

Generating Vendor RFQs

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Many businesses order from vendors on a quote by quote or sales order by sales order basis. All Orders make this easy by allowing you to create linked purchase orders directly from a sales order. In cases where you have multiple vendors where you may source product you need a tool to generate requests for quotes (RFQ) from a vendor before you can create the linked purchase order. You also need a tool to keep track of the cost quoted by each vendor and which vendor you will ultimately supply the product. All Orders offers such a tool called 'Vendor RFQ'. To use this feature CHECK 'Enable RFQ' in Sales Order Preferences. For the purposes of demonstration I also enable 'Show standard cost and markup %'

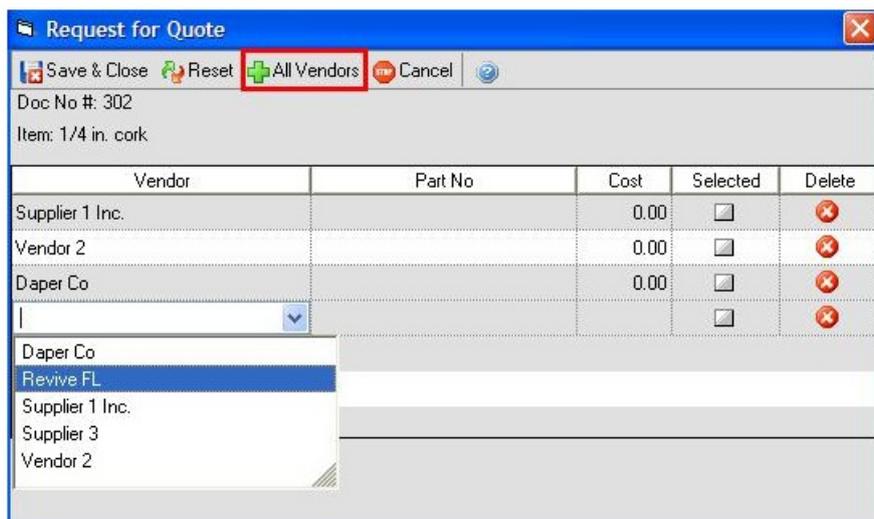
To begin create a quote (or a sales order) and item items as usual. On the line item, click the detail icon and select 'Request for Quote'.

Available	UOM	Std Cost	Markup %	Price Per	Total Price	Tax	Clear	Details
0	EA	2.95	103.3898	6.00	600.00	Tax	<input type="checkbox"/>	▼
2	EA	30.00	100.0000	60.00				

% Ship Method	▼	Tax Co	
Freight \$	0.00	Pre-Tax Total	780.00 T

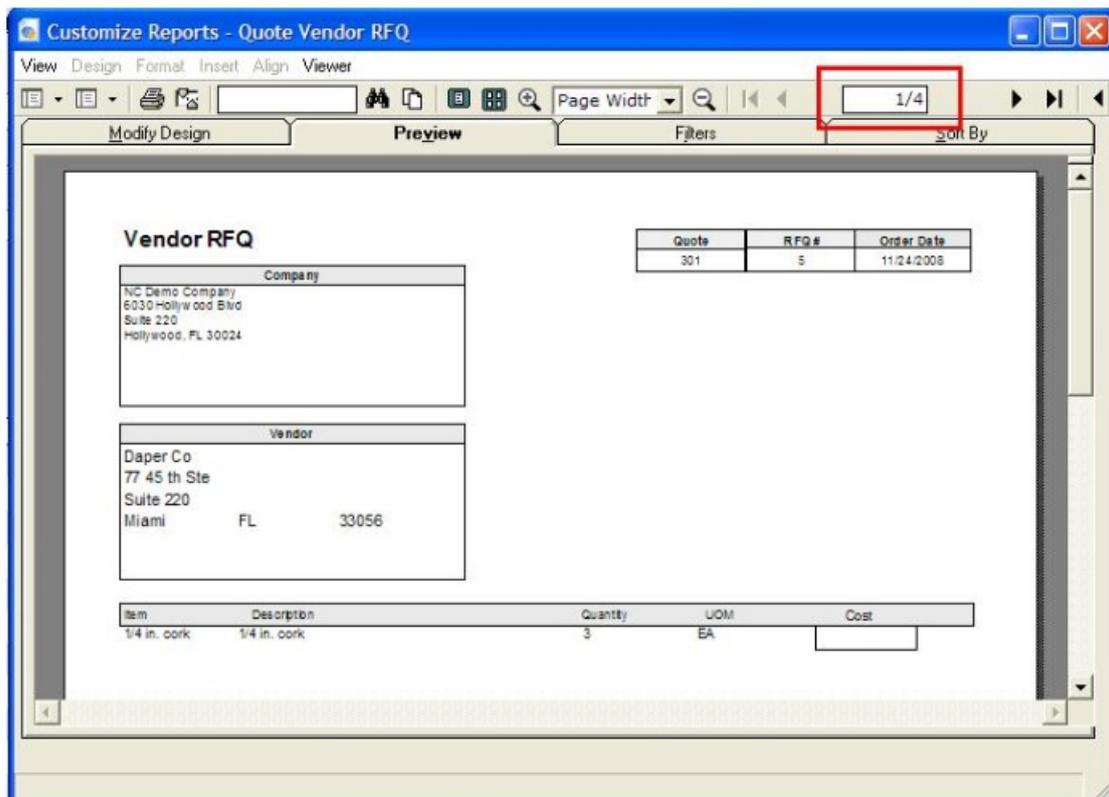
- Insert Line Shift+Insert
- Delete Line Shift+Del
- Add New Ctrl+N
- Select All
- Deselect All
- Item Info
- Full Description
- Comments
- Custom Fields
- WO Custom Fields
- Dependency
- Change UOM
- Request for Quotes

You will now see a dialog that looks like the following:

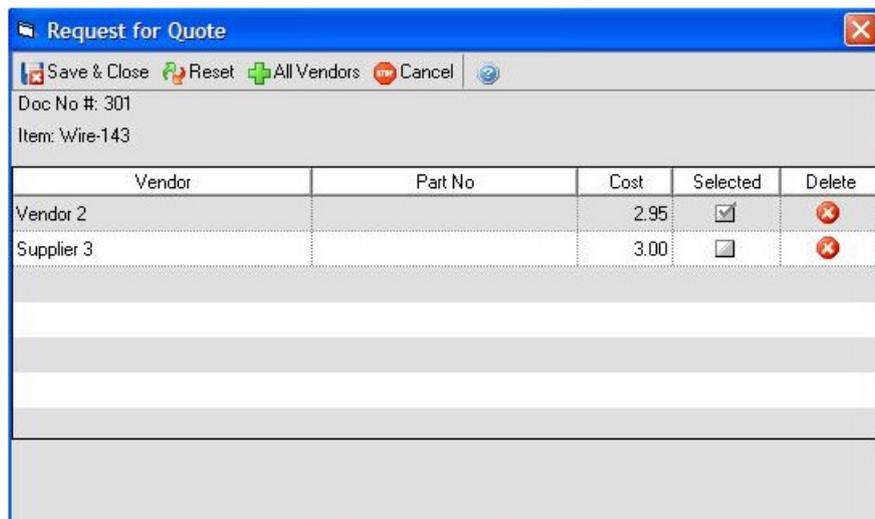


At this point you start to add the vendors that you want a quote from. You do not complete the cost or selected columns at this point. You can also click the 'All Vendors' button to automatically insert all preferred vendors for that item. Once you have added the vendors, click Save & Close. Then from the main quote screen, print the

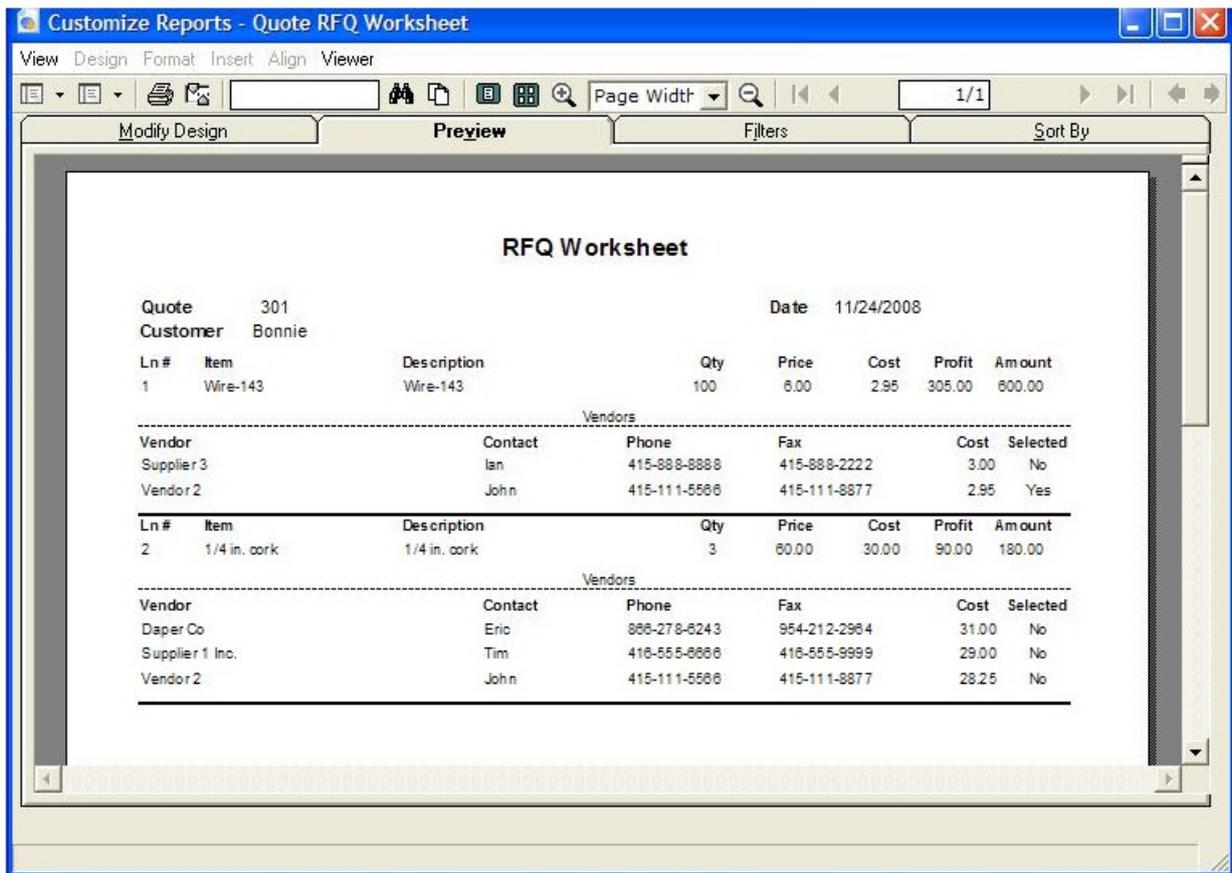
Quote Vendor RFQ form. You will now see that a RFQ has been generated for each vendor. In our example there are 4 vendors.



Now you wait until the vendor respond to your request. When they do, open up the Request for Quotes screen again and enter the costs. When you have determined which vendor you will order from, check the 'Selected' box.



All Orders provides a handy report called the RFQ Worksheet to manage this process.



When one item is selected per vendor and a sales order has been created from the quote, you can create a linked purchase orders and All Order will chose the selected vendor and cost from the Request for Quotes screen.