Technical White Paper

Bid Packaging – RFQ Processing

This technical white paper is designed for Spitfire Project Management System users. This white paper illustrates the way the Bid Package, RFQ and Commitment Doc types work together and offers best practices for bid processing workflows.

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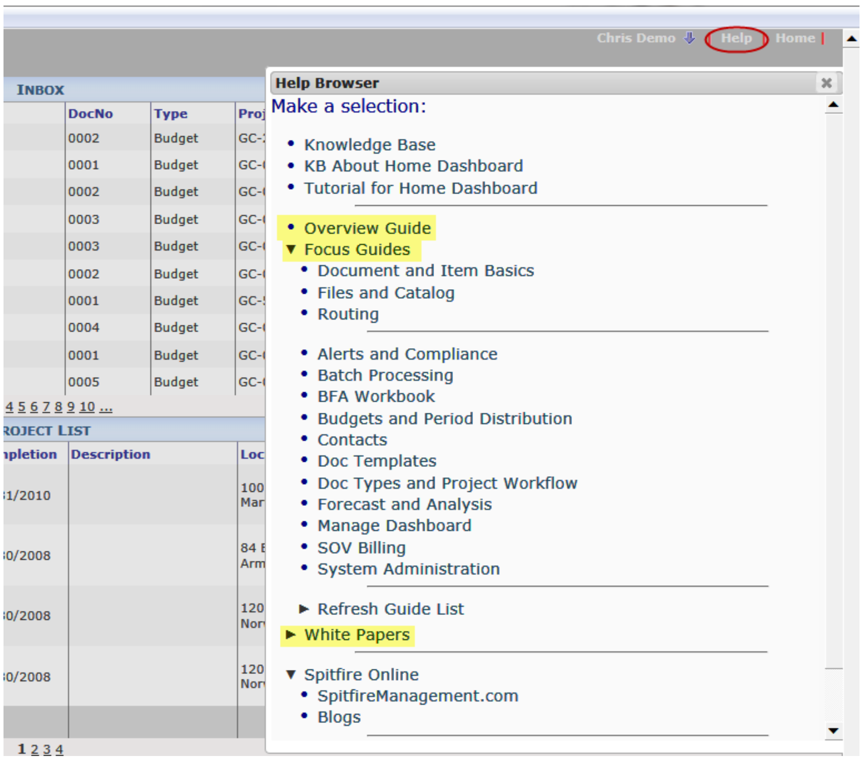
Introduction

sfPMS uses the Bid Package, RFQ and Commitment Doc types (and optionally, the Invitation to Bid document and Plan Room Dashboard) to facilitate requesting quotes (bids) from vendors and converting awarded bids into vendor contracts. This white paper illustrates the way the Doc types work together and offers best practices for bid processing workflows.

Note: There can be other workflows involving these Doc types. Once you understand how they work together, you will figure out the best workflow for your projects.

This paper assumes some familiarity with sfPMS and its dashboards as described in the *Overview Guide* as well as a general understanding of Spitfire documents as described in the *Focus on Document and Item Basics* guide. Information on how to create the specific Doc types mentioned in this guide can be found in the *Focus on Doc Types and Project Workflow* guide.

All documentation referred to within this white paper can be found on the Spitfire Help menu.



Note: Because sfPMS is configurable and because different users have different levels of access rights and permissions, the screens shown and the fields described in this guide may not be the same as those in your system.

Note: aside from some updated pictures and one sentence marked in green, the information herein is the same as the information in the V4.3 documentation.

Overview

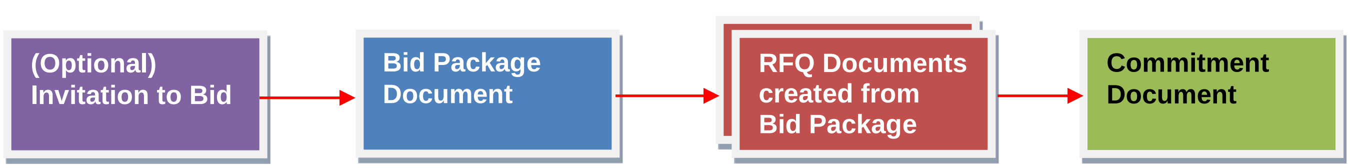
Workflow Involving Routing

You can optionally start your Bid Package workflow with the Invitation to Bid document.

- (*optionally*) Create the Invitation to Bid document (see page 7).
    - Route the Invitation to Bid to vendors and pre-vendors.
    - Record the responses from the vendors on the Invitation to Bid's Route Detail tab.
- Create the (related) Bid Package (see page 10).
- (*optionally*) Attach the Invitation to Bid to the Bid Package (see page 13.)
- Attach files and other documents to the Bid Package.
- On the Bid Package's RFQ tab, use the ITB icon to automatically create RFQs for the vendors who responded in the affirmative to the Invitation to Bid.

  or

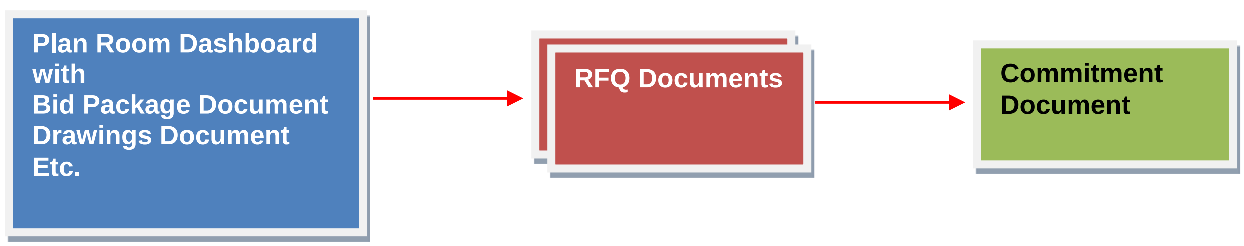
  On the Bid Package's RFQ tab, create an RFQ for each selected vendor through the and/or icons.
- Route the RFQs to the vendors (see page 14).
- Input the returned quote information into the RFQ document or have the vendors enter this information themselves (see page 16).
- Review the RFQs through the Bid Package, perhaps using the Competitive Bid Response Analysis (CoBRA) workbook (see page 18).
- Award an RFQ.
- Create a Commitment from the awarded RFQ (see page 23).



Workflow Involving Plan Room

- Create a Bid Package document when you need vendor quotes (see page 10).
- Place the Bid Package on the Plan Room Dashboard (see page 15).
- Place other Doc types, such as Drawings, on the Plan Room Dashboard also.
- Notify vendors about the Plan room, through regular means (perhaps with a routed Invitation to Bid document or a newspaper notice).
- As you receive the sealed bids from vendors, create an RFQ for each vendor from the Bid Package's RFQ tab.

  Note: if your vendors can log into Spitfire with a personal login, they may be able to create their own RFQ documents from the Bid Package through a self-service link. For more information, see the *Setup for Spitfire's Plan Room* technical white paper and the *How to Use the Plan Room (from a vendor login)* instructions.
- Review the RFQs through the Bid Package, perhaps using the Competitive Bid Response Analysis (CoBRA) workbook (see page 18).
- Award an RFQ.
- Create a Commitment from the awarded RFQ (see page 23).



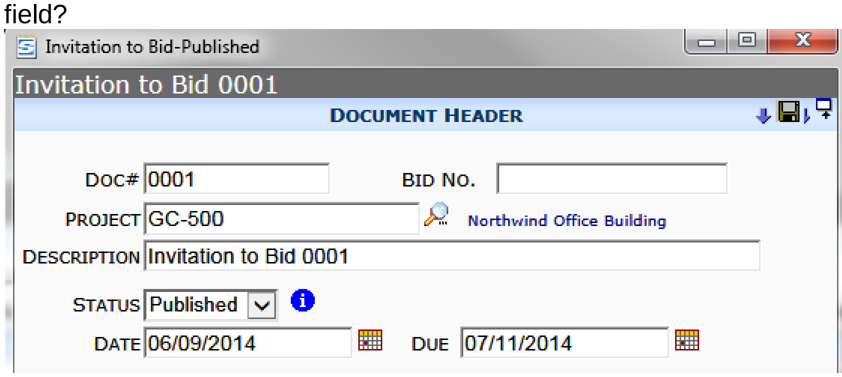
The Invitation to Bid Document

Your workflow can start with an Invitation to Bid document as a place to record which vendors are interested in bidding. You can then use this information on your Bid Package.

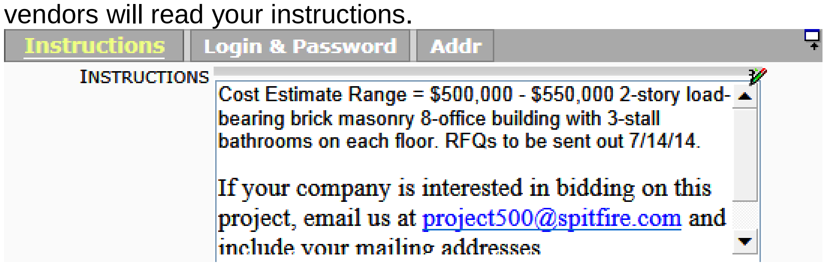
For more information about the Invitation to Bid document, see the *Focus on Doc Types and Project Workflow* guide.

Considerations

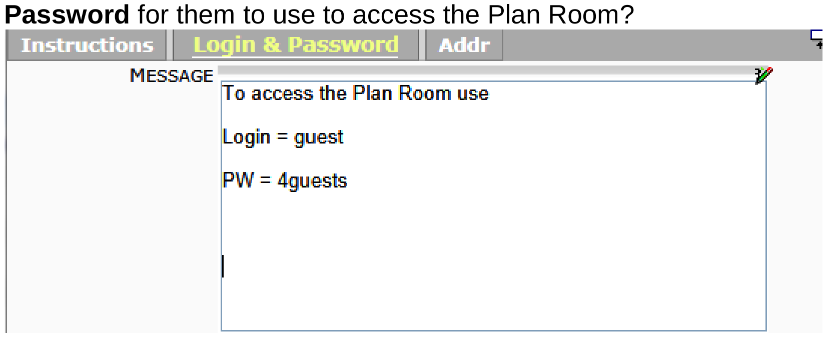
- Are the Document Header fields filled in? Have you indicated the date by which the vendors must respond to you on the **Due** field?



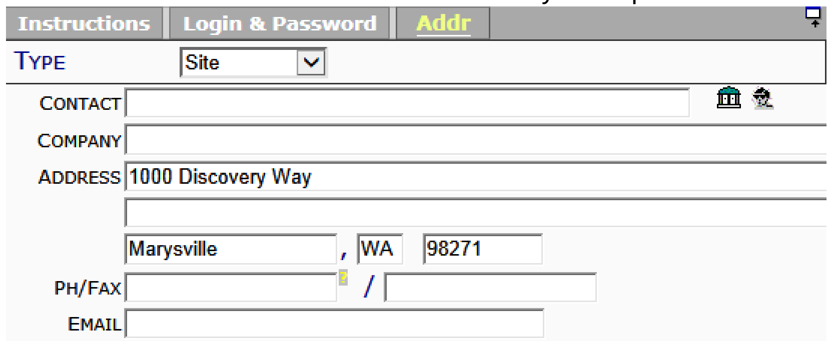
- Have you filled in the field on the **Instructions** tab? If you are using a bookmark template to generate an output file that will be routed to vendors, information on the Instructions tab will likely be included in that file. If you are placing the Invitation to Bid on the Plan Room Dashboard, the Instructions tab is where your vendors will read your instructions.



- If you want your vendors to go to the Plan Room for more information/documents, have you entered a **Login and Password** for them to use to access the Plan Room?



- Do you want to indicate a bid location or site location on the **Address** tab? **Note**: some customization may be required.



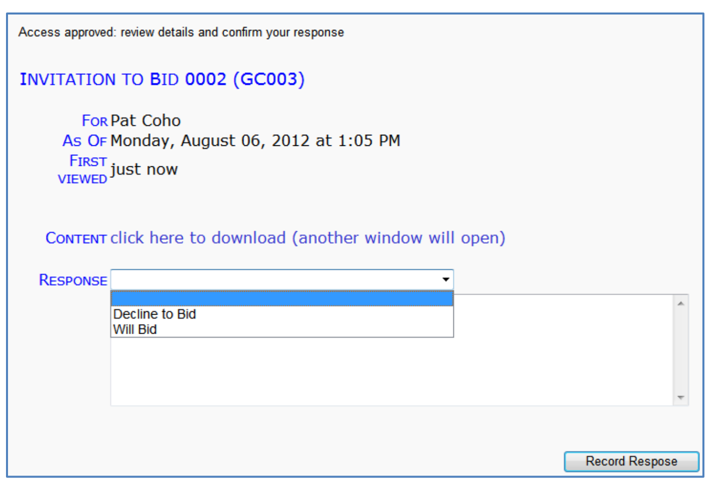
- If you are going to route the Invitation to Bid, you will need to add routees to the **Route Detail** tab. (For more information, see the *Focus on Routes* guide.) Routed Invitation to Bid documents often use Transmittal templates because transmittal output is personalized per routee. The Build Route dialog can even default to include transmittals for this Doc type.
- If there is an **Attachment** (), or **Attachment (auto)** template for the **Invitation to Bid**, a file will be generated from the template and routed to any routees. (For more information, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.)

Vendor Responses

If you route the Invitation to Bid to vendors, these vendors will be listed on the Route Detail tab. Vendors can reply to emails (and indicate their interest through the Response Wizard) or indicate in some other way (such as regular mail) that they want to bid and you can edit the routee rows to indicate their responses.

Respond Wizard

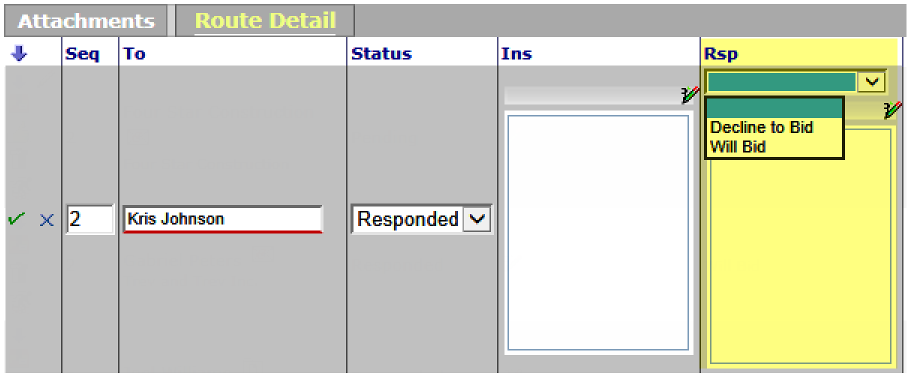
It is possible for vendors to follow a link in the email they receive in order to get to a Response Wizard.



For more information, see the *Focus on Routes* guide.

Route Detail Tab

If you need to record a vendor's response yourself, edit the routee row and select the proper **Rsp** from the drop-down.



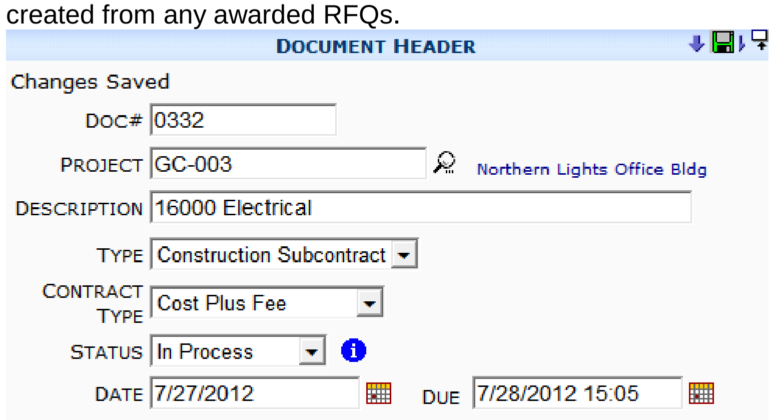
For more information, see the *Focus on Routes* guide or the Invitation to Bid chapter in the *Focus on Doc Types and Project Workflow* guide.

The Bid Package Document

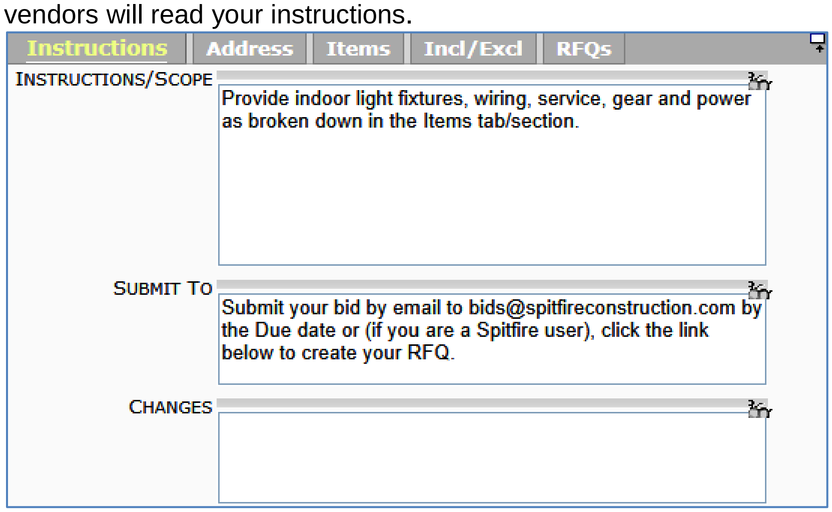
Before you place the Bid Package on the Plan Room Dashboard or begin creating RFQs, you should first ensure that all pertinent information is on the Bid Package.

Considerations

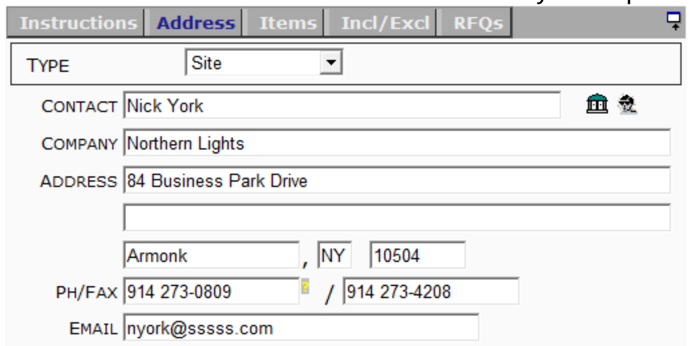
- Are the Document Header fields filled in? Have you indicated the date by which the vendor quotes are due in the **Due** field? If you select a **Type**, this type will be passed to Commitments created from any awarded RFQs.



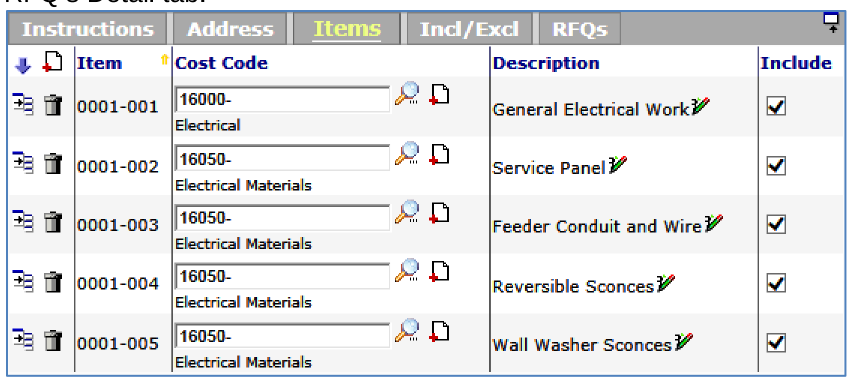
- Have you filled in the fields on the **Instructions** tab? If you are using a bookmark template to generate output files that will be routed to vendors, information on the Instructions tab may be included in the file. If you are placing the Bid Package on the Plan Room Dashboard, the Instructions tab is where your vendors will read your instructions.



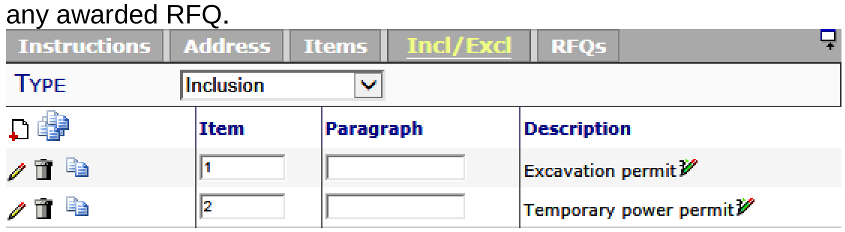
- Do you want to indicate a bid location or site location on the **Address** tab? **Note**: some customization may be required.



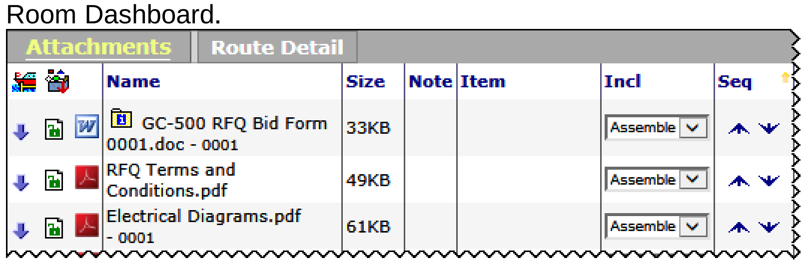
- Are all Items for which you want a quote, in the **Items** tab? Items need a **Cost Code**, **Description**, **Acct Category** and **Units**. Be sure the **Include** checkbox is checked if you want the Item to be included in the final calculation summarized on the RFQ's Detail tab.



- Did you want to add Inclusions, Exclusions, Legal Attachments or Other Clauses at the **Incl/Excl** tab? Whatever you add to this tab will be copied to the RFQs and to Commitments created from any awarded RFQ.



- Do you want any files attached to the Bid Package? Files in the **Attachments** tab are copied over to the RFQs that are created from the Bid Package, and routed to vendors, or viewed and exported by vendors who open the Bid Package on the Plan Room Dashboard.



TIP

The attachment of drawing files onto a Bid Package can be automated through the DocTypeConfig | AutoAttach rule. For more information, see the *Rules and Rule Values* technical white paper or talk to your implementer.

Note: you can add Drawing documents (logs) directly on to the Plan Room Dashboard if vendors will be accessing the Plan Room Dashboard.

- Do you intend to route the Bid Package? While you can route the Bid Package internally (and therefore may need to add to the **Route Detail** tab), Bid Package documents are not usually routed to vendors.
- Do you need to set up any templates? If there are **Attachment** (), **Attachment (auto)** or **Attachment (all)** templates for the Bid Package, the same templates will apply to the RFQs created from the Bid Package.
  For more information, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.
- Do you want to create RFQs to route to specific vendors? Do you want to create RFQs for those vendors that responded in the affirmative on a corresponding Invitation to Bid? Do you want to place the Bid Package document on the Plan Room Dashboard and have vendors create "self-service" RFQs? How you proceed depends on the answer to this question.

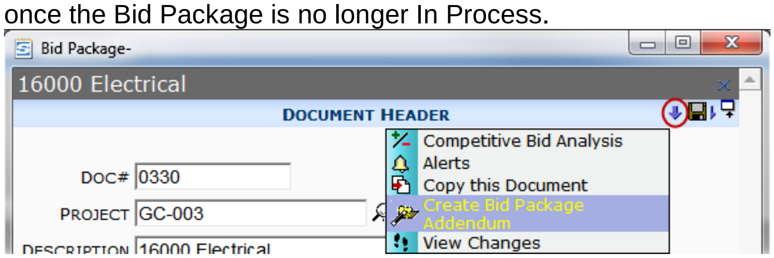
Note: It is good practice to save often while adding all your Bid request information to the Bid Package.

Create and Route RFQs

If you are not using the Plan Room Dashboard, but rather want to create RFQs for specific vendors and route those RFQs to those vendors, you will use the RFQs tab on the Bid Package document.

Before you do, you should

- Make sure you have at least one Item. You will not be able to add to the RFQs tab without an Item.
- Make sure everything is ready on the Bid Package document. Once you create RFQs, changes made to the Bid Package are not reflected in the RFQs.
  Note: Additional information after the fact can be included in a Bid Package Addendum, created from the Bid Package Options menu. The **Create Bid Package Addendum** choice will appear once the Bid Package is no longer In Process.



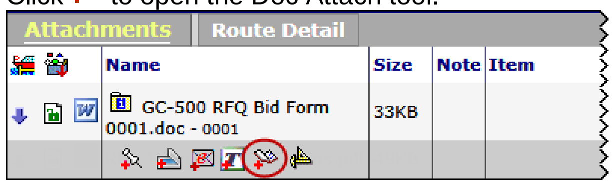
- (*optional*) If you want to create RFQs for those vendors that responded in the affirmative on an Invitation to Bid, you must attach the Invitation to Bid document to the Bid Package (see next page).
- Change the status to **Accepting Bids** and save.

Attaching the Invitation to Bid

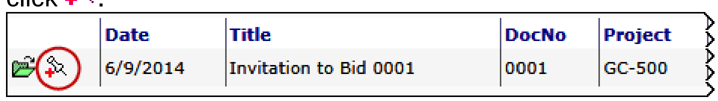
In order to automatically create RFQs for those vendors that responded in the affirmative on an Invitation to Bid, you must attach that Invitation to Bid onto the Bid Package.

To attach the Invitation to Bid:

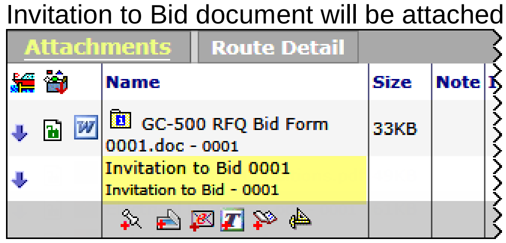
1. On the Bid Package, go to the Attachments tab.
2. Click to open the Doc Attach tool.

   The Doc Attach window will open, already filtered for Invitation to Bid documents.
3. Find the Invitation to Bid that you want in the search results and click .

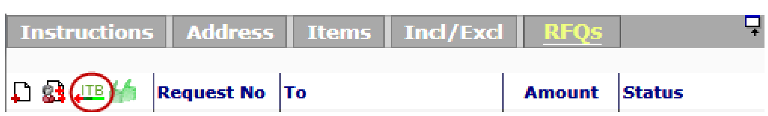
4. Click Ok at the top of the Doc Attach window. The Invitation to Bid document will be attached to the Bid Package.

The RFQs Tab

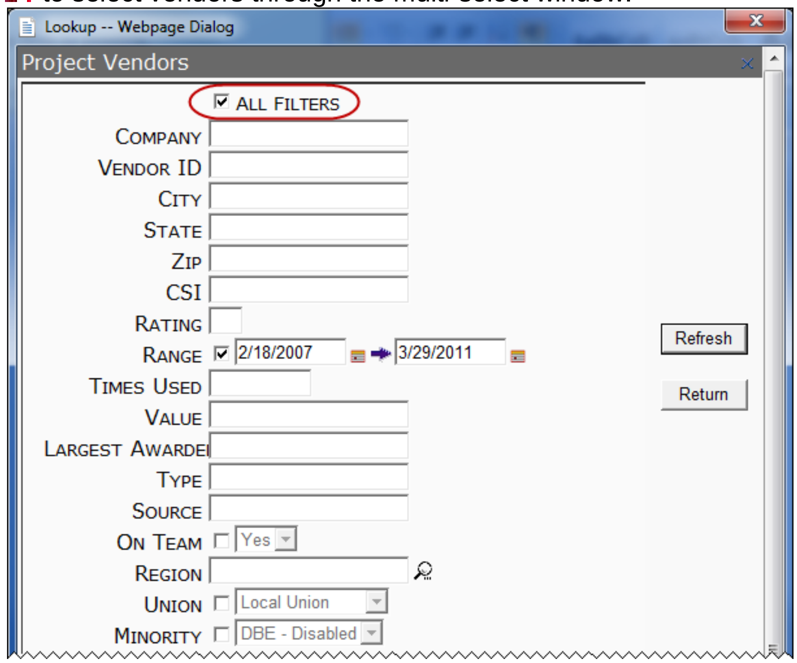
There are a few options for creating RFQs on the Bid Package's RFQ tab.

Note: the Bid Package must have at least one Item saved before you can create RFQs.



- If you have attached an Invitation to Bid to the Bid Package (as described above), you can click ITB to have sfPMS select the vendors who responded in the affirmative to the Invitation to Bid.
  - When you click to confirm, an RFQ will be created automatically for each vendor.

- If there are (other) vendors that you wish to select, you can click to select vendors through the multi-select window.



TIP
You can use more than one method to build the RFQ list on the Bid Package. And you need not worry about duplicates. You can re-click the ITB button or reselect a vendor in the manual selection process and only one RFQ will be created per vendor.

  - Filters can help you find the vendors.
  - The Return button returns you to the Bid Package.
  - When you click to confirm, an RFQ will be created automatically for each vendor.

TIP
Once on the RFQs tab, vendors and RFQ documents cannot be deleted directly. If you want to delete any RFQ from the RFQ tab, you must delete the RFQ document from the Catalog. Don't forget to save after deleting.

- If you need to add just one vendor, you can click to create an RFQ document. You can do this multiple times as needed (for example, if bids are arriving in the mail and you need to create an RFQ document for each vendor as the bids arrive.)
  - When you click OK at the confirmation box, an RFQ will open. You will need to select its vendor.

To route RFQs:

1. (*optional*) Click to open an RFQ if you want to make an addition or modifications to an individual document. With proper workflow, however, you should not need to do so.
2. Click to route all the RFQs to their next routees (which, depending on how predefined routing was set up, should be the vendor or an assistant, etc.)
3. Save and close the Bid Package document.

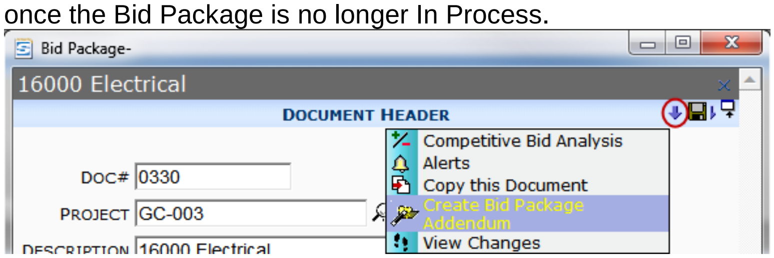
Unless your vendors are Spitfire users, you will need to enter the quote information you receive from your vendors into the appropriate RFQs (see page 16).

Plan Room Dashboard

If you want your vendors to log into Spitfire, create RFQ documents and enter their information directly onto those RFQ documents, you will use the Plan Room Dashboard.

Before you do, you should

- Make sure everything is ready on the Bid Package document. Vendors will be viewing only accessible parts of the document. (For example, vendors do not see the RFQs tab.)
  Note: Additional information after the fact can be included in a Bid Package Addendum, created from the Bid Package Options menu. The **Create Bid Package Addendum** choice will appear once the Bid Package is no longer In Process.

  - Change the status of the Bid Package Addendum to **Published** to include it on the Plan Room Dashboard.

- Change the status of the Bid Package to **Accepting Bids** and save. Accepting Bids is a status (equivalent to Published) that automatically publishes the document on the Plan Room Dashboard.

- Change the status of any related Drawings documents to **Published** and save to include the document on the Plan Room Dashboard.

Once a document is included on the Plan Room Dashboard, its attachments can be opened and viewed by any vender. The document itself can be opened and viewed from the Plan Room by any vendor who has been given rights to view the document.

Note: Vendors can create an RFQ document from the Bid Package document using the self-service **Click here for RFQ** link. These RFQ documents are not listed on the Plan Room Dashboard, but are accessible from the Project Dashboard and Spitfire Catalog.

For more information about the Plan Room setup and use see the *Setup for Spitfire's Plan Room* technical white paper and *How to Use the Plan Room (from a vendor login)*.

The RFQ Document

Info From Bid Package

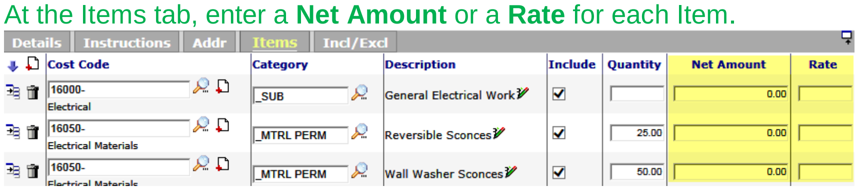
RFQs that are created from a Bid Package (whether from the RFQ tab or the self-service link) carry the following information from the Bid Package:

- The **Description**
- The **Type**
- The **Contract Type**
- The **Due** Date
- The notes from the **Instruction** tab
- The **Items**
- Everything on the **Incl/Excl** tab
- Attachment **templates**
- Files in the **Attachment** tab (plus the Bid Package document)

Vendor Data

To input vendor data into the RFQs:

1. Open the RFQ document (from the Inbox, the Project Dashboard or the RFQs tab on a Bid Package, depending on your access) **Note**: the RFQ document will also open for vendors who use the self-service link on a Bid Package.
2. At the Items tab, enter a **Net Amount** or a **Rate** for each Item.



3. Change the status to **Bid Back** and save the document.

TIP

If a Spitfire Item Template has been set up for the RFQ Doc type, you can also use the Via Excel option from the Details Options menu. For more information on using Via Excel, see the *Focus on Document and Item Basics* guide.

Review of RFQs

Whether created on the RFQ tab or through the self-service link, RFQs created from the Bid Package are listed on the Bid Package's RFQs tab. Each time the Bid Package is refreshed (saved), the status and quote amounts for the RFQs are updated.

(Remember that vendors do not see the RFQs tab on the Bid Package.)

Instructions | Address | Items | Incl/Excl | RFQs

ITB	Request No	To	Amount	Status
	0001-0005	Able Electric	$16,100.00	Rejected
	0001-0007	Wingtip Engineers	$14,490.00	Rejected
	0001-0006	Margie and Sons	$14,235.00	Awarded
	0001-0008	Adventure Works Architecture	$12,300.00	Declined to Bid
	0001-0003	Lucan and Sons	$0.00	Declined to Bid
	0001-0002	Trev and Trev Inc.	$0.00	Declined to Bid

1 2

The RFQs tab allows you to quickly review total quote amounts from those vendors who responded to your bid request.

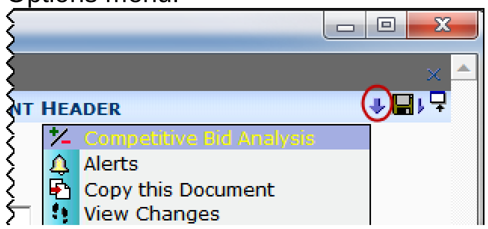
Another tool that you can use to review quotes is the Competitive Bid Response Analysis (CoBRA) workbook, described in the next chapter.

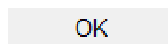
CoBRA

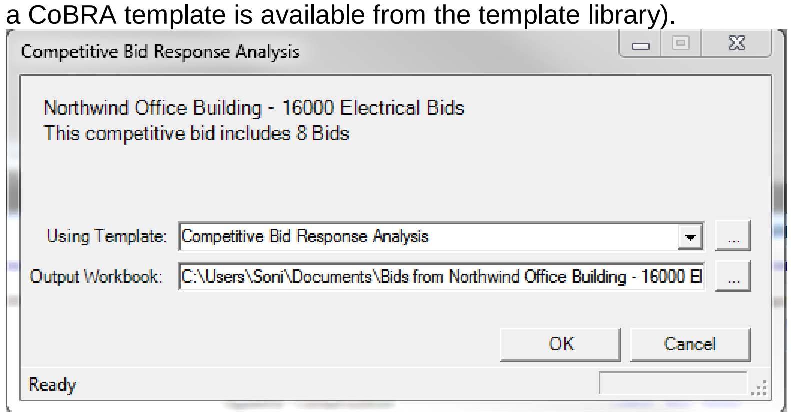
CoBRA can be viewed for one Bid Package or for all Bid Packages on your project.

To view CoBRA for one Bid Package:

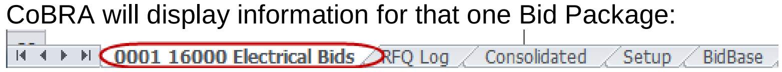
1. Select **Competitive Bid Analysis** from the Bid Package's Options menu:



2. Click  at the Using Template dialog box (assuming a CoBRA template is available from the template library).

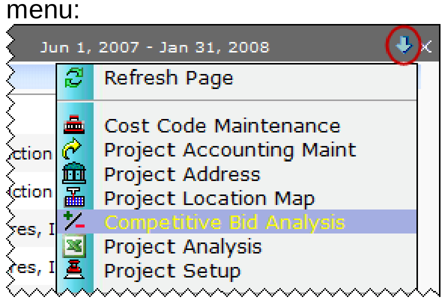


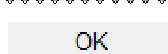
CoBRA will display information for that one Bid Package:

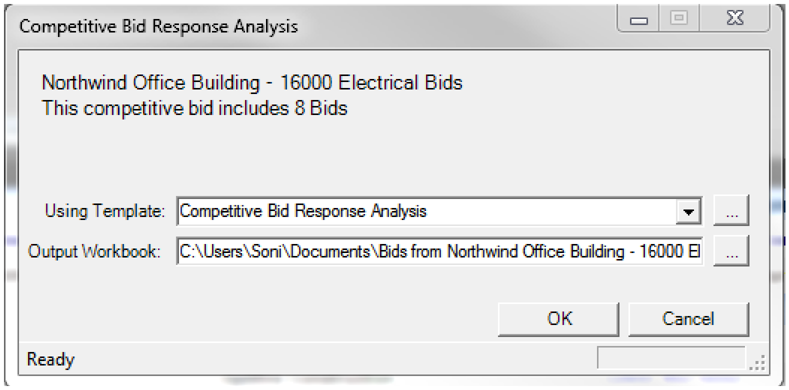


To view CoBRA for all Bid Packages on a project

1. Select **Competitive Bid Analysis** from the Project Option's menu:



2. Click  at the Using Template dialog box (assuming a CoBRA template is available from the template library).



CoBRA will display information for all Bid Packages in the project:

Bid Package Worksheet

Project ID and Bid Package Description

Project Description and Bid Package Scope

Mouse over the red triangle to read a note from the RFQ.

The RFQ status cell is a drop-down with options inherited from the RFQ document. Each status has its own color. Although the RFQ status is reflected here, changes made here are not carried back to the RFQ. This cell is informational only.

GC-500 **Northwind Office Building - 16000 Electrical Bids**

16000 Electrical Bids — Provide indoor light fixtures, wiring, service, gear and power as broken down in the Items tab/section.

B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
							Bid Back Able Electric			Bid Back Active Electric			Bid Back Four Star Construction		
	Status Filter			Variance			-$1,100.00			$46.00			$531.00		
Line Number	**Cost Code**	**Account Category**	**Line Description**	**EAC Amount**	**EAC Units**	**EAC Qty**	**RFQ Amount**	**RFQ Units**	**RFQ Qty**	**RFQ Amount**	**RFQ Units**	**RFQ Qty**	**RFQ Amount**	**RFQ Units**	**RFQ Qty**
			Vendor Total:	**$15,000.00**			**$16,100.00**			**$14,954.00**			**$14,469.00**		
0001-001	16000	_LABOR	General Electrical Wo		NA	1	$2,000.00	NA	1	$14,254.00	NA	1	$4,989.00	NA	1
0001-002	16050	_MTRL PERM	Service Panel			2	$600.00	NA	2	$.00		2	$180.00	EA	2
0001-003	16050	_MTRL PERM	Feeder Conduit and W			1	$2,000.00	NA	1	$.00		1	$600.00	EA	1
0001-004	16050	_MTRL PERM	Reversible Sconces			25	$5,250.00	NA	25	$.00		25	$6,250.00	EA	25
0001-005	16050	_MTRL PERM	Wall Washer Sconces			50	$6,250.00	NA	50	$.00		50	$2,450.00	EA	50
0001-006	16000	_SUB	Electrical			0				$700.00	NA	0			

Each Item on the RFQ appears on its own row.

Sum of Vendor amounts.

Variance of EAC amount to Vendor amount.

An Item added by the Vendor shows up red on yellow.

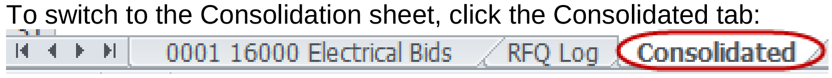
You can select a status as a filter.

Not shown: Any Item that is not included in the Vendor's total (i.e., the **Include** checkbox is unchecked for the Item) shows up in blue italics.

Consolidation Worksheet

Each CoBRA workbook includes a Consolidation worksheet. This worksheet is particularly useful when you open CoBRA from the Project Dashboard and have several Bid Packages documents on your project.

- To switch to the Consolidation sheet, click the Consolidated tab:



Competitive Bid No		EAC Amount	Selected Vendor	RFQAmount	Variance
	Total →	$192,361.00		$37,300.61	$155,060.39
0001	16000 Electrical	$119,211.00			$0.00
0002	15000 Mechanical	$73,150.00	Consolidated Plumbing	$37,300.61	$35,849.39

Each Bid is listed as one row. The Bid No., Bid Description and EAC Amount is listed

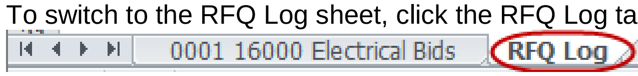
The data related to the RFQ with the status of "Awarded" is transfered to this worksheet.

The Variance column is difference between the RFQAmount and the EAC Amount.

RFQ Log

The RFQ Log worksheet provides a summary by vendor of all line items.

- To switch to the RFQ Log sheet, click the RFQ Log tab:



Project ID: GC-500 Project Description: Northwind Office Building

Project Company: CCC Northwind Trade Union

Doc #	Bid Package Title	Union	Route Via	Sent Date & Time	Company	Contact
0001	16000 Electrical Bids		E		Able Electric	Able Electric
0001	16000 Electrical Bids		W		Active Electric	Margie and Sons
0001	16000 Electrical Bids		H		Margie and Sons	Wingtip Engineers
0001	16000 Electrical Bids		H	10/8/12 11:5 AM	Wingtip Engineers	Active Electric

The color of the row indicates the status of the RFQ.

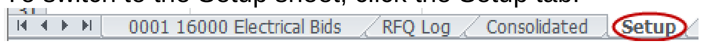
The Doc status appears as a code, e.g., I = In Process, O = Out for Bid, etc.

Phone	Fax	e-mail	Amount	Status	NoteA
(555) 555-1212	(555) 555-1212	jsunderson@ableelec.com	$0.00	I	Submit your bid by email to bids@spitfireconstruction.com by the Due date or (if you are a Spitfire user), click the link below to create your RFQ.
(555) 555-1212	(555) 555-1212		$0.00	O	
(555) 555-1212	(555) 555-1212		$0.00	I	
	(555) 555-1111		$0.00	I	

Setup

The Setup worksheet allows you to change the width, name and visibility of the columns on the Bid, RFQ Log and Consolidated worksheets; the worksheet tab names; the colors for the different Doc statuses; and whether the workbook should open on the RFQ Log worksheet.

- To switch to the Setup sheet, click the Setup tab:



This worksheet allows the user to set parameters used on other workseets.

Tab Name controlled by Spitfire			
Bid Base	Description	Width	Visible
Line Number	Line Number	14	Y
Cost Code	Cost Code	14	Y
Account Category	Account Category	16	Y
Line Description	Line Description	20	Y
EAC Amount	EAC Amount	16	Y
EAC Units	EAC Units	6	Y
EAC Qty	EAC Qty	8	Y
RFQ Amount	RFQ Amount	16	Y
RFQ Units	RFQ Units	6	Y
RFQ Qty	RFQ Qty	8	Y

Tab Name	RFQ Log		
RFQ Log	Description	Width	Visible
Bid Set No	Doc #	6	Y
Bid Set Name	Bid Package Title	45	Y
Bid Union	Union	6	Y
Bid Route	Route Via	10	Y
Bid Sent Date	Sent Date & Time	18	Y
Bid Company	Company	30	Y
Bid Contact	Contact	30	Y
Bid Phone	Phone	15	Y
Bid Fax	Fax	15	Y
Bid Email	e-mail	35	Y
Bid Amount	Amount	18	Y
Bid Status	Status	10	Y
Bid Note	NoteA	30	Y

Tab Name	Consolidated		
Consolidated	Description	Width	Vis
Bid Set No	Competitive Bid Number	15	
Bid Set Name		30	
EAC Amount	EAC Amount	18	
Selected Vendor	Selected Vendor	30	
RFQ Amount	RFQ Amount	18	
Variance	Variance	18	

Code	Spitfire Default Term
A	Awarded
B	Bid Back
D	Declined to Bid
I	In Process
O	Out for Bid
R	Rejected
X	Canceled

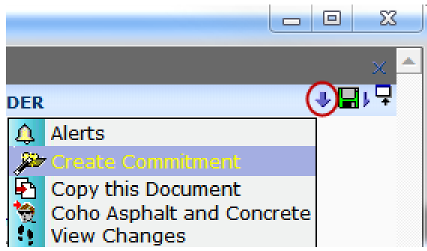
Other Info:	
Open On RFQ_Log	

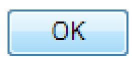
Awarded RFQs to Commitments

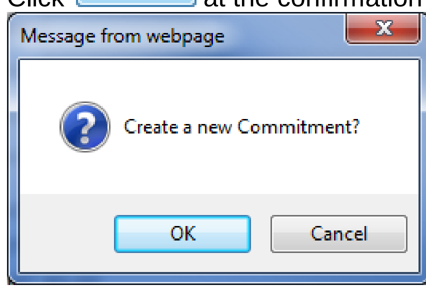
When it is time, awarding one of the RFQs and creating the Commitment document for that vendor is a fairly simple process.

To create a Commitment from an awarded RFQ:

1. Open the winning bid (RFQ) from the Bid Package's RFQs tab or elsewhere.
2. Change the document status to **Awarded**.
3. Save the RFQ document.
4. Select **Create Commitment** from the RFQ's Options menu:



5. Click  at the confirmation box that appears.



The Commitment document will open.

Info From Bid Package

Commitments that are created from an awarded RFQ carry the following information from the Bid Package:

- The **Description** (combined with the Vendor name from the RFQ)
- The **Type**
- The **Contract Type**
- Certain notes from the **Instructions** tab (appearing on the **Scope** tab)
- The **Items** (with amounts from the RFQ)
- Everything on the **Incl/Excl** tab

You can add information to the Commitment, route it and change its status as appropriate. For more information about the Commitment Doc type, see the *Focus on Doc Types and Project Workflow* guide.

Closing the Bid Package

Once you have awarded one (or more) of the RFQs on the Bid Package, you can close the Bid Package to make it read-only.

To close the Bid Package:

1. (*optional*) At the Bid Package's RFQs tab, change the statuses of the remaining RFQs, unless you know that a rule will take care of that. (See the next chapter on workflow setup.)
2. Change the document status to **Closed**.
3. Save the document. The Bid Package will become read-only. If rules have been set up to do so (see the next chapter), all un-awarded RFQ documents on the Bid Package will be closed also.
4. Close the document window. You can reopen and view this Bid Package as needed in the future.

Setup for the Bid Package Workflow

In order for the Bid Package – RFQ – Commitment workflow to function as described, some set up is required at your site. Your implementer may also have other suggestions.

Note: if you want to use the Plan Room Dashboard, see the *Setup for Spitfire's Plan Room* technical white paper instead.

Summary

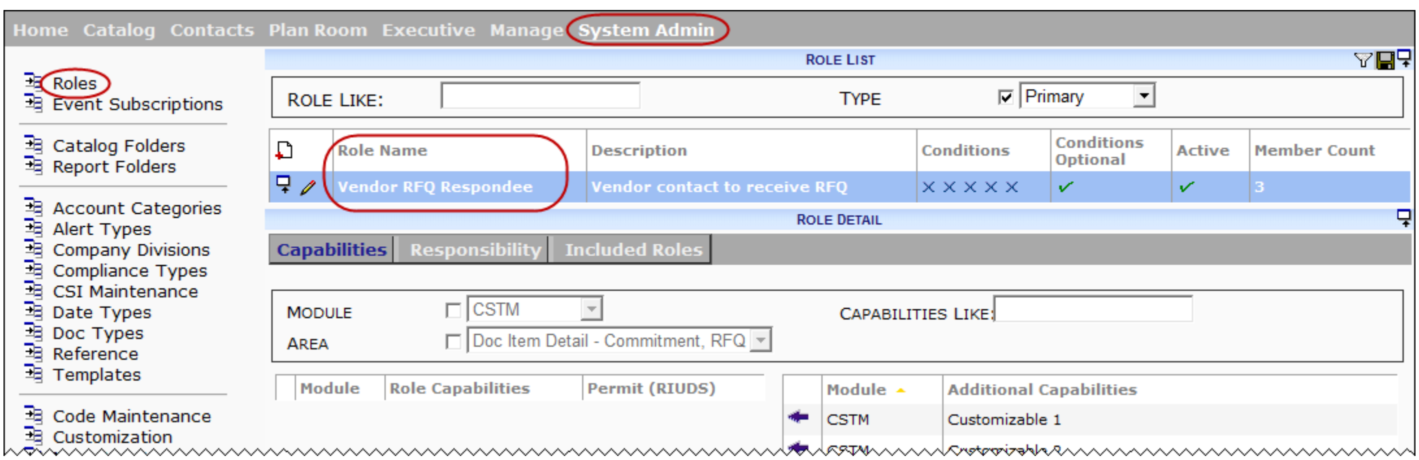
- Give the **Vendor RFQ Respondee** role to vendor Contacts.
- Create predefined routes for the RFQ Doc type.
- Create and upload templates for the Bid Package and RFQ Doc types.
- Set up helpful rules.

The Roles Tool

TIP
For more information about the Roles tool, see the *Designing User Roles* technical white paper.

The **Vendor RFQ Respondee** role serves to identify Contacts at each of your vendors so that when RFQs are routed to your vendor companies, they actually go to a specific person at that company.

- Review the distributed Vendor RFQ Respondee role to see if any changes are required. By default, this role has no Capabilities, Responsibilities or Sub Roles.



Contacts Dashboard

TIP

For more information about the Contacts Dashboard, see the *Focus on Contacts* guide.

All vendors who may be selected to receive an RFQ should have the aforementioned Vendor RFQ Respondee role.

- Review your vendor Contacts and give the **Vendor RFQ Respondee** role to any who are missing this role.

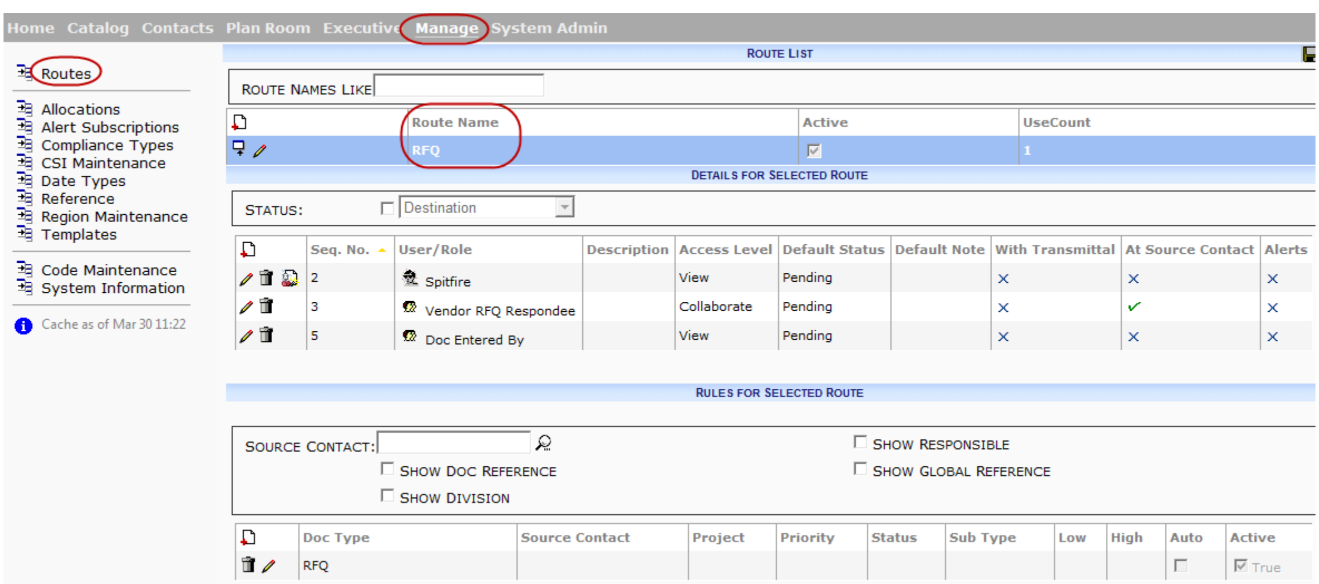
Routes Tool

TIP

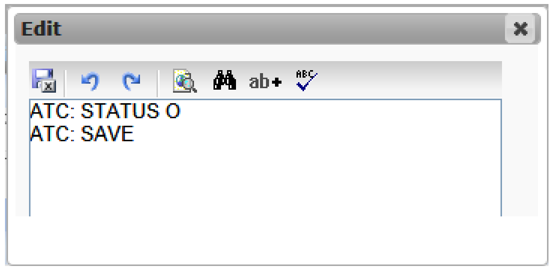
For more information about the Routes tool, see the *Focus on Routes* guide.

Once you have the Vendor RFQ Respondee role assigned to the individuals at your vendor companies, you can use that role in a predefined route for the RFQ Doc type. Otherwise, routed RFQ documents will go to the primary vendor company's email or fax. In addition, the predefined route will allow you to use a Spitfire workflow script to change the RFQ status when the document is routed.

- You may already have a predefined route for RFQs. Review your predefined routes to see if any changes are required.



- By default, this predefined route has a Spitfire workflow script at Seq 2 that changes the status of the RFQ document to "Out to Bid" when it is first routed:



- Note that the Vendor RFQ Respondee role at Seq 3 has **At Source Contact** checked (on). This means that only the person at the company indicated as the source contact (i.e., vendor) for the RFQ will be added to the route.
- The Doc Entered By role at Seq 5 ensures that the RFQ document will be routed back to whoever created the RFQ.
- RFQ as the Doc Type is the only rule required for this predefined route.

Templates

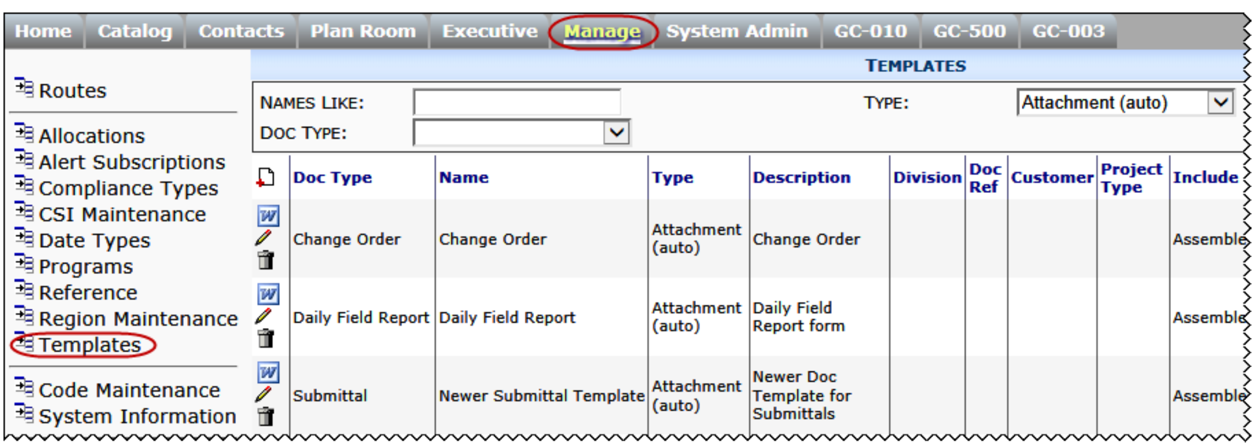
If you will be routing RFQs via email, fax or hard copy, you will need an Attachment template and/or Transmittal template for the RFQs. You can create and upload several templates, if appropriate.

Information on how to create these templates can be found in the *Focus on Bookmark Templates* guide. Information on how to upload them into Spitfire using the Templates tool can be found in the *Focus on the Manage Dashboard* guide.

In addition, you might want to take advantage of the Via Excel option for adding Items to your Bid Package or editing Items on your RFQs.

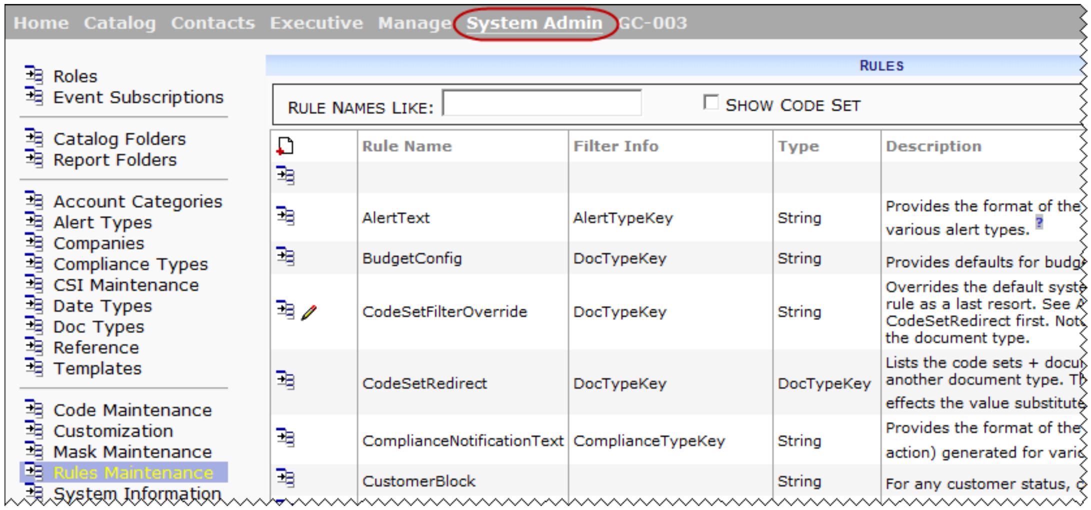
Information on how to create Spitfire Item Templates can be found in the technical white paper *Spitfire Item Templates (for Via Excel)*.

The Templates tool, found on both the Manage and System Admin Dashboards might look something like the following:



Rules

There are several rules, established through the Rules Maintenance tool on the System Admin Dashboard, which can improve the Bid Package – RFQ workflow.

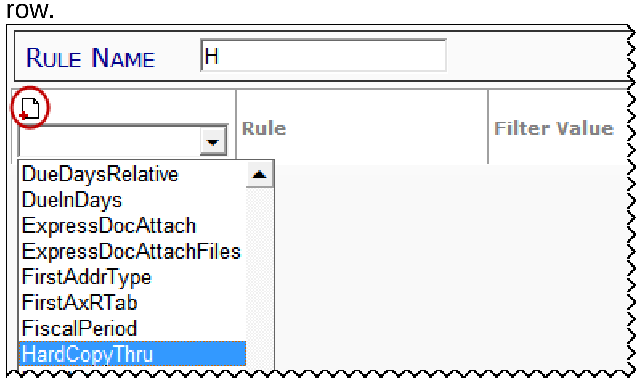


DocTypeConfig | HardCopyThru

If you may have Hard Copy routees on your RFQs and you are using a predefined route (such as the one described previously), you can have sfPMS insert another routee before each Hard Copy routee. In this way, the RFQ will be routed to the specified Spitfire user whenever he or she needs to print the RFQ in order to deliver it to a Hard Copy routee.

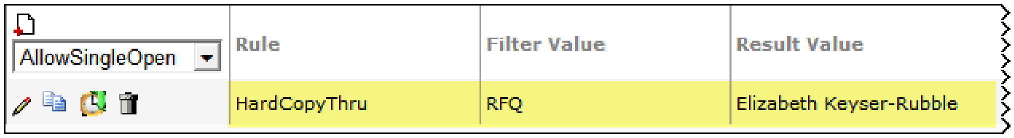
To set up the HardCopyThru rule:

1. At the Rules maintenance tool, expand the **DocTypeConfig** rule group.
2. Type **H** in the Rule Name filter to see if the **HardCopyThru** rule already exists.
3. Assuming it does not exist for the RFQ Doc type, select **HardCopyThru** from the drop-down then click to add a new row.



4. Select **RFQ** from the Filter Value drop-drop.

5. In the Result Value field, click to look up the name of the Spitfire User who will receive the RFQ document in his or her Inbox in order to print it out and send it to the Hard Copy routee.
6. Click to accept the row.
7. Click to save the rule.

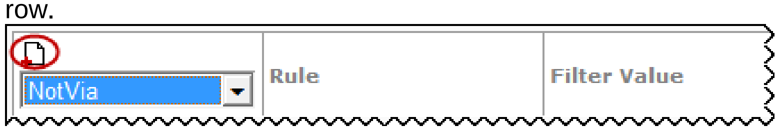


RouteConfig | NotVia

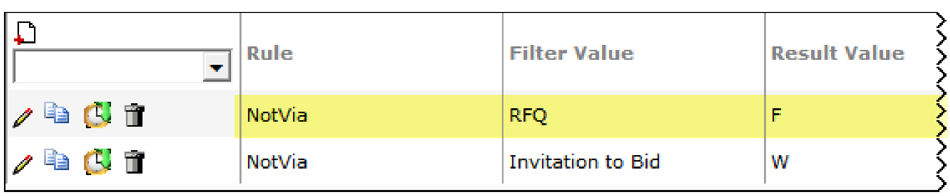
You can prevent a certain Doc type, such as RFQ, from being routed in a particular way (via email or via fax). For example, if you don't want any Vendor Contacts to receive the RFQ via fax, you can indicate this through the NotVia rule. Then, if sfPMS were to encounter a Via Fax routee, it would convert that routee to a Via Hard Copy routee.

To set up the NotVia rule:

1. At the Rules Maintenance tool, expand the **RouteConfig** rule group.
2. Select **NotVia** from the drop-down then click to add a new row.



3. Select **RFQ** from the Filter Value drop-drop.
4. In the Result Value field, enter **F** for fax (or E for email or W for Spitfire Inbox).
5. Click to accept the row.
6. Click to save the rule.



TIP

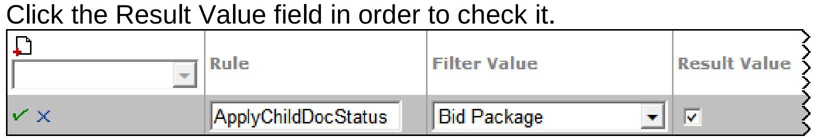
See the technical white paper *Rules and Rule Values* for other result value options for the NotVia test value.

WhenDocClosed | ApplyChildDoc Status *and* ChildDocStatus

You can tell sfPMS to change the status of RFQs when you change the status of the parent Bid Package document to **Closed**. Two rules are required to set this up.

To set up the ApplyChildDocStatus rule:

1. At the Rules Maintenance tool, expand the **WhenDocClosed** rule group.
2. Select **ApplyChildDocStatus** from the drop-down then click to add a new row.
3. Select **Bid Package** from the Filter Value drop-drop.
4. Click the Result Value field in order to check it.



5. Click to accept the row.
6. Click to save the rule.
7. Continue with the next instructions.

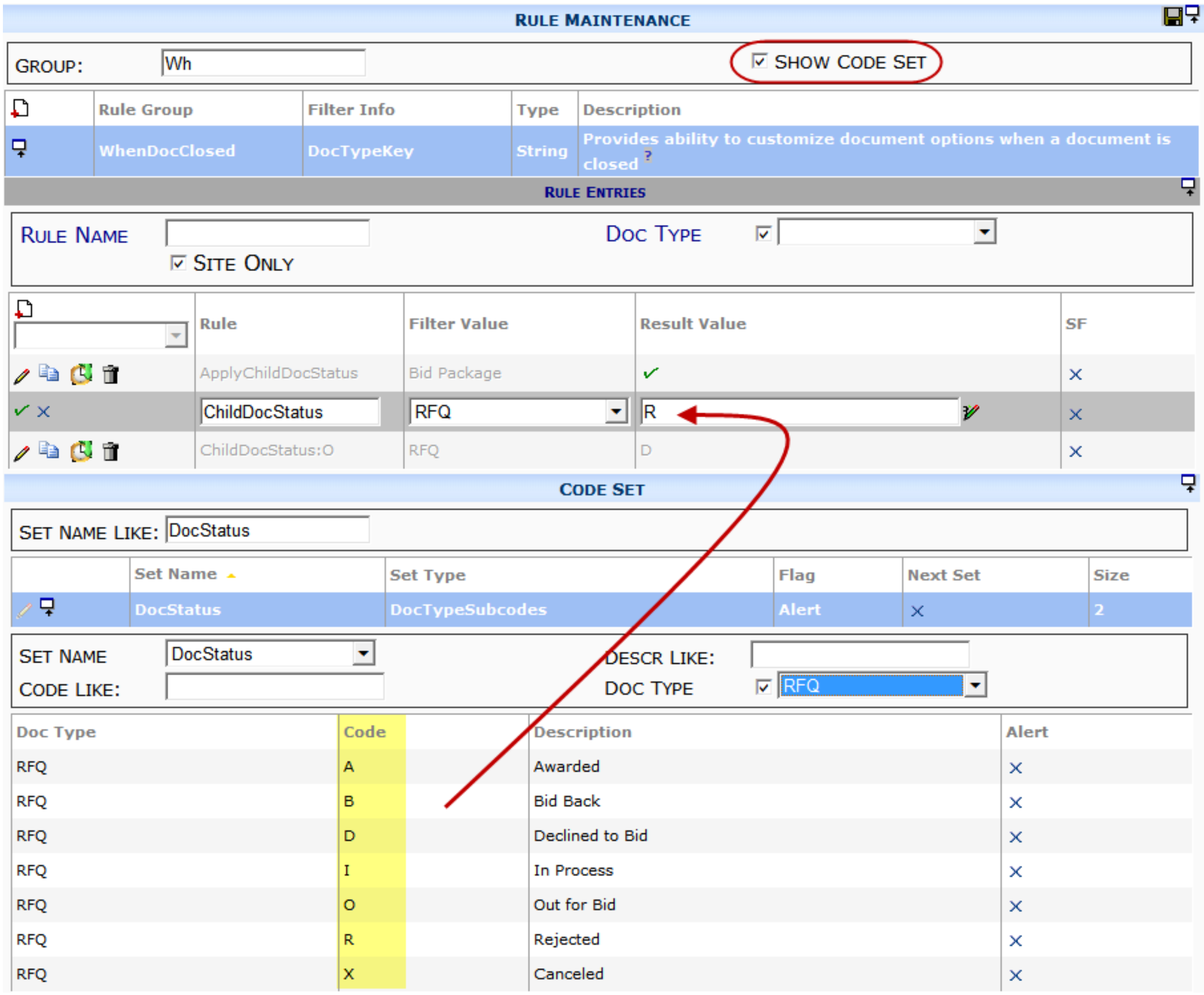
You can choose what status all open RFQs should have when the Bid Package is **Closed**.

TIP

See the technical white paper *Rules and Rule Values* for other options with the ChildDocStatus value.

To set the ChildDocStatus rule:

1. Still in the WhenDocClosed rule group, select **ChildDocStatus** from the drop-down then click to add a new row.
2. Select **RFQ** from the Filter Value drop-down.
3. Enter the code that represents the status that you want all open RFQs to have (i.e., the DocStatus code established in the Code Maintenance tool).
    - If you are not sure of the code, click **Show Code Set** at the top of the Rules tool, find the DocStatus code set and filter by the RFQ Doc type:
      (*see next page*)



For example, using the above codes, if you want all open RFQs to have their status set to Rejected when the parent Bid Package document is Closed, enter **R** as the Result Value.

4. Click to accept the row.
5. Click to save the rule.