

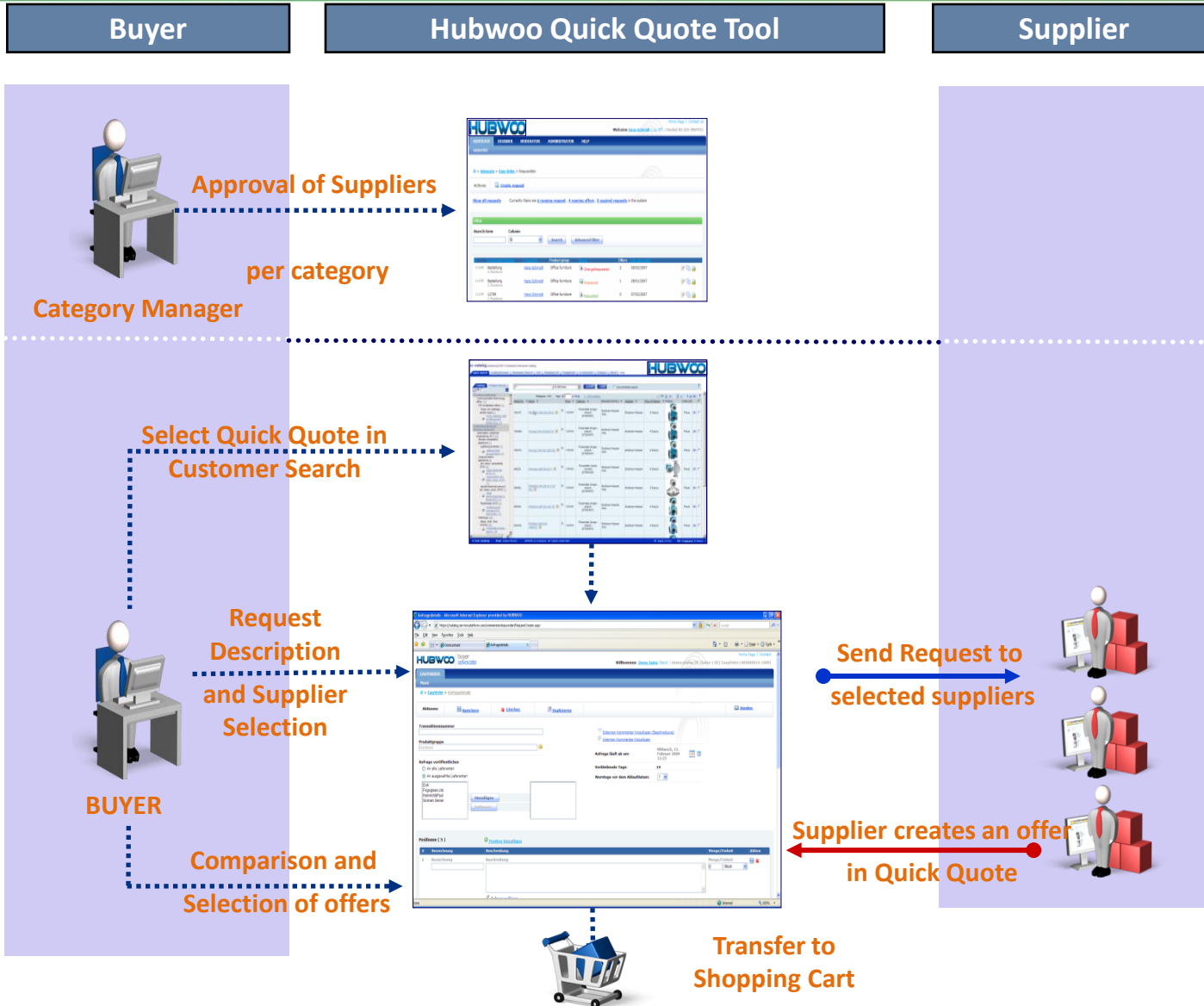
# Quick Quote

## Supplier Standard Training

- **Welcome to the Quick Quote Standard Supplier Training.**
- **During this presentation you will be oriented on:**
  - Quick Quote Workflow
  - How to login
  - Using the landing page
  - Handling requests
  - Create/edit offers/requests
  - Change Requests

- **1. Buyer/Requester**
  - Select Quick Quote in Customer Search (When no appropriated catalog item was found in supplier hosted catalogs)
  - Create a free-text request
  - Select one or more approved suppliers based on category list
- **2. Supplier**
  - Receive an Email and log into Quick Quote
  - Supplier reply with structured offer on item level
- **3. Buyer/Requester**
  - Requester choose one of the offered items and create an order based on the process for Catalog items.
  - Question and Answer process available if offers don't fit.

# Quick Quote Workflow



- You will receive an email from the Customer Care Team with your username, password and the URL to login to the Hubwoo Portal Supplier site.
- Login with the credentials supplied to you.

The screenshot shows the Hubwoo login interface. At the top left is the Hubwoo logo with the tagline 'The Business Network' and 'Connecting Companies™'. To the right is a search bar labeled 'Search The Business Network'. Below the logo is a large heading: 'IS YOUR COMPANY ON THE BUSINESS NETWORK YET?'. On the left side, there is a vertical list of three numbered steps: 1. Join Now - Free, 2. Complete your Profile, and 3. Market your Products and Services. In the center, there is a grey box with a statistic: 'In 2013 40% of suppliers identified will be through a Business Network'. On the right side, there is a 'Login' form with two input fields: 'Enter your user name' and a password field with dots. Below the password field are links for 'Forgot User Name?' and 'Forgot Password?'. A blue 'Login' button is at the bottom of the form, next to a 'Need Help?' link. Three green callout boxes with arrows point to the form fields: '1. Type in your User Name (your email address)' points to the username field, '2. Type in your Password' points to the password field, and '3. Click "Login"' points to the Login button.

# Quick Quote Landing Page

Requests

Home > Requests

Currently are 5 open requests , 73 running offers , 179 expired offers in the system.

### Filter

Keyword  Column ID ▼

Advanced filter

Search Reset

Search Results (192 items found)

<< < Go > >>

ID	Transaction	Reference	Created by	Info	Status	Expiration / Creation Date	Action
100583289	Prueba12345 1 Positions	Prueba12345	Support Hubwoo Customer EN		Sent (selected)	Thursday, November 20, 2014 Thursday, November 06, 2014	
100582283	QQ Prueba2 1 Positions	Prueba1234	Support Hubwoo Customer EN		ChangeRequested	Wednesday, November 19, 2014 Wednesday, November 05, 2014	
100581949	testnotif 1 Positions	-	Support Hubwoo Customer EN		Created	Wednesday, November 19, 2014 Wednesday, November 05, 2014	
100581757	QQ Prueba1 1 Positions	Test QQ	Support Hubwoo Customer EN		Sent	Tuesday, November 18, 2014 Tuesday, November 04, 2014	
100581638	QQ Prueba 1 Positions	QQ Prueba ES	Support Hubwoo Customer EN		ChangeRequested	Tuesday, November 18, 2014 Tuesday, November 04, 2014	
100575000	test1234 2 Positions	Test Referenz	Support Hubwoo Customer EN		ChangeRequested	Monday, November 30, 2015 Tuesday, October 21, 2014	
100574834	test only 1 Positions	-	Support Hubwoo Customer EN		Requested	Tuesday, November 04, 2014 Tuesday, October 21, 2014	
100571829	test - mon2 1 Positions	test	Support Hubwoo Customer EN		Sent	Friday, November 14, 2014 Tuesday, October 14, 2014	
100571815	Test 1234 1 Positions	test	Support Hubwoo Customer EN		Created	Tuesday, October 28, 2014 Tuesday, October 14, 2014	
100569314	Transaction12345 1 Positions	Test456	Support Hubwoo Customer EN		Sent (selected)	Wednesday, October 22, 2014 Wednesday, October 08, 2014	

<< < Go > >>

- When you click the **Opportunities** Tab, you will get to the Quick Quote homepage, where you can view new and previous requests and search for requests.

The screenshot shows the Hubwoo interface. At the top is a navigation bar with tabs: Home, Opportunities, Catalogs, Orders, Finance, Analyze, Business Directory, Connections, and Administration. Below this is a 'Requests' section with a breadcrumb 'Home > Requests'. A callout box labeled 'Current Order status.' points to the text: 'Currently are 2 open requests, 57 running offers, 190 expired offers in the system.' Below this is a 'Filter' section with a 'Keyword' input field, a 'Column' dropdown menu set to 'ID', and an 'Advanced filter' link. A callout box labeled 'Basic and advanced filter' points to the 'Search' and 'Reset' buttons. Below the filter section is a 'Search Results (196 items found)' section with a pagination control showing '1' of 1 items. Below the search results is a table with the following data:

ID	Transaction	Reference	Created by	Info	Status	Expiration / Creation Date	Action
100522952	test 1 Positions	-	User Hubwoo Kunde DE		Requested	Wednesday, June 25, 2014 Wednesday, June 11, 2014	

# Requests | Advanced Filter

- The Advanced filter allows you to search with additional criteria including :
  - ID
  - Transaction number
  - Reference
  - Status
  - Expiration
  - Created by
- Enter the appropriate filters and then click on search.

[Home](#) > [Requests](#)

Currently are **5 open requests** , **79 running offers** , **218 expired offers** in the system.

### Filter

▼ Advanced filter

ID

Transaction

Status

Expiration

Reference

Created by [Click here to load the list of users](#)

**1. Enter the filter information.**

**2. Click on Search**

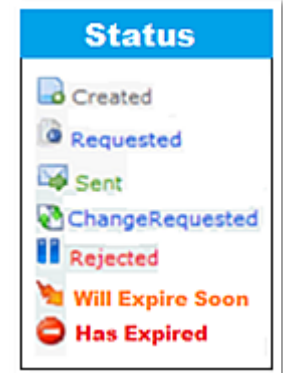
**Search Results** (233 items found) [<<] [<]  Go [>] [>>]

ID	Transaction	Reference	Created by	Info	Status	Expiration / Creation Date	Action
100585264	QQDemo1234 1 Positions	1234567	Support Hubwoo Customer EN		Sent (selected)	Tuesday, November 25, 2014 Tuesday, November 11, 2014	
100583289	Prueba12345 1 Positions	Prueba12345	Support Hubwoo Customer EN		Sent (selected)	Thursday, November 20, 2014 Thursday, November 06, 2014	



# Requests | List of Created Requests

The Column headers for Search results are described below:



ID number of the request

ID number assigned by supplier

Click the icon to open the requests information box

Request expiration date

ID	Transaction	Reference	Created by	Info	Status	Expiration	Action
100020053	TD05142009 2 Positions	-	David Dupont democatalog EN (Sales 1 EN)		Requested	Thursday, May 28, 2009	

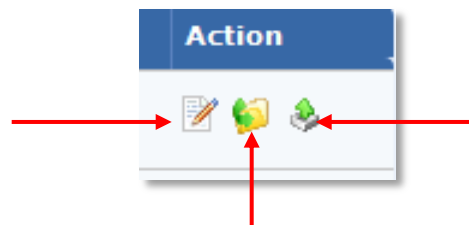
Buyer generated number with the number of positions in the request.

User that created the request.

Status of the request. Requested, Sent or Expired

Action Icons – see below

Open the detail page and edit the offer..









Download options

Archives the current request.

# Editing a Request

- In order to create an offer you will need to open the request. To open the request click on the Edit icon in the Action Column.

Search Results (1 items found) [<<] [<] [1] Go [>] [>>]

ID	Transaction ^	Reference	Created by	Info	Status	Expiration / Creation Date	Action
100581949	testnotif 1 Positions	-	Support Hubwoo Customer EN	 	 Created	Wednesday, November 19, 2014 Wednesday, November 05, 2014	  

Click on the edit icon to open the offer.

- Once the offer is opened, enter your reference number. This number is created by you and will be sent back to the Buyer.

Status Requested

Reference\*

Internal comment

Comment for customer

**Buyer:** Support Hubwoo  
**E-Mail:** gravity@hubwoo.com  
**Phone number:** 0049  
**Company:** Customer EN  
Main

**Request ID:** 100543455  
**Transaction Number:** Test Reference  
**Product group:** Hardware  
**Expiration:** 8/18/2014 10:36 AM  
**Time left:** 13 Days  
**Training:**

**Buyers comment:**  
Comments may be entered by your Buyer

**Positions(2)**

#	Short description	Description	Amount / Unit
1	Office Chairs	Black, swivel chairs with wheels	10 / Piece
Create new offer position			
2	Ballpoint pens	Black ballpoint pens	50 / Piece
Create new offer position			

Actions Reject Save Archive In Progress Send

\*) Marked fields are mandatory fields

Enter your reference number here

- Review the requests from the Buyer. This example has two positions or requests. To see the details of the offer click on link “Create new offer position”

Status Requested  
Reference\*

Internal comment  
 Comment for customer

**Buyer:** Support Hubwoo  
**E-Mail:** gravity@hubwoo.com  
**Phone number:** 0049  
**Company:** Customer EN  
**Location:** Main

**Request ID:** 100543455  
**Transaction Number:** Test Reference  
**Product group:** Hardware  
**Expiration:** 8/18/2014 10:36 AM  
**Time left:** 13 Days  
**Training:**

**Customers comment:**  
Comments may be entered by your Buyer

**Positions(2)**

#	Short description	Description	Amount / Unit
1	Office Chairs	Black, swivel chairs with wheels	10 / Piece
<a href="#">Create new offer position</a>			
2	Ballpoint pens	Black ballpoint pens	50 / Piece
<a href="#">Create new offer position</a>			

**Click on link to edit the request.**

**Actions** [Reject](#) [Save](#) [Archive](#) [In Progress](#) [Send](#)

\* Marked fields are mandatory fields

- The request will expand and you will have the options to enter the Article number, Classification Code, Delivery Days, Amount per unit, and to modify the expiration date.
- You can also view the Short and Long descriptions

Positions(2)

#	Short description	Description	Amount /Unit
1	Office Chairs	Black, swivel chairs with wheels	10 / Piece

Create new offer position

Short description\*  
Office Chairs

Long description  
Black, swivel chairs with wheels

Article No \* 1234

Classification \*

Delivery Day(s) \* 4

Amount \* / Unit: \* 10 Piece

Price per unit: \* 50.00 EUR

Tax 19%

Expiration date Friday, August 15, 2014

Save

Browse...

2 Ballpoint pens Black ballpoint pens 50 / Piece

Create new offer position

- **Article Number:** The number used to identify the requested item
- **Eclass:** Click on the icon to search through the buyer's **Classification Code**
- **Delivery Days:** The amount of days needed to deliver the product
- **Amount / Unit:** The amount of product that can be delivered. Choose the unit of measure from the drop down menu.
- **Price per unit:** The desired price per unit.
- **Currency:** Choose the currency from the drop down menu.

The screenshot shows a form with the following fields and callouts:

- Article No\*:** A text input field.
- Eclass\*:** A text input field with a magnifying glass icon. Callout: "Click to view the classification code options".
- Delivery Day(s)\*:** A text input field.
- Amount:\* / Unit:\***: A text input field containing "5" and a dropdown menu showing "Each". Callout: "Choose the unit from the drop down menu.".
- Price per unit:\***: A text input field containing "0 . 00" and a dropdown menu showing "Dollar". Callout: "Choose currency from the drop down menu".
- Expiration date:** A date picker icon.

# Add Attachment

- You can also choose to add an attachment from your computer. Click on **Browse** to see the item on your computer. Then click on the green button to the right of Browse.
- Click on the calendar icon to set an expiration date for this offer.
- When completed click on the **Save** button to save the line item details.

#	Short description	Description	Amount/Unit
1	Stainless Steel conveyor	Low profile frame design for tight spaces with design and wipe down cleaning applications.	5 / piece

[Create new offer position](#)

**Short description\***  
Stainless Steel conveyor

**Long description**  
Low profile frame design for tight spaces with design and wipe down cleaning applications.

**Article No\*** ssc45738

**Eclass\*** 36121401

**Delivery Day(s):\*** 21

**Amount:\*/ Unit:\*** 5 piece

**Price per unit:\*** 5000.00 Dollar

**Tax** 7%

**Expiration date**

**Click on Save to save this line item**

**Click to set an expiration date**

**Add an attachment**



# Save the Request

- When all your offers have been completed click on the “Save” button to save the order.

Internal comment

Comment for customer

E-Mail: gravity@hubwoo.com  
Phone number: 0049  
Company: Customer EN  
Location: Main

Product group: Hardware  
Expiration: 9/30/2014 11:25 AM  
Time left: 61 Days  
Training

Customers comment:  
Comments may be entered by your Buyer

Positions(2)

#	Short description	Description	Amount / Unit
1	Office Chairs	Black, swivel chairs with wheels	10 / Piece
Office Chairs    Expiration date <b>Friday, August 08, 2014</b> Amount <b>10</b> Delivery Day(s): <b>4</b> Price per unit: <b>50</b> EUR			
Create new offer position			
2	Ballpoint pens	Black ballpoint pens	50 / Piece
Create new offer position			

Click on Save to save the order.

Actions    Reject    Save    Archive    In Progress    Send

\* ) Marked fields are mandatory fields

# Send the Request

- You will receive a message “**Successfully saved**”. Once this message is received, click on the **Send** button to send the offer to the Buyer.

Click on Send to send the order to the Buyer

The screenshot displays the Hubwoo interface. At the top, there is a navigation bar with buttons for 'Actions', 'Reject', 'Save', 'Archive', 'In Progress', and 'Send'. Below this, a message box contains the text 'Successfully saved.' with a green checkmark icon. To the left of the message box, there are options for 'Internal comment' and 'Comment for customer'. In the center, there is a section for 'Buyer' information, including 'Support Hubwoo', 'gravity@hubwoo.com', '0049', 'Customer EN', and 'Main'. To the right, there is a section for 'Request ID' and 'Transaction Number', with values '100542559' and 'Test Reference' respectively. Below this, there is a section for 'Product group', 'Expiration', 'Time left', and 'Training'. At the bottom, there is a section for 'Customers comment' with the text 'Comments may be entered by your Buyer'. The interface also shows 'Positions(2)' at the bottom left.


Buyer:	Support Hubwoo	Request ID	100542559
E-Mail:	gravity@hubwoo.com	Transaction Number	Test Reference
Phone number:	0049	Product group:	Hardware
Company:	Customer EN	Expiration	9/30/2014 11:25 AM
Location:	Main	Time left:	61 Days
		Training	

Customers comment:  
Comments may be entered by your Buyer

- The request has been successfully sent to the Buyer

**Filter**













▼ Advanced filter

ID  Expiration  

Transaction  Reference

Status  Created by [Click here to load the list of users](#)

**Search Results** (233 items found) [<<] [<]  Go [>] [>>]

ID	Transaction ▲	Reference	Created by	Info	Status	Expiration / Creation Date	Action
100585264	QQDemo1234 1 Positions	1234567	Support Hubwoo Customer EN	 	 Sent (selected)	Tuesday, November 25, 2014 Tuesday, November 11, 2014	  
100583289	Prueba12345 1 Positions	Prueba12345	Support Hubwoo Customer EN	 	 Sent (selected)	Thursday, November 20, 2014 Thursday, November 06, 2014	  

# Change Requests

- If the Buyer is not completely satisfied with the offer, they may send you a **Request for Change**.
- If a Request for Change is submitted, you will notice in your request list the status is now **“Change Requested”**

Filter

Keyword  Column ID

Advanced filter

Search Reset

Search Results (1 items found)

ID	Transaction	Reference	Created by	Info	Status	Expiration / Creation Date	Action
100543469	Quick Quote Training 2 Positions	Test Reference	Support Hubwoo Customer EN		ChangeRequested	Monday, August 18, 2014 Monday, August 04, 2014	

[<<] [<] [Go] [>] [>>]

[<<] [<] [Go] [>] [>>]

Status change

Click on the edit icon to open/edit the change request.

# Change Requests

- Click on the edit icon to view the line item and the reason for the change.

Positions(2)

#	Short description	Description	Amount /Unit
1	Office Chairs	Black, Swivel chairs with wheels	10 / Piece

Office Chairs Expiration date Unlimited Amount 10 Delivery Day(s): 4 Price per unit: 250 USD

Click on the line item detail to see the change request.

#	Short description	Description	Amount /Unit
1	Office Chairs	Black, Swivel chairs with wheels	10 / Piece

Office Chairs Expiration date Unlimited

Black, Swivel chairs with wheels

Article No	1234
Classification	41040406
Delivery Day(s):	4
Amount / Unit:	10 Piece
Price per unit:	250 USD
Tax:	19%
Sum price:	2500 USD

Request for change  
Can delivery date be changed to 2 days?

Change Request information

# Change Requests

- If you agree with the changes, modify the order accordingly (for this example we are changing the delivery days to 2) and save the line item, then save the offer and send it back to the Buyer. Once the Buyer accepts the offer, you will receive a Purchase Order.

**1. Change days**

**2. Save line item.**

**3. Save entire order.**

**4. Send order to Buyer.**

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