

## Electronic Request for Quote (e-RFQ)

# Intuitively and Effectively Manage All Aspects of Your Supplier e-RFQ Processes

Upland Ultriva's closed-loop processes, business rules and automated alerts-driven approach to supply chain management has tangible benefits, including improved productivity through an immediate availability of actionable business intelligence, which also mitigates risks. Utilizing Electronic Request for Quote (e-RFQ) processes takes your supply chain management approach one step further, improving strategic sourcing capabilities by mirroring effective social media communication concepts to manage all aspects of your supplier requests for quote processes.

## Streamline the Creation of Vendor and Item Quotes

With Ultriva's e-RFQ module, you can easily streamline the creation of vendor item quotes. The e-RFQ module provides various tools and information for buyers and suppliers to easily navigate and work with the criteria that suits their needs. Through the e-RFQ module, a full audit trail of buyer and supplier interactions and communications is available, including a full quote history by supplier and supplier item. As bids are submitted, the e-RFQ compares multiple bid responses, presenting them in a clear, table form automatically identifying the most competitive bid.

How does Ultriva streamline the RFQ Process with our interactive RFQ dashboards? By adding efficiency to the process through three panels tailored to the specific needs of our suppliers: the RFQ Tracking Panel, the Integration Status Panel, and the My Routines Panel.

### RFQ Tracking Panel

*Highlights important tasks and provides real-time action alerts by e-RFQ, including:*

- **Open e-RFQs**
- **e-RFQs Due Today**
- **e-RFQs Ready for Review**
- **Expired e-RFQs**

### Integration Status Panel

*Lists e-RFQ related ERP integrations, including:*

- **e-RFQ Create:** updates ERP systems with e-RFQ data when released to supplier(s)
- **e-RFQ to Purchase Order:** can automatically create a PO in the ERP system or allow buyers to create POs in Ultriva

### My Routines Panel

*Provides buyers with one-click access to e-RFQ workflows requiring action, including:*

- **Waiting for Dispatch**
- **Open e-RFQs**
- **Waiting for PO**

### Benefits of e-RFQ Process

- Fully integrated with Ultriva's Collaborative Supply Portal (CSP)
- Closed-loop e-RFQ workflows with associated business rules and alerts
- Simple point-and-click functionality to create single and multi-line item e-RFQs
- Seamlessly attach documents, notes, terms and conditions
- Real-time collaboration and execution between customers and suppliers
- Complete tracking, traceability and reporting on all e-RFQs
- Table-based, intuitive comparison of all e-RFQ responses
- Auto-conversion of e-RFQs to POs
- Tight integration with ERP systems

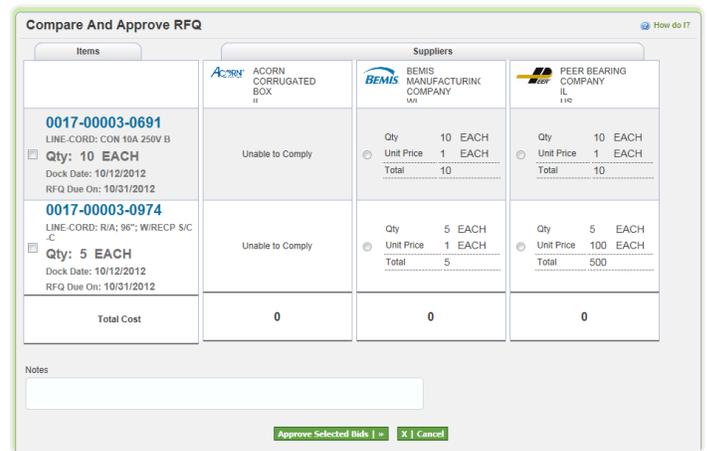
## Buyer e-RFQ Quote Initiation

The buyer can select single or multi-line item quote templates, attach documents, set payment thresholds, define delivery schedules, attach Terms and Conditions, set price breakdowns, and send to designated suppliers. For first time suppliers and/or items, e-RFQ will create temporary Supplier and Item Master records.



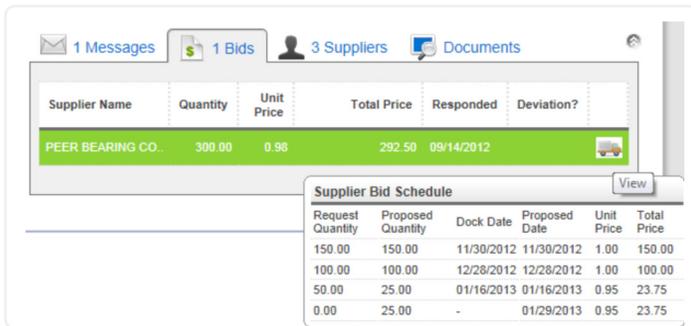
## Buyer e-RFQ Bid Review & Acceptance

The buyer may view all bid submissions in a side-by-side comparative analysis, with the most competitive bid intuitively highlighted. They can also view and accept or propose alternative supplier delivery quantities and supporting schedules.



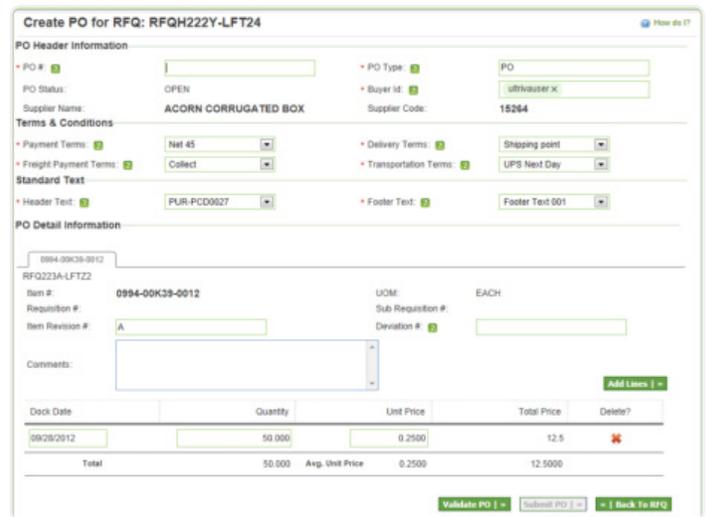
## Supplier e-RFQ Bid Submission

The supplier acknowledges receipt of the e-RFQ and accepts or replies with "no-bid." Suppliers can also offer discounts and propose new delivery quantities and schedules. History on all supplier bid responses is automatically stored and retrievable.



## Converting Supplier Bid to PO

Once the supplier bid is accepted, the e-RFQ either progresses into 'Waiting for PO' status or converts directly to a PO, based on customer configuration. Buyers may also create a PO in Ultriva and submit directly to suppliers when e-RFQ is operating in a stand-alone mode.



## About Upland Software

Upland Software (Nasdaq: UPLD) is an enterprise cloud software company that provides award-winning solutions in Project and IT Management, Workflow Automation and Digital Engagement. Our goal is 100% customer success, achieved through a unified operating platform that delivers the performance, scalability and support that over 2,500 Upland customers worldwide demand every day. Learn more at [uplandsoftware.com](http://uplandsoftware.com).