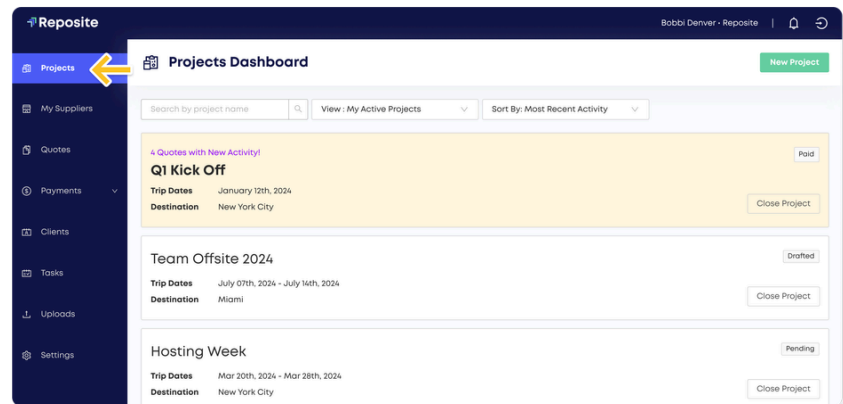


# Viewing and Managing Quotes

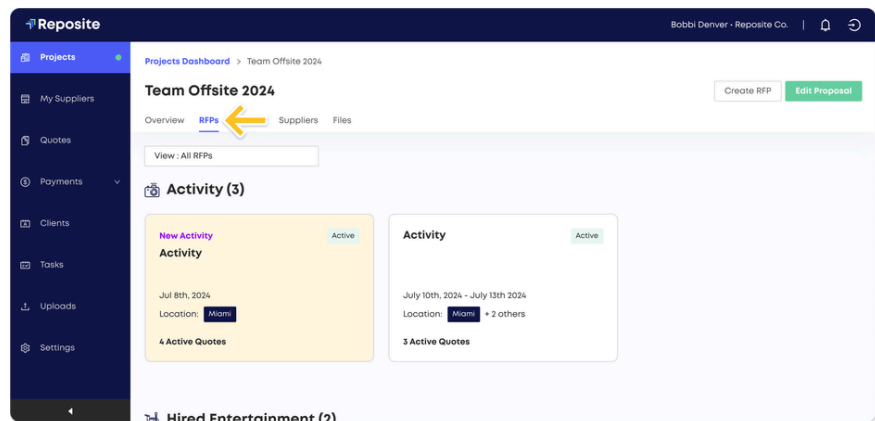
Reposite offers a variety of ways for you to view, manage, and track quotes so you can stay organized. This can help you to spend less time looking for information from each supplier and more time making swift decisions to be able to manage as many projects as possible with ease.

## Accessing Quotes via the RFPs Tab

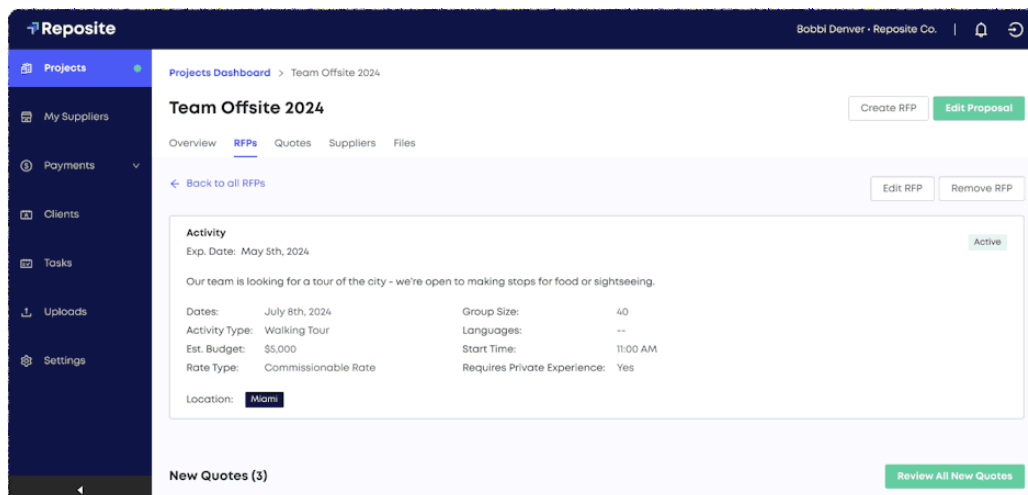
1. Click **Projects** in the left-hand navigation. A list of your active projects appears.



2. Click on the project which you would like to manage quotes for. The selected project's "Overview" page appears.
3. Click on the **RFPs** tab. A categorically sorted list of the selected project's RFPs appears.



4. Click the RFP whose quotes you would like to access. The individual RFP screen appears.
5. Click the quote you would like to view, found at the bottom of the RFP review screen. For more information on managing quotes via the RFPs tab, see [xyz link](#).

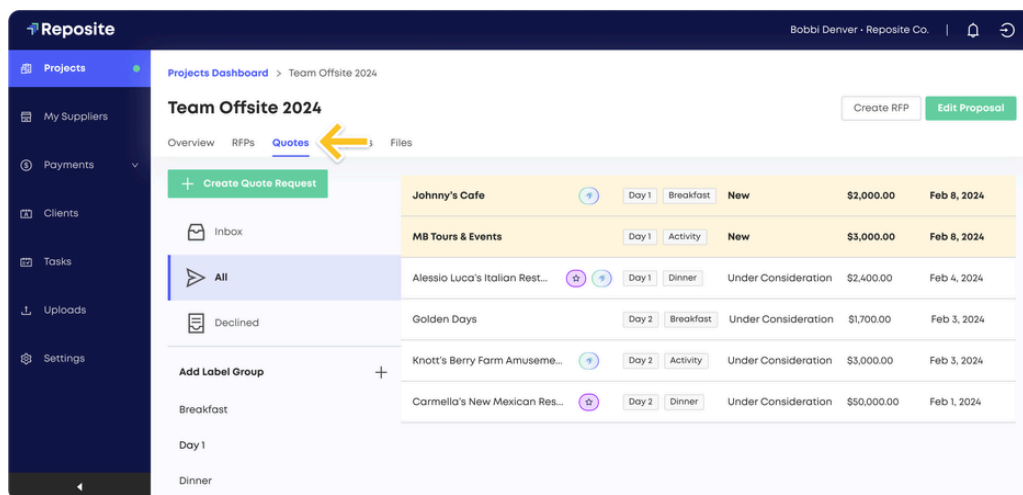


## Accessing Quotes via the Quotes Tab

1. Click **Projects** in the left-hand navigation. A list of all your active projects appears.

*[use same project image as above (Confluence freaks out if I try to add the same photo twice)]*

2. Click on the project which you would like to manage quotes for. The selected project's "Overview" page appears.
3. Click on the **Quotes** tab. Your quote "inbox" appears.



4. Click the quote you would like to access. For more information on managing quotes via the Quotes tab, see [\[xyz link\]](#).

## Managing Quotes in the RFPs Tab

The RFPs tab categorizes quoted RFPs by quote status labels to help you stay coordinated and to provide comprehensive information about your quotes at a glance.

### Status Labels:

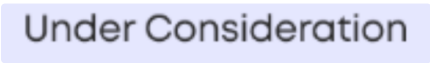
**Accepted:** Appears on any quote that has been "Accepted".

Accepted

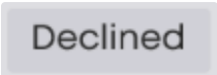
**New:** Appears on any quotes that are incoming on this RFP and have not had any other status action taken.



**Under Consideration:** Appears on any quote that has been marked as “Under Consideration”.

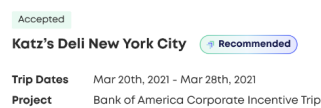


**Declined:** Appears on any quote that has been “Declined”.

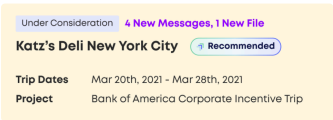


**Activity Colors:**

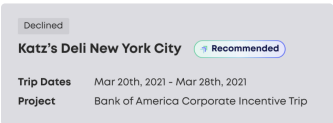
**White Background Activity** appears for any “New”, “Under Consideration”, and “Accepted” quotes with no new activity.



**Yellow Background Activity** appears as the background of any “New”, “Under Consideration”, and “Accepted” quotes with new activity. An notification of newly received activity is visible next to the quote’s status label.



**Grey background activity** appears as the background of any “Declined” quotes.



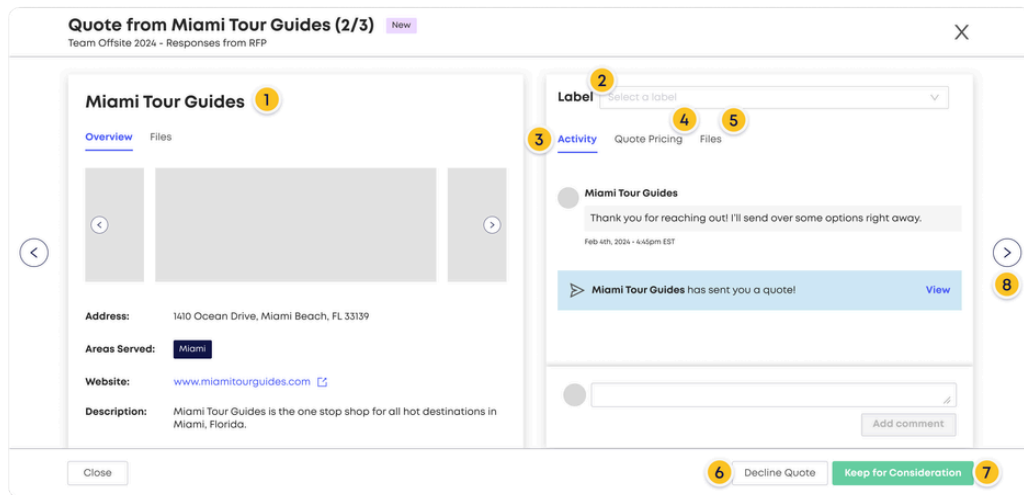
Managing Quotes in the Quotes Tab

The Quotes tab sorts all of the selected project’s quotes into four categories:

- **Inbox:** Displays quotes with unviewed recent activity. “Recent activity” includes newly received quotes, updates to quote pricing, newly added quote files, quote comments, and more.
- **All:** Displays all received quotes other than declined quotes, regardless of activity.
- **Declined:** Displays all declined quotes.
- **Project Labels:** Displays and sorts quotes by your custom-created Project Labels. For more information on Project Labels, see [\[xyz link\]](#).

Navigating the Quote View

Use the below diagram as a reference when navigating the Quote View.

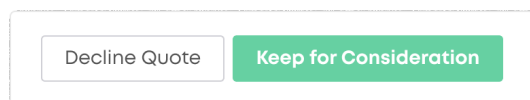


1. **Supplier Profile:** The left side of the Quote View Screen is reserved for displaying information about the quoting supplier's profile. The supplier's website, description, services, associated files, and more can be found here.
2. **Label:** Input text into the field and press the **Enter** key to create a Project Label. Planners managing large projects with extensive amounts of quotes may find this feature useful for organizing and quickly navigating through their quotes. To sort your quotes by their Project Labels, use the "Project Labels" function underneath the Quotes tab.
3. **Activity:** By default, the majority of the right side of the Quote View Screen displays a history of activities that have been made to the quote so far. Activities logged here can include the quote's request date, the date the quote is sent, updates to pricing, updates to the quote's status, newly added files, and more. You may also add comment messages to the supplier within this window.
4. **Quote Pricing:** Clicking this tab will switch the right-hand view to show the quote's pricing details, including a breakdown of specific line items.
5. **Files:** Clicking this tab will switch the right-hand view display any files attached to the quote. These files can be added by you or the supplier.
6. **Decline Quote:** Click this button in order to decline the quote. For more on declining quotes, see [\[xyz link\]](#).
7. **Keep for consideration:** Click this button in order to keep the quote for consideration. For more about considered quotes and accepting quotes, see [\[xyz link\]](#).
8. **Carousel Arrows:** Clicking the right and left carousel arrows will allow you to look through multiple quotes in one sitting. This can be accessed from the "review Quotes" CTAs on the individual RFP views. New or Under Consideration status quotes can be reviewed together in a carousel to easily company quotes of different status types.

## Keeping Quotes for Consideration

Marking a quote as "under consideration" is both a helpful organizational tool and also the first step in being able to accept a quote. Quotes "under consideration" also gain the option to be added to a proposal using the AI Add to Proposal feature. For more on adding quotes to a proposal, see [\[xyz link\]](#).

1. Open a New status quote you would like to keep for consideration.
2. Click the **Keep for consideration** button found at the bottom right-hand corner of the quote view screen. The selected quote has now been flagged as "Under Consideration." This will notify the supplier that you are keeping their quote for consideration to move forward!

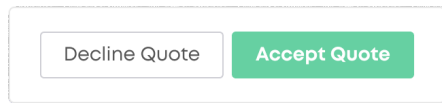


## Accepting Quotes

Marking a quote as “accepted” serves as a formal way to communicate to the supplier that you would like to proceed with their offer. “Accepted” quotes can additionally be paid for through Reposite via Stripe, if the supplier has provided an invoice.

Note: After accepting a quote, you will still have the option to “un-accept” if you change your mind!

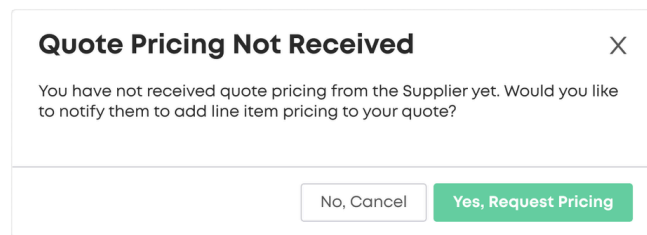
1. Open the quote you would like to accept.
2. Click the **Accept Quote** button found at the bottom right-hand corner of the quote view screen. If the quote includes pricing items, it will then be flagged as “Accepted”.



Note: Accepting a quote will notify the supplier that their quote has been accepted and allow them to send an invoice if applicable.

## If the quote has no pricing information:

The following pop-up window appears:



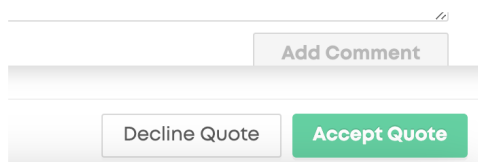
Clicking the **Yes, Request Pricing** button will send an email notification to the supplier prompting them to add pricing info to their quote. Once pricing info has been added, you will be able to accept their quote.

## Declining Quotes

Marking a quote as “Declined” will decline the quote and hide it from the inbox on the Quotes tab and be relegated to the bottom of the RFPs tab under Declined. This will let the supplier know that the quote was declined.

Note: After declining a quote, you will still have the ability to “Reopen” the quote and move it back to “Under Consideration” status.

1. Click the **Decline** button found next to either the “Keep for consideration” button or the “Accept” button, depending on how you have marked the quote previously. A pop-up window appears.



#### Why are you declining this quote?



- ☒ Not a good match ☐ Didn't submit in time
- ☐ Better options available ☐ Client declined this option
- ☐ Out of budget
- ☐ Other

Include optional message to the supplier

DECLINE

2. In the pop-up window, select your reasoning for declining the quote. Optionally, you may include a message to be sent to the supplier who's quote you are declining. This message will be sent to the supplier as an email notification.

Note: If you do not add a message, the supplier will not receive an email notification that you have declined their quote but they will still see that the quote was declined when logging in to Reposite.

3. Click the **Decline** button. The quote will be marked as "Declined".

## Un-Accepting Quotes

In the case that you would like to rescind your offer to accept a quote, follow the steps below to "un-accept" any accepted quote. "Un-accepting" a quote will move it back to "Under Consideration" status.

1. Open the "Accepted" quote that you would like to un-accept.
2. Click on the **Un-Accept Quote** button found at the bottom of the quote view screen. A pop-up window appears.

williamvale.com

William Vale is a modern luxury Brooklyn hotel located in Williamsburg. It offers impeccable service, spectacular views, and stunning room

Un-Accept Quote

#### Un-Accept Quote



You have previously accepted this quote. Un-accepting it will move the quote back to Under Consideration. Are you sure you want to un-accept?

To better understand how this feature is being used, please share the reason you are un-accepting this quote,

Trip has been canceled.

No, Cancel

YES, UN-ACCEPT

3. In the pop-up window, enter a reason for un-accepting the quote. You must provide a reason before you are able to finish un-accepting the quote.

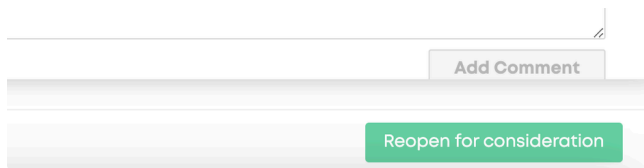
4. Click the **Yes, Un-Accept** button to finish un-accepting the quote.

Note: The supplier who's quote you have un-accepted will be notified within Reposite. They will not be able to see your stated reason for un-accepting, and only see that you have moved their quote back to "Under Consideration".

## Reopening Declined Quotes

In the case that you would like to reconsider a previously declined quote, follow the steps below to "reopen" any previously declined quote. Reopened quotes will be moved back to "Under Consideration" status.

1. Open the "Declined" quote which you would like to reopen.
2. Click the **Reopen for consideration** button found at the bottom right-hand side of the quote view screen. A pop-up window appears.



## Reopen Quote?

Selecting "Keep for Consideration" will reopen this quote and notify the Supplier that their quote is being considered. Are you sure you want to reopen this quote?

No, don't reopen

YES, REOPEN

3. In the pop-up window, click the **Yes, Reopen** button to confirm you would like to reopen the quote. The quote will then be moved back to "Under Consideration" status.

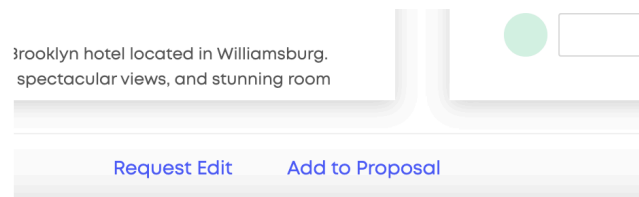
Note: The supplier who's quote you have reopened will be notified within Reposite that you have moved a quote of theirs back to "Under Consideration".

## Adding Quotes to a Proposal

Quotes that are marked as "Under Consideration" or "Accepted" can be quickly and easily added to your Reposite proposal with a single click of a button.

Note: This feature is only available to paid users.

1. Open the "Under Consideration" quote which you would like to add to your proposal.
2. Click the **Add to Proposal** button found at the bottom of the quote view screen. A pop-up window appears to confirm that the quote has been successfully added to your proposal.



## Success!

This supplier was added to your proposal.

View Proposal

3. Click the **View Proposal** button to view your proposal. Otherwise, click the grey "X" or anywhere outside the pop-up window to close it and return to the quote view screen.