ProjectVIEW ERP
Cost Monitoring Solution

Vendor Web Interface for submitting Quotations

This section describes how a vendor can review his received Requests for Quotation, derive Quotations from them and submit them to the contractor via ProjectVIEW. The entire process is completed through ProjectVIEW's web portal.

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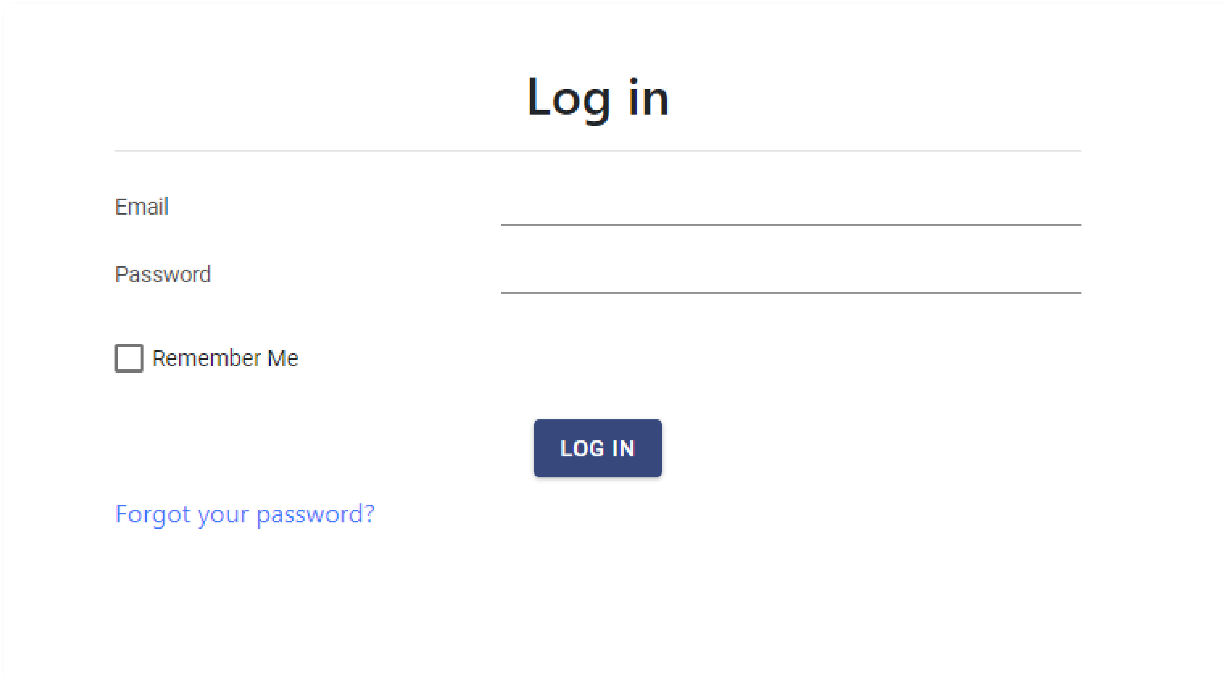
1 Introduction

Each time a ***Request for Quotation*** is sent to a vendor, that particular vendor will receive an email advising that such a request has been received. The email will also contain a clickable link to ProjectVIEW's web portal.

The web portal can also be accessed using any browser and contains all the active Requests for Quotations sent to the vendor. The vendor can review them and submit his own Quotation back to the company.

2 Step 1: Log in screen

The first screen that will welcome a vendor to ProjectVIEW's web portal is the Log in screen:



To access his personalized area, the vendor has to:

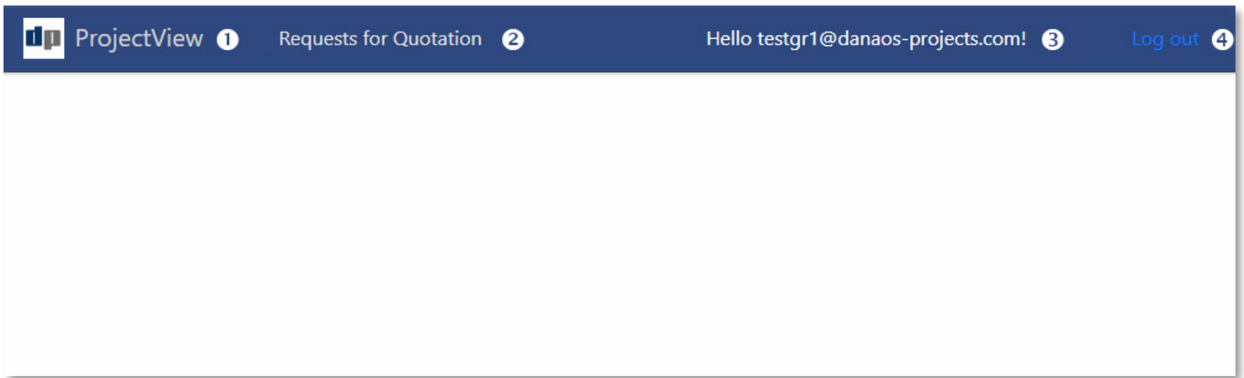
1. Fill in his email
2. Fill in his password
3. Click the "LOG IN" button (4)

Note

- ✓ By clicking on the "Remember Me" check box, the vendor can toggle whether he would like his information to be stored on this particular computer for future use.
- ✓ By clicking on "Forgot your password?", the vendor can request to reset his old password. In the next screen, his email will be requested in order for the system to begin the reset procedure for this account.

3 Step 2: Main Screen

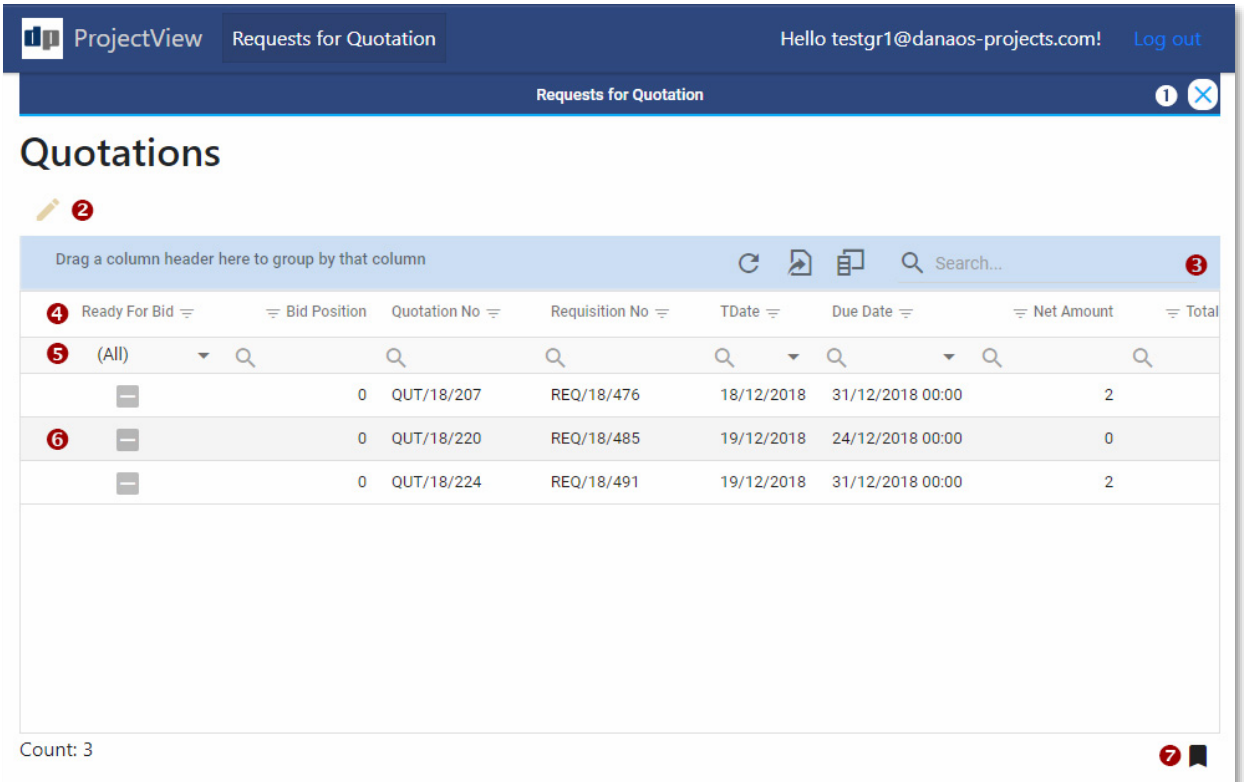
Having successfully logged in, the vendor will be now presented with the web portal's main screen:



- ✓ By clicking on "ProjectVIEW" (1) at any time and from any screen, the vendor can return to this screen.
- ✓ By clicking on "Requests for Quotation" (2), a list of Requests for Quotation will be loaded (see Step 3: Review Requests for Quotation).
- ✓ By clicking on "Hello …" (3), a vendor can manage his account (e.g. to change his password etc).
- ✓ By clicking on "Log out" (4), the vendor is logged out and returned to the Log in screen (see Step 1: Log in screen)

4 Step 3: Review Requests for Quotation

Having clicked on “Requests for Quotation” (**RFQ**) in the main screen, the vendor is presented with the following screen with a list of Requests for Quotation:



1. Close button. By clicking the “X” in the upper right corner, the vendor can return to the main screen.
2. Edit Button. By clicking on the pencil **AFTER HAVING SELECTED** a quotation, the selected quotation is displayed on screen. Please see Step 4: Edit Quotation
3. Utility Bar. Contains a number of helpful options for managing the list of RFQs.
4. List Column Headers
5. List Column Filters
6. List of RFQs. Select row and press the Edit Button to display the selected quotation.
7. Save Column Configuration. Saves the list and state of visible columns.

4.1 Utility Bar

The utility bar contains the following buttons:

	Refreshes the list of RFQs
	Exports a single or multiple rows from the list
	Brings the “Column Chooser” widget which allows the vendor to select which columns will be visible in the list
	Searches the list for a specific value

Further to the aforementioned buttons, a vendor can drag and drop a header from the RFQ list to any location on the Utility Bar in order to group or filter the list by that column. To remove the grouping or filter, the user has to simply drag and drop the Header back to the RFQ list.

4.2 Column Headers

The Column Headers in this screen (as well as in any other screen in the web portal) are similar in functionality to those found in any datasheet management software. Specifically:

- ✓ Clicking on a Header sorts the RFQ list by that column in ascending or descending order. Please note that if a column is used for sorting, an arrow will be shown on its Header next to its text.
- ✓ Clicking on a Header’s filter symbol ( ) displays a new selection box which the vendor can use to filter the RFQ list. Please note that if a filter is applied in this fashion, the aforementioned symbol turns blue. To remove the filter, the vendor simply has to click on the symbol and remove the filter conditions.
- ✓ A vendor can drag and drop a Column Header before or after another Column Header to move that specific column.
- ✓ A vendor can also resize a column by placing the mouse pointer just between two consecutive Column Headers. The mouse pointer will turn into a double arrow allowing the resize of the column by dragging the mouse sideways.

Furthermore, as described in the previous section of this manual, a Header can be used to group or filter the RFQ list (See. Utility Bar).

4.3 Column Filters

Just below each column Header, a magnifying glass can be found. A vendor can click next to it to the filter icon and type some text in to filter the RFQ list. By clicking on the icon itself, a vendor can select a number of filtering options (Contains, Starts with, Equals etc.). These options are used in conjunction with the text a vendor enters next to the icon in order to filter the RFQ list.

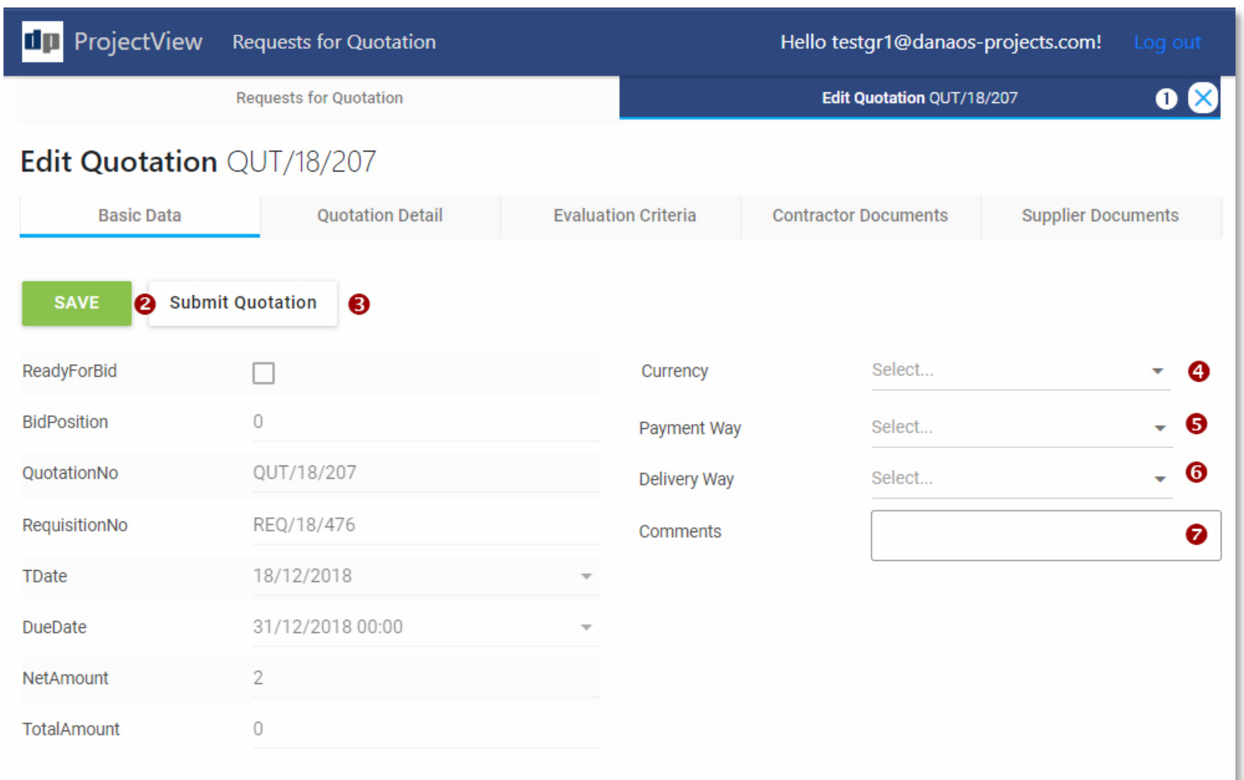
5 Step 4: Edit Quotation

After selecting a RFQ from the list and pressing the Edit button, that particular RFQ will be displayed. Each RFQ screen comprises of the following tabs:

- ✓ Basic Data
- ✓ Quotation Detail
- ✓ Evaluation Criteria
- ✓ Contractor Documents
- ✓ Supplier Documents

5.1 Edit Basic Data

In this screen, the basic information for a RFQ are displayed including quotation dates etc.



The following options are available to a vendor:

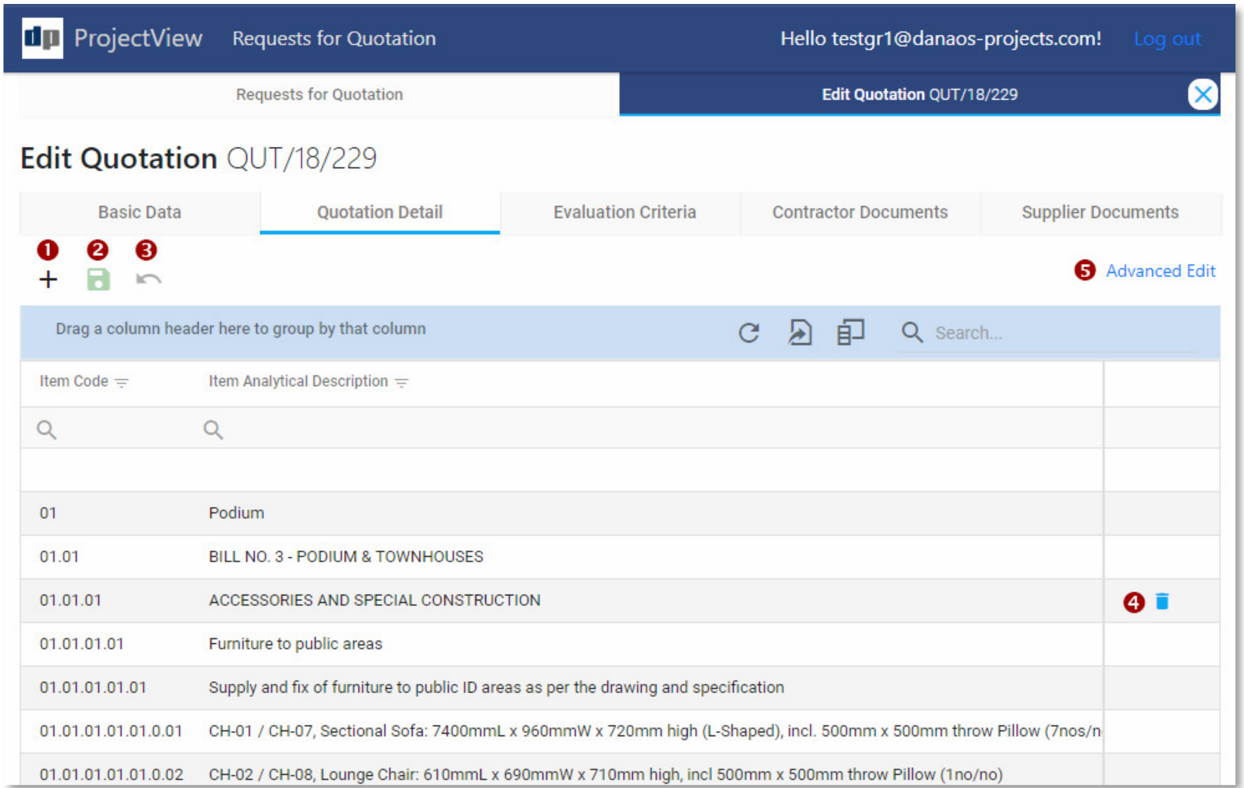
1. Close button. By clicking the “X” in the upper right corner, the vendor can return to the main screen.
2. Save button. Saves any changes made by a vendor.
3. Submit Quotation button. Sends all the information entered by a vendor in all screens relevant to this quotation.
4. Currency drop-down menu. Allows a vendor to change (not mandatory) the currency for this quotation.
5. Payment Way drop-down menu. Allows a vendor to select a payment method.
6. Delivery Way drop-sown menu. Allows a vendor to select a delivery method for the items quoted in this quotation.
7. Comments. Allows a vendor to add comments relevant to the entire quotation.

Note

- ✓ The “Submit Quotation” button should **ONLY** be pressed **AFTER** the vendor has finalized his quotation and filled in all prices, quantities, documents etc.
- ✓ The comments entered in this screen refer to the **ENTIRE** quotation. Comments regarding specific items within the quotation can be added later. Please see Step 5: Fill in Quotation Details

5.2 Fill in Quotation Details

In this screen, a vendor can find all the BOQ items contained in this quotation. The list's functionality is the same as the one found in the main screen. Please refer to Step 3: Review Requests for Quotation, Utility Bar, Column Headers and Column Filters for further information.



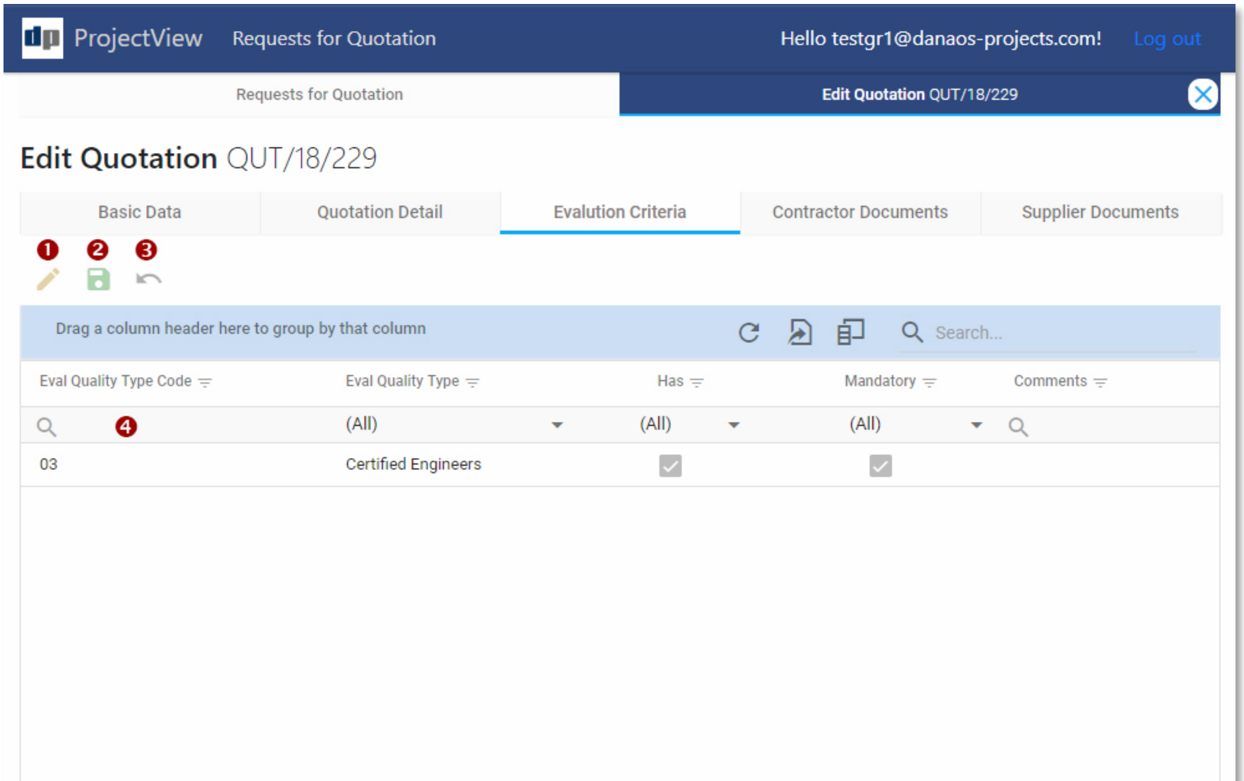
1. A vendor can also add additional items by clicking on the "+" button (1) on the top left corner of the list. A new first row will appear in the list where a vendor can add all necessary fields.
2. The save button (2) has to be clicked in order to save **ANY** changes made to the list.
3. In case of an error, the undo button (3) can be clicked to revert **ALL** changes.
4. After an additional item has been saved, it can be deleted with this button (4).
5. To show further columns, the "Advanced Edit" (5) toggle can be enabled.

Note

✓ Most of the cells in the list can be edited and filled-in with values and prices. Please note that some cells are locked as they contain the contractor's original values.

5.3 Check Evaluation Criteria

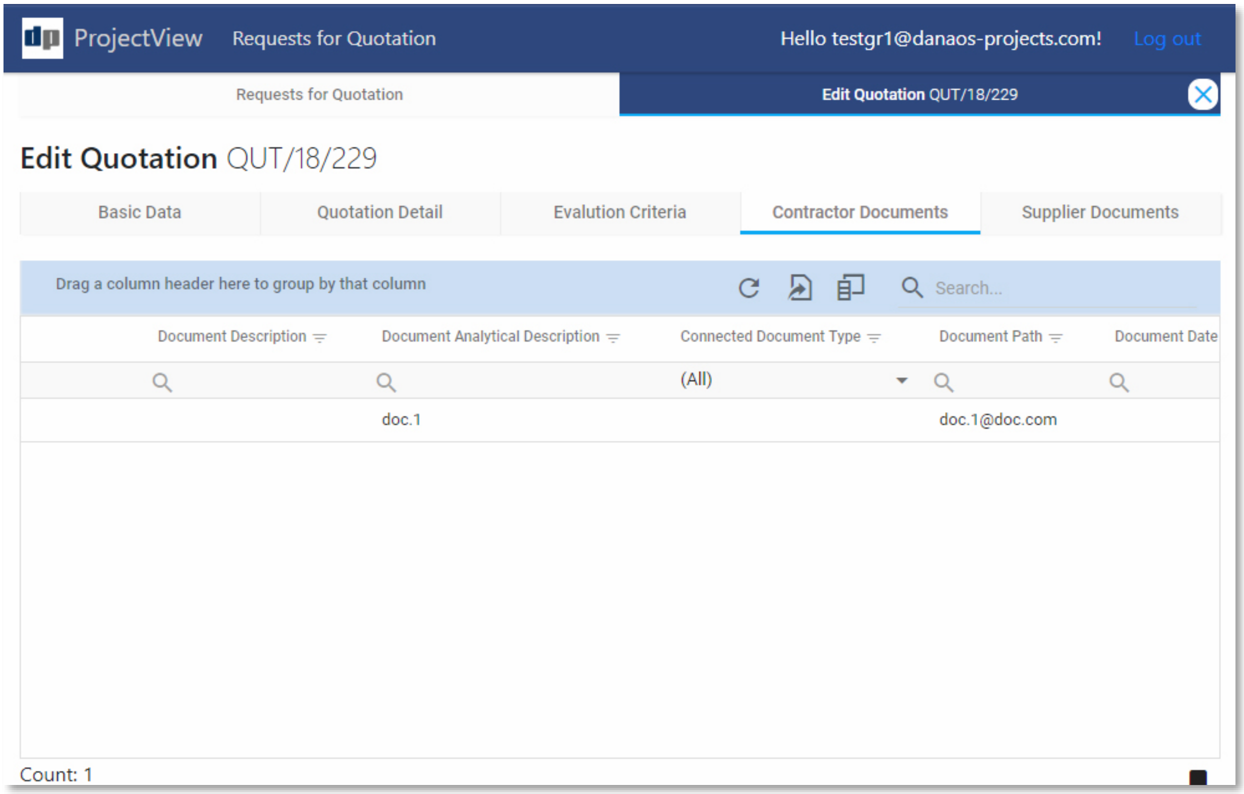
In this screen, a vendor can find all the Evaluation Criteria set by the contractor for this quotation. The list's functionality is the same as the one found in the main screen. Please refer to Step 3: Review Requests for Quotation, Utility Bar, Column Headers and Column Filters for further information.



1. In order for a vendor to edit (check/uncheck) an evaluation criteria, the vendor has to first select the evaluation criteria in question, and to consequently click on the edit button (1) on the top left corner of the list.
2. Having finished editing the evaluation criterion, the save button (2) has to be clicked in order to save **ANY** changes made to the list.
3. In case of an error, the undo button (3) can be clicked to revert changes.

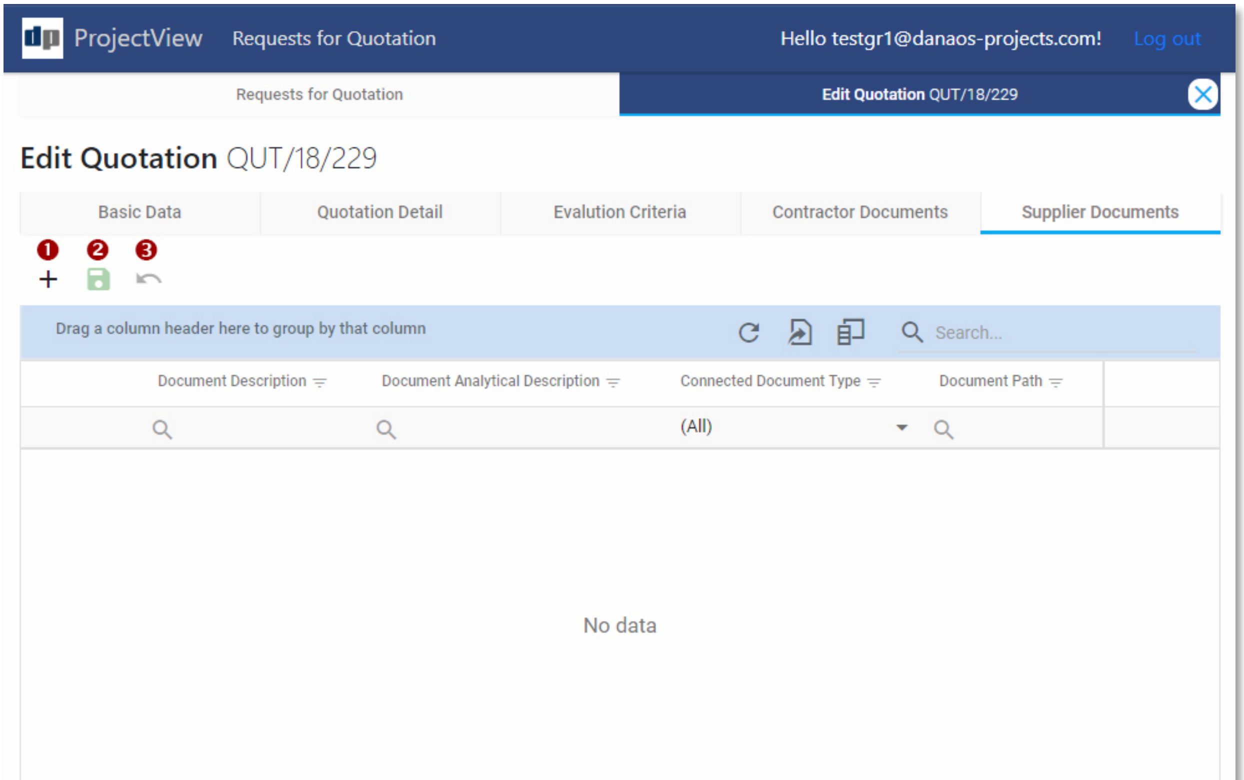
5.4 Access Contractor Documents

In this screen, a vendor can find links to all the documents attached by the contractor for review by the vendor. The list's functionality is the same as the one found in the main screen. Please refer to Step 3: Review Requests for Quotation, Utility Bar, Column Headers and Column Filters for further information.



5.5 Provide Additional Documentation

In this screen, a vendor can attach one or more documents which he deemed necessary for review by the contractor. The list's functionality is the same as the one found in the main screen. Please refer to Step 3: Review Requests for Quotation, Utility Bar, Column Headers and Column Filters for further information.



1. In order for a vendor to add a document, the vendor has to first add a new row in the list by clicking on the "+" button (1) on the top left corner of the list.
2. Having finished adding the document, the vendor has to click on the save button (2) to save **ANY** changes made to the list.
3. In case of an error, the undo button (3) can be clicked to revert changes.

Note

- ✓ Any document added by a vendor have to be on a cloud location (e.g. Google Drive, Dropbox etc.). The vendor can copy and paste the document's location in the column "Document Path" inside the list.

In case of any queries or support issues, please contact us:

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