PM4 + Partners
Knowledge Articles

Working with
Requests for Quotes (RFQs)
for Subcontractors

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Working with Requests for Quotes (RFQs)

When PCL processes their CRXs, they may find that they need a quote from a subcontractor. They can request this quote manually through email, or by using the CRX workflow (if it is enabled). When the request is sent by the CRX workflow, the request for quote (RFQ) appears in the subcontractor workspace so they can respond to it. The subcontractor responds to the RFQ through the collaborative workspace. PCL reviews the response and determines whether more information is needed. Once the response is acceptable to PCL, it is included in the CRX package to be sent the consultant/owner for their approval.

**Note:** Subcontractors can only see outstanding RFQs for their company. Outstanding CRXs require action from the subcontractor to complete them. They have a status of “Awaiting Submission” or “Awaiting Resubmission”.
Quick Start

What you need to know to get started without delay

The main actions you take in PM4+ related to Request for Quote is to review the request and prepare and upload your quote for PCL to review.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open workspace</td>
<td>![CRX management (external)]</td>
</tr>
<tr>
<td>Open list of requests</td>
<td><img src="Image6" alt="Outstanding RFQs" /></td>
</tr>
<tr>
<td>Select request to respond to</td>
<td>Click request ID link to open details</td>
</tr>
<tr>
<td>Review request details</td>
<td><img src="Image7" alt="Select paperclip" /></td>
</tr>
<tr>
<td></td>
<td>Download any attachments to review</td>
</tr>
<tr>
<td>Prepare quote</td>
<td>This is an offline process</td>
</tr>
<tr>
<td>Upload quote to RFQ record</td>
<td>Open RFQ again; select paperclip again; select <strong>New</strong> to start upload</td>
</tr>
<tr>
<td></td>
<td>Select <strong>Choose files</strong> in the Upload document dialog</td>
</tr>
<tr>
<td></td>
<td>Choose files to attach (quote/supporting docs) then <strong>Close</strong> dialog.</td>
</tr>
<tr>
<td></td>
<td>Exit the attachments screen.</td>
</tr>
</tbody>
</table>
## Working with Requests for Quotes (RFQs) for Subcontractors

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Complete quote details</strong></td>
<td>Select <strong>Edit</strong> to enter edit mode</td>
</tr>
</tbody>
</table>
| | - **Cost impact** = Yes  
| | - **Total amount** = value for the quote  
| | - **Schedule impact** = Yes *(if required)*  
| | - **Number of days** = # of days to complete.  
| | - **Comment** – (optional) info about quote. |
| **Submit quote to PCL** | Select **Submit** |
| | Read and respond to any confirmation dialogs |
| | Add comment if necessary.  
| | Select **Submit** to send quote to PCL for Review |
Viewing and monitoring RFQs assigned to your company

Your company’s collaborative workspace provides three ways you can track, monitor the progress and, respond to your company’s requests for quotes (RFQs):

**Tabbed list**  
**My company’s outstanding RFQs**  
In this list you can only see RFQs with a status of "Awaiting submission" or "Awaiting resubmission". These RFQs need to be completed by you and submitted by to PCL for review. This list can also be accessed through the Navigation pane.

**Count tile**  
**Outstanding RFQs**  
This tile indicates the total number of RFQs awaiting submission or resubmission from you. This number matches the number of RFQs seen in the tabbed list **My company’s outstanding RFQs**.

Select this tile to take you to the list filtered by the ‘outstanding type’ statuses.

**Navigation pane**  
**My RFQ log**  
**My outstanding RFQ log**  
This filtered log list is opened from the Navigation pane: External collaboration > CRX > My RFQ log

This list shows all RFQs whether outstanding or which have been **Submitted** by you to PCL for review or accepted and **Entered** by PCL.
My RFQ log

1. From the Navigation pane, select External collaboration > CRX > My RFQ log
   The list of all the RFQs for your company displays.

2. To view more details about or to respond to a specific RFQ, select the hyperlink in the Request ID field from any RFQ log list.

View workflow history

If you are concerned as to where a certain RFQ is in the process, you can view the workflow history.

1. Select the RFQ to view.
2. From the action pane select Workflow.
3. From the drop-down choose View history.

In the Workflow History pane there are three fast tabs which open to reveal detail information:

- **General** – who started, when started, current state and last change date.
- **Tracking details list** – this lists each activity in the workflow process and who performed the action to continue the workflow to the next step.
- **Tracking details** – you can review the workflow activity details for each step.
Responding to RFQs

When you are ready to answer the quote request you can provide your response from any view of the RFQ log list. However, from the CRX management (external) workspace the easiest way to provide a response is to select one of the following:

- The Outstanding RFQs count tile or
- The My company’s outstanding RFQs tabbed list

These two starting points provide a list of only the RFQs you need to respond to.

Prepare your RFQ Response

1. From the list of outstanding RFQs in your workspace, select the Request ID link to open the details view for the RFQ.
   
   The details view for the selected RFQ opens.

2. Review the RFQ and any attachments (for example, you might review the cover letter from PCL and any other documents provided with the RFQ).

3. (Outside PM4+) Prepare the quote document with the details for the quote.

Attach the quote and other documents to the RFQ

1. Select the attachments icon ( ) in the action pane on the far right.

   The Attachments for Request ID: RFQ##### screen opens.

2. From the action pane, select New

   The Upload document dialog opens.

3. Select Choose files and navigate to the location where you stored the quote document and any others you want to attach to the RFQ.
4. When the upload is complete, select **Close** to close the Upload document dialog.

   The uploaded documents are now available as an attachment for the quote in the Attachments list.

5. Close the Attachments list screen to return to the RFQ screen.

   The attachments icon updates to show attachments were added to the quote.

6. Once you are satisfied with the attachments uploaded to PM4+, finish sending the quote back to PCL.

**Respond to a request to revise and resubmit an RFQ**

When PCL returns a quote for revision and resubmission, update and upload the revised quote documents as requested using the same process for uploading a new quote.

Once the quote is uploaded, send the revised response back to PCL.
Send the RFQ response to PCL

1. Select **Edit** in the action pane.

   The field groups **COST IMPACT**, **SCHEDULE IMPACT** and **NOTES** are open for editing. You cannot edit any other fields.

2. Set the **Cost impact** toggle to **Yes**

3. In the **Total amount** field, type the value for the quote.

4. Set the **Schedule impact** toggle to **Yes** if completing the work effort for the RFQ has a schedule impact.

5. In the **Number of days** field, type the number of days the change takes to complete.

6. In the **Comment** field type any additional information you want to include with the quote.

7. From the action pane select **Save**

8. From the **Workflow** drop-down list in the action pane, select **Submit**

   **Note:** If no documents are attached to the submission, you see a message to confirm that you want to send the quote back without any documents.

   Select **OK** to send the quote to PCL without any attachments; or select **Cancel** to cancel the transmission and return to the workspace so you can add attachments.
9. Next, you see a confirmation message informing you that you are about to return the RFQ to PCL, and that you cannot make any more changes to it.

You are about to confirm your RFQ response and no further adjustments can be made. Do you wish to proceed?

10. Select **OK** to send the quote to PCL; or, select **Cancel** to cancel the submission and return to the workspace to make further adjustments.

   The RFQ workflow - Submit dialog opens.

11. In the **Comment** field, add any additional information about the RFQ.

12. Select **Submit** to complete the submission process.

   The quote is returned to PCL for their review. The status for the RFQ is automatically updated to "Submitted".

13. To see the change in status for the RFQ, refresh your browser session by pressing **F5** or using the Refresh button for your browser.

   **Note:** you can monitor the progress of your RFQ by looking at the Workflow history or viewing in My RFQ log.