to create it.

Add Supplier Note

Note Text:

[Save] [Cancel]

3 Click the ⊗ icon to delete a note.

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How to Set Exchange Rates

If you're running a quick quote that spans more than a single country, you may want to set the exchange rates up to allow suppliers to bid in their native currency. To do so, follow the steps below:

(U) Activate   ($) Exchange Rates   Copy   Delete
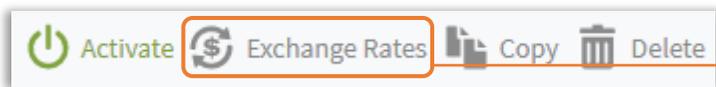
1 Click the **Exchange Rates** button.

3 Select the **From** currency, set the **Exchange Rate** and select the number of decimal points for the **Rounding Precision** when converting back to the default quick quote currency.

2 Click the **Add Currency** button.

Quick Quote Currencies

Click 'Add Currency' to allow for additional currencies to be used by suppliers within this quick quote.

Add Currency

	From	To	Exchange Rate	Rounding Precision
⊗	EUR - Euro ▾	GBP	0.92	2dp ▾

Save   Cancel

4 Once you've added all of the currencies that you want to allow suppliers to bid in, click **Save**.

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How to Use the Lines Tab

The lines tab is where you input the information for the products or services that you want suppliers to bid on. To use the lines tab, follow the steps below:

1 Certain actions relating to lines can be started from these buttons. You have the ability to **Import or Export Lines** to work offline, you can **Manage Columns** to change the data that you either want to define or capture and you can edit the line in the system by clicking **Edit Lines**.

| Header | Lines | Suppliers | Responses | Journal |

Import or Export Lines | Manage Columns | Edit Lines

Values with this style are defaults.

Items Per Page: 20 ▼   No records returned

| Line Number | Item Name ⓘ | Qty ⓘ | Description ⓘ | Unit Of Measure ⓘ | Historic Price | Min Qty ⓘ | Max Qty ⓘ | Price ⓘ |
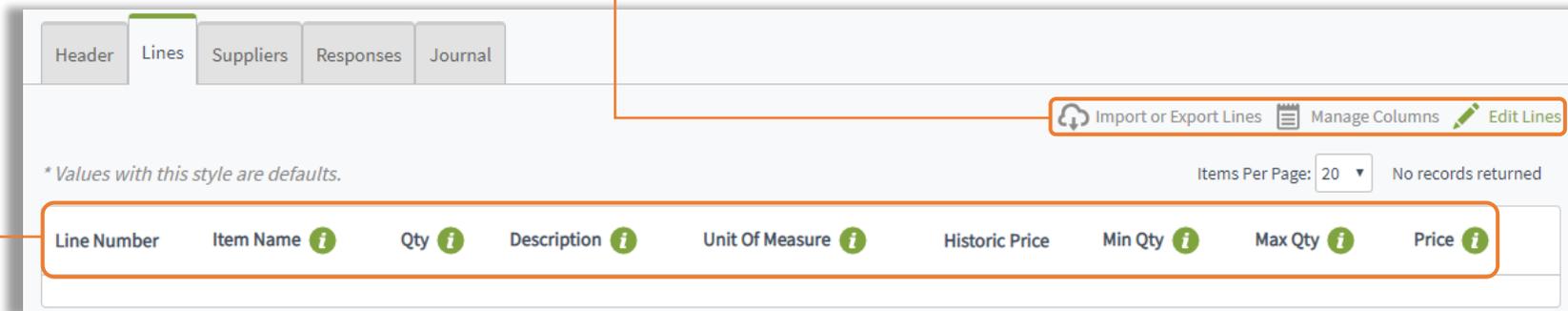
2 The line columns are named here. Click the ⓘ icon to view the supplier access level, maximum size and whether the column will be replicated in price breaks.

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How to Manage Columns

To provide flexibility when using quick quotes, you can add, remove or move columns. This allows you to either define or request extra data from suppliers to manage columns, first click the Manage Columns button and then follow the steps below:
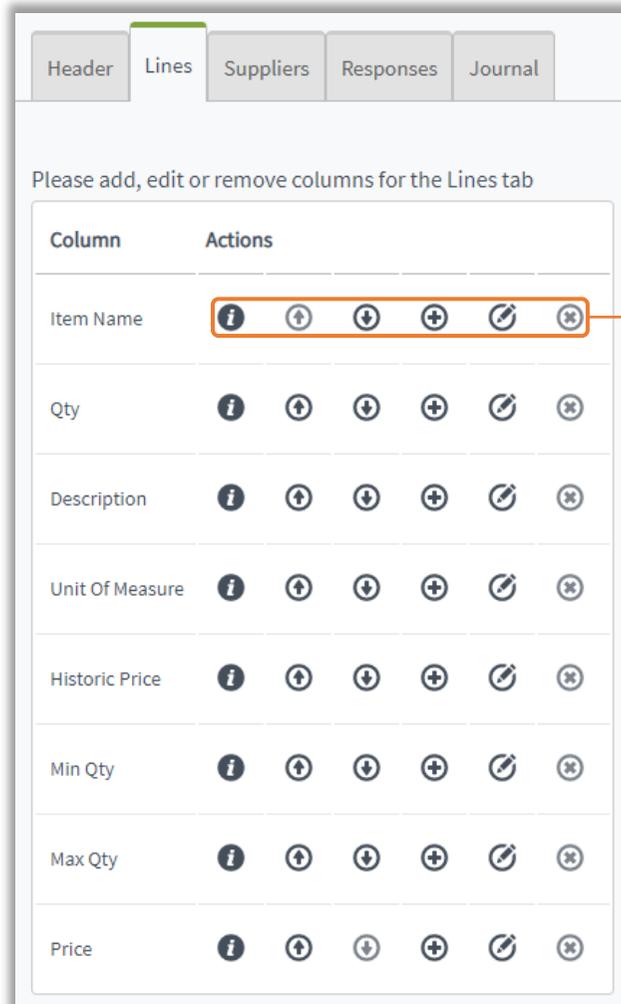
1 For each column, there is associated actions. They are:
Click ❶ to show the details of column.
Click ⊕ to move the column up one.
Click ⊕ to move the column down one.
Click ⊕ to add another column and then follow the instructions on how to add a column.
Click ⊘ to edit the column and then follow the instructions on how to edit the column.
Click ⊗ to delete the column. Default columns can't be deleted.

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How to Add a Column

Having clicked the ⊕ icon, follow the steps below to add a column:

1 Enter a **Title** for the column that described the information that will be captured in the column.

2 Select the type of data that you want to capture with the column from the drop-down options.

3 Select whether the column with be supplier visible, editable or read-only.

4 Select whether the column should be included in price breaks, meaning it duplicates when a supplier chooses to break a line down in separate lines.

5 Click **OK**. Your line will now appear in the lines tab.

Add Column

Title: *

Target Price

Type: *

Short Text ▼

Supplier Access: *

None ▼

Include in price break: *

OK

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How to Edit a Column

Having clicked the ⊘ icon, follow the steps below to edit a column. Your options here will be defined by the data type of the column.

1 Edit the information as required. You can select whether the column is mandatory, rename it, enter a tooltip to make it clear to suppliers what the column is for and set some parameters for the data that can be captured in the column.

Type:
Monitary

Supplier Access:
None

Replicated in price breaks:
No

Title:
Target Price

Mandatory:
☐

Tool Tip:

Default:

Decimal Places:

Minimum Value:

Maximum Value:

Save Cancel

2 Click **Save** to update the information or **Cancel** to remain with the previous information.

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How to Edit Lines

Once you have managed your columns, the next step will be to build out the line items. To do so, firstly click Edit Lines in the lines tab and then follow the steps below:

1 Enter the information for the line where it is supplier visible, or there's no supplier access. For supplier answerable columns, leave them blank.

2 Click the ⊞ icon to add another line below.
Click the 🗎 icon to duplicate the line below.
Click the 📎 icon to add a line specific attachment. This could be a spec or image of the item.
Click 🗑 to delete the line.

Values with this style are defaults.

Items Per Page: 20 ▾   Page 1 of 1 of 1 records returned.

Line Number	Item Name ℹ	Qty ℹ	Description ℹ	Unit Of Measure ℹ	Historic Price	Target Price	Min Qty ℹ	Max Qty ℹ	Price ℹ	🗑
1	User Guide Printing	100	Printing of quick quote user guide - 100 pages in colour.	Each	2.5	2.10				⊞ 🗎 📎 🗑

Commit Changes   Discard Changes

3 Click **Commit Changes** to save your progress or **Discard Changes** to remain with the lines you had before clicking Edit Lines.

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How to Import and Export Lines

When you're working with large amounts of line data, it can often be easier to work offline. Therefore, you have to ability to download your current lines to edit them offline to reimport them, or can you download a blank template to populate and upload. To do this, follow the steps below:

1 Select **Download Template**. This will either download your current lines if you've created any or a blank template to populate.

Import/Export Lines

Export
Click on the download button below to download a template for this Quick Quote which can be completed and re-imported back into the system.

Download Template

Import
Use the field below to select your completed template and import the lines in to this Quick Quote

Drag File Here
Or Click "Browse" To Add

Browse

3 Either drag and drop your saved file into the white box or click browse and select the file. The lines will then automatically upload and you will be notified once they've been process and added to the lines tab.

2 Input your lines on the spreadsheet. Fields highlighted in green are supplier editable and do not require your input. Once complete, save the file.

Line Number	Item Name	Qty	Description	Unit Of Measure	Historic Price	Target Price	Min Qty	Max Qty	Price
1	User Guide Printing	100	Printing of quick quote user guide - 100 pages in colour.	Each	2.5	2.1			

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How to Select Suppliers

For quick quotes, you have the ability to invite suppliers who already exist on your system or create a temporary supplier just for this one event. To use the suppliers tab, follow the steps below:

1 Use the free text search to search for suppliers that you have selected to be invited to the mini tender.

2 To invite existing suppliers, select **Invite Suppliers** and follow the steps on the following page, or click **Create Temporary Supplier** to create a new supplier just for this quick quote and follow the steps on 'How to Create a Temporary Supplier'.

| Header | Lines | Suppliers | Responses | Journal |

Invite Suppliers   Create Temporary Supplier

Search for [   ] 🔍

Sort By Supplier Name ▾   Items Per Page 10 ▾   2 Results.

Aimbo
SUP128

Invited Contacts:
ℹ️ Rori Dell Casa   ⊗

Dom's User Guide Printing Company Ltd
Temporary

Invited Contacts:
ℹ️ Dominic Urmson   ⊗

1
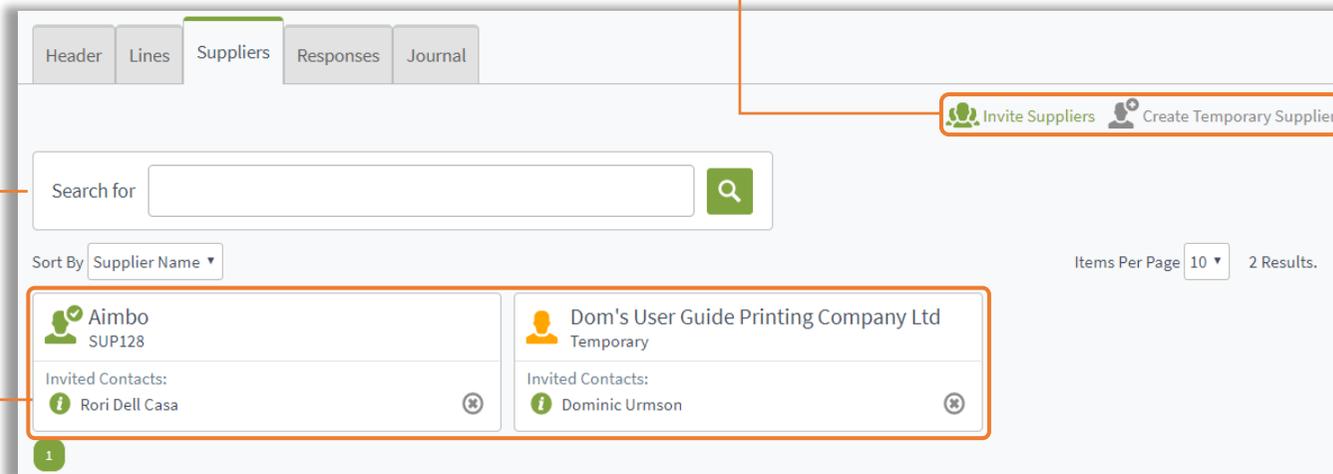
3 All selected suppliers will appear here. A green icon indicates a supplier who is approved on your system. An orange icon indicates a temporary supplier or unapproved supplier. Click the X to remove the supplier from the quick quote.

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How to Invite Suppliers

Having selected Invite Suppliers on the suppliers page, follow the steps below to select the supplier for the quick quote:

3 Click **Return to Invited Suppliers** to return to the view of selected suppliers.

1 Use the drop-down to select what you want to search for and then the free text search to search for suppliers.

Return to Invited Suppliers

Search for: Supplier Name ▼ [   ] Search   Clear Search Results   ☐ Include Temporary Suppliers

Name	Code	Contact	Email	Tag	Category	Status	Action
11111111{}{£$"£		111"£{ 11111	11111111@test.com	Code 1		Approved	👤 Invite
Abata	SUP203	Woody Metham	wmetham5m@themeforest.net	Category 1, Food & Drink	Advertising	Approved	👤 Invite
Agivu	SUP317	Bink Simonich	bsimonich8s@posterous.com			Approved	👤 Invite

2 Click **Invite** on the line of the supplier that you wish to include in the quick quote.

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How to Create a Temporary Supplier

If you want to invite a supplier just for this quick quote, then you can create a temporary supplier account to accommodate this. Having selected Create Temporary Supplier on the Suppliers tab, follow the steps below:

1 Enter the **Supplier Name**, **Contact Name** and **Contact Email**.
It's essential you get the email correct as this is what will be used to send the invite to the supplier.

Create Temporary Supplier

Supplier Name: ★

ACU Design

Contact Name: ★

Dominic Urmson

Contact Email: ★

d.urmson@acudesign.com

Invite Supplier   Cancel

2 Click **Invite Supplier**. This will add the temporary supplier to the suppliers tab. They won't receive the invite until the quick quote is activated though.

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How to Activate the Quick Quote

Once you've set everything up for your quick quote, you'll then want to activate it and invite the selected suppliers. To do so, first go to the header tab and then follow the steps below:

⏻ Activate   💲 Exchange Rates   📋 Copy   🗑 Delete
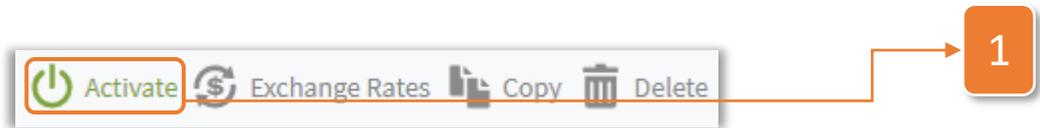
1   Click **Activate** to begin the process of activating the quick quote.

2   Select whether you want the quick quote to be open from the specified open date or to open immediately.
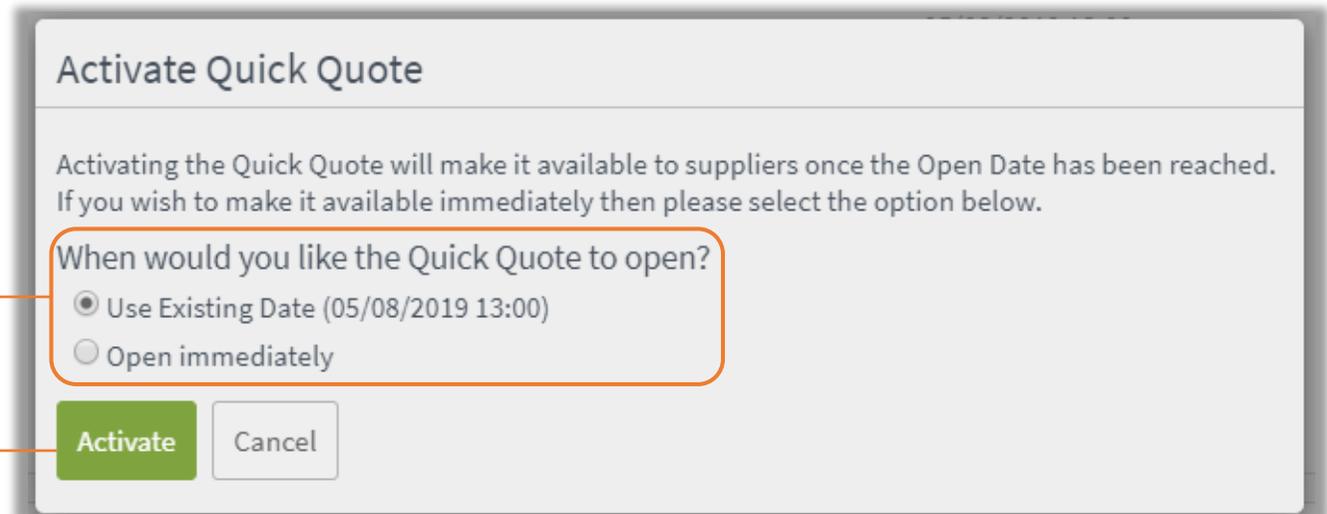
Activate Quick Quote

Activating the Quick Quote will make it available to suppliers once the Open Date has been reached. If you wish to make it available immediately then please select the option below.

When would you like the Quick Quote to open?
- 🔘 Use Existing Date (05/08/2019 13:00)
- ⚪ Open immediately

[Activate]   [Cancel]

3   Click **Activate**. The quick quote will then be open for bidding from either the date specified or immediately and the invites will then be sent to the suppliers.

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How Suppliers Respond

Once you've activated your quick quote, the invited suppliers will receive an email inviting them to provide a quote for the specific lines. This email will contain a link, once the supplier follows that link they will be able to do the below:

1 They can view the header information including any notes and attachments that you added.

2 Suppliers can decline to bid, export a bidding sheet to complete their quote offline and reimport it, as well as collapsing the header sections to make better use of the space on the screen.

⊗ Decline to Bid   ☁ Import/Export Bids   ▦ Collapse Header

⊟ Quick Quote Information

Reference	QQ00132
Title	User Guide printing
Description	Quick quote for the printing of user guides
Default Currency	Pound sterling (GBP)
Open Date	13/08/2019 13:21
Close Date	14/08/2019 13:00

⊟ Notes

No notes have been added to this Quick Quote

⊟ Attachments

📄 Generic RFP.xls

Bidding Currency: **Pound sterling (GBP)**   ✏ Change Currency   🖇 Add new header attachment   📋 Add new header note   ➕ Bid On All Lines

	Item Name	Quantity	Description	Unit Of Measure	
1	User Guide Printing	100.00	Printing of quick quote user guide - 100 pages in colour.	Each	➕ Bid

1

Save All Responses | Submit Bids

3 Suppliers can view the line information that you're requesting quotes for, bid on these lines as well as adding any of their own notes and attachments. They can also select a different currency to bid using with your specified exchanged rates.

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How Suppliers Make Bids

The most important thing for suppliers is to make their bids on your lines. The instructions below show how suppliers do this:

1 Having selected the ⊞ Bid icon on a line the supplier can place their bid for a set quantity. If you've allowed price breaks, they can select to ⊕ Add additional quote and provide a quote for different ranges of quantities.

2 If you have provided different currencies for bidding, then the supplier can select **Change Currency**, select a currency and then chose to either convert bid using the specified exchange rate or convert their bids but keep the values.
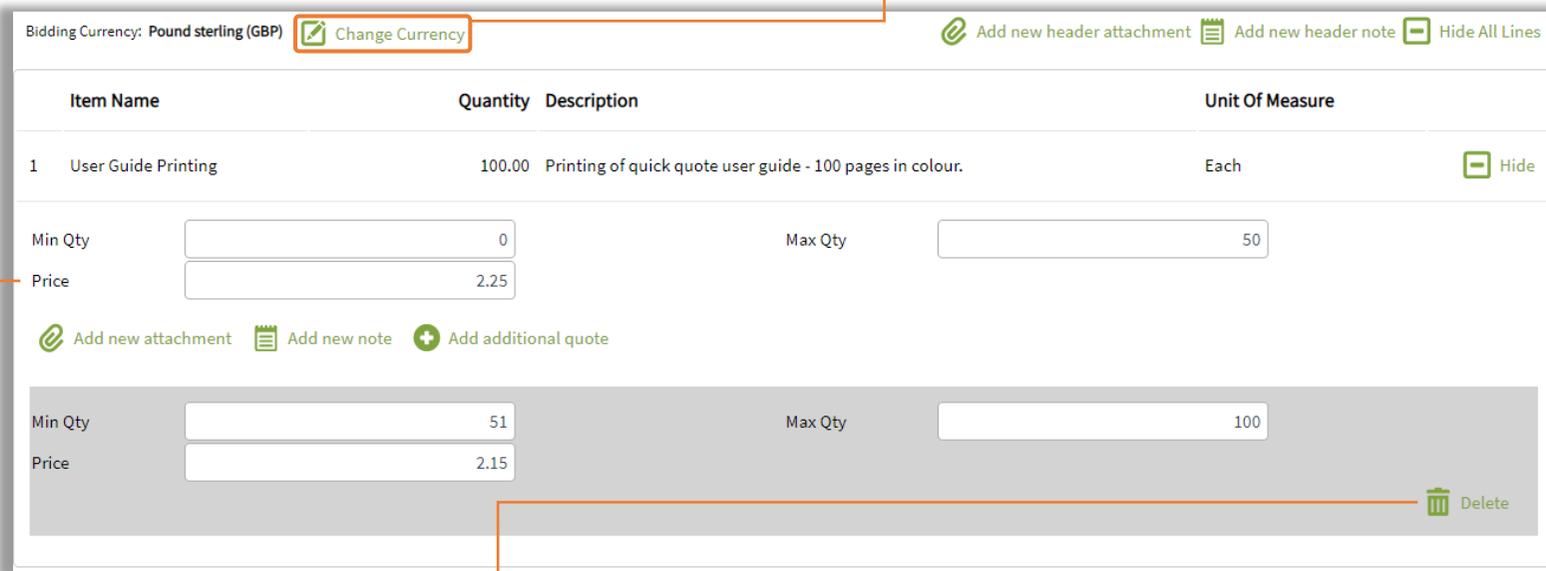
Bidding Currency: **Pound sterling (GBP)** 🖊 Change Currency			🔗 Add new header attachment 📋 Add new header note ⊟ Hide All Lines
Item Name	**Quantity**	**Description**	**Unit Of Measure**
1 User Guide Printing	100.00	Printing of quick quote user guide - 100 pages in colour.	Each ⊟ Hide

Min Qty	0	Max Qty	50
Price	2.25		

🔗 Add new attachment   📋 Add new note   ⊕ Add additional quote

Min Qty	51	Max Qty	100
Price	2.15		

🗑 Delete

3 If a supplier has used price breaks, they can delete the additional quotes by clicking the delete icon.

Suppliers can also bid by exporting the lines, completing them offline and then importing them. To do this they must first click the ☁ Import/Export Bids icon and then follow the instructions below:

1 If they click the **Download Template** button they will export a spreadsheet containing the lines of the quick quote.

Import/Export Lines ⊗

Export Template

Click on the download button below to download a template for this Quick Quote which can be completed and re-imported back into the system.

Download Template

Import Lines

Use the field below to select your completed template and import the lines in to this Quick Quote

Drag File Here
Or Click "Browse" To Add

Browse

2 Complete the green fields on the spreadsheet. Enter the price you want to submit for the line and the minimum and maximum quantity for that price. Once completed save the file.

3 Either drag and drop your saved file into the white box or click browse and select the file. The prices will then be automatically uploaded.
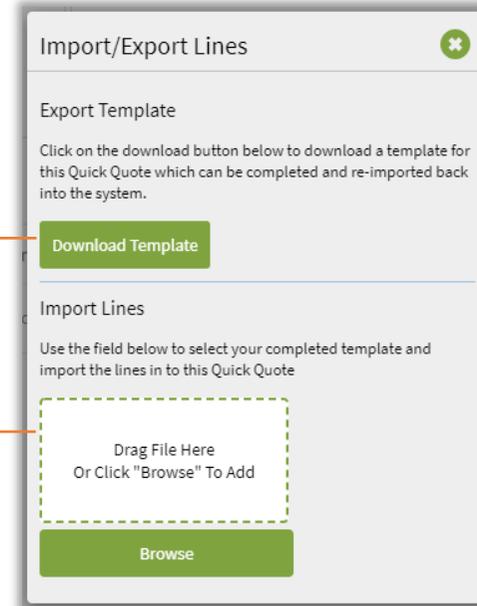
	Line Number	Item Name	Qty	Description	Unit Of Measure	Min Qty	Max Qty	Price
3	1	User Guide Printing	100	Printing of quick quote user guide - 100 pages in colour.	Each			

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4 Once all bids have been entered, click **Submit** to submit the prices.
Click **Save All Responses** will save progress and allow the supplier to return and continue their quote at a later date.

⊗ Decline to Bid   ☁ Import/Export Bids   ▦ Collapse Header

⊟ Quick Quote Information

Reference	QQ00132
Title	User Guide printing
Description	Quick quote for the printing of user guides
Default Currency	Pound sterling (GBP)
Open Date	13/08/2019 13:21
Close Date	14/08/2019 13:00

⊟ Notes

No notes have been added to this Quick Quote

⊟ Attachments

📄 Generic RFP.xls

Bidding Currency: **Pound sterling (GBP)**   📝 Change Currency   📎 Add new header attachment   📋 Add new header note   ➕ Bid On All Lines

	Item Name	Quantity	Description	Unit Of Measure	
1	User Guide Printing	100.00	Printing of quick quote user guide - 100 pages in colour.	Each	➕ Bid

1

Save All Responses   Submit Bids

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How to Monitor a Quick Quote

Once suppliers have begun to bid on a quick quote, you can monitor their progress and responses in the responses tab. To do so, follow the steps below:

1 Use the free text search bar to find specific suppliers.

3 Click the **Detailed** tab to view the supplier submissions and then follow the steps on the following page.

Header	Lines	Suppliers	Responses

Summary	Detailed		Export Data

Search for [   ] 🔍

Set View [All Suppliers ▼]   Items Per Page [10 ▼]   Page 1 of 1 - 3 records returned

Supplier Name	Accessed	Declined	Responded	Progress
👤 Aimbo (SUP128)	✔	○	✔	100%
👤 Dom's User Guide Printing Company Ltd (Temporary)	✔	○	✔	100%
👤 Zoonoodle (SUP207)	✔	○	✔	100%

2 All invited suppliers will be listed in the table. Here you'll be able to see whether they have accessed the quick quote, declined to take part, whether they have submitted their response and their % progress of number of lines completed versus number of lines.

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1 The lines will show here, with each supplier's bid in a column. This most expensive bid will highlight in red and the cheapest will highlight in green. Select a supplier's name to view just their bids.

2 You can filter the view by selecting to either show all suppliers or just responded suppliers. If you've allowed multiple currencies you can also either choose to view in the base currency, or in the suppliers submitted currencies.

| Header | Lines | Suppliers | **Responses** |

▤ Summary   ▤ **Detailed**   ☁ Export Data

Search for line [   ] 🔍

Set View: All Suppliers ▼   ☑ View Prices in Quick Quote Currency   Items Per Page [20 ▼]   Page 1 of 1 - 1 records returned

Item Name	Description	Historic Price	Aimbo	Dom's User Guide Printing Co…	Zoonoodle
User Guide Printing	Printing of quick quote user guide - 100 pages in colour.	2.50	2.35	2.25	2.75

3 To export suppliers' responses, click the Export Data button. This will download a spreadsheet of all suppliers' submissions with unit savings, total savings and % savings.