

USER MANUAL
(Request For Quotation Process)

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interSoln

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1 Introduction

Surprises and exceptions are common in daily business. interSoln Workflow is a new generation of product, designed with flexibility in mind, to meet the needs of people who work in varying business situations.

interSoln Workflow allows business professionals to improve business processes through experimentation and learning. Teams can coordinate their work by building the work process, following the progression of the work, and authorised users can adapt the process when changes are required.

Organizations can equally well automate and manage formal office processes. interSoln Workflow Portal come with the following modules:

A. Human Resource Process

- Leave Application
- Expense Application

B. Sales Tracking Process

C. Request For Quotation Process

D. Product(s) Promotion(s) Process

This document covers the usability of the Request For Quotation Process module.

Please note the interSoln Workflow Portal HTML interface is totally customizable. But, the fundamental are the same.

2 Getting Started

Before we proceed into the later portion of this user manual, you need to know the fundamental of the interSoln Workflow portal. The following sections shall guide you through these.

2.1 Login

Start your Internet Explorer and enter the interSoln Workflow URL in the address bar. You can get this information from your administrator. Login with the user name and password that is assigned to you by the same administrator.

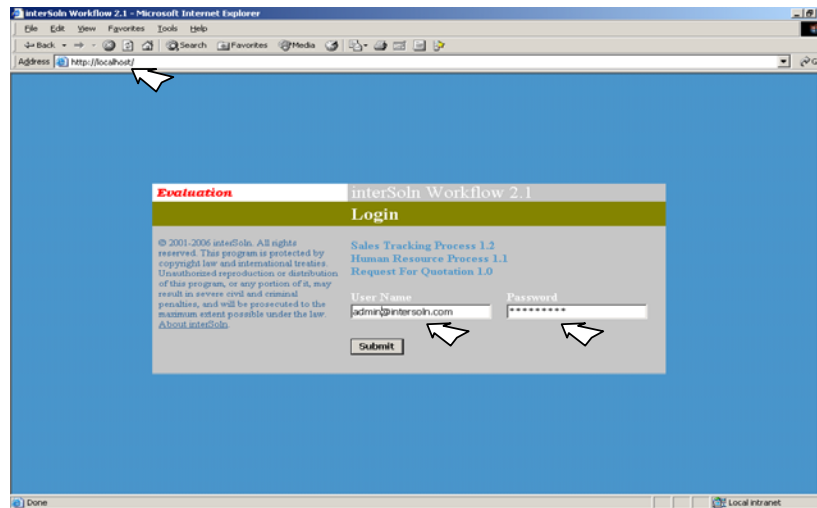


Figure 2.1a: Login Screen

Upon successful login, you'll see the following screen. Please take note of the location of the arrows below. The following section will detail how to manoeuvre through them.

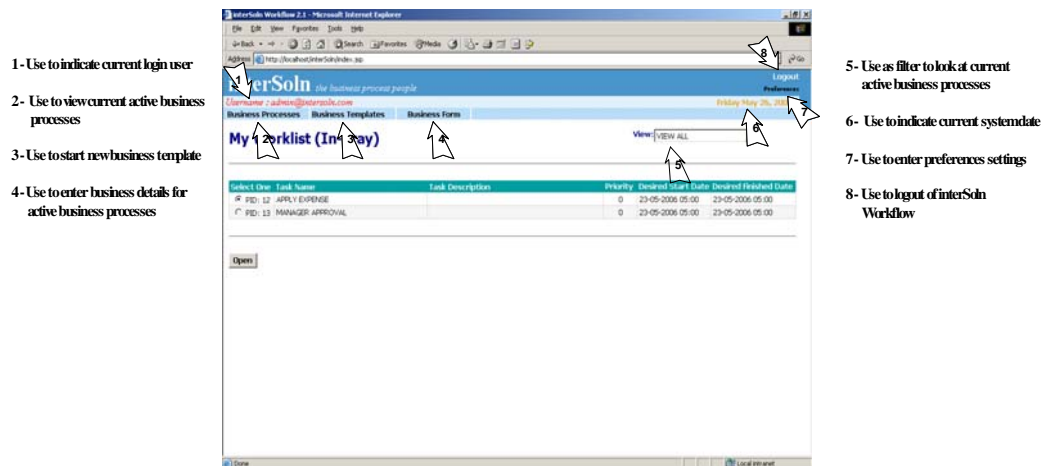


Figure 2.1b: My Worklist (In-tray) Screen

2.2 Business Process Menu

To open your current task in a business process, move your mouse over the “Business Process” menu. A pop up window will indicate two options for you to select.

- My Worklist (In-Tray) – Use to indicate all the active process the require your action now
- Browser – Use to provide a graphical view of the business process that you’re a participant of

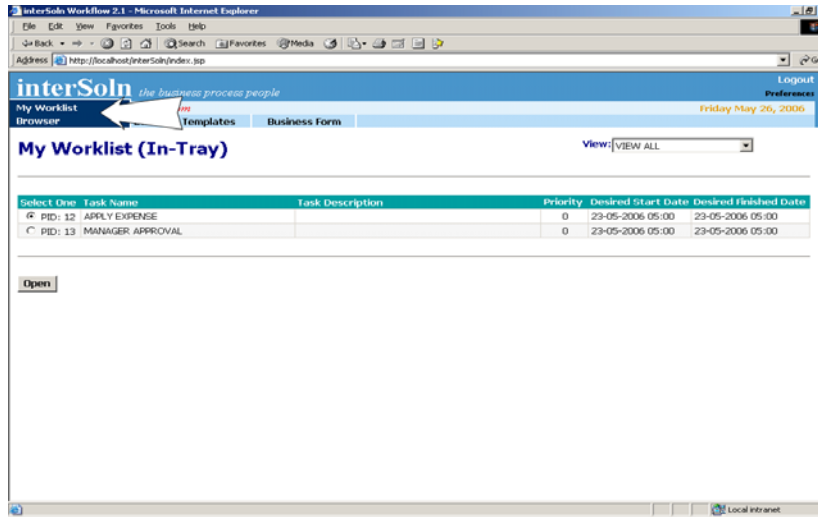


Figure 2.2: Business Processes Pop-Up Screen

2.3 Business Template Menu

To start a new business request, click on the “Business Template” menu and depending on the rights that you’ve been given by your administrator, you’ll be able to start different business request.

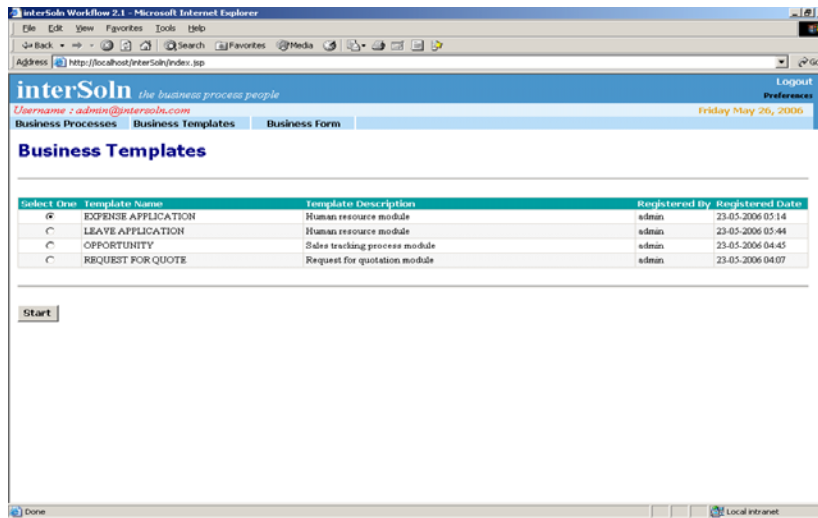


Figure 2.3: Business Templates Screen

2.4 Business Form Menu

To share business details information pertaining to an active business process, move your mouse over the “Business Form” menu after you’ve open an active business process. A pop up window will indicate four options for you to select.

- Attachment(s) – Use to add remove attachment to opened active business process
- Comment(s) – Use to add comments on opened active business process
- History – Use to provide a graphical view of the opened active business process
- ReAssign – Use to reassign current task in opened business process to someone else in the interSoln Workflow user directory

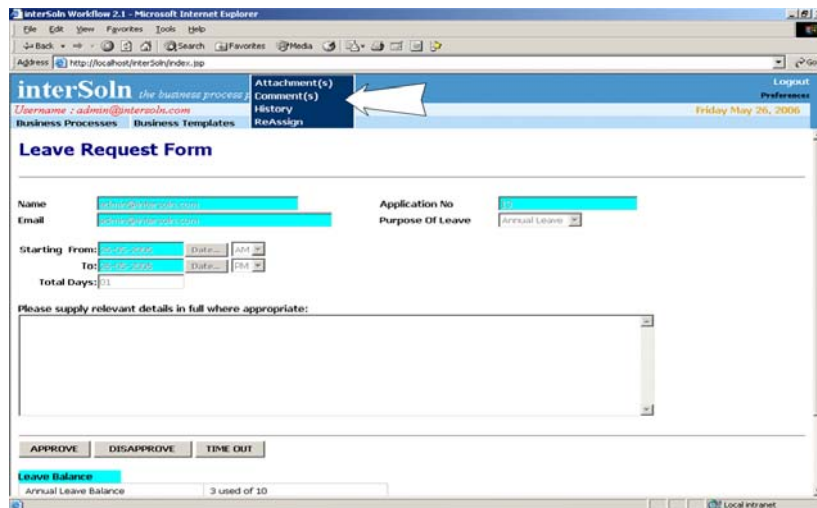


Figure 2.4: Business Form Screen

2.5 Preferences Menu

To set your user and administration preferences, select “Preferences” from the top right hand side of the web page. Depending on your access rights given to you by your administrator, you’ll be allowed different access to different option in the preferences menu.

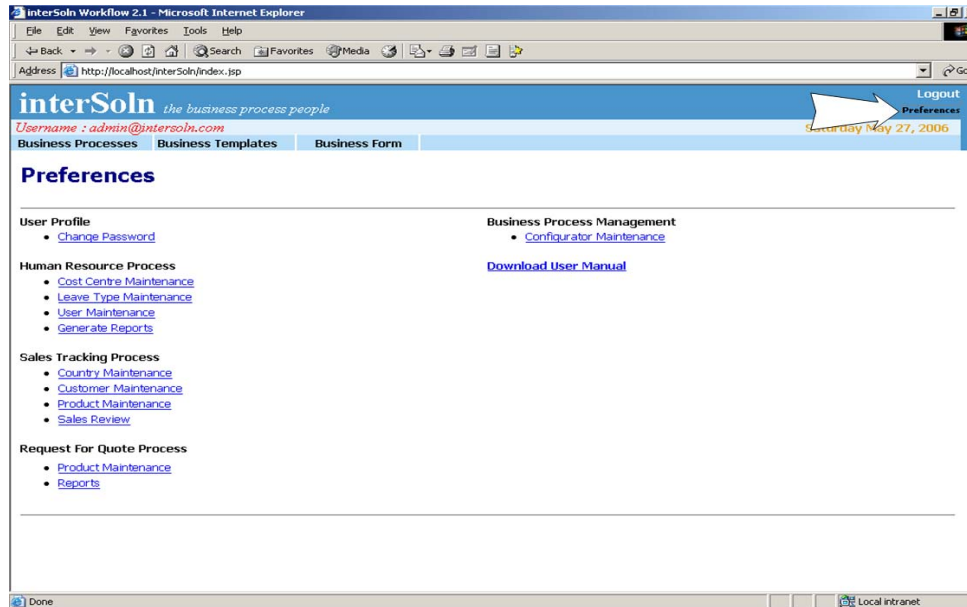


Figure 2.5: Preferences Screen

3 Request For Quotation Process

The Request For Quotation Process allows a requestor to request from a list of selected suppliers to quote for particular quantity of product(s). Each request will individually be sent to the respective personnel for approval, purchase order creation, invoice issuing, payment terms validation, delivery order, etc.

Upon successful purchase of the products, the sales persons can start quoting to their customer(s) through the Sales Tracking Process.

3.1 Requesting supplier(s) to quote

To request for supplier(s) to quote, highlight the “Request For Quote” from “Business Template” and click on the “Start” button. Upon successful request, the following screen will be shown.

You may start requesting your supplier(s) to quote by entering the following details. After entering the necessary information, select the “Submit” button to send the request out to your indicated supplier(s).

- Buyer – Use to pop up a buyer window for you to select the buyer that has been allocated to you by your administrator. You can create/delete your own buyer here as well.
- Supplier(s) – Use to pop up a supplier window for you to select the supplier(s) that have been allocated to you by your administrator. You can create/delete your own supplier here as well.
- Remarks – Use to add remarks to be shared with the supplier(s)
- Attachments – Use to add/remove attachment to be shared with the supplier(s)
- Add – To add the product to be quoted by supplier(s)
- Delete – To delete the selected product(s) in the request for quote form

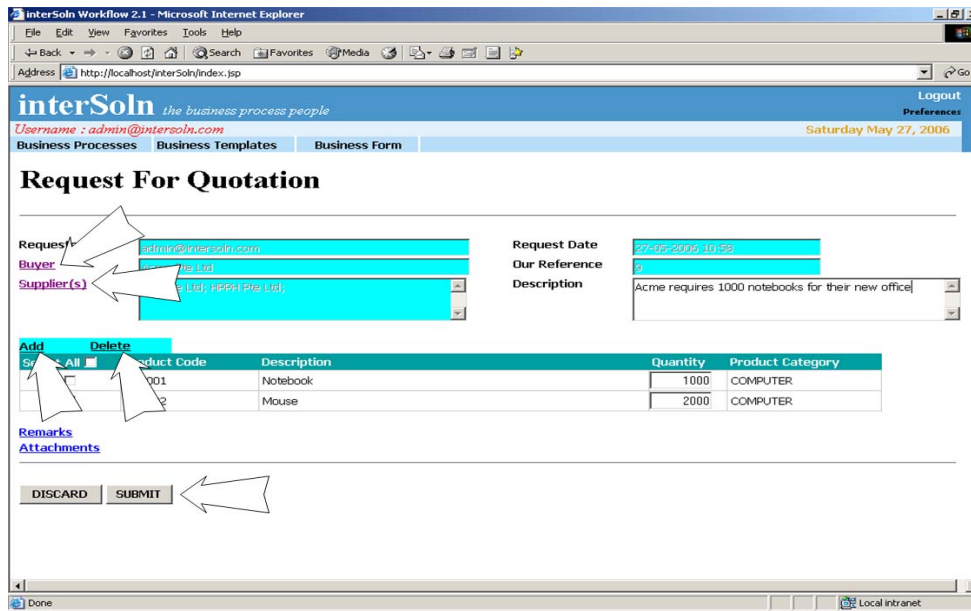


Table 3.1a: Request For Quotation Screen

Upon successful submission of the request for quote, the following screen will be shown.

To close off all the requests at any stage, select the “Case Closed” button. This will end all business processes that are related to this request.

You can also view or enact on the individual requests by selecting the supplier name.

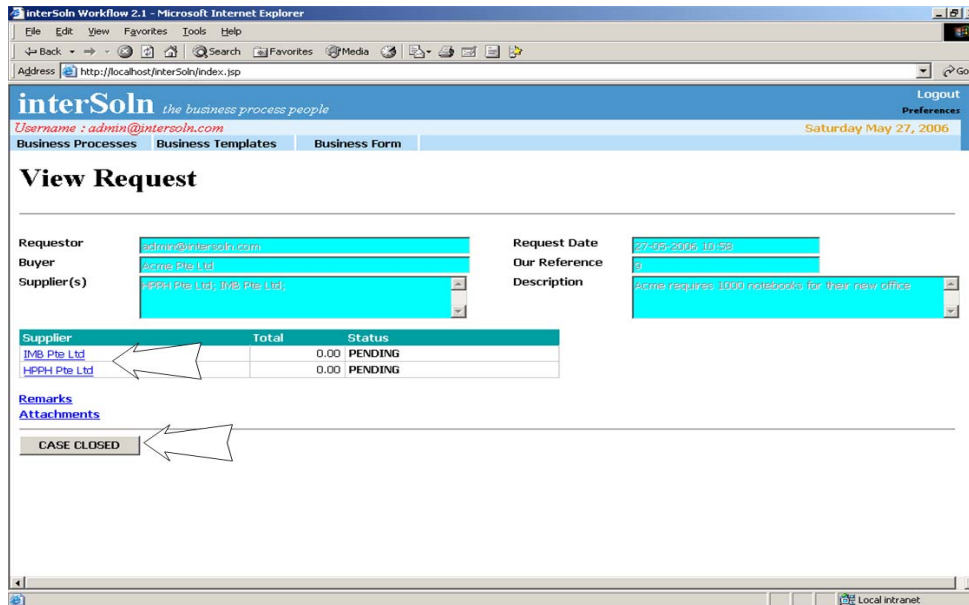


Table 3.1b: View Request Screen

At the final stage for the entire request for quote process, the following screen will be shown.

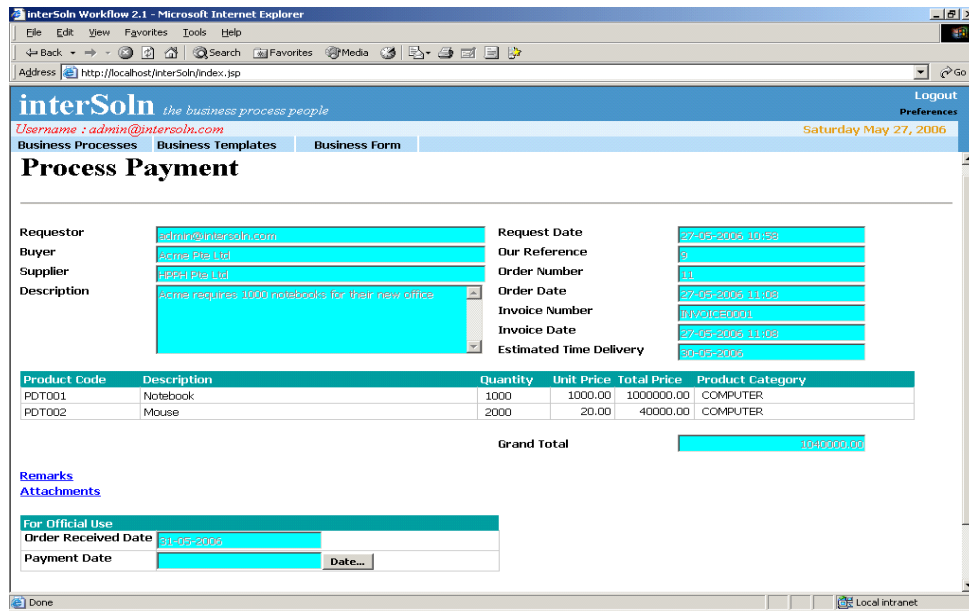


Table 3.1c: Payment Screen

3.2 Assigned Company Administrator

Administrator has rights that normal users do not have. Hence, he/she has the following responsibilities before normal users can proceed with their using interSoln Workflow's Request For Quote Process.

3.2.1 Product Maintenance

This screen is for the administrator to maintain the entire company's product(s) to be used whilst requesting supplier(s) to quote.

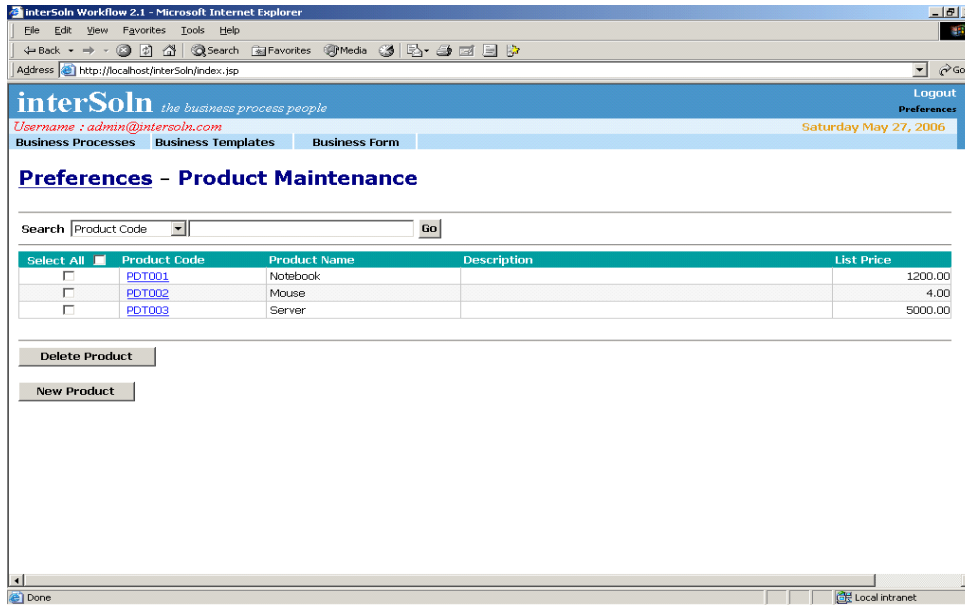


Figure 3.2.1: Product Maintenance Screen

3.2.2 Request For Quote Reports

At present, the request for quote process is able to generate three type of reports (namely: Product Listing, Product Pricing History and Order Listing) based on the following condition.

Product Category, Product Name, Order Number, Invoice Number, After Date Created and Before Date Closed.

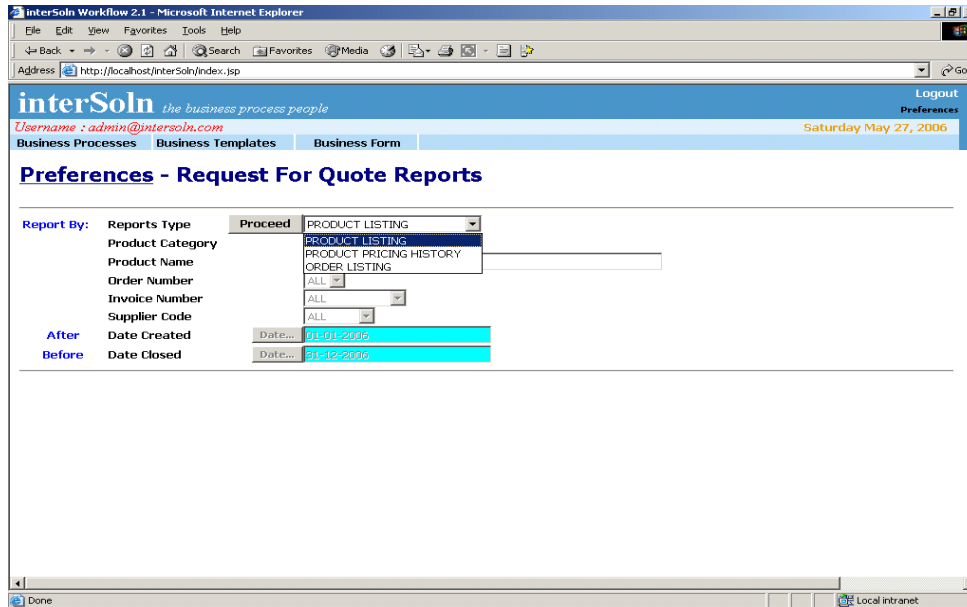


Figure 3.2.2: Request For Quote Report(s) Screen

3.2.2.1 Product Listing Report

This report allows the administrator to generate the entire company's product(s) whilst categorising them into their respective product category.

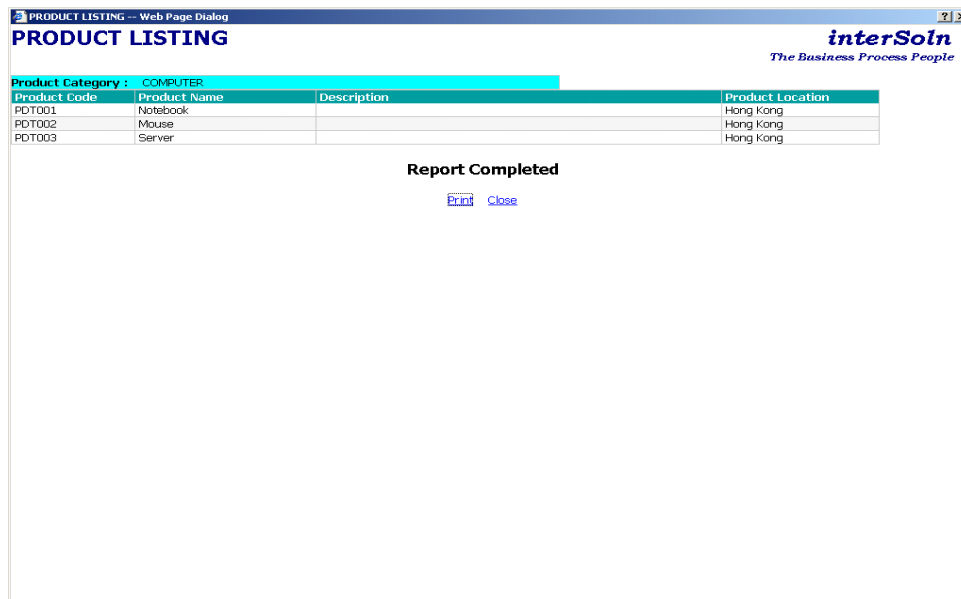


Figure 3.2.2.1: Product Listing Report

3.2.2.2 Product Pricing History Report

This report allows the administrator to look at the product pricing history based on individual supplier(s). This way, the administrator can planned accordingly.

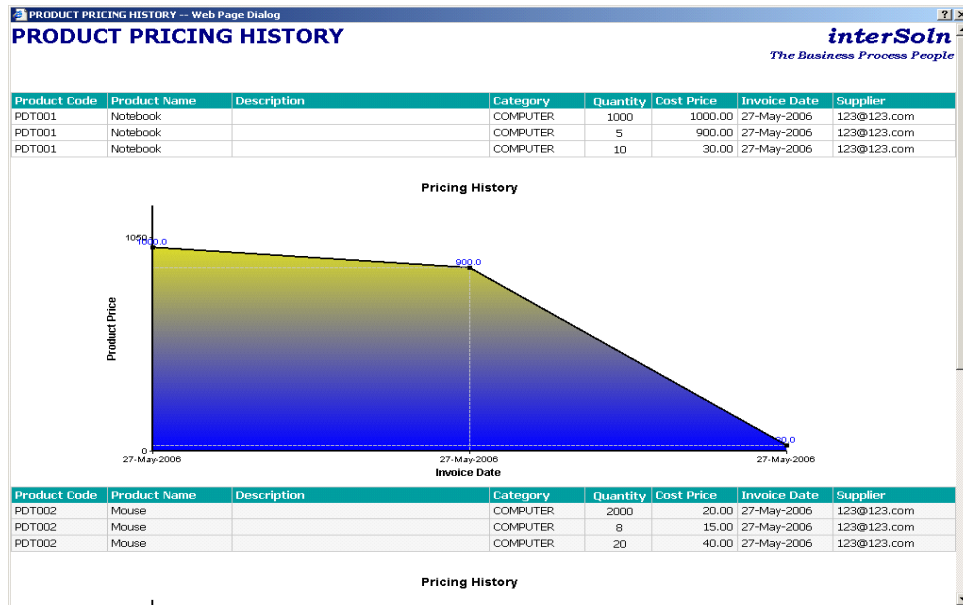


Figure 3.2.2.2: Product Pricing History Report

3.2.2.3 Order Listing Report

This report allows the administrator to print the order(s) issued to the respective supplier(s) based on order number, invoice number, etc.

The screenshot displays the 'ORDER LISTING' report in a web browser window. It contains two order entries. Each entry includes a header section with order details and a table of products.

Order 1:

- Requestor: admin@intersoln.com
- Buyer: Acme Pte Ltd
- Supplier: HPPH Pte Ltd
- Description: Acme requires 1000 notebooks for their new office
- Request Date: 27-May-2006 10:58
- Our Reference: 9
- Order Number: 11
- Order Date: 27-May-2006 11:08
- Invoice Number: INVOICE0001
- Invoice Date: 27-May-2006 11:08
- Estimated Time Delivery: 30-May-2006

Product Code	Description	Quantity	Unit Price	Total Price	Product Category
PDT001	Notebook	1000	1000.00	1000000.00	COMPUTER
PDT002	Mouse	2000	20.00	40000.00	COMPUTER
Grand Total: 1040000.00					

Order Received Date: 31-May-2006
 Payment Date: 01-Jun-2006

Report Completed

Order 2:

- Requestor: admin@intersoln.com
- Buyer: Acme Pte Ltd
- Supplier: HPPH Pte Ltd
- Description:
- Request Date: 27-May-2006 11:12
- Our Reference: 12
- Order Number: 14
- Order Date: 27-May-2006 11:14
- Invoice Number: INVOICE0002
- Invoice Date: 27-May-2006 11:14
- Estimated Time Delivery: 29-May-2006

Product Code	Description	Quantity	Unit Price	Total Price	Product Category
PDT001	Notebook	5	900.00	4500.00	COMPUTER
PDT002	Mouse	8	15.00	120.00	COMPUTER
PDT003	Server	9	6000.00	54000.00	COMPUTER

Figure 3.2.2.3: Order Listing Report

----- End of User Manual -----