**ESKER**

# Quote Request Automation

## Streamline everyday purchases with simple, compliant RFQ management

Esker Quote Request gives all employees — particularly occasional buyers — a simple, intuitive way to collect and compare quotes from multiple suppliers. Fully integrated into Esker's Source-to-Pay (S2P) suite, it automates the RFQ process for tail and non-strategic spend, reducing manual processes, improving compliance and accelerating purchasing decisions. Users can quickly create RFQs, invite participants, receive responses and award suppliers from a single unified interface.

### Why automate with Esker?

**Empower employees**
Enable non-procurement users to run compliant quote requests without sourcing expertise. Esker's guided interface ensures consistency and control.

**Strengthen compliance & governance**
Ensure required documentation and fields are completed through structured workflows that automatically enforce procurement policies.

**Enhance collaboration with suppliers**
Enable to view requests, submit quotes and stay informed through a dedicated portal — reducing errors and streamlining communication.

**Accelerate purchasing decisions**
Reduce the time to gather and compare quotes with rapid setup, templates and integrated communication, moving users from request to accepting a bid in minutes.

**Improve transparency & auditability**
Centralize all interactions, documents and responses for full visibility and audit-ready tracking.

**Integrated, S2P experience**
Award-decisions flow directly into downstream processes such as requisitioning, purchasing and invoicing — all within Esker's SaaS platform.

## How it works

Esker Quote Request provides a simplified way for employees to request and compare quotes from suppliers without navigating full sourcing processes. Working alongside Esker's strategic Sourcing solution, it enables occasional buyers to create and manage quotes in minutes while maintaining procurement compliance.

### 1. Initiate quote request

Create a structured request for quotes (RFQ) using a guided workflow that captures items, quantities, delivery needs and documents. Select suppliers from the database and send RFQs.

### 2. Engage suppliers

Suppliers access a dedicated portal to review requirements, upload documents, enter prices and submit or decline quotes. Automated reminders ensure timely RFQs.

### 3. Compare & evaluate

Supplier responses are consolidated into a side-by-side comparison table showing pricing, delivery terms and comments. Esker highlights the best proposed values to support faster, informed decisions.

### 4. Award & progress to purchasing

Award items to selected suppliers through a guided workflow, with automatic notification to winners. Accepted quotes convert to purchase requisitions in one click for seamless handoff to procurement.

### 5. Gain visibility & control

Dashboards track every RFQ from creation to awarding, showing supplier engagement, cycle times and spend. Standardized processes increase compliance and provide full traceability.

### 6. Centralize archives & audit trail

All RFQs, communications and award decisions are stored in a centralized digital repository for long-term access, traceability and audit readiness.
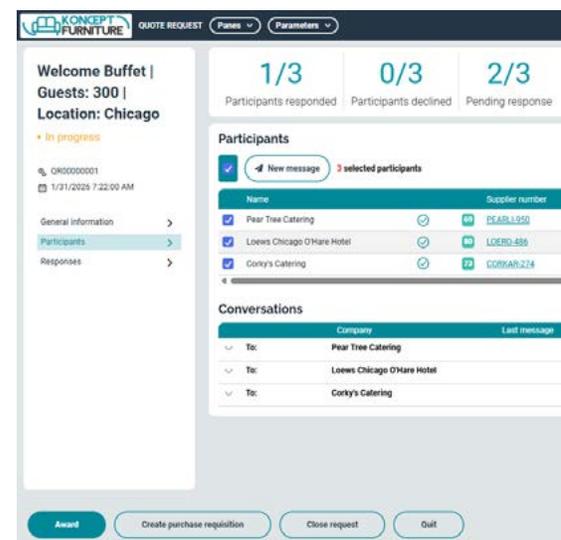
# Solution features

Esker's 40+ years of field experience and dedication to product development is the key to continued innovation. Some of the most prominent features of the solution include:

### Streamlined quote request creation

Esker Quote Request enables occasional buyers to build compliant RFQs in minutes using a guided workflow with an intuitive interface. Users can easily add key details, documents and required items, and with Esker Synergy Agent, they can further accelerate the process by automatically generating a draft request ready for review and submission.

### Buyer-friendly workflows for tail spend

Designed for occasional buyers, Esker simplifies the full request process, from defining requirements to inviting participants. Pre-configured workflows reinforce procurement policy, reduce manual effort and ensure even occasional requestors follow compliant purchasing practices.

### Supplier invitations & transparent communication

Buyers can easily invite suppliers using automated emails that share deadlines and requirements. Clear instructions, documents and scope details reduce follow-up questions and improve response quality.

### Efficient document & item management

Users can upload supporting files such as statements of work, drawings or specifications directly into the request. Structured item tables standardize supplier responses, enabling cleaner comparisons and more accurate award decisions.

### Supplier portal for seamless interactions

Suppliers receive notifications and submit responses through a dedicated, easy-to-use portal. They can review requirements, download documents, enter pricing, adjust delivery dates, attach files and submit or revise their responses — all without relying on uncontrolled email communication.

### Side-by-side response comparison

Esker provides a centralized view of all supplier quotes, allowing buyers to easily compare pricing, delivery timelines and other key criteria. The response dashboard accelerates decision-making by presenting decision-ready data, especially for low-complexity or repetitive purchases.

### Simple awarding with complete traceability

Buyers can select winning suppliers directly from the response view, choosing either per-item or overall awards. All actions are fully logged, ensuring complete auditability and compliance with procurement policy while maintaining a smooth, efficient purchasing experience for end users.

### Integrated S2P experience

Esker Quote Request integrates seamlessly with the rest of Esker's Source-to-Pay suite. Supplier selection, item details and outcomes flow directly into downstream purchasing processes, ensuring a unified, and connected experience across the full buying cycle.

### Insightful dashboards & reporting

Dashboards provide visibility into drafts, open requests and recently closed activities. KPIs such as average participants, response rate and cycle time help organizations monitor agility and efficiency in tail end sourcing, while giving the Procurement team a reliable overview of buying activity occurring outside strategic events.

### Built-in standardization & governance

Every quote request follows a structured, repeatable template that reduces errors and ensures all employee-driven purchasing is captured within the platform. Centralized data, auditable logs and structured submission formats give Procurement teams the visibility and control needed to maintain compliant processes.

## Want to automate your entire S2P process?

Sourcing is just one part of the S2P process. Esker's Source-to-Pay suite is designed to help Procurement and Finance leaders achieve their goals by removing departmental siloes, streamlining procurement processes, improving enforcement of policy compliance and enhancing supplier management with visibility over the entire buying process.

By aligning procurement and finance, Esker helps CFOs and CPOs achieve better financial outcomes and foster collaboration across all operations. Companies that use Esker's Source-to-Pay suite have the flexibility and agility to reduce costs, increase process efficiency and mitigate supply chain risks, resulting in a more sustainable and profitable business.

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