Quick Quote

Supplier Standard Training

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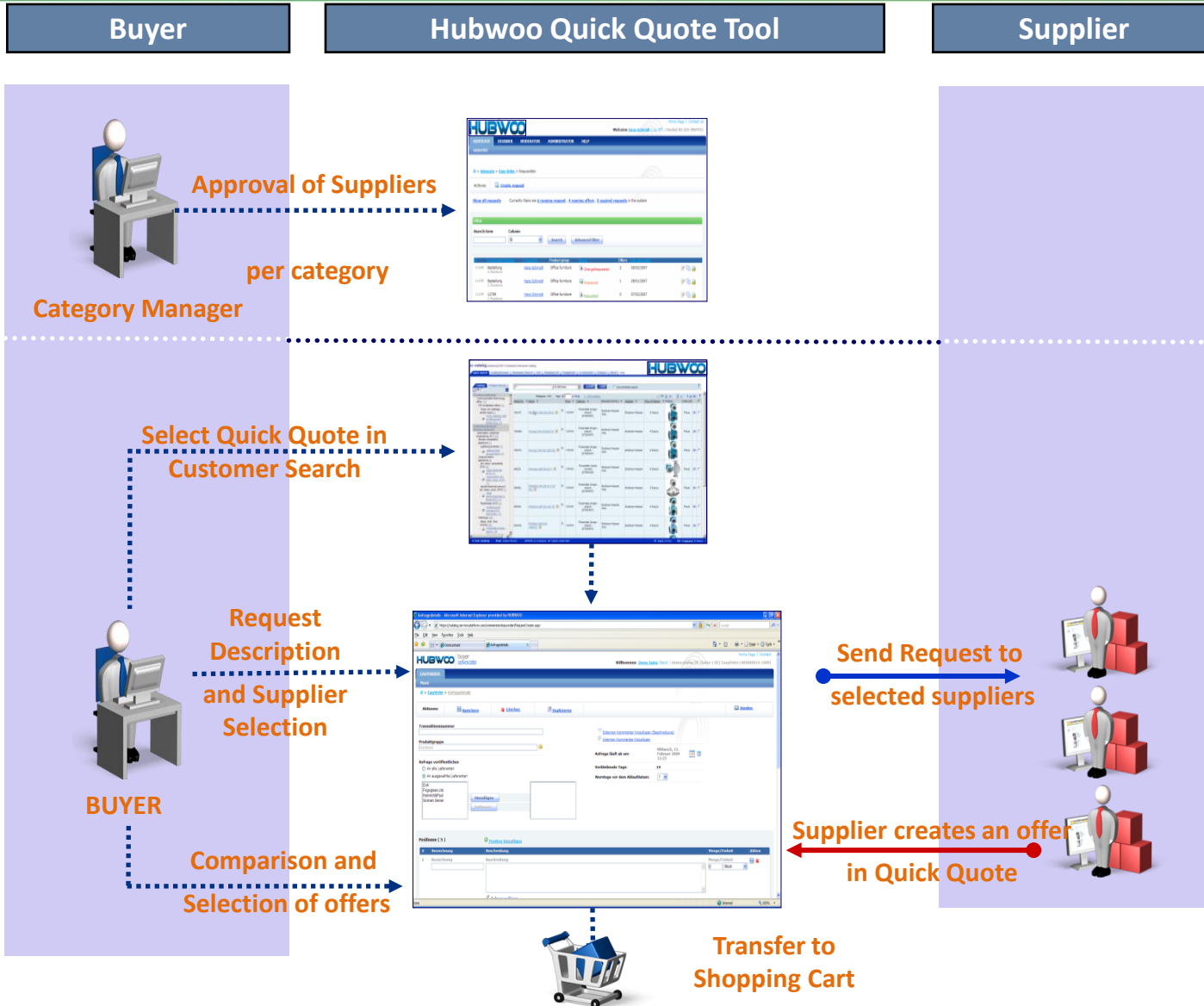
Agenda

- **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

Quick Quote Workflow

- **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

Buyer	Hubwoo Quick Quote Tool	Supplier

Category Manager

Approval of Suppliers

per category

BUYER

Select Quick Quote in
Customer Search

Request
Description
and Supplier
Selection

Comparison and
Selection of offers

Send Request to
selected suppliers

Supplier creates an offer
in Quick Quote

Transfer to
Shopping Cart

Log-in

- 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.

Quick Quote Landing Page

Requests Page

- 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.

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.

⌂ > **Requests**

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

Filter

▼ Advanced filter

ID		Expiration	
Transaction		Reference	
Status		Created by **Click here to load the list of users**	

2. Click on Search

1. Enter the filter information.

[Search] [Reset]
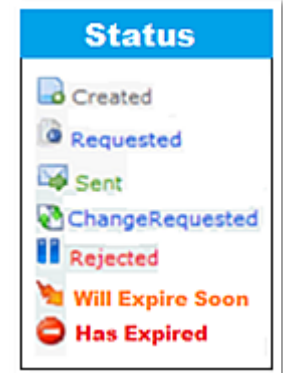
Search Results (233 items found)   [<<] [<] 1 Go [>] [>>]

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

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The Column headers for Search results are described below:

Status
- Created
- Requested
- Sent
- ChangeRequested
- Rejected
- Will Expire Soon
- Has Expired

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)	(i)	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

Action
📝 📁 ⬇

Open the detail page and edit the offer..
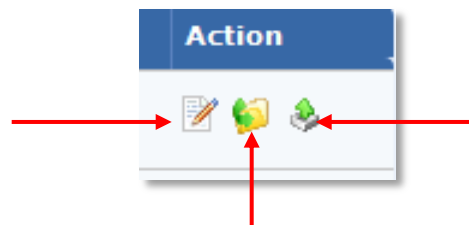
Download options

Archives the current request.

Editing a Request

Request page | Edit 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.

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	

Search Results (1 items found)

[<<] [<] 1 Go [>] [>>]

Click on the edit icon to open the offer.

Offer Details

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

Offer Details

- 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	**Buyer:** Support Hubwoo	**Request ID** 100543455
Reference* [_____]	**E-Mail:** gravity@hubwoo.com	**Transaction Number** Test Reference
	Phone number: 0049	**Product group:** Hardware
💬 **Internal comment**	**Company:** Customer EN	**Expiration** 8/18/2014 10:36 AM
💬 **Comment for customer**	**Location:** Main	**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
	🖼 Create new offer position		
2	▾ Ballpoint pens	Black ballpoint pens	50 / Piece
	🖼 Create new offer position		

Click on link to edit the request.

Actions	❌ Reject	💾 Save	📥 Archive	🕐 In Progress		📤 Send

*) Marked fields are mandatory fields

Offer Details

- 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

Offer Details

- **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.

Article No*

Eclass*

Delivery Day(s):*

Amount:* / Unit:*   5   Each

Price per unit:*   0 . 00   Dollar

Expiration date

Click to view the classification code options

Choose the unit from the drop down menu.

Choose currency from the drop down menu

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.

Save the Request

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

Click on Save to save the order.

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

Actions	⊗ Reject	💾 Save	👜 Archive	🕐 In Progress		✉ Send

✔ Successfully saved.

Status ⓘ Requested
Reference* | Test Reference |

💬 **Internal comment**

💬 **Comment for customer**

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

Request ID 100542559
Transaction Number Test Reference
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)

Confirmation

- The request has been successfully sent to the Buyer

Change Requests

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**"

Change Requests

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

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

#	Short description	Description	Amount /Unit
	Positions(2)		
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	

#	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.

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