Purchase RFQ

Module Guide: Purchase RFQ

Module Location

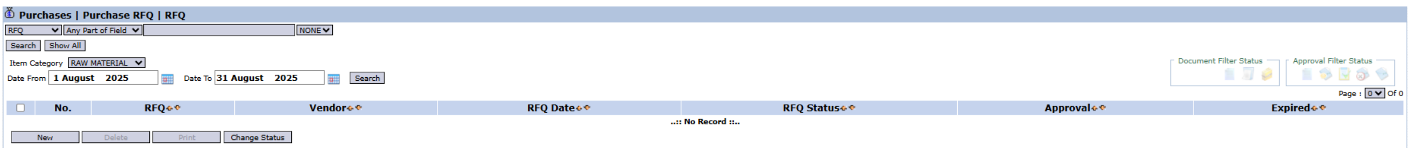
Purchasing > Purchase RFQ > Purchase RFQ

Module Objective

The **Purchase RFQ (Request for Quotation)** module is a tool for the Purchasing (Procurement) department to create and send official Request for Quotation documents to suppliers (vendors). This process is typically done after a Purchase Requisition has been approved, as a step to find and get the best price offers from several vendors.

1. Main View (RFQ List)

The main page of this module displays a list of all RFQ documents that have been created and sent to vendors.



View Explanation & Filters

This page is for viewing and managing all existing RFQs.

- **Filters**: You can search for a specific RFQ by its **RFQ number**, **Item Category**, or a date range (**Date From / Date To**).

- **RFQ List**: The table below will display all RFQs that match the filters, with columns such as **RFQ**, **Vendor**, **RFQ Date**, **RFQ Status**, and **Approval**.

Button Functions

- **New**: The primary button to create a new Purchase RFQ.

- **Delete**: To delete a selected RFQ.

- **Print**: To print the RFQ document that will be sent to the vendor.

- **Change Status**: To change the status of a selected RFQ.

2. Steps to Create a Purchase RFQ

Step 1: Create a New RFQ

From the Main View, click the **New** button to open the **Create RFQ** form. 

Step 2: Fill in Header Information

On the form that appears, fill in the general information:

- **Vendor**: Select the supplier (vendor) to whom you will send the RFQ. 

- **Purchase Requisition**: **Important!** Click the **Pick** button to select an approved **Purchase Requisition (PR)** document. This will become the basis of your RFQ.


- **RFQ Date**: Enter the date the RFQ is created.

- **Memo**: Provide additional notes if needed.

Step 3: Verify Item Details

After you select the PR in Step 2, the detail table at the bottom will be automatically populated with the requested **Item Code** and **Quantity** details.

Step 4: Save and Confirm

After all data is filled in, use the buttons in the bottom-left section:

- **Save**: To save the RFQ as a draft. 

- **Confirm**: To finalize the RFQ and send it into the approval workflow.

Workflow & Integrated Business Process

- This module is the step after a **Purchase Requisition** is approved.

- The RFQ sent to the vendor will be answered with a price offer, which will then be recorded in the **Vendor Quotation** module.

Tips & Important Notes

- Always create an RFQ by referencing an approved **Purchase Requisition** to maintain a correct and documented procurement workflow.

- You can create **multiple RFQ documents for the same Purchase Requisition** and send them to several different vendors to compare prices.
- A finalized RFQ document can be printed via the **Print** button to be sent officially to the vendor.

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