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Request for Quote

Cavallo Support - 2025-06-09 - [Sales](#)

Overview

This module is used to create Request for Quote (RFQ) documents. These RFQ documents can be created as a standalone document, or they can be generated from a sales document or a vendor. From there, the RFQ can be emailed directly to the vendor as a printable report attachment. Once a response has been received by the vendor, the user can update the RFQ appropriately and convert it to a purchase order.

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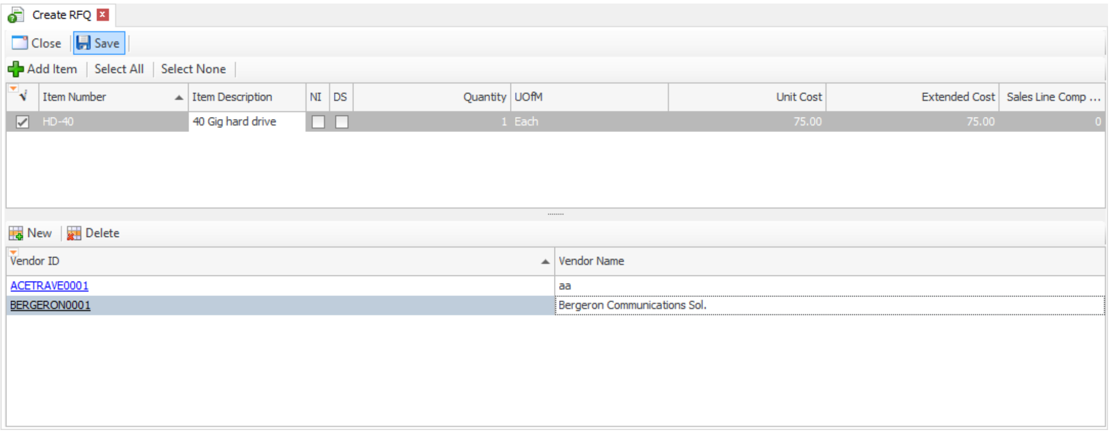
Creating RFQs

Standalone

To create a standalone RFQ, navigate to the Request for Quote module and click **Create RFQ**.



Click the **Add Item** button to add items. Simply type in the item number, or you can use the lookup to find your item. From there you can specify the quantity and unit of measure, or anything else you might need. The unit cost is pulled from the current cost of the item, but it can be altered if needed. If you accidentally add an item you don’t need, you can change the item number or you can unselect the Selected checkbox column. Once unselected, this line will not appear on any RFQs that are created.

To add vendors, click the **New** button along the bottommost grid. Once a new row is added, type in the vendor ID or use the lookup to find the vendor you need. Vendors can be deleted if needed.

Once you are happy with the items and vendors, click **Save** to create your RFQs. An RFQ will be create for each vendor you’ve specified, and the Create RFQ screen will be closed.

Sales Document

RFQs can be created from a sales document as well. Go into a sales document you wish to create an RFQ from and click the **Actions** dropdown menu. Choose **Create RFQ from Sales Doc**. This will open a screen very similar to the Create RFQ screen mentioned above, except all of the items will be populated from the sales document and all of the vendors will be filled in based on which vendors have been used to purchase the items before.

If the RFQ is created from a quote, all line items on that quote will be added to the RFQ screen. If the RFQ is being created from an order or invoice, only dropship and backordered lines will appear as line items on the RFQ. If any of these items do not need to be added to the RFQ, simply unselect them before clicking **OK**.

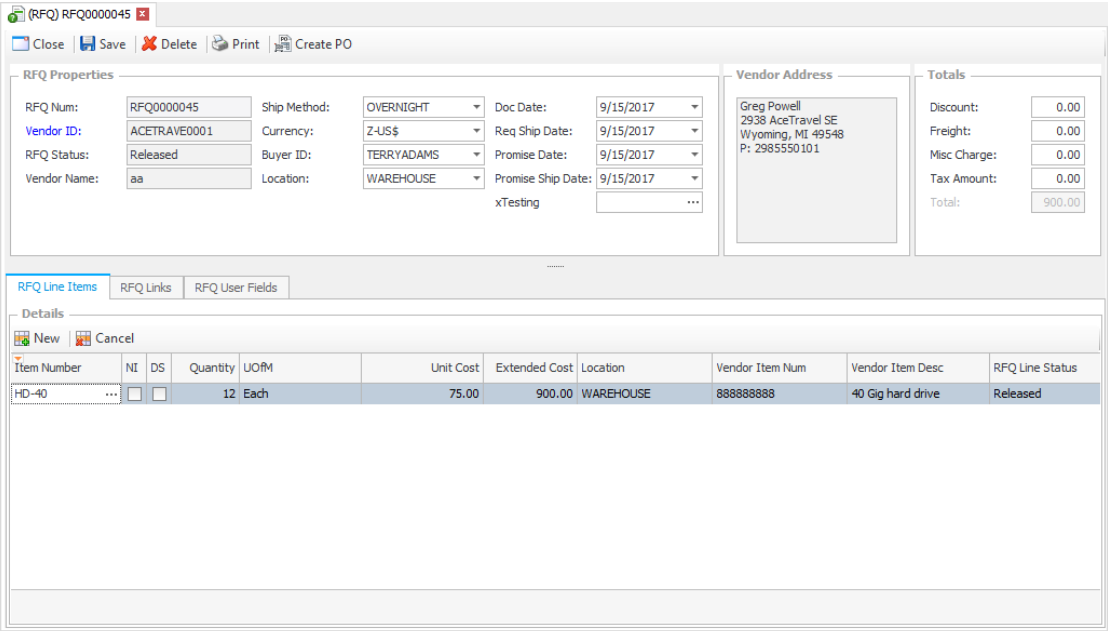
Creating an RFQ from a sales document creates a link back to the sales document on the RFQ and potentially (with security) creates SOP to POP links, if the RFQ is eventually converted to a purchase order.

Vendor

Lastly, RFQs can be created from the Vendor card. Open a Vendor card and click the **Actions** dropdown menu. Choose **Create RFQ from Vendor**. This is very similar to the standalone scenario, except that it automatically adds the vendor to the RFQ list.

RFQ Entry

The RFQ Entry screen is very similar to all of the document entry screens that exist in SalesPad. It allows users to make further adjustments or changes to the RFQ, print/email any reports the vendor requires, and convert any RFQ to a purchase order.



Statuses

RFQs have statuses just like purchase orders have, so users can see what state the RFQ is currently in. Once an RFQ has been printed/emailed, the RFQ's status is changed to Released, and if any changes happen to the document after it has been released, its status will be set to Change Quote. Once an RFQ is converted to a purchase order, the status will be changed to Converted to Quote, and it will become Read Only so that no more changes can be made. If the RFQ is deleted, the RFQ is marked as deleted and the status is changed to Cancelled. In addition to deleting, an RFQ's status can also be set to Cancelled if all lines on the RFQ have been cancelled and the user chooses to update the status when prompted upon saving.

RFQ Links

The RFQ Links tab shows Sales Document and PO links that are related to this RFQ. Links can be removed but not recreated. These links are used to create SOP to POP links when the RFQ is converted to a purchase order, and they are also used to cancel lines from any RFQs that may have been created from the same sales document. Each of these functionalities are protected with securities.

Create PO

The Create PO button is used to convert an RFQ to a purchase order. Once clicked, the PO screen will pop up to allow the user to make any final changes and save the purchase order. If all of the lines are dropship, then a dropship purchase order will be created. If there are mixed lines, a standard purchase order will be created for the non-dropship lines, and a dropship purchase order will be created for the dropship lines. These purchase orders will pop up one after the other. Once this is finished, the RFQ's status is changed to Converted to PO, along with all of the lines.

If you have the *Create SOP to POP Links* security enabled, SalesPad will attempt to create SOP to POP links. This will only work if the RFQ lines were created directly from the sales document, the sales document is an order or invoice, and the sales document's lines can be linked (sufficient backorder quantity, dropshipped, etc.).

If you have the *Cancel Related RFQs When Converting to PO* security enabled, any RFQ that is linked to the same sales order as the current RFQ will have its lines cancelled. If all lines on the RFQ are cancelled, then you will receive a prompt asking if you want to cancel the entire RFQ. This functionality helps eliminate RFQs that have been made unnecessary once a purchase order has been created for the sales document.

Security and Application Settings

Create RFQ – Allows users to access the Create RFQ plugin.

- *Show Cost* - Controls whether or not the user will see Item Costs.
- *Open Docs After Creation* - Controls whether or not the new RFQ documents will open after they are created.
- *Default Location* - Specifies the default location.
- *Adjust For Purchasing UofM* - If set to True, the Unit of Measure and Quantity will be adjusted based on the Purchasing Unit of Measure.

Create RFQ From Sales Doc – Allows users to create RFQs from sales documents.

Create RFQ From Vendor – Allows users to create RFQs from a Vendor card.

RFQ Entry – Allows users access to view and edit RFQs.

- *Pre Save Script* - Allows users to enter a Pre Save Script.
- *Can Create PO* - Controls whether the user has the ability to create a new PO from an RFQ.
- *Cancel Related RFQs When Converting to PO* - When enabled, converting an RFQ to a PO will cancel all other RFQ lines that are linked to the same Sales Document lines as the ones being converted.
- *Create SOP to POP Links* - When enabled and converting an RFQ to a PO, SalesPad will attempt to create SOP to POP links, if the RFQ is linked to an eligible sales document.

RFQ Line Items – Allows users to edit and create RFQ line items.

- *Can Edit Cost* - Controls whether the user can edit Unit Cost on line items.
- *Can View Cost* - Controls whether the user can view an item's Unit Cost.
- *Cancelled Line Color* - Color of line item that has been cancelled.
- *StrikeThrough Cancelled Lines* - Changes the appearance of the RFQ Line (strike through), if the line is fully cancelled.

RFQ Links – Allows users access to the RFQ Links tab.

RFQ Properties – Allows users access to the RFQ property fields in RFQ Entry.

RFQ Search – Allows users access to search and open RFQ documents.

RFQ User Fields – Allows users access to the RFQ User Fields tab in RFQ Entry.