QUICK GUIDE

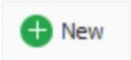
QUOTE MANAGEMENT

InEight® ESTIMATE

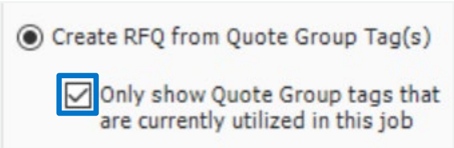
CREATE AND PUBLISH AN RFQ

1. Select the **Quote** tab ▶ Select **Request for Quote (RFQ)**.

2. From the **Actions** tab, click on the **New** icon to create a new RFQ.



3. Select **Create RFQ from Quote Group Tag(s)**, leaving the checkboxes checked to only show quote groups and resources that are being used.



4. Select a **description** from the panel.

5. Click **OK**.

6. In the **Response Deadline Date** field, select a date two weeks from today, and for the **Response Deadline Time**, type a time stamp (e.g. 2:00 pm).

7. Select the **Terms & Conditions** tab.

8. Create and type in any special conditions in the **Buyer's Special Terms & Conditions** field.

9. Type in instructions in the **RFQ Instructions** field.

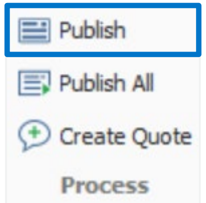
10. Select the **Seller Companies** tab and click in the first blank row in the **Company Name** column.

11. Click on the **Address book** icon, and then select vendors.

12. Click **OK**.

13. Select the sellers to whom you want to send the RFQ.

14. Under the **Actions** tab of the record, select **Publish** to create your RFQ document.

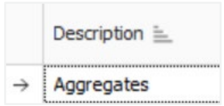


15. Click **OK** to save the RFQ Record.

CREATE A QUOTE FROM RFQ

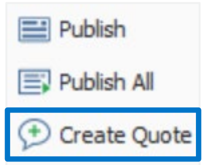
1. Select the **Quote** tab ▶ Select **Request for Quote (RFQ)**.

2. Right-click to open the **RFQ record** for which you've received quotes (e.g. Aggregates RFQ).



3. Select the **Seller Companies** tab and select the sellers for whom you need to create quotes.

4. From the **Actions** menu, select **Create Quote**.



5. Click **OK** to close the quote.

6. Close the RFQ Record and the RFQ Register.

7. To open the Quote Register, select **Quote** from the InEight Estimate landing page.

8. Select **Quotes** from the **Quote Management** section.

QUICK GUIDE

QUOTE MANAGEMENT

InEight® ESTIMATE

ENTER QUOTE DETAILS

1. Right-click to open the **Quote Record** for a seller.
2. On the **Resources** tab, make sure **No Split** is unchecked for all items.
3. Also on the **Resources & Cost Items** tab, now enter unit prices for the resources:

Resource Code	Description	Unit Price
MBR	Aggregate Base Rock	$8.00
MDIRTB	Dirt Class B	$6.00

4. Click **OK** to close the Quote Record.

NEED SOME MORE HELP?

Learn more in our Knowledge Library
learn.ineight.com

Take a course at InEight U
university.ineight.com

CREATE QUOTE GROUP SCOPE ITEMS

1. From the **Setup** tab ▶ select **Foundation Setup Data**.

2. Select the **Quote Group Tags** tab.

3. Right click on a quote group row header and select **Open**.

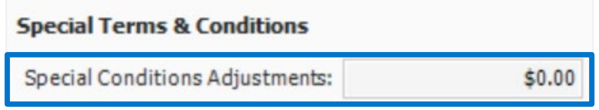
4. Add Scope Items, check if they are included, and add default amounts (if desired).

Scope Item	Default Included	Default Amount	Default % of Total
	■		

5. Click **OK**.

EDIT SCOPE ON SPECIAL TERMS & CONDITIONS

1. Open a quote.
2. Under **Special Terms & Conditions**, add a special condition adjustment for the overall quote if needed.



3. Indicate if the adjustment should be spread over your quoted items evenly or by weighted average.
4. Uncheck any scope items that are not included as part of the quote. (Unchecked scope items will automatically add the default amount that was defined on their corresponding quote group.)
5. Click **OK**.

COMPARE AND AWARD QUOTES

1. Select the **Quote** tab ▶ Select **Resources**.
2. Under **Description**, select a **Resource**.
3. Review the quotes to determine the lowest bidder award all by right clicking on the **Example Items** and selecting **Award All**.
4. Right click on an amount under **Example Vendor** row and select **Award**.