

# RFQ – Request For Quotation Training Document



## **Training document: Structure & Overview**

### What is it?

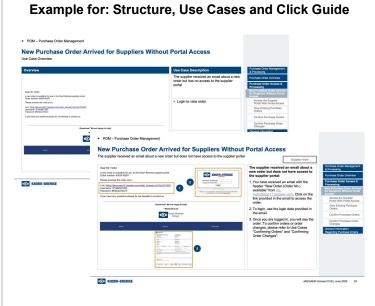
This document will guide users through general information and specific topics and serves as a handbook for further functionalities by using "Use Cases" as guidance.

### What is a Use Case?

A use case illustrates possible functionalities and provides step-by-step guidance.

### **How are Use Cases structured?**

Use Cases include one slide with main information as overview, followed by a detailed click guide.			
Use Case Overview	Overview of the use case content including description, content, notes, and screenshot		
Headline	A brief introduction to the use case		
System View	Shows screenshots for the related step		
Click Guide	Detailed guidance through the functionalities		
Note	Relevant information to the use case		



\*Visible functions/buttons may differ depending on the roles & rights assigned

# **RFQ Training Document Content & Use Cases**

RFQ Basics	Send Quote	Decline Items	Communication & Forwarding
RFQ Overview	Quote and Send Back	Decline RFQ (All Items)	Messaging
■ Get an overview of all RFQs	• Quote (online) and send it back to CVS	■ Decline all items of an RFQ	Send and receive messages related to an RFQ
	Quote with Excel CBD	Decline Single Items	Re-Assign RFQ
	■ Quote with an excel CBD for each item	■ Decline single items of an RFQ	■ Re-assign an RFQ / change the responsibility
	Quote with Excel CBD – multipos		
	■ Quote with one excel CBD for all items		



# In this chapter we will see...

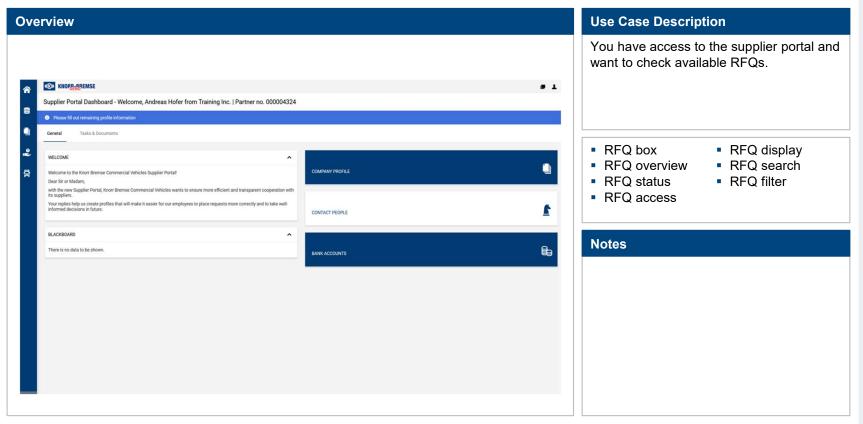
■ RFQ Overview

**RFQ Basics** 



## **RFQ Overview**

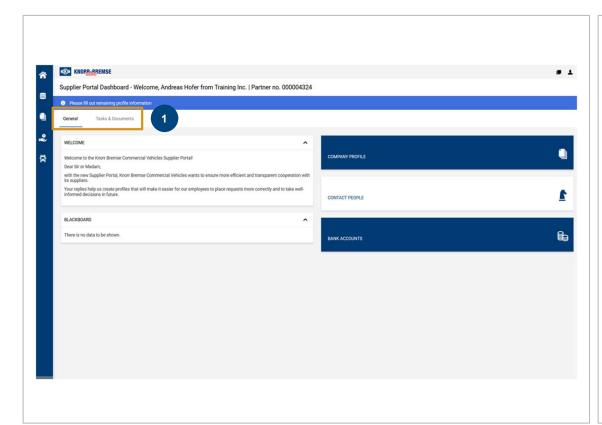
**Use Case Overview** 





## **RFQ Overview**

RFQ box with quick access to RFQs



Supplier View

### RFQ box with quick access to RFQs

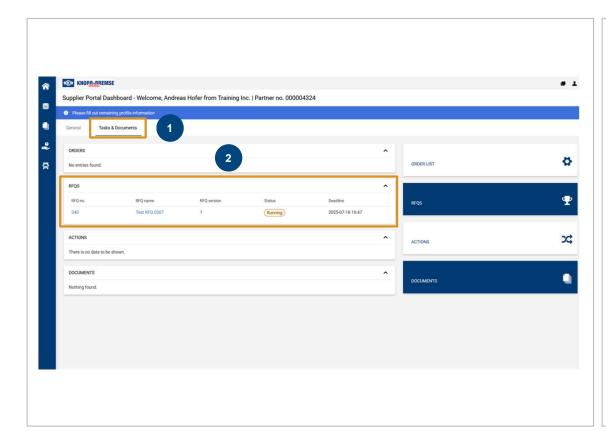
1. After logging in, the supplier portal dashboard with various fields becomes visible. You first land on the "General" tab, which contains general information.





## **RFQ Overview**

RFQ box with quick access to RFQs



Supplier View

### RFQ box with quick access to RFQs

- 1. Next to it, there is the "Tasks & Documents" tab. When you click on "Tasks & Documents", several boxes appear.
- 2. One of these boxes is called "RFQS".

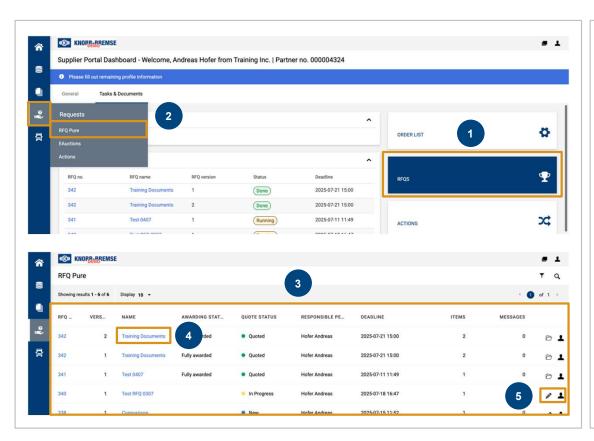
  The latest RFQs are displayed in this box and can be accessed by clicking on the (blue highlighted) name of the RFQ.





### **RFQ Overview**

RFQ overview with details regarding all RFQs



Supplier View

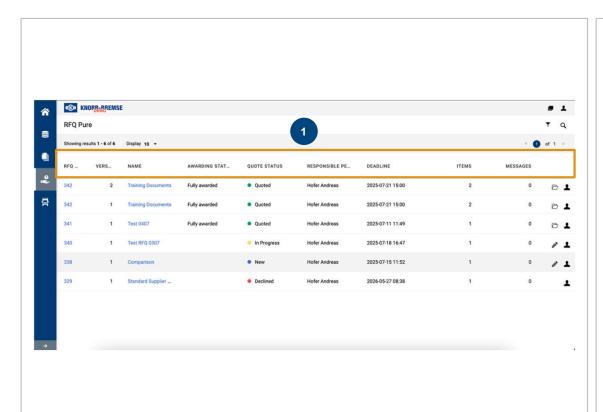
# RFQ overview with details regarding all RFQs

- 1. To navigate to an overview of all RFQs, click on the RFQ box on the right side.
- 2. Alternatively, navigate to the RFQ overview by clicking on the "Requests" icon in the navigation bar and on "RFQ Pure".
- 3. The RFQ overview displays various columns with details to RFQs such as name, state, deadline.
- 4. Single RFQs can be accessed by clicking either on the RFQ no or on the Name (both blue marked).
- 5. As long as the deadline is not reached an RFQ can be re-assigned to a colleague by clicking on the silhouette icon on the right side. An RFQ can be edited as long as the state is "In Progress".



## **RFQ Overview**

RFQ overview with details regarding all RFQs



Supplier View

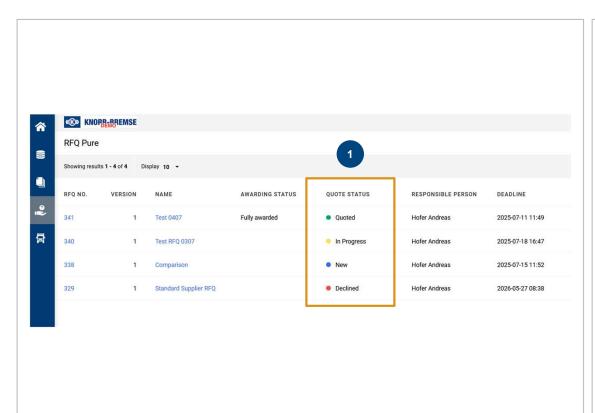
# RFQ overview with details regarding all RFQs

- 1. Find below details on the displayed information:
  - RFQ NO. = JAGGAER Connect internal RFQ number
  - VERSION = Version of RFQ
  - NAME = Name of RFQ
  - QUOTE STATUS = Status of RFQ
  - RESPONSIBLE PERSON = Creator/Buyer of RFQ
  - DEADLINE = Date until quotes can be sent to CVS
  - ITEMS = number of items in the RFQ
  - MESSAGES = number of messages sent related to the RFQ



## **RFQ Overview**

How to understand the quote status



Supplier View

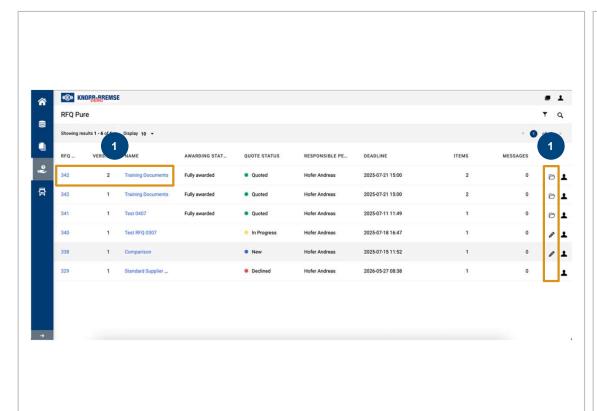
### How to understand the quote status

- 1. The following quote status exist:
  - New new RFQ, not seen
  - In Progress RFQ seen but not quoted yet
  - Quoted Quote sent back to CVS
  - Declined RFQ declined
  - Cancelled RFQ cancelled by CVS
  - Expired RFQ expired, no quote sent back



## **RFQ Overview**

How to access an RFQ



Supplier View

#### How to access an RFQ

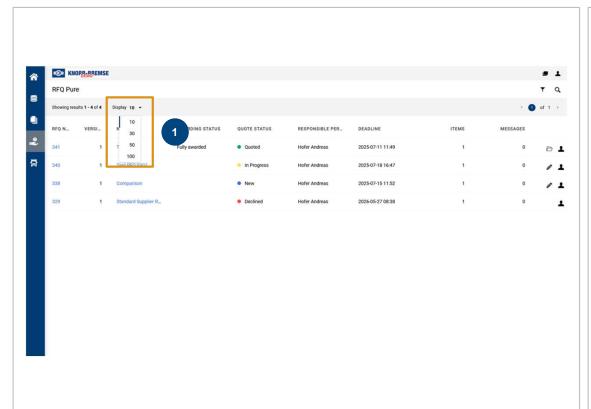
1. RFQs can be accessed by clicking either on the RFQ number (RFQ NO.), on the Name (NAME) (both blue marked) or on the "Folder" or "Pen" icon to the right of an RFQ.





## **RFQ Overview**

How to modify the display in the RFQ overview



Supplier View

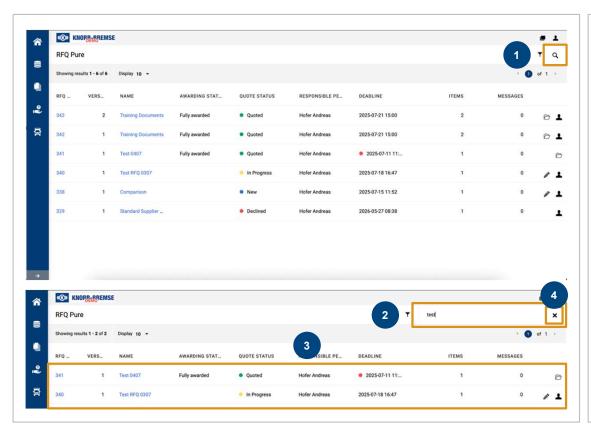
# How to modify the display in the RFQ overview

1. In the RFQ overview, 10 RFQs are shown by default on the first page. By clicking on the dropdown field, it can be changed up to 100. The setting is saved for the current view.



## **RFQ Overview**

How to search for an RFQ



Supplier View

#### How to search for an RFQ

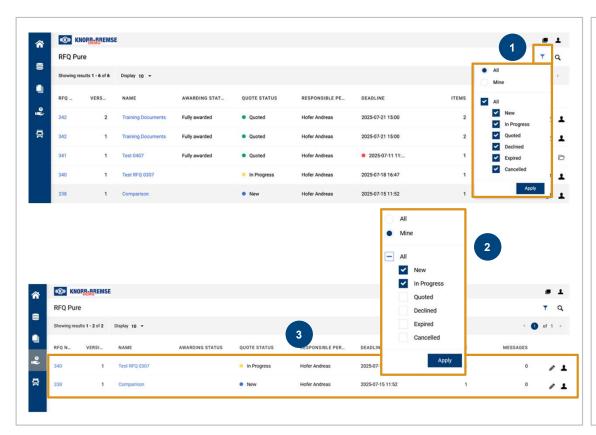
- 1. In the upper right corner, there is a filter icon and a magnifying class. By clicking on the magnifying class, it is possible to search for RFQs.
- 2. A search field opens. Type in your search and press "Enter".
- 3. Only matching RFQs are displayed.
- 4. Remove the filter by clicking on the "X".





## **RFQ Overview**

**RFQ Filter** 



Supplier View

#### **RFQ Filter**

- 1. By clicking on the "Filter" icon the overview can be filtered after the responsibility (All vs. Mine) and by the state of the RFQ (All vs single entries).
- 2. De-select not relevant quote states and click on "Apply".
- 3. The list of RFQs shown is limited to the filter applied.





# In this chapter we will see...

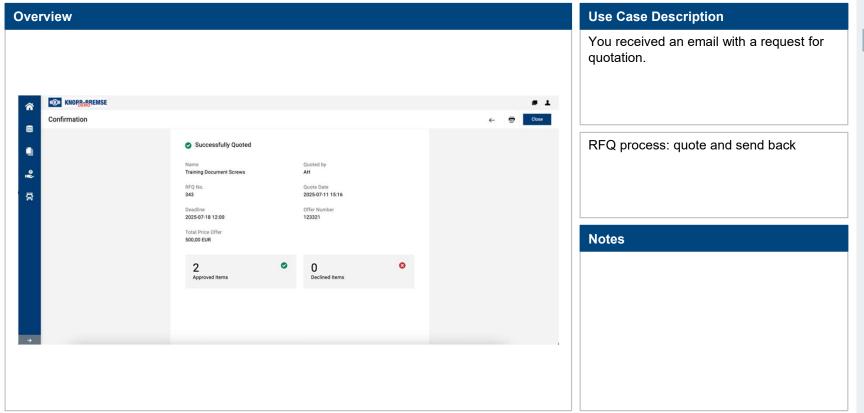
- Quote and Send Back
- Quote with Excel CBD
- Quote with Excel CBD multipos

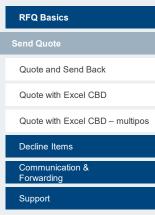
# **Send Quote**



## **Quote and Send Back**

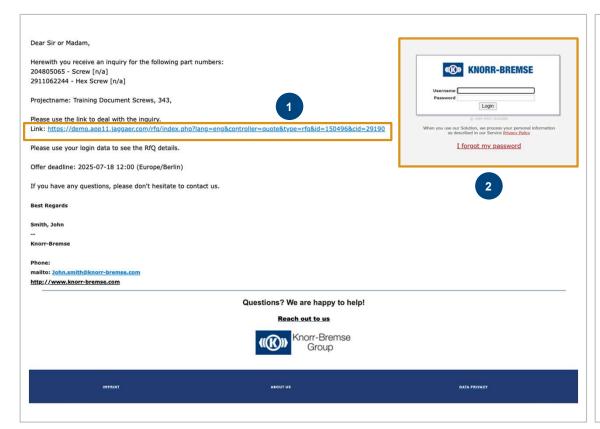
**Use Case Overview** 





## **Quote and Send Back**

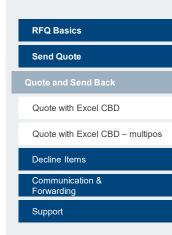
You received an email with a request for quotation



Supplier View

# You received an email with a request for quotation

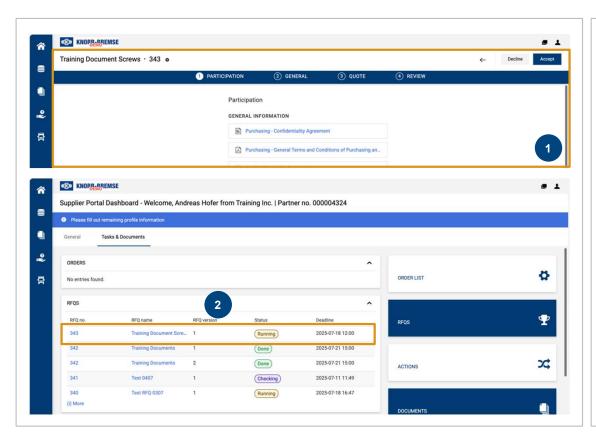
- Click on the link provided in the email that you received from JAGGAER Connect with the header "Invitation for the RFQ: RFQ Name, RFQ No. (Company Name)" from noreply@app11.jaggaer.com.
- Login with your credentials provided in the email or received when the account got created.





### **Quote and Send Back**

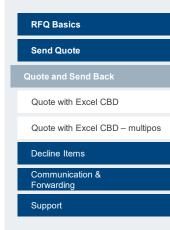
Login and open the RFQ



Supplier View

#### Login and open the RFQ

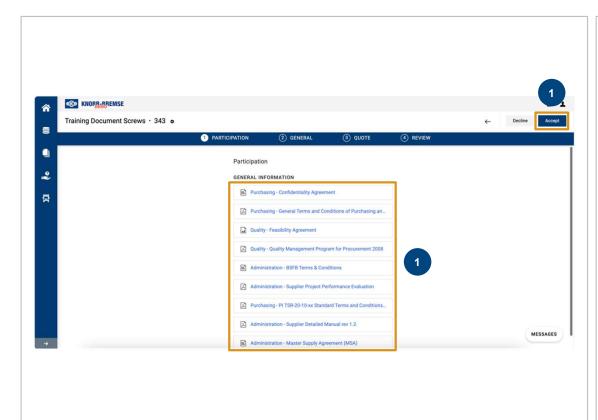
- 1. If you have used the link from the email, you will land directly in the RFQ.
- 2. Alternatively, you can login to the portal, click on the "Tasks & Documents" tab and click on the latest RFQ received in the RFQS box.
- 3. A new tab opens starting with "Participation", which is the exact same as described in step 1, with the only difference that you did not land directly in the RFQ.





## **Quote and Send Back**

Quote and send back - I. Participation

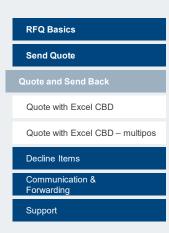


Supplier View

### Quote and send back - I. Participation

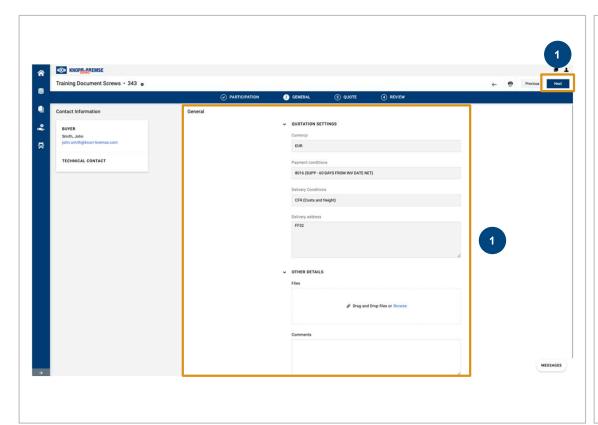
 Read and/or download the documents to proceed with the quotation and click on "Accept" in the upper right corner to proceed with the RFQ.

Note: Clicking "Decline" means you are rejecting the RFQ.



## **Quote and Send Back**

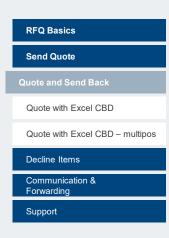
Quote and send back - II. General



Supplier View

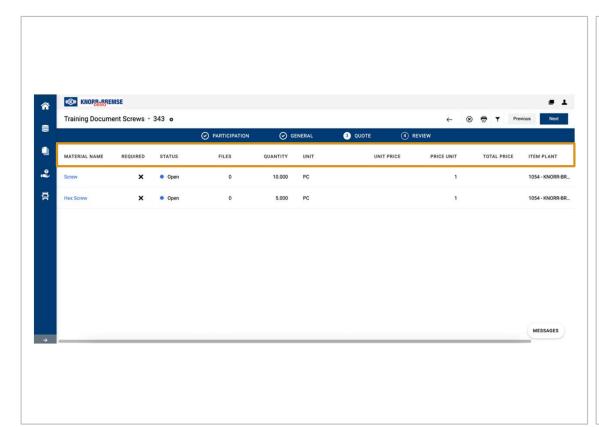
#### Quote and send back - II. General

1. Read general terms and conditions and click on "Next"; Optionally: leave a comment regarding this quote on head level here at the bottom.



### **Quote and Send Back**

Quote and send back - III. Quote

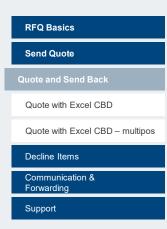


Supplier View

#### Quote and send back - III. Quote

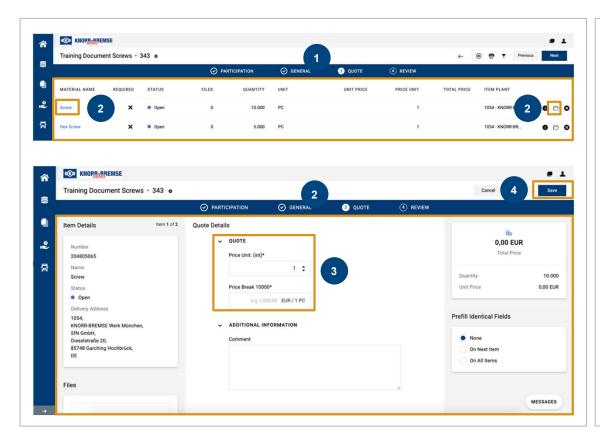
Find below details on the displayed information:

- MATERIAL NAME = name of the requested material
- REQUIRED = if an item is required, it means that you must send a quote for the item, otherwise you cannot quote for the other items in this RFQ. An "X" means that this item is not required.
- STATUS = current quote status per item
- FILES = item specific files attached
- QUANTITY = requested quantity
- UNIT = item unit
- UNIT PRICE = price offered
- PRICE UNIT = quantity unit of the price requested
- TOTAL PRICE = price offered multiplied by quantity
- ITEM PLANT = Plant requesting the item



### **Quote and Send Back**

Quote and send back - III. Quote



Supplier View

#### Quote and send back - III. Quote

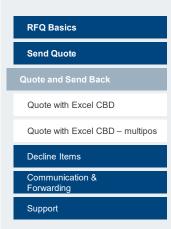
- 1. The quote tab provides an overview of items/materials requested for quotation.
- 2. Click on the blue marked material name to jump into the details of the requested item/material or click on the "Folder" icon to the right to open item details.

Note: On the left side item details are displayed. Optionally item related documents can be downloaded in the section "Files". With the "Comment" field it is possible to leave an item related comment for CVS.

3. Perform your quote. Type in the price for the price unit given/selected.

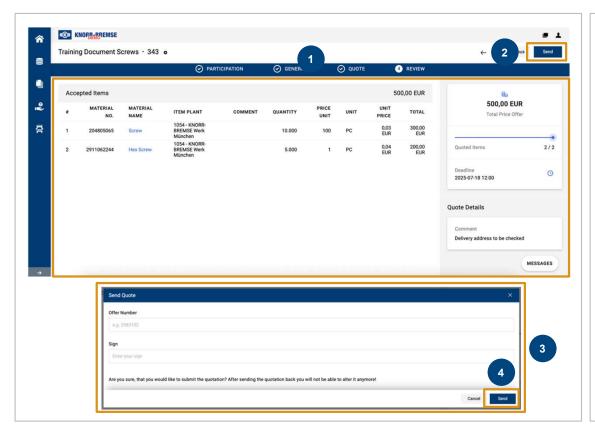
Note: You may need to download an excel file for the CBD and upload the maintained file again (see use case "Quote with excel CBD").

4. When the quote is done, click on "Save" in the upper right corner.



### **Quote and Send Back**

Quote and send back - IV. Review



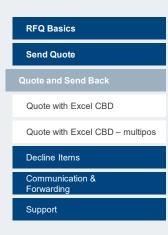
Supplier View

#### Quote and send back - IV. Review

- 1. The "Review" tab provides an overview of quotes done.
- 2. By clicking on "Send" in the upper right corner the quotation is finished.
- 3. A window opens with an offer number to be maintained optionally.
- 4. Confirm the quote by clicking on "Send" to send it to CVS.

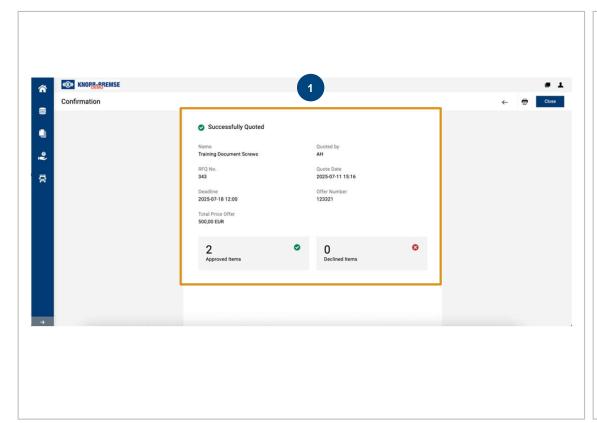
Note: If the quotation contains more than 1 item, you will be led to the next item upon completing the quotation for the first item. After quotation of all items, a review of all quotes is offered.

If you have left a comment regarding this quote on head level, it will be displayed in the "Review" tab on the lower right side.



## **Quote and Send Back**

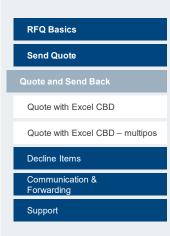
Quote and send back – V. Confirmation



Supplier View

#### Quote and send back - V. Confirmation

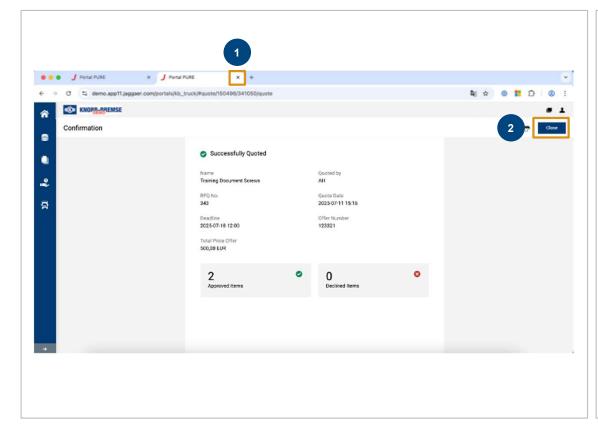
1. Upon sending the RFQ to CVS, a confirmation and summary of the quotation is displayed.





### **Quote and Send Back**

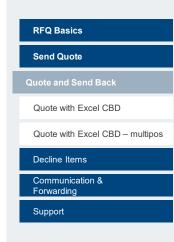
Quote and send back - VI. Process ends



Supplier View

# Quote and send back – VI. Process ends

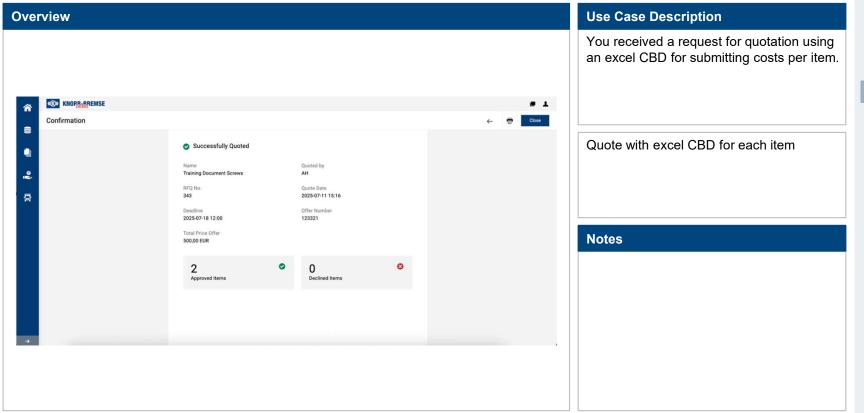
- 1. Close the RFQ/the window.
- 2. For supplier portal users: Click on "Close" to go back to the overview of all RFQs.

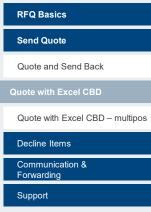




## **Quote with Excel CBD**

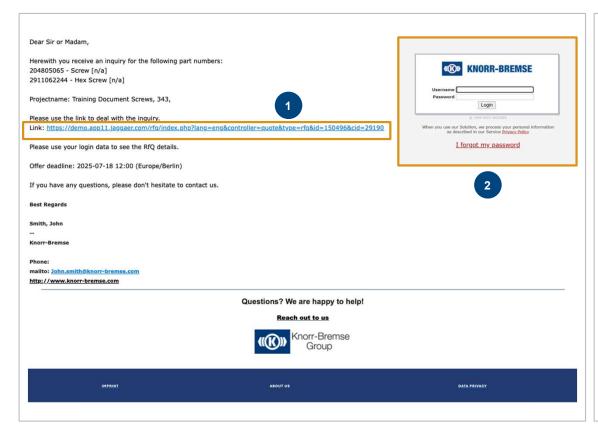
Use Case Overview





### **Quote with Excel CBD**

How to quote with excel CBD - I. Open RFQ

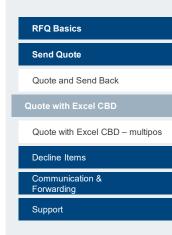


Supplier View

#### How to quote with an excel CBD

Quote with excel CBD - I. Open RFQ:

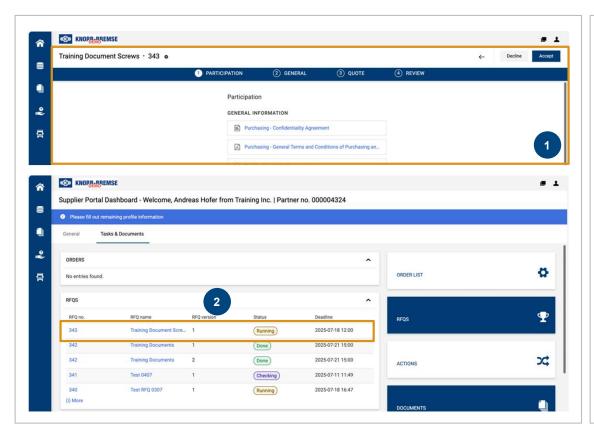
- Click on the link provided in the email that you received from JAGGAER Connect with the header "Invitation for the RFQ: RFQ Name, RFQ No. (Company Name)" from noreply@app11.jaggaer.com.
- 2. Login with your credentials provided in the email or received when the account got created.





### **Quote with Excel CBD**

How to quote with excel CBD - Open RFQ

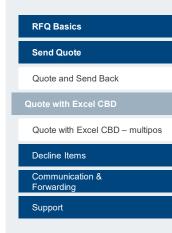


Supplier View

#### How to quote with an excel CBD

Quote with excel CBD - Open RFQ:

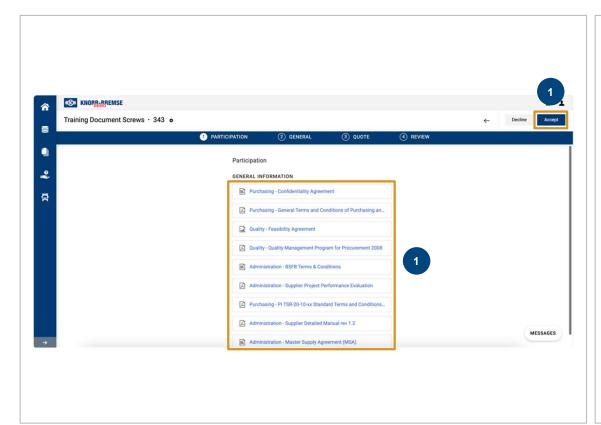
- 1. If you have used the link from the email, you will land directly in the RFQ.
- 2. Alternatively, you can login to the portal, click on the "Tasks & Documents" tab and click on the latest RFQ received in the RFQS box.
- 3. A new tab opens starting with "Participation", which is the exact same as described in step 1, with the only difference that you did not land directly in the RFQ.





### **Quote with Excel CBD**

How to quote with excel CBD – I. Participation



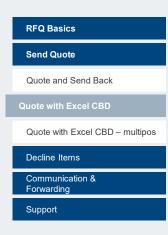
Supplier View

### How to quote with an excel CBD

Quote with excel CBD – I. Participation:

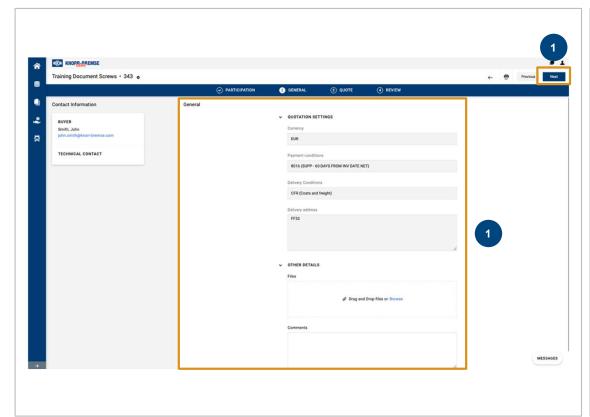
 Read and/or download the documents to proceed with the quotation and click on "Accept" in the upper right corner to proceed with the RFQ.

Note: Clicking "Decline" means you are rejecting the RFQ.



## **Quote with Excel CBD**

How to quote with excel CBD - II. General

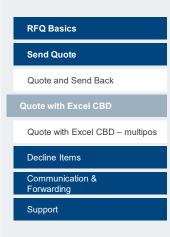


Supplier View

### How to quote with an excel CBD

Quote with excel CBD – II. General:

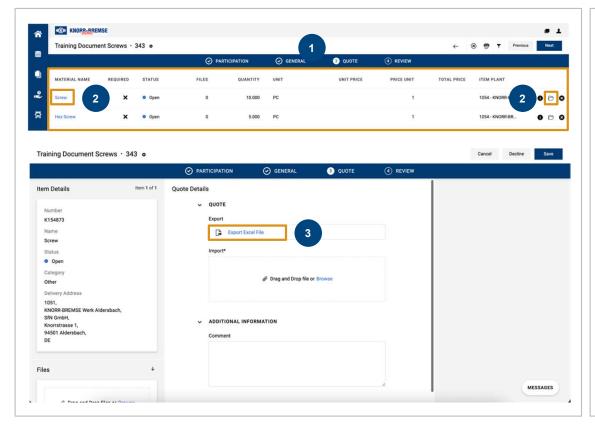
 Read general terms and conditions and click on "Next"; Optionally: leave a comment regarding this quote on head level here at the bottom.





### **Quote with Excel CBD**

How to quote with excel CBD - III. Quote



Supplier View

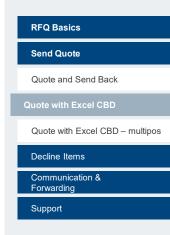
#### How to quote with an excel CBD

Quote with excel CBD - III. Quote:

- 1. The quote tab provides an overview of items/materials requested for quotation.
- Click on the blue marked material name to jump into the details of the requested item/material or click on the "Folder" icon to the right to open item details.

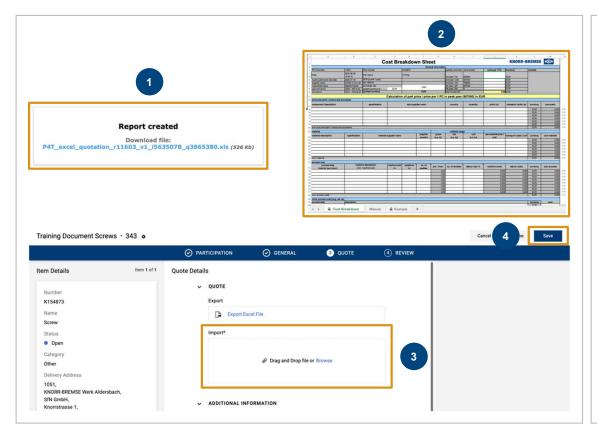
Note: On the left side item details are displayed. Optionally item related documents can be downloaded in the section "Files". With the "Comment" field it is possible to leave an item related comment for CVS.

 In the middle of the page below "Export", an excel file (for quotation) can be downloaded. Click on "Export Excel File" for item related information and prices.



### **Quote with Excel CBD**

How to quote with excel CBD - III. Quote

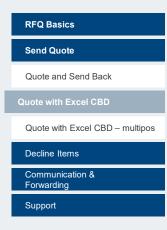


Supplier View

#### How to quote with an excel CBD

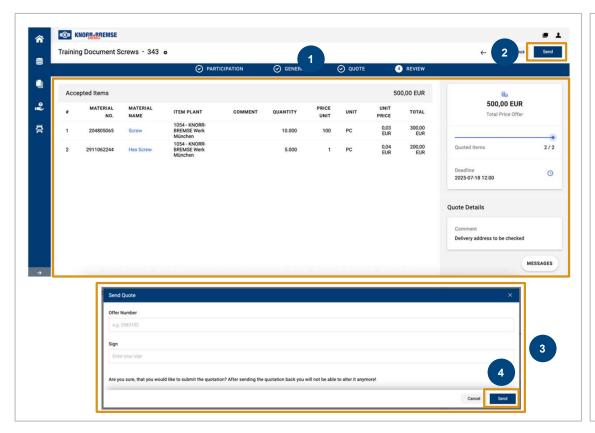
Quote with excel CBD - III. Quote:

- A new tab opens. Click on the file name to open/save it.
- Fill in information/prices/costs.
   Careful, do not change rows/columns in the excel file - only add information/prices. Save the excel file.
- 3. After providing all relevant costs and information, import the file via drag and drop or browse. The excel file/CBD is uploaded immediately and displays either information about wrong inserted information/costs or states "Uploaded file has been successfully checked". If information/costs provided were wrong, please delete the old file, correct data and import the new file again.
- 4. Click on "Save" in the upper right corner to continue.



### **Quote with Excel CBD**

How to quote with excel CBD - IV. Review



Supplier View

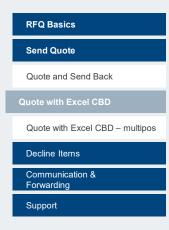
#### How to quote with an excel CBD

Quote with excel CBD - IV. Review:

- 1. The "Review" tab provides an overview of quotes done.
- 2. By clicking on "Send" in the upper right corner the quotation is finished.
- 3. A window opens with an offer number to be maintained optionally.
- Confirm the quote by clicking on "Send" to send it to CVS.

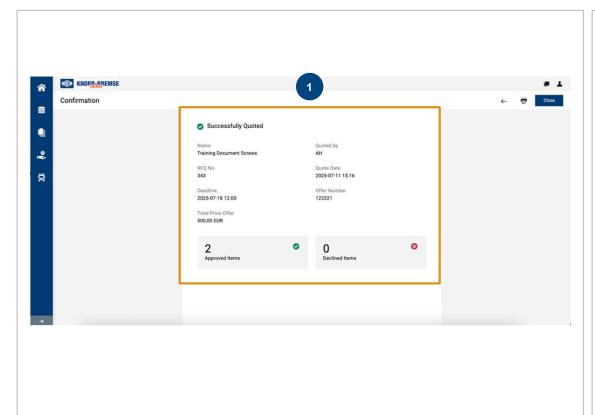
Note: If the quotation contains more than 1 item, you will be led to the next item upon completing the quotation for the first item. After quotation of all items, a review of all quotes is offered.

If you have left a comment regarding this quote on head level, it will be displayed in the "Review" tab on the lower right side.



## **Quote with Excel CBD**

How to quote with excel CBD – V. Confirmation

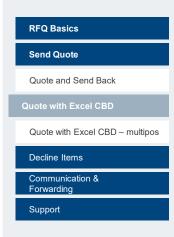


Supplier View

### How to quote with an excel CBD

Quote with excel CBD – V. Confirmation:

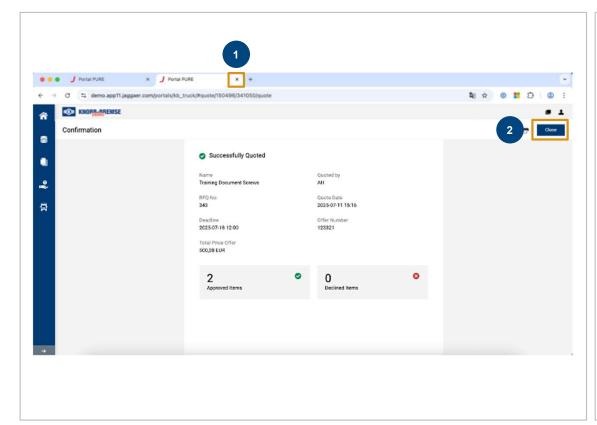
1. Upon sending the RFQ to CVS, a confirmation and summary of the quotation is displayed.





### **Quote with Excel CBD**

How to quote with excel CBD - VI. Process ends

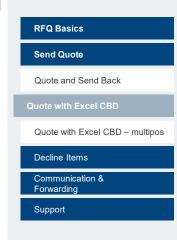


Supplier View

### How to quote with an excel CBD

Quote with excel CBD – VI. Process ends:

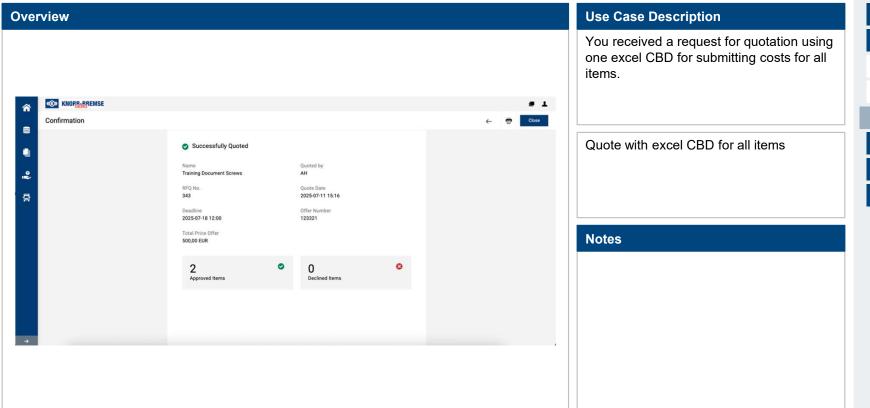
- 1. Close the RFQ/the window.
- For supplier portal users: Click on "Close" to go back to the overview of all RFQs.

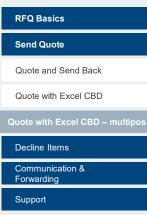




# **Quote with Excel CBD – multipos**

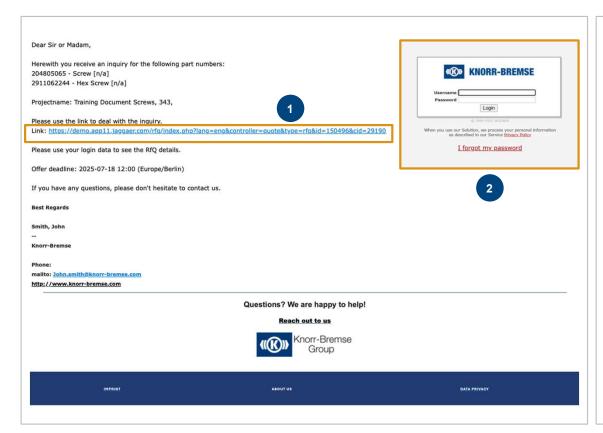
Use Case Overview





## **Quote with Excel CBD – multipos**

How to quote with excel CBD - multipos - Open RFQ

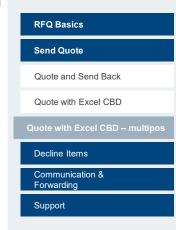


Supplier View

#### How to quote with an excel CBD

Quote with excel CBD (multipos) – Open RFQ:

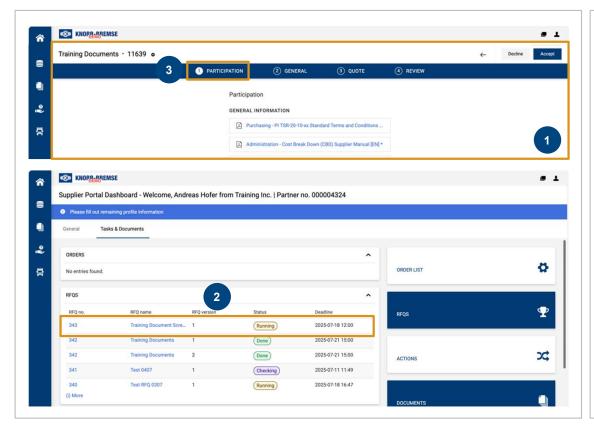
- 1. Click on the link provided in the email that you received from JAGGAER Connect with the header "Invitation for the RFQ: RFQ Name, RFQ No. (Company Name)" from no-reply@app11.jaggaer.com.
- 2. Login with your credentials provided in the email or received when the account got created.





## **Quote with Excel CBD – multipos**

How to quote with excel CBD - multipos - Open RFQ

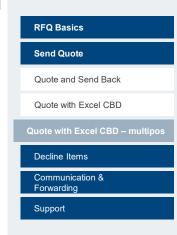


Supplier View

#### How to quote with an excel CBD

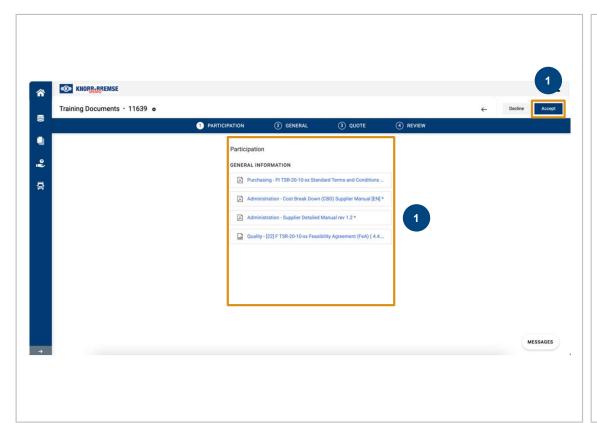
Quote with excel CBD (multipos) – Open RFQ:

- 1. If you have used the link from the email, you will land directly in the RFQ.
- 2. Alternatively, you can login to the portal, click on the "Tasks & Documents" tab and click on the latest RFQ received in the RFQS box.
- 3. A new tab opens starting with "Participation", which is the exact same as described in step 1, with the only difference that you did not land directly in the RFQ.



## **Quote with Excel CBD – multipos**

How to quote with excel CBD - multipos - I. Participation



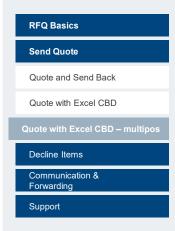
Supplier View

#### How to quote with an excel CBD

Quote with excel CBD (multipos) – I. Participation:

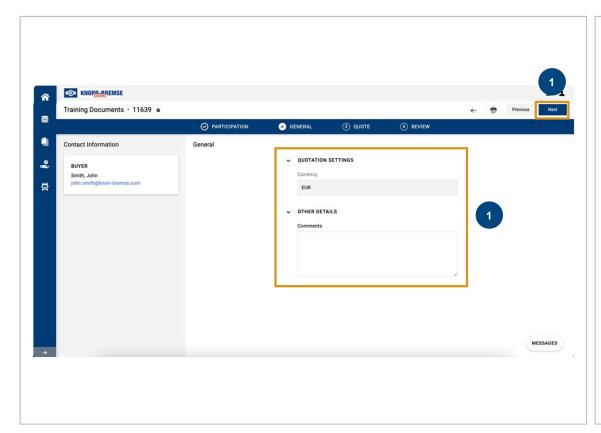
 Read and/or download the documents to proceed with the quotation and click on "Accept" in the upper right corner to proceed with the RFQ.

Note: Clicking "Decline" means you are rejecting the RFQ.



## **Quote with Excel CBD – multipos**

How to quote with excel CBD - multipos - II. General

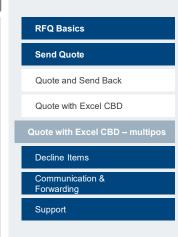


Supplier View

#### How to quote with an excel CBD

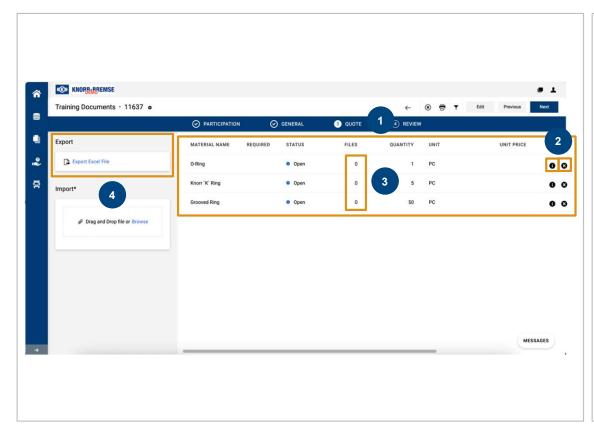
Quote with excel CBD (multipos) – II. General:

1. Read general terms and conditions and click on "Next"; Optionally: leave a comment regarding this quote on head level here at the bottom.



## **Quote with Excel CBD – multipos**

How to quote with excel CBD - multipos - III. Quote

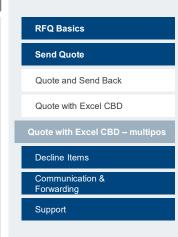


Supplier View

#### How to quote with an excel CBD

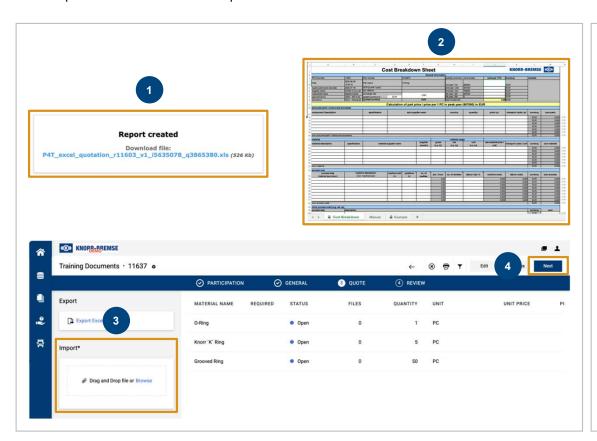
Quote with excel CBD (multipos) – III. Quote:

- 1. The quote tab provides an overview of items/materials requested.
- 2. To the right of each item an "Information" icon is found. You may need to scroll to the right to find the icon. Click on it to receive more information about the item. Close the window to jump back to the overview.
- 3. Item related documents can be accessed by clicking on the blue marked number in the "Files" column or by downloading all item related files when clicking on the button "Download Documents".
- 4. At the left side of the quote overview, a section called "Export" can be found. Click on "Export Excel File" to provide information and prices for all items listed.



## **Quote with Excel CBD – multipos**

How to quote with excel CBD - multipos - III. Quote

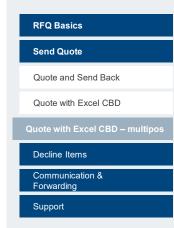


Supplier View

#### How to quote with an excel CBD

Quote with excel CBD (multipos) – III. Quote:

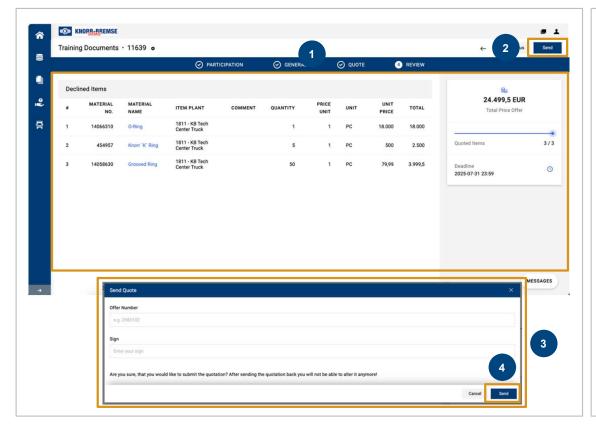
- 1. A new tab opens. Click on the file name to open/save it.
- Fill in information/prices/costs.
   Careful, do not change rows/columns in the excel file - only add information/prices. Save the excel file.
- 3. After providing all relevant costs and information, import the file in the import section via drag and drop or browse. The excel file/CBD is uploaded immediately and displays either information about wrong inserted information/costs or states "Uploaded file has been successfully checked". If information/costs provided were wrong, please delete the old file, correct data and import the new file again.
- 4. Click on "Save" in the upper right corner to continue.





### **Quote with Excel CBD – multipos**

How to quote with excel CBD - multipos - IV. Review



Supplier View

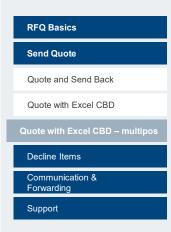
#### How to quote with an excel CBD

Quote with excel CBD (multipos) – IV. Review:

- 1. The "Review" tab provides an overview of quotes done.
- 2. By clicking on "Send" in the upper right corner the quotation is finished.
- 3. A window opens with an offer number to be maintained optionally.
- 4. Confirm the quote by clicking on "Send" to send it to CVS.

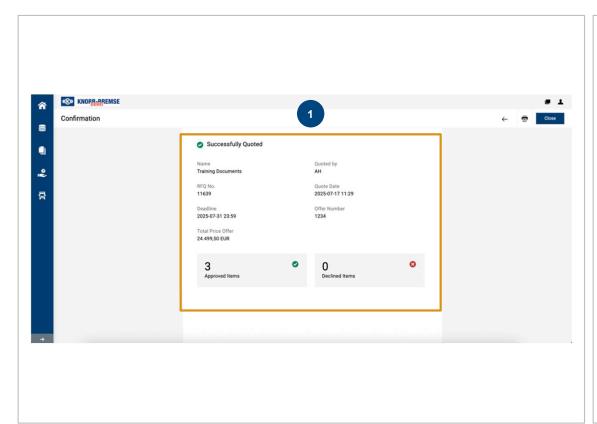
Note: If the quotation contains more than 1 item, you will be led to the next item upon completing the quotation for the first item. After quotation of all items, a review of all quotes is offered.

If you have left a comment regarding this quote on head level, it will be displayed in the "Review" tab on the lower right side.



## **Quote with Excel CBD – multipos**

How to quote with excel CBD – multipos – V. Confirmation

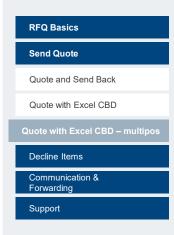


Supplier View

### How to quote with an excel CBD

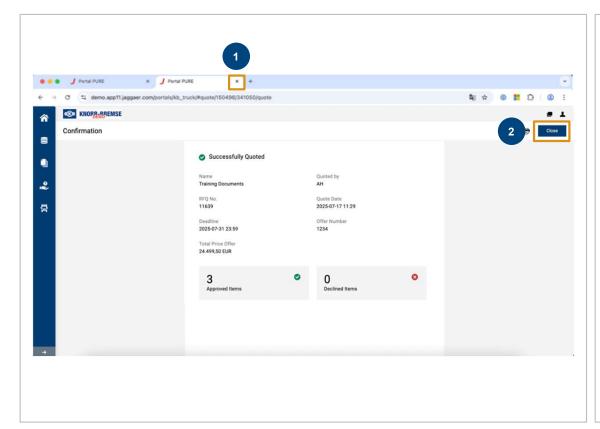
Quote with excel CBD (multipos) – V. Confirmation:

1. Upon sending the RFQ to CVS, a confirmation and summary of the quotation is displayed.



## **Quote with Excel CBD – multipos**

How to quote with excel CBD – multipos – VI. Process ends

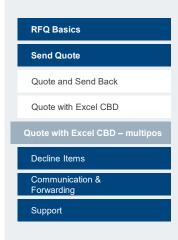


Supplier View

### How to quote with an excel CBD

Quote with excel CBD (multipos) – VI. Process ends:

- 1. Close the RFQ/the window.
- 2. For supplier portal users: Click on "Close" to go back to the overview of all RFQs.





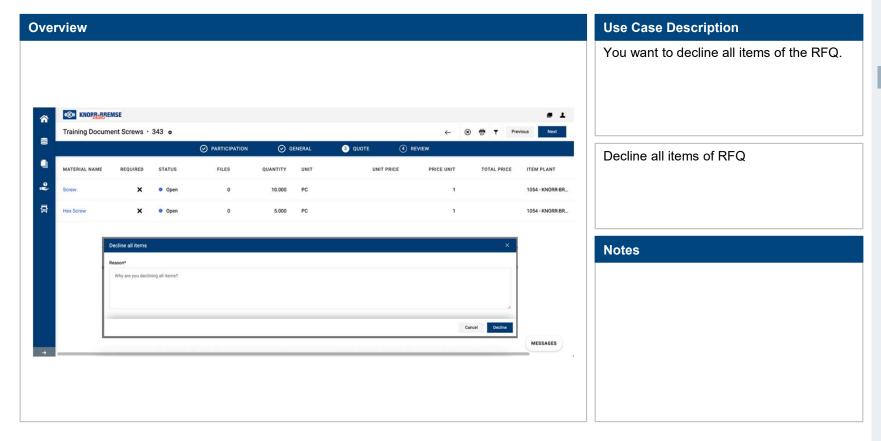
## In this chapter we will see...

- <u>Decline RFQ (All Items)</u>
- <u>Decline Single Items</u>

## **Decline Items**



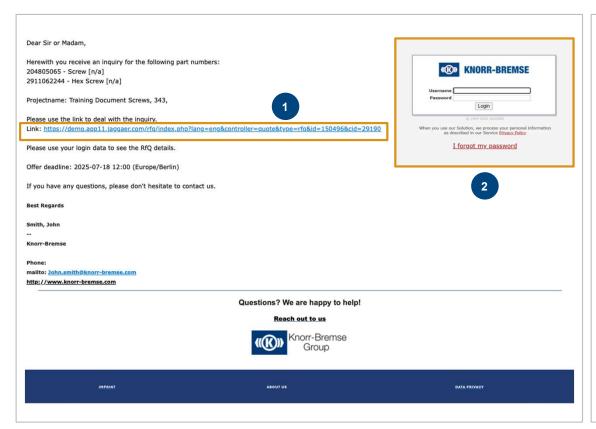
## **Decline RFQ (All Items)**





## **Decline RFQ (All Items)**

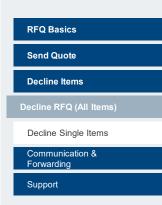
You received an email with a request for quotation



Supplier View

# You received an email with a request for quotation

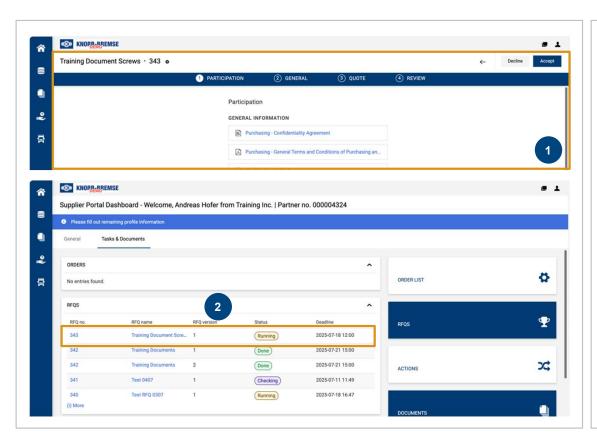
- Click on the link provided in the email that you received from JAGGAER Connect with the header "Invitation for the RFQ: RFQ Name, RFQ No. (Company Name)" from noreply@app11.jaggaer.com.
- 2. Login with your credentials provided in the email or received when the account got created.





## **Decline RFQ (All Items)**

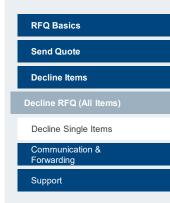
Login and open the RFQ



Supplier View

#### Login and open the RFQ

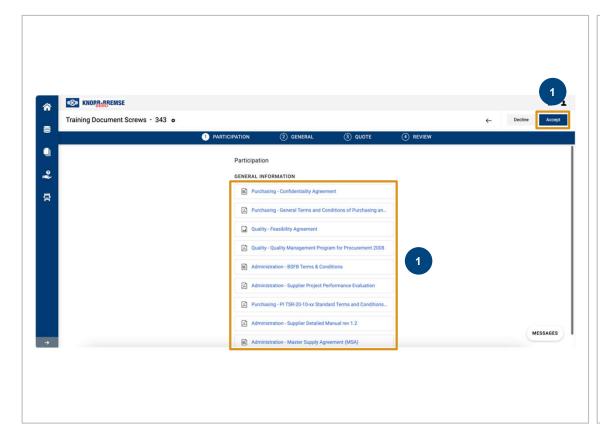
- 1. If you have used the link from the email, you will land directly in the RFQ.
- 2. Alternatively, you can login to the portal, click on the "Tasks & Documents" tab and click on the latest RFQ received in the RFQS box.
- 3. A new tab opens starting with "Participation", which is the exact same as described in step 1, with the only difference that you did not land directly in the RFQ.





## **Decline RFQ (All Items)**

How to decline an RFQ (all items) - I. Participation



Supplier View

# How to decline all positions of an RFQ – I. Participation

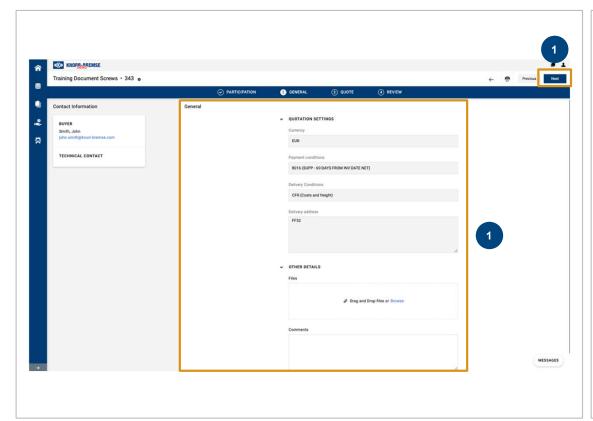
 Read and/or download the documents to proceed with the quotation and click on "Accept" in the upper right corner to proceed with the RFQ.

Note: Clicking "Decline" means you are rejecting the RFQ.



## **Decline RFQ (All Items)**

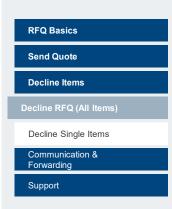
How to decline an RFQ (all items) - II. General



Supplier View

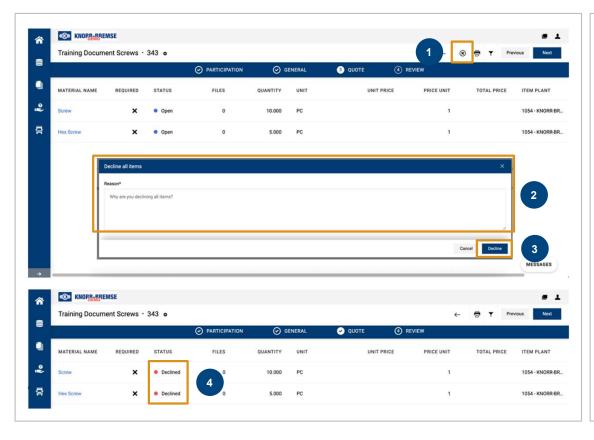
# How to decline all positions of an RFQ – II. General

 Read general terms and conditions and click on "Next"; Optionally: leave a comment regarding this quote on head level here at the bottom.



## **Decline RFQ (All Items)**

How to decline an RFQ (all items) - III. Quote



Supplier View

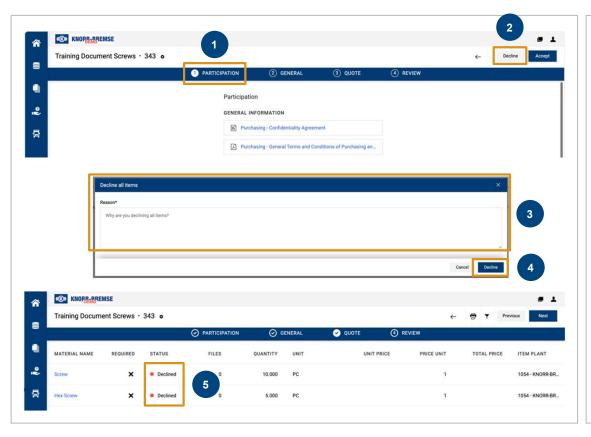
# How to decline all positions of an RFQ – III. Quote

- 1. Click on the "Decline all items" button (x) in the upper right corner.
- 2. A field will pop up where you have to enter the reason for declining all items.
- 3. Click on "Decline" to confirm the rejection of the RFQ.
- 4. The status of all items changes to "Declined" in the RFQ. The process ends.



## **Decline RFQ (All Items)**

How to decline an RFQ (all items) - III. Quote



Supplier View

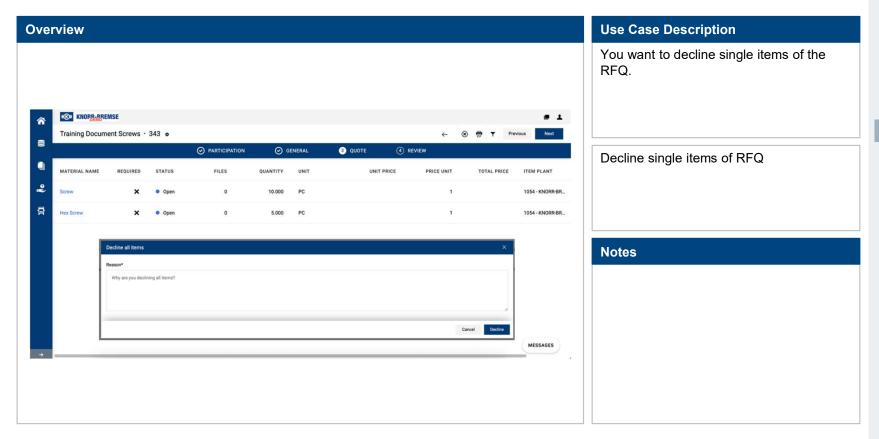
# How to decline all positions of an RFQ – III. Quote

- 1. Alternatively, open the RFQ and stay in the "Participation" tab.
- 2. Click on "Decline" in the upper right corner.
- 3. State a reason for declining all items.
- 4. Click on "Decline" to confirm the rejection of the RFQ.
- 5. The status of all items changes to "Declined" in the RFQ. The process ends.



## **Decline Single Items**

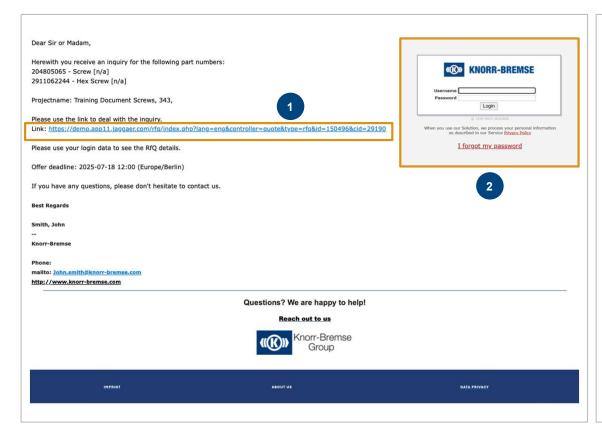
Use Case Overview





## **Decline Single Items**

You received an email with a request for quotation



Supplier View

# You received an email with a request for quotation

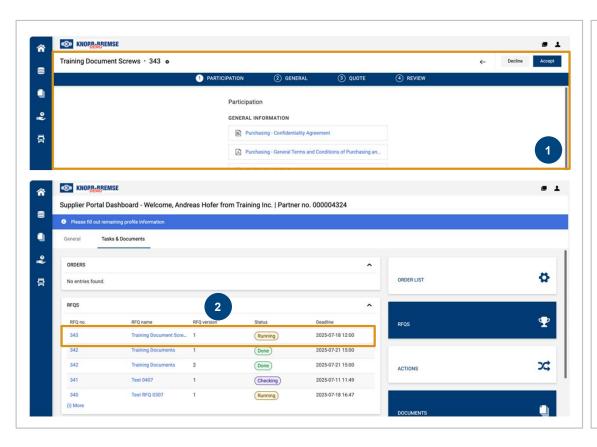
- Click on the link provided in the email that you received from JAGGAER Connect with the header "Invitation for the RFQ: RFQ Name, RFQ No. (Company Name)" from noreply@app11.jaggaer.com.
- 2. Login with your credentials provided in the email or received when the account got created.





## **Decline Single Items**

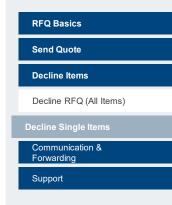
Login and open the RFQ



Supplier View

#### Login and open the RFQ

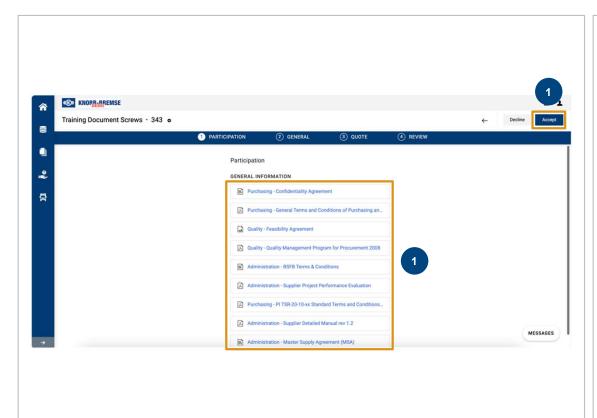
- 1. If you have used the link from the email, you will land directly in the RFQ.
- 2. Alternatively, you can login to the portal, click on the "Tasks & Documents" tab and click on the latest RFQ received in the RFQS box.
- 3. A new tab opens starting with "Participation", which is the exact same as described in step 1, with the only difference that you did not land directly in the RFQ.





## **Decline Single Items**

How to decline single items – I. Participation



Supplier View

# How to decline single items of an RFQ – I. Participation

 Read and/or download the documents to proceed with the quotation and click on "Accept" in the upper right corner to proceed with the RFQ.

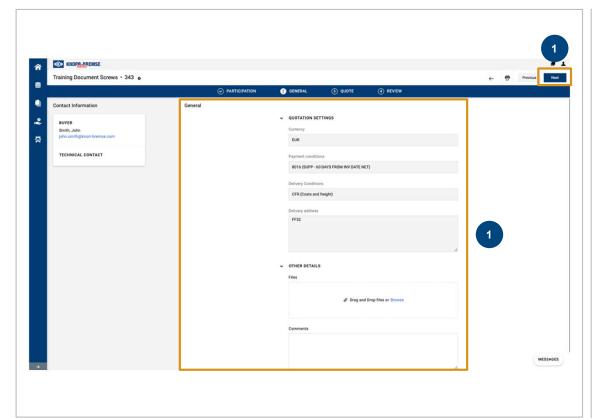
Note: Clicking "Decline" means you are rejecting the RFQ.





## **Decline Single Items**

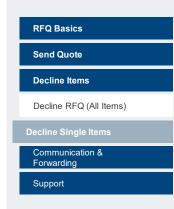
How to decline single items – II. General



Supplier View

# How to decline single items – II. General

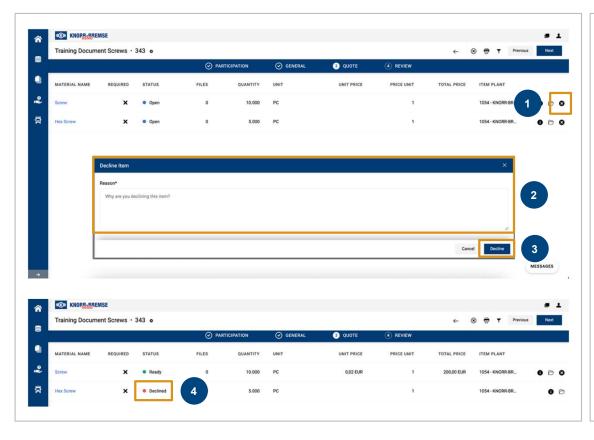
 Read general terms and conditions and click on "Next"; Optionally: leave a comment regarding this quote on head level here at the bottom.





## **Decline Single Items**

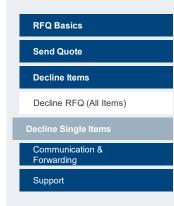
How to decline single items - III. Quote



Supplier View

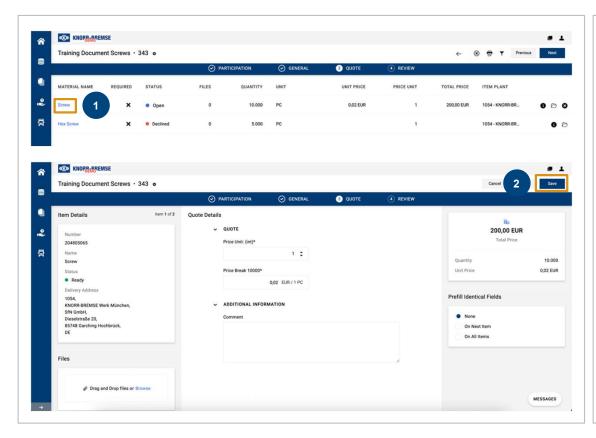
#### How to decline single items - III. Quote

- 1. Click on the "Decline" button next to the item/material.
- 2. Add a reason to the text field.
- 3. Click on "Decline" to confirm the rejection of this item.
- 4. The status changes to "Declined".



## **Decline Single Items**

How to decline single items - III. Quote



Supplier View

#### How to decline single items - III. Quote

- Open the next item by clicking on the item/material name (blue marked) or by clicking on the folder icon to the right.
- 2. Perform your quote and click on "Save" in the upper right corner.

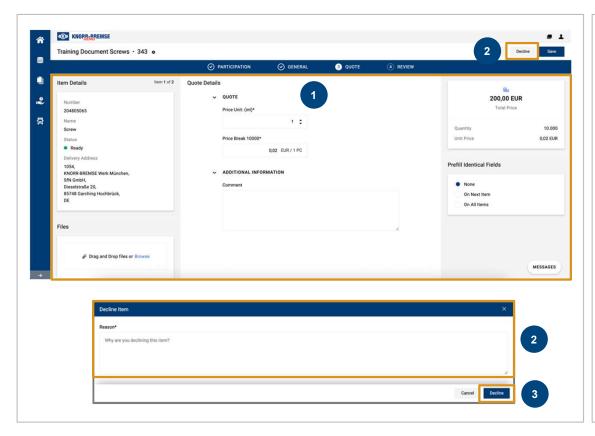
Note: You may need to download an excel file for the CBD and upload the maintained file again. Careful, do not change lines/columns in the excel file only add information/prices.





## **Decline Single Items**

How to decline single items - III. Quote



Supplier View

### How to decline single items - III. Quote

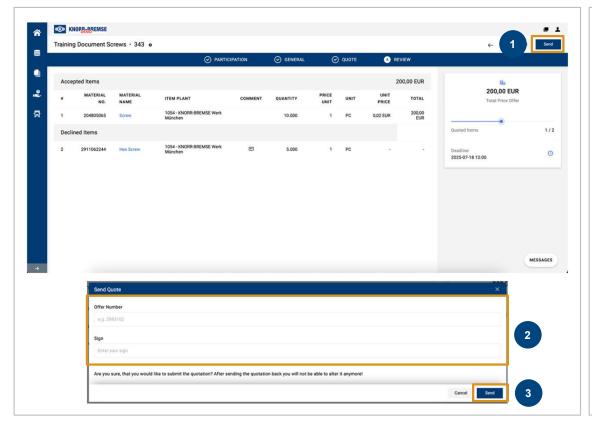
- 1. With the previous click on "Save", the next item in the list will be opened automatically. You can either perform your quote or decline an item also in this view by clicking on the "Decline" Button in the upper right corner.
- 2. Add a reason to the text field.
- 3. Click on "Decline" to confirm the rejection of this item.





## **Decline Single Items**

How to decline single items - IV. Review



Supplier View

# How to decline single items – IV. Review

The review tab provides an overview of quotes accepted/declined:

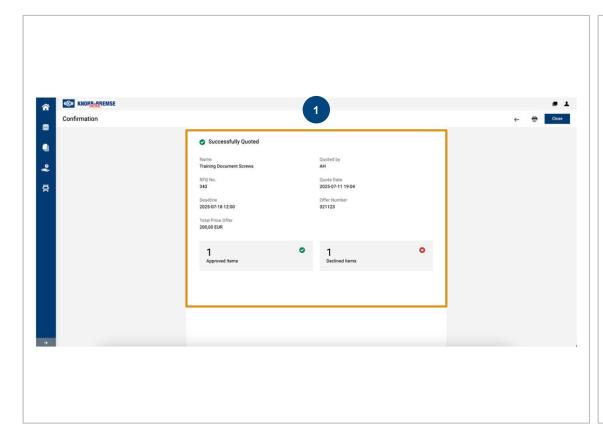
- 1. By clicking on "Send" in the upper right corner the quotation is done and sent to the customer.
- 2. A window opens with an offer number optionally to be maintained.
- 3. Confirm the quote by clicking on "Send"





## **Decline Single Items**

How to decline single items – V. Confirmation



Supplier View

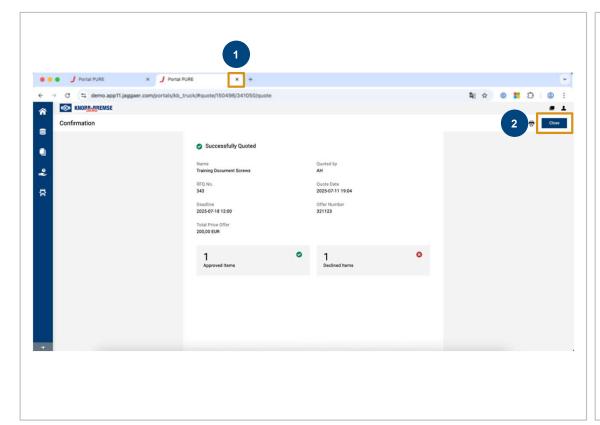
# How to decline single items – V. Confirmation

1. Upon sending RFQ to CVS, a summary of the quotation is displayed.



## **Decline Single Items**

How to decline single items – VI. Process ends



Supplier View

# How to decline single items – VI. Process ends

- 1. Close the RFQ/the window.
- 2. For supplier portal users: Click on "Close" to go back to the overview of all RFQs.





## In this chapter we will see...

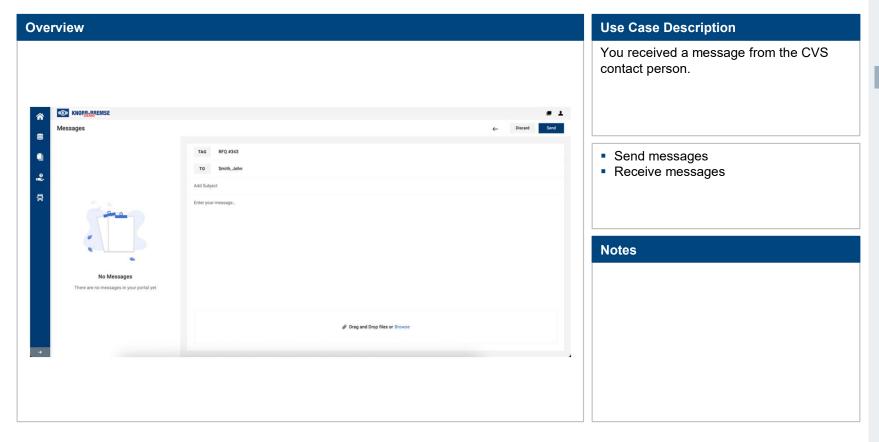
- Messaging
- Re-Assign RFQ

**Communication & Forwarding** 



## Messaging

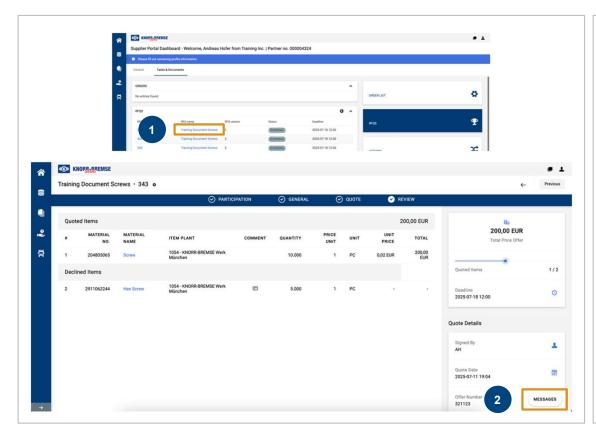
Use Case Overview





## Messaging

How to send messages



Supplier View

### How to send messages

- 1. Open an RFQ.
- 2. Click on "Messages" at the bottom right corner.





# Messaging

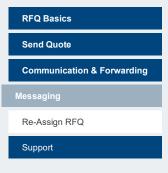
How to send messages



Supplier View

### How to send messages

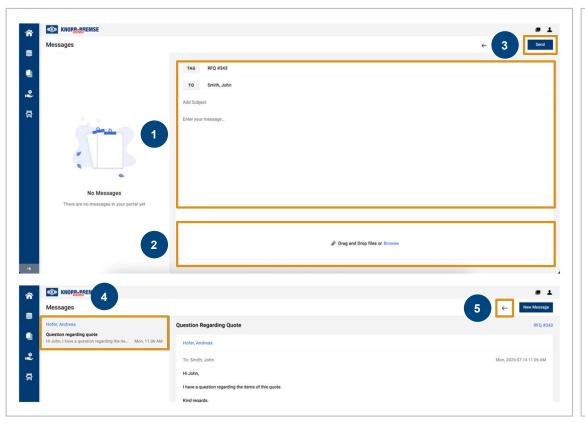
1. Click on "New Messages" in the middle of the page or in the top right corner.





## Messaging

How to send messages



Supplier View

### How to send messages

- A new message opens.
   Add a "Subject" and enter your message in the respective field.
   The related RFQ is automatically linked to the message via "TAG". The recipient is the creator/buyer of the RFQ and is
- automatically inserted.2. Optionally, attach a file.
- 3. Click on "Send" in the upper right corner to send the message to CVS.
- 4. Click on the message at the left to open it.
- 5. Click on "Back" to go back to the RFQ.



## Messaging

How to receive messages



Supplier View

#### How to receive messages

To check if you have received a reply from the buyer, you can use the following options:

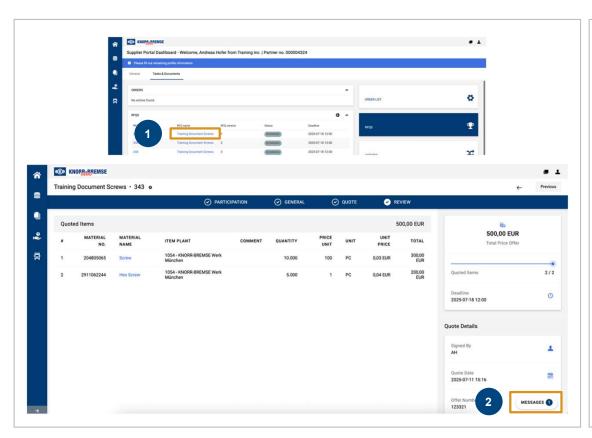
1. You are informed by email if a new message was sent by CVS. You will receive an email with the header "New message for RFQ: RFQ name" from no-reply@app11.jaggaer.com.





## Messaging

How to receive messages



Supplier View

#### How to receive messages

To check if you have received a reply from the buyer, you can use the following options:

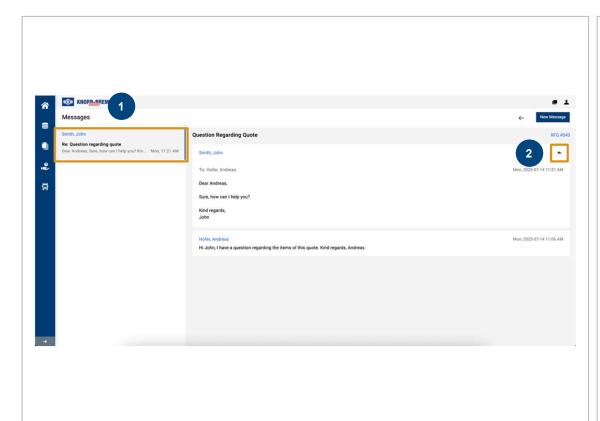
- 1. Open the RFQ.
- 2. Click on "Messages" in the bottom right.





## Messaging

How to receive messages



Supplier View

### How to receive messages

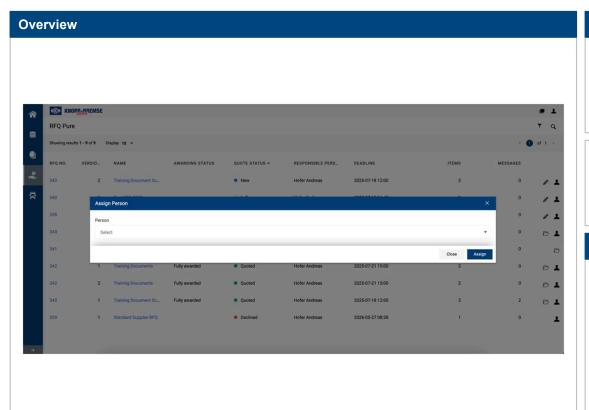
To check if you have received a reply from the buyer, you can use the following options:

- 1. Click on the new message to display details.
- 2. Click on the "Reply" button to reply if necessary.



## Re-Assign RFQ

Use Case Overview



### **Use Case Description**

You received an invitation for requests. Due to upcoming holidays, it is not possible to reply.

• Re-assign RFQ / change responsibility

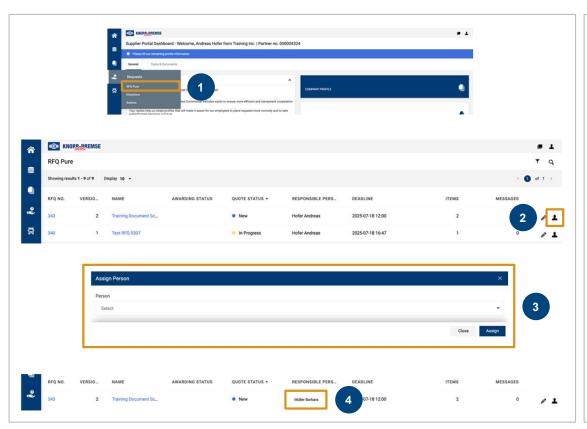
Notes





## Re-Assign RFQ

How to re-assign an RFQ



Supplier View

#### How to re-assign an RFQ

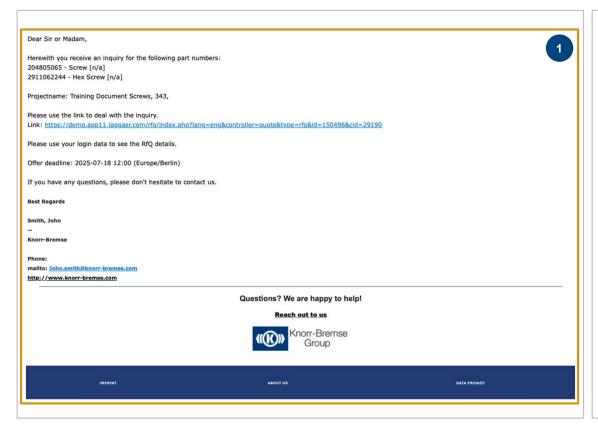
- 1. Go to RFQ overview.
- 2. Click on the "Silhouette" icon located at the right to the RFQ.
- 3. Choose a user from the dropdown and click on "Assign" in order to assign this RFQ to the desired person.
- 4. The entry in the column "Responsible person" changed to the user selected.





## Re-Assign RFQ

How to re-assign an RFQ



Supplier View

### How to re-assign an RFQ

1. Additionally, the new responsible person gets informed via email. JAGGAER Connect automatically sends out an email with the header "Invitation for the RFQ: RFQ Name, RFQ No. (Company Name)" from no-reply@app11.jaggaer.com.



