



Responding to an RFQ

Felix User Guide

TABLE OF CONTENTS

INTRODUCTION	2
RESPONDING TO AN RFQ	2
COMPLETING A PRICING SCHEDULE	3
TYPES OF RFQ MESSAGES	5
SENDING RFQ MESSAGES	5

INTRODUCTION

This user guide provides an understanding about how vendors can respond to RFQs. It also explains the types of RFQ messages and how to respond to these messages within an RFQ in Felix.

RESPONDING TO AN RFQ

After indicating your interest in providing a quote and reviewing the relevant details within the RFQ it is time to begin drafting a response. This guide will outline the process of preparing and submitting your response to an RFQ.

Preparing your response

To prepare your response to an RFQ:

1. Navigate to the RFQ you wish to provide a response to. To view an RFQ, refer to the article [How to View an RFQ](#).
2. Go to the **Documents** tab to download and review any documentation related to the service/packages included in the RFQ by either clicking an individual document of interest or by clicking the **Download All** button at the top right corner for all documents in one zip file.
3. Go to the **Response** tab where you will see one or more services/packages included in the RFQ listed on the left. You can click on each and review further details specific to each service/package including additional comments, questions from the issuing organisation, required document submissions, and pricing requirements.
4. If you require more details or clarification on an RFQ in order to prepare your response, you are able to send a **Request for Information (RFI)** to the issuing organisation. To send an RFI, refer to the article [How to send RFQ messages](#).

Note: There may not be a **Documents** tab in all RFQs. If the issuing organisation hasn't added any documents that are related to the services you have matched with, the page will skip straight to the **Response** tab.

Submitting your response

To provide a quote for the services/packages in the RFQ:

1. Navigate to the RFQ you wish to provide a response to. To view an RFQ, refer to the article [How to View an RFQ](#).
2. Go to the **Response** tab of the RFQ.
3. In the services listing (left hand side of the tab), click which service/package you wish to quote for from the list.
4. In **Service Details** section, take note of the **Service Close Date** and review the **Comments**.
5. Click the dropdown under **Which one of your listed services are you providing a quote for?** to select from the options. These are based on the services on your account that closely match the requirement.
6. In **Pricing** section,

- (Where the issuing organisation has given you currency options) Click the dropdown under **Which currency are you quoting in?** to select currency. If you don't see this dropdown, the default currency will be displayed.
 - Fill out the pricing fields as required by the client. This may include a single lump sum field, multiple pricing option fields or a button to access a detailed pricing schedule.
 - In the case of a pricing schedule, refer to the article [How to Complete a Pricing Schedule](#).
7. In **Requested documents** section, upload any requested documents by the client.
 8. (Optional) In **Additional information** section, upload any further documentation to support your quote and provide any comments you desire to share with the client in the **Comments** text box.
 9. Respond to the questions in the **Questions** section by clicking **Yes**, **No** or **N/A**.
 10. (Optional) Click the **Save these rates for me to use on my next quote for this service** checkbox will save the rates you have entered for the service to appear for your use in future quotes.
 11. Click **Save** if you wish to save the updates you made or click **Submit** to send your response for the service.
 12. Repeat **steps 3-11** if you wish to quote on the other services/packages in the RFQ.
 13. Upon clicking the **Submit** button, a popup box will appear to confirm submission of the quote. It will also advise you whether the issuing organisation has allowed for further quote updates or whether you need to ask permission to update.
 14. (Optional) Click the **Email me a confirmation of my submission** checkbox in the popup box to receive an email confirmation of the quote submission. You may wish to keep this for your records and/or forward it to others inside your organisation.
 15. Click the **Submit** button in the popup box to confirm your quote submission.

Note: Sometimes, clients request tender returnables. If they have not specified a field in the **Requested documents** section, use the upload field in the **Additional information** section to provide these.

COMPLETING A PRICING SCHEDULE

The issuing organisation for an RFQ may request that you submit your quote's pricing in a custom pricing schedule. A pricing schedule format in Felix that allows them to compare proposals more easily.

- Issuing organisations of RFQs have some options when they create custom pricing schedules.
- Depending on their setup per RFQ, you may see more columns of information (**e.g.** Additional Reference No from them) being requested to provide more detail for each line item (**e.g.** Lead Time and/or Manufacturer) or being offered the ability to propose quantities as you see them.

To complete a pricing schedule for an RFQ:

1. Go to the **Response** tab of the RFQ.
2. Under **Pricing** section or your chosen service/package, click the **Open Pricing Schedule** button.
3. Observe the following features of the pricing schedule:

- **Optional** column - If a client has labelled a row Optional, you are not required to respond to that row but you may if you to quote on those items.
 - (If your client has configured this) **Quantity (Proposed)** - This column allows you to suggest quantities different to what the client has estimated.
 - **Currency** - Either the default RFQ currency will be shown across the table or the currency you chose in the RFQ **Response** tab (only where you are provided an option by the client).
 - **Export** button (top right corner of the pricing schedule) - At any time, you can export the pricing schedule view into a CSV format. Use this to prepare your responses offline before coming back to enter values into Felix and/or when you have completed an offline record of your submission later.
4. For each row/item on the pricing schedule, you can select to Quoted, flag it as Included or flag it as Excluded.
 - If you enter a rate into the Rate column, the Status column will automatically flag the item as **Quoted**. (You may also be required to provide a Lead Time and Manufacturer if the client has requested this.)
 - If you want to indicate that a row is included elsewhere on the pricing schedule, select **Included** in the **Status** column. This will clear any rate you may have entered. We highly recommend to use the **Comments** feature to provide more context on where it is included.
 - If you want to indicate that a row is excluded from your quote altogether, select **Excluded** in the **Status** column. This will clear any rate you may have entered. We highly recommend to use the **Comments** feature to provide more context on the reason for your inability to provide the item.
 5. Update the **Rate** column for each line item on the pricing schedule by clicking the cell twice.
 6. (Optional) You can leave comments under the **Comments** column by clicking the **bubble icon** on each line item.
 - **Comments** - Enter any relevant context required. Highly recommended to add a comment here for Included and Excluded line items.
 - **Inclusions** - Typically used for Quoted items to refine or clarify the scope of what you have quoted.
 - **Exclusions** - Typically used for Quoted items to refine or clarify the scope of what you have quoted.
 7. If you later decide to quote an item that you flagged as **Included** or **Excluded**, you can change the status to Quoted in the **Status** column. This will require you to enter a **Rate** (and possibly a Lead Time and Manufacturer if the client has requested this.)
 8. At any time, click **Finish & Close** at the top right corner of the pricing schedule to save your work and return to the RFQ screen.

Notes:

- If you **Finish & Close** (save) without completing the full pricing schedule, you will be prompted to either set all blank items as **Included** or **Excluded**.
- You can return to the pricing schedule later to complete it, changing item statuses as desired before you submit your RFQ on the **Response** tab.

TYPES OF RFQ MESSAGES

Sometimes an organisation will issue updates or notices about an RFQ. To do this, the organisation will send a message within the RFQ. There are four distinct types of messages that can be sent or received in an RFQ.

Request for Information

A Request for Information (RFI) is a message that you are able to send to an organisation. An RFI can be used to ask further questions or clarify details regarding the RFQ. An organisation can respond to your RFI directly or they may put out an **Addendum** or **Notice to all Tenderers** to address any issues within the RFQ.

Addendum

An addendum is an additional piece of important information added to the RFQ. It may have an effect on how you as a vendor will respond to the RFQ and as such requires an acknowledgement that you have seen it.

Notice to all Tenderers

A notice to all tenderers is a message sent by the issuing organisation to all vendors who have received this RFQ. Notices to all tenderers are purely informative messages and do **not** require an acknowledgement.

Direct Message

A direct message is a private message that can be sent by an organisation to a single vendor or a group of vendors.

SENDING RFQ MESSAGES

Sometimes an organisation will issue updates or notices related to an RFQ. To do this they will send a message within the RFQ. This guide will outline how to view and respond to messages within an RFQ.

Viewing RFQ messages

To view messages that you have received within an RFQ:

1. Navigate Locate the RFQ you would like to view the messages of by using the quick search or filters.
2. Click on the RFQ **Job Name** or hover over the **ellipsis icon** and select **View Details** from the options.
3. Go to the **Communications** tab.
4. Locate the message you wish to view.
5. Click on the relevant message to view its contents.

Note: You will also receive an email notification when an organisation sends out an update relating to an RFQ you have received. Clicking the link in the email will allow you to view the newly received message.

Creating a Request for Information (RFI)

To create an RFI:

1. Navigate to **Requests for Quotation** from the main menu.

2. Locate the RFQ for which you would like to create a Request for Information by using the quick search or filters.
3. Click on the RFQ **Job Name** or hover over the **ellipsis icon** and select **View Details** from the options.
4. Go to the **Communications** tab.
5. Click the **Add New** button.
6. Enter a **title** for your message in the field provided.
7. (Optional) Enter a **reference number** for your message in the field provided.
8. Use the **Body** field to enter the contents of your message.
9. (Optional) Attach any documents related to your message using the upload box.
10. Click the **Send** button.

The screenshot shows the 'Create a message' interface within the 'Communications' tab. At the top, there's a navigation bar with tabs: Job Details, Documents, Response, Communications (active), Notes, and Options. Below the tabs, a light blue banner contains an information icon and text: 'Need more information to help prepare your quote? Request more information by sending a message directly to the customer. They may respond here directly, or answer your query with a general update to the RFQ.' The form itself has three main sections: 'Title' with a text input field labeled 'Message Title...', 'Ref # (optional)' with a text input field labeled 'Ref #', and 'Body' with a large text area labeled 'Message Body...'. At the bottom of the form is a file upload area with a cloud icon and the text 'Drop files here or click to select files'. Below the upload area are two buttons: 'Send' (orange) and 'Cancel' (white).

Responding to addendums

To respond to an addendum:

1. Navigate to **Requests for Quotation** from the main menu.
2. Locate the RFQ for which you received an addendum by using the quick search or filters.
3. Click on the RFQ **Job Name** or hover over the **ellipsis icon** and select **View Details** from the options.
4. Go to the **Communications** tab.
5. Click on the addendum to view its content.
6. Review the details of the addendum.
7. Navigate to the **Status** section of the message.
8. Click the **Click here to acknowledge receipt of this addendum** checkbox.
9. (Optional) Click the **Create RFI** button if you would like to ask for further information.

Job Details
Documents
Response
Communications
Notes
Options

Back

Addendum

Title

New Docs

From

John Smith (felixsoftwaretesting+staff@gmail.com)

Date/Time

December 19, 2022 2:55 pm

Message

Hi all,
We're received new docs from our client. Kindly acknowledged once received.
Thanks!

Documents

Download all

Download

Management Plans 1

Document

Added

Management Plan Docs.pdf

Dec 19, 2022 2:55:15 PM

Status

☐ Click here to acknowledge receipt of this addendum

Need to request more information about New Docs?

Create RFI

Notes:

- After acknowledging receipt of an addendum, its status will be changed from **Awaiting Confirmation** to **Confirmed**.
- You can bulk download attachments on an addendum.

Responding to direct messages

To respond to a direct message:

1. Navigate to Requests for Quotation from the main menu.
2. Locate the RFQ for which you received a direct message by using the quick search or filters.
3. Click on the RFQ **Job Name** or hover over the **ellipsis icon** and select **View Details** from the options.
4. Go to the **Communications** tab.
5. Click on the direct message to view its contents.
6. Enter your reply in the field provided.
7. (Optional) Attach any documents related to your message using the upload box.
8. Click the **Send** button.

Job Details

Documents

Response

Communications

Notes

Options

Direct Message

Back

Title

Site Visit

From

John Smith (felixsoftwaretesting+staff@gmail.com)

Date/Time

December 19, 2022 3:15 pm

Message

Hi,

Will conduct the site visit next week or week after next. Let me know your availability.

Thanks!

Attachment

No attached document.

Reply

Hello,

Sure. Will be available Monday or Tuesday either next week or the week after next.

Thanks!

Drop files here or click to select files

Send