

# Add Request For Proposal RFP

Fill in the information of the client wanting an RFP

Save the RFP

[image.png](#)

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## ICP Data

Go to the ICP Data tab

Click on Add to add in ICP.

[image.png](#)

Enter the ICP number and save

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## ICP Import (Scrape)

Then click on the ICP import

This will update the various information, click on save again

[image.png](#)

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## Consumption data import

Once you have fixed the spreadsheet, make sure it is in this format

A sample of the Excel file is attached - [Consumption Data Import.xlsx](#)

[image.png](#)

Import the consumption data

[image.png](#)

Find the file to import

Make sure the Excel sheet is saved and closed before importing

[image.png](#)

After the file is imported, it will update the following tabs

- 144 Part
- 48 Part
- Consumption Stats

[image.png](#)

After all the ICPs have been entered and Consumption data imported.

Save and Close and go back to the RFP

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## Retailer Quotes

Go to the retailer quotes tab to enter all your retailer quotes

Click on Add to add the quotes

[image.png](#)

Enter the Retailer that the quote is for.

If this is the current retailer, put a tick on

Select the ICP that this quote is for

Put in a description

EA Levy and Meter charge will populate from Retailer selected

After you have saved, tabs become available

[image.png](#)

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## Retailer Quote Import

Prepare the import file from the Retailer Quote

See sample file - [Retailer quote import.xlsx](#)

Enter both WD and WE OR BD and NBD

under each other

[image.png](#)

Here is a sample of a 3 Year Stagged file

Sample attached - [Mercury 2-3yr.xlsx](#)

[image.png](#)

Here is a sample of a 5 year flat file

Sample Attached - [Mercury 5yr Flat.xlsx](#)

[image.png](#)

Once the Excel files are prepared, go to Retailer quote import

Fill in the information as to the Type, Rate, Years and Start Period

Then Upload and Import

[image.png](#)

After import is done, it will populate all Tabs with cost data

- Costs
- Energy Cost
- Network Cost
- Total Cost

[image.png](#)

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## Retailer summary

In order for the Retailer Summary and Benchmarks to work

The Current Retailer needs to be set.

[image.png](#)

This will show all the information on the various Retailers

[image.png](#)

This is similar to your Excel sheet for Summary by Term Master

[image.png](#)

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## Benchmark

This shows the information on the various levels of benchmark

[image.png](#)

This is similar to Summary by Term

[image.png](#)

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Revision #2

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