

# Efasst | Negotiation Platform

## *Quick Start Guide*



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# What is efasst?

Main Goal



**efasST**<sup>®</sup>  
*Strategic Sourcing Tools*

## Supplier Relationship Management



**Main Goal: To streamline the development and consolidation of strategic alliances with our suppliers through an easier, safer, integrated and transparent exchange of information.**

# What is Efasst?

What do I gain by using efasst?



MORE INFORMATION	MORE BUSINESS	MORE TRANSPARENCY	LESS COSTS	MORE INTEGRATION
<p>Belonging to a database of potential suppliers Efacec</p> <p>&gt; Fast access to information of the queries / ongoing orders Efacec</p> <p>Commercial information available online and through a single channel</p> <p>Eliminates the Risk of Information Loss</p>	<p>Greater probability of increased turnover with Efacec</p>	<p>&gt; Transparency in Purchase Processes</p>	<p>&lt; Administrative costs in dealing with processes</p>	<p>&gt; Integration of the supply chain - Best level of service provided to the end customer</p>

# What should I know before using efasst?

*The most important terms should I know about the Negotiation Platform*



1 - **RFQ (Request for Quotation)** : Request for Quotation by Efacec sent to shortlisted suppliers.

2 - **Type of Request:**

- a. **Technical Proposal:** Document(s) that define and explain the technical solution of the Supplier for a particular product for which he was invited to submit a proposal.
- b. **Quotation / Commercial Proposal:** Supplier's Commercial Quotation for a particular product (pricing, delivery times and other commercial cond.).
- c. **Technical and Commercial Proposal:** When the request sent by Efacec has a technical-commercial scope, the Supplier must submit his commercial quotations as well as the corresponding technical proposals.

3 - **Quotation Revision:** Whenever you want to submit a revision to the quotation already sent for Efacec you can do so via the "Quotation Review". Only the last revision sent will be considered!

4 - **Alternative Quotation:** Whenever you want to indicate alternatives to the supply of a particular product you may do so through the option "Alternative" (eg. to send quotations to offer quantity discounts and/or alternative technical solutions). All sent alternatives will be considered and will lack analysis by Efacec for the choosing of the best alternative sent.

5 - **Users**

- a. **Master-User:** That manages all user accounts/profiles associated with the Supplier. User with partner code (PXXXXXXXX). This partner can activate/deactivate user accounts as well as manage which access profiles that each account should have.
- b. **Child User:** Supplier's Secondary-User. It is a user account enabled by the Master-User with a particular access profile. Cannot manage user accounts!

# What should I know before using efasst?

Which states can be associated with a Request for Quotation?



## IN PROGRESS (by the Supplier)

1. When Efacec sends a New Request for Quotation to the Supplier and he has not yet sent his Technical Proposals / Commercial Quotations

(or)

2. When Efacec requests the revision of quotations (beginning of the negotiation rounds)

## UNDER EVALUATION (By Efacec)

1. When all Technical Proposals/ Commercial Quotations have already been sent to Efacec and are being evaluated

## ARCHIVED

1. When the request for quotation was closed or canceled by Efacec

**STATES OF THE REQUEST FOR QUOTATION**

# What should I know before using efasst?

## General Aspects of Using the Negotiation Platform



- Whenever there is a new Request For Quotation to be handled in efasst Portal, Suppliers will be notified via email. This email (and all other automatic emails triggered under a Request for Quotation) is sent to the selected contacts by Efacec. These contacts relate to users associated with the Supplier's account .
- Only active users with "Commercial" profile can send commercial quotations to Efacec. We recommended that, before using efasst, the Master-User (user with the account PXXXXXXXX) to check and update the list of users through the "Roles Management" menu.
- Shipping/handling queries via efasst is only available to registered suppliers on the portal as potential partners (partner code PXXXXXXXX).
- It is highly recommended not to submit quotations on the deadline of the Request for Quotation.
- Cannot send quotations/technical proposals after the Deadline for Receipt of Quotations.
- Only the Efacec Contact is able to extend the Deadline for Receipt of Quotations.
- After sending the quotation(s) to Efacec, these cannot be changed unless they are again made available to the Supplier by the Efacec Contact. If you want to introduce a new revision of a quotation already sent to Efacec you may do so at any time, provided that the request is still ongoing. The system will consider the last revision sent!
- You may send more than one commercial/technical alternative for each consulted item.
- The number of negotiation rounds is unlimited.
- After closing a quotation request, no automated email is sent to the Suppliers. Thus, you should monitor the process via the platform. Any questions should be clarified with the Efacec Contact!

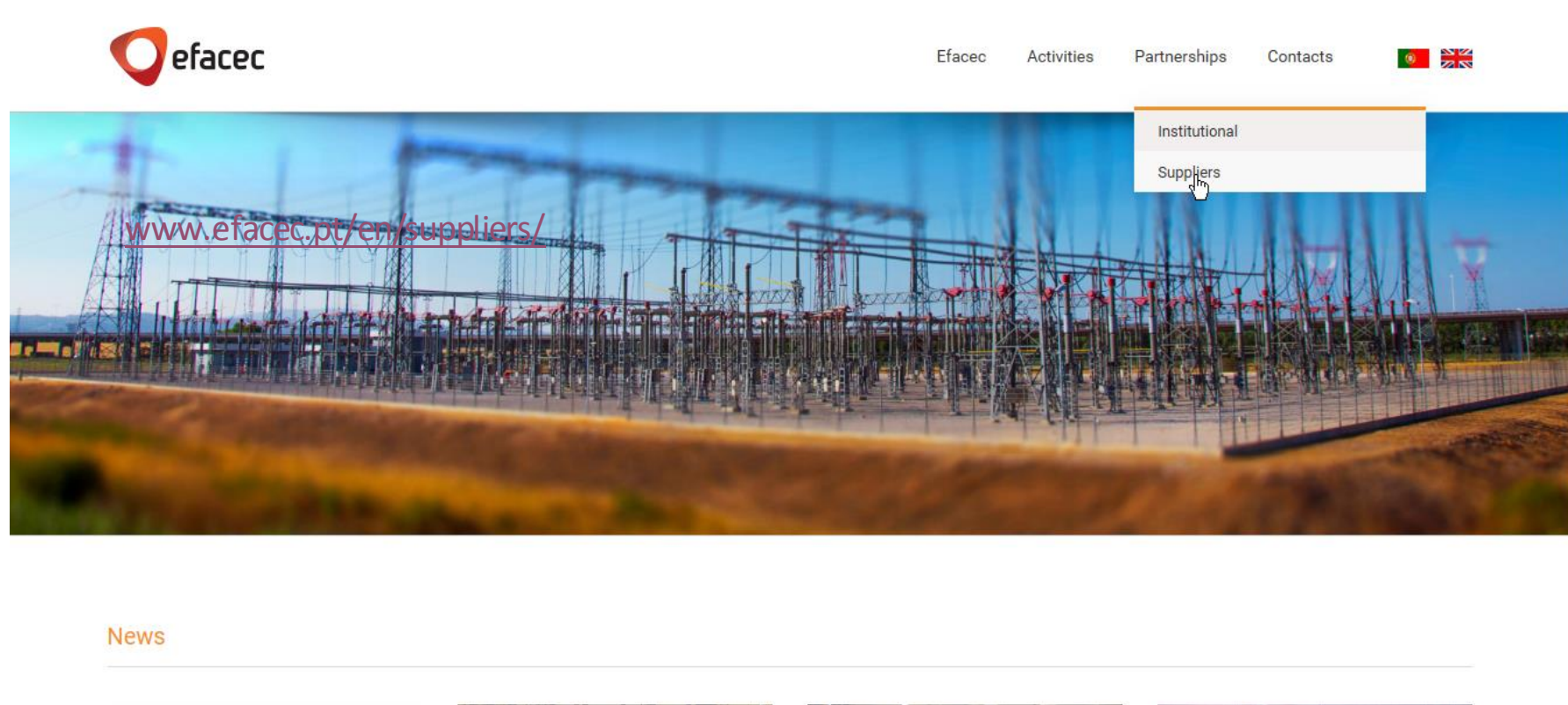
# How to send a quotation in 5 steps?

Step 1 | Access Efasst Portal



## STEP 1 | ACCESS TO THE PRIVATE AREA OF EFASST PORTAL

Link: [www.efacec.pt/en/suppliers/](http://www.efacec.pt/en/suppliers/)





# How to send a quotation in 5 steps?

Step 2 | Access Request for Quotation



## STEP 2 | ACCESS REQUEST FOR QUOTATION (see reference of the Request in the email sent)

**Appointment book**

- [New Messages - 22](#)
- [Portfolio: There are some information to fill](#)
- [Requests for Quotation to Reply - 34](#)

2 a) Access the list "Requests for Quotation to Reply"

2 b) Click on the RFQ's Code

Request Code	Description	Query Type	Efacec Contact	Quotation Request Date	Quotations accepted until:	Items to Quote/Quotations
RFQ000351	Cables (MV/LV)	Technical-Commercial		2013-11-11	2013-11-29	2   0
RFQ000352	Cables (MV/LV)	Technical-Commercial		2013-11-11	2013-11-29	2   2 <i>i</i>

Sign that indicates that it is necessary to review quotations (according to the comments sent by Efacec).

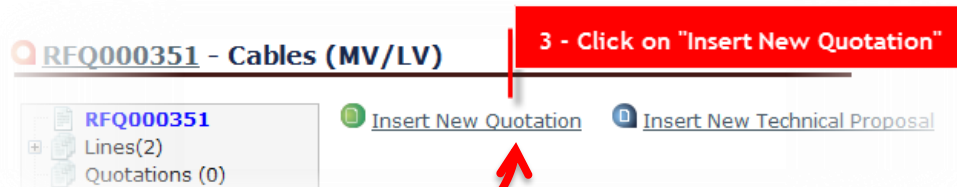
Sign that indicates that there are already technical proposals uploaded to the Request for Quotation.

# How to send a quotation in 5 steps?

Step 3 | Click on "Insert New Quotation"



## STEP 3 | CLICK ON "INSERT NEW QUOTATION"



- A | Navigation Tree (see RFQ information)
- B | General Data of the Request for Quotation
- C | List of Items to Quote
- D | See Item Detailed Description

- E | Line Info (Red - Quotations/ Technical Prop. missing; Yellow - Information to be sent to Efacec missing; Green - All ok)
- F | Insert Detailed Quotation (lets you modify other negotiable assumptions besides Qty, Price and Deadline)
- G | "Not Quote" item

# How to send a quotation in 5 steps?

Step 4 | Insert Quotation/Technical Proposal



## STEP 4 | INSERT QUOTATION/TECHNICAL PROPOSAL

**RFQ000351 - Insert New Quotation**

Save and Send to Efacec  Save 4 a)

Currency	EUR - EURO	Terms of Payment	990 - Due on 120 days	Delivery Terms	DAP - Delivered At Place
Commercial Proposal (Your Ref.)	CP123456	Doc. Description	Commercial Proposal	File	C:\Users\2877\i Browse...
Tech. Proposal (Your Ref.)	TP123456	Doc. Description	Technical Proposal	File	C:\Users\2877\i Browse...

<input type="checkbox"/>	Line	Description	Qty.	Unit	Qty. Type	Delivery Date	Not quote	Price (unit)	Lead Time (Calendar Days)	
<input checked="" type="checkbox"/>	10	Cable: RV (FXV) 0,6/1 kV 3G2,5	15000	M	One time purchase	2013-12-06	<input type="checkbox"/>	0,55	7	
<input checked="" type="checkbox"/>	20	Cable: RV-K 1,8/3 kV 1x300 Cu5	12000	M	One time purchase	2013-12-06	<input type="checkbox"/>	18,69	7	

4 b)

### 4 a) Area that allows:

- Introduce general conditions to all quotations (Currency; Payment Cond. and Delivery Cond.)
- General Documents to all quotations (Commercial Documents and Technical Proposals)

### 4 b) Area that allows you to insert the unit price of the item and its lead time.

# How to send a quotation in 5 steps?

Step 5 | Submit Quotations/Technical Proposals to Efacec



## STEP 5 | SUBMIT QUOTATIONS/TECHNICAL PROPOSALS TO EFACEC

**RFQ000351 - Insert New Quotation** 5 - Save and Send to Efacec

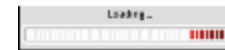
Save and Send to Efacec  Save

Currency: EUR - EURO

Commercial Proposal (Your Ref.): CP123456

Tech. Proposal (Your Ref.): TP123456

Navigation tree: RFQ000351, Lines(2), Quotations (0), Tech. Proposals (0), Efacec General Docs (0), Messages



Operation completed successfully. ✓

### NOTE:

To view Quotations/Technical Proposals after sending them to Efacec, you can do it through the “Quotations”/” Technical Prop.” tab (navigation tree).

- Through the “Quotations” tab you can also perform operations depending on the submission state of the quotation - sent or not sent (Review Quotation/ Create Alternative Quotation/ Edit Quotation / Send Quotation / Deactivate Quotation)
- Through the Technical Prop. tab you can Add Documents to a previously inserted technical proposal/ Send Technical Prop. to Efacec or Add a New Technical Prop.

**RFQ000351**

Navigation tree: RFQ000351, Lines(2), **Quotations (2)**, Tech. Proposals (1), Efacec General Docs (0), Messages

Line	Description	Quotation
10	Cable: RV (FXV) 0,6/1 kV 3G2,5	<a href="#">Q00000743AA1</a>
20	Cable: RV-K 1,8/3 kV 1x300 Cu5	<a href="#">Q00000744AA1</a>



EFASST SUPPORT

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