

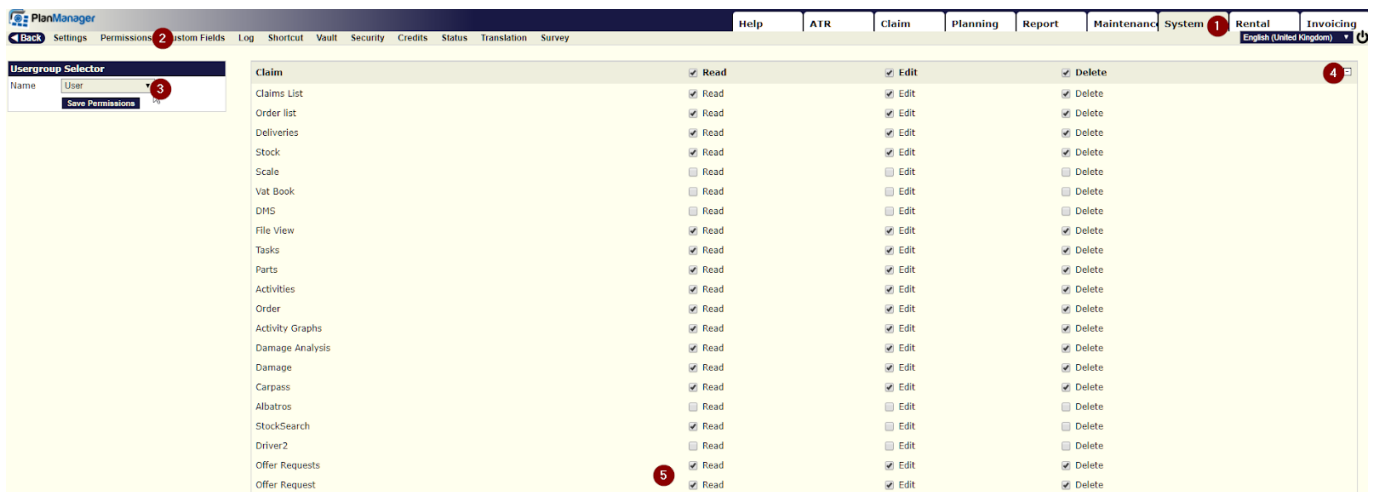
How do I send a quote?

Introduction

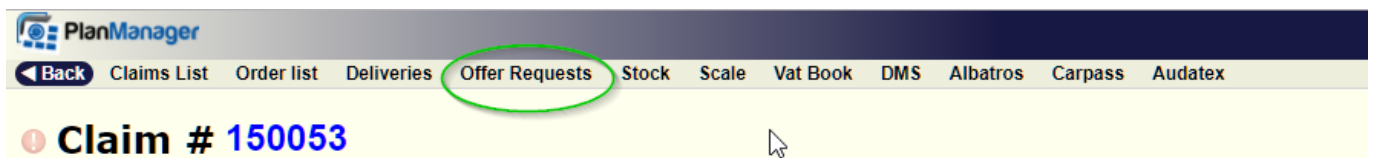
Since its release in June 2016, it is possible to send quotation requests to different suppliers as an easy way to get the best price for your order. Below is an overview of all facets of this new implementation with accompanying explanations.

Job postings activate your surroundings

To activate this new feature, go to "System - Permissions", there you select the user who should be activated. Then click the "plus" icon next to "Claims", check all the boxes next to "Offer Request" and "Offer Request" and click on "Save Permissions" top left of your screen.



If you go to the Claim tab, you will see that the sub Offer Request has been added.



A request for an offer sent to several supplier

When you create an item to order, click on the file screen on the 'Order' button, this

will open a popup. Now you will see a dropdown menu where you can select 'Offer'.

Then you can, in the field next to the 'Offer' button, select the suppliers you want to send an offer to.

The screenshot shows a table of parts with columns for quantity, part number, description, and price. Below the table, there is a dropdown menu for selecting suppliers. A green arrow labeled '2' points to the dropdown menu, and another green arrow labeled '1' points to the 'Offer' button.

Quantity	Part Number	Description	Price
1.00	8D0 955 987	R/F WASHER JET	£ 5.15
1.00	8D2 955 407 A	L/F WIPER ARM	£ 34.12
1.00	8D2 955 408 A	R/F WIPER ARM	£ 34.12
1.00	8D1 955 425 A	L/F WIPER BLADE	£ 17.35
1.00	357 955 425 D	R/F WIPER BLADE	£ 17.20

Suppliers dropdown menu:

- All Auto Parts
- Best Parts Co
- PARTS SUPPLIER 1

Buttons: Offer, Previous orders (2), Deliveries

If you click on the 'offer' button, you get an overview of the tender lines and different suppliers. Here you can make adjustments if necessary, add pictures, select a final answer date and add a comment.

The screenshot shows a claim overview with a table of tender lines and a table of suppliers. A green arrow points to the 'Ask Offers' button.

Claim # 150053

Offer Request

Make: AUDI, Model: A4 AVANT

Creator: Jean-Marie Smets, Creation Date: 28-07-2017 15:14, Reply by Progress: 29-07-2017

Buttons: Save, Select Images, Ask Offers

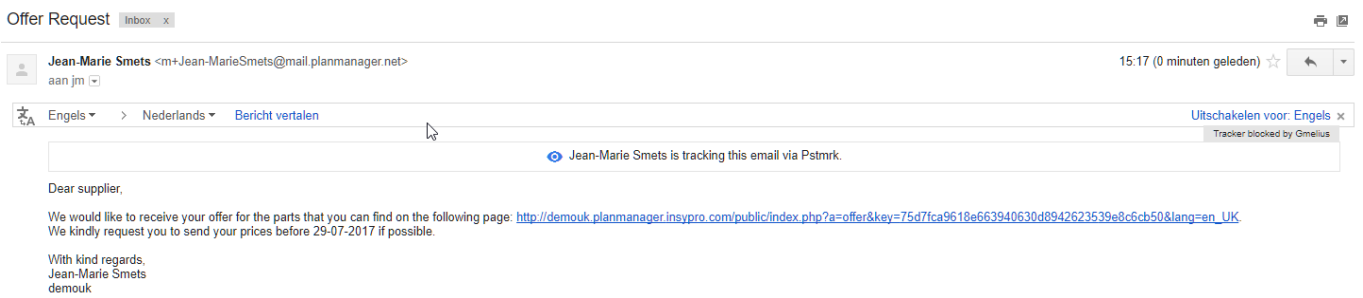
Number	Description	Quantity
001	L/F WATER DEFLECTOR	1
002	R/F WATER DEFLECTOR	1
003	FRT UPPER MOULDING	1
004	L/F SNAP ON MOULDING	1
005	R/F SNAP ON MOULDING	1
006	L/F WASHER JET	1
007	R/F WASHER JET	1
008	L/F WIPER ARM	1
009	R/F WIPER ARM	1
010	L/F WIPER BLADE	1
011	R/F WIPER BLADE	1

Supplier	City	Email
All Auto Parts		test.insypro@gmail.com
Best Parts Co		supplier.insypro@gmail.com
PARTS SUPPLIER 1		thierry.gross@rlc.de

When you save everything, you can click on the button 'Ask offers' to send the offer request.

The supplier receives the offer request

Once your offer request has been sent, the supplier will receive an email that looks like this.



If the supplier clicks on this link, he will be taken to a screen where he can enter prices and as such can send them back to your PlanManager.

Offer Request 9

Welcome,

On 31-07-2017 we've sent you a mail regarding this offer request. The parts we're looking for are listed in the table below. These parts are destined for the repair of a vehicle with the following specifications:

Make : AUDI
Model : A4 AVANT
Vinnr : WAUZZZ8K8DA118348
First registration : 18-09-2012

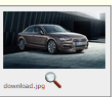
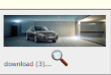
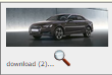
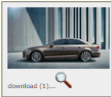
Please fill in the fields on the right and the prices in the table below. Then press the commit button on the bottom of the table.

This page is accessible until 01-08-2017.

Signed By * JM Smets

Valid Until 15-08-2017

Comment All in stock, sincerely, JM



Number	Description	Available	Gross Sale Price	Rebate		Net Purchase Price	Quantity	Total	
001	8D0 854 327 B 01C	L/F WATER DEFLECTOR	<div>in stock</div>	<div>£ 20.61</div>	<div>10</div>	<div>%</div>	<div>£ 18.55</div>	<div>1</div>	<div>£ 18.55</div>
002	8D0 854 328 B 01C	R/F WATER DEFLECTOR	<div>in stock</div>	<div>£ 20.61</div>	<div>10</div>	<div>%</div>	<div>£ 18.55</div>	<div>1</div>	<div>£ 18.55</div>
003	8D0 845 131 E 01C	FRT UPPER MOULDING	<div>in stock</div>	<div>£ 23.14</div>	<div>13.57</div>	<div>%</div>	<div>£ 20</div>	<div>1</div>	<div>£ 20.00</div>
004	8D0 845 453 A	L/F SNAP ON MOULDING	<div>in stock</div>	<div>£ 10.96</div>	<div>27.01</div>	<div>%</div>	<div>£ 8</div>	<div>1</div>	<div>£ 8.00</div>
005	8D0 845 454 A	R/F SNAP ON MOULDING	<div>in stock</div>	<div>£ 10.96</div>	<div>27.01</div>	<div>%</div>	<div>£ 8</div>	<div>1</div>	<div>£ 8.00</div>
006	8D0 955 987	L/F WASHER JET	<div>in stock</div>	<div>£ 5.15</div>	<div>15</div>	<div>%</div>	<div>£ 4.38</div>	<div>1</div>	<div>£ 4.38</div>

The offer comes into PlanManager

When a supplier has sent a response to your offer request, you will see this immediately in the File menu - Offer requests. Here you have an overview of the sent offer requests and the answer. In the offers that have an answer you will see the suggested price and a green check. In this table you can easily compare the prices from the different suppliers.

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Carpas

Audatex

English (United Kingdom)

Job # 150053

Offer Request

Make

Model

Comment

8

AUDI

A4 AVANT

Creator

Creation Date

Reply by

Progress

Jean-Marie Smets

31-07-2017 09:21

01-08-2017

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Add Lines

Results: Viewing items 1-11 of 11.

Show purchase value

Previous

1

Next

	Number	Description	All Auto Parts	Best Parts Co	PARTS SUPPLIER 1
001	8D0 854 327 B 01C	L/F WATER DEFLECTOR	£ 18.55 ✓	£ 18.55 ✓	£ ----
002	8D0 854 328 B 01C	R/F WATER DEFLECTOR	£ 18.55 ✓	£ 17.52 ✓	£ ----
003	8D0 845 131 E 01C	FRT UPPER MOULDING	£ 20.83 ✓	£ 20.83 ✓	£ ----
004	8D0 845 453 A	L/F SNAP ON MOULDING	£ 9.86 ✓	£ 9.64 ✓	£ ----
005	8D0 845 454 A	R/F SNAP ON MOULDING	£ 9.86 ✓	£ 9.00 ✓	£ ----
006	8D0 955 987	L/F WASHER JET	£ 4.64 ✓	£ 5.00 ✓	£ ----
007	8D0 955 987	R/F WASHER JET	£ 4.64 ✓	£ 5.00 ✓	£ ----
008	8D2 955 407 A	L/F WIPER ARM	£ 29.00 ✓	£ 25.00 ✓	£ ----
009	8D2 955 408 A	R/F WIPER ARM	£ 29.00 ✓	£ 29.00 ✓	£ ----
010	8D1 955 425 A	L/F WIPER BLADE	£ 14.75 ✓	£ 15.62 ✓	£ ----
011	357 955 425 D	R/F WIPER BLADE	£ 14.62 ✓	£ 15.48 ✓	£ ----
Total deliverable parts:			£ 174.30	£ 170.64	£ ----
			Order	Order	Order

Supplier	Offer Date	Signed By	Offer Due Date	Comment
All Auto Parts	31-07-2017 08:27	E.RITATING	07-08-2017	LINE 001 NOT IN STOCK

If you compared the prices and made your selection, click the button "Order" under the column of the supplier of your choice. After clicking on the "order" button, you will see that an order is created automatically. Then click "Order XXXX" and you will be referred to the corresponding order page.

Now you will only have to click on 'Communicate' to place your order.

You can also choose to see the buying or selling price that the supplier sent. You can select the prices you want to see using the dropdown on top of the field.

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Car Fleet

Invoicing

English (United Kingdom)

Job # 150053

Offer Request

Make

Model

Comment

8

AUDI

A4 AVANT

Creator

Creation Date

Reply by

Progress

Jean-Marie Smets

31-07-2017 09:21

01-08-2017

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Add Lines

Results: Viewing items 1-11 of 11.

Show sale value

Previous

1

Next

Number	Description	All Auto Parts	Best Parts Co	PARTS SUPPLIER 1
001	8D0 854 327 B 01C	L/F WATER DEFLECTOR	£ 20.61	£ -----
002	8D0 854 328 B 01C	R/F WATER DEFLECTOR	£ 20.61	£ -----
003	8D0 845 131 E 01C	FRT UPPER MOULDING	£ 23.14	£ -----
004	8D0 845 453 A	L/F SNAP ON MOULDING	£ 10.96	£ -----
005	8D0 845 454 A	R/F SNAP ON MOULDING	£ 10.96	£ -----
006	8D0 955 987	L/F WASHER JET	£ 5.15	£ -----
007	8D0 955 987	R/F WASHER JET	£ 5.15	£ -----
008	8D2 955 407 A	L/F WIPER ARM	£ 34.12	£ -----
009	8D2 955 408 A	R/F WIPER ARM	£ 34.12	£ -----
010	8D1 955 425 A	L/F WIPER BLADE	£ 17.35	£ -----
011	357 955 425 D	R/F WIPER BLADE	£ 17.20	£ -----
Total deliverable parts:		£ 199.37	£ 199.37	£ -----
		Send to estimation	Send to estimation	Send to estimation

Supplier	Offer Date	Signed By	Offer Due Date	Comment
All Auto Parts	31-07-2017 08:27	E.RITATING	07-08-2017	LINE 001 NOT IN STOCK

If you want to see the sales values, select "Show Sale Value '.

When you click the 'Send to estimation', the components are added to the current specifications in this claim. If no specification exists, there will be created a new frame. If a part of the components in this offer is linked to a support framework and a part not yet, the components will be those not yet been coupled are added to a set of specifications of the scope in which the other components of the offer are already linked to.

Then you will be redirected to the file screen for each file.

Unique solution ID: #1520

Author: Jean-Marie

Last update: 2021-11-10 15:49