How do I create an RFQ (Request for Quote's)?

The following panels will outline how a buyer will be able to create an RFQ (Request for Quote).

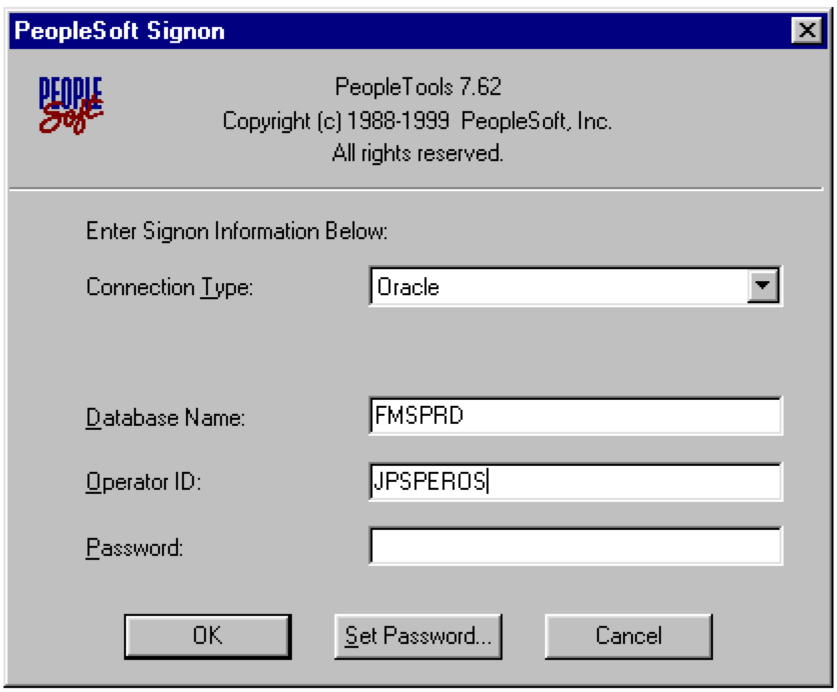
Login	1. Login into the PeopleSoft Purchasing 7.5 system and prepare to select a buyer for a specific requisition.
Create RFQ's	2. When the buyer is required to create a Request for Quote prior to sending the sub-contract to the vendor.

How do I create an RFQ (Request for Quote's)?

Step 1: Login

- Launch the PeopleSoft Signon from the Novel Application launcher.
  - Connection type "Oracle" (Defaulted)
  - Database Name "FMSPRD" (Defaulted)
  - Enter your login name. (UPPERCASE only)
  - Password is your login name (lowercase only)

- Click "OK"



How do I create an RFQ (Request for Quote's)?

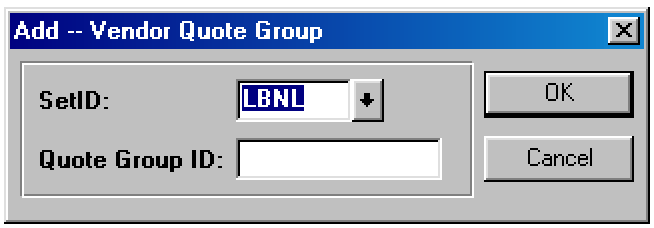
Step 2: Creating Request for Quotes (RFQ's)

Setting up Vendor Quote Groups

Use the Vendor Quote Group panels to set up the vendor quote groups and establish groups of vendors specific to particular items and locations.

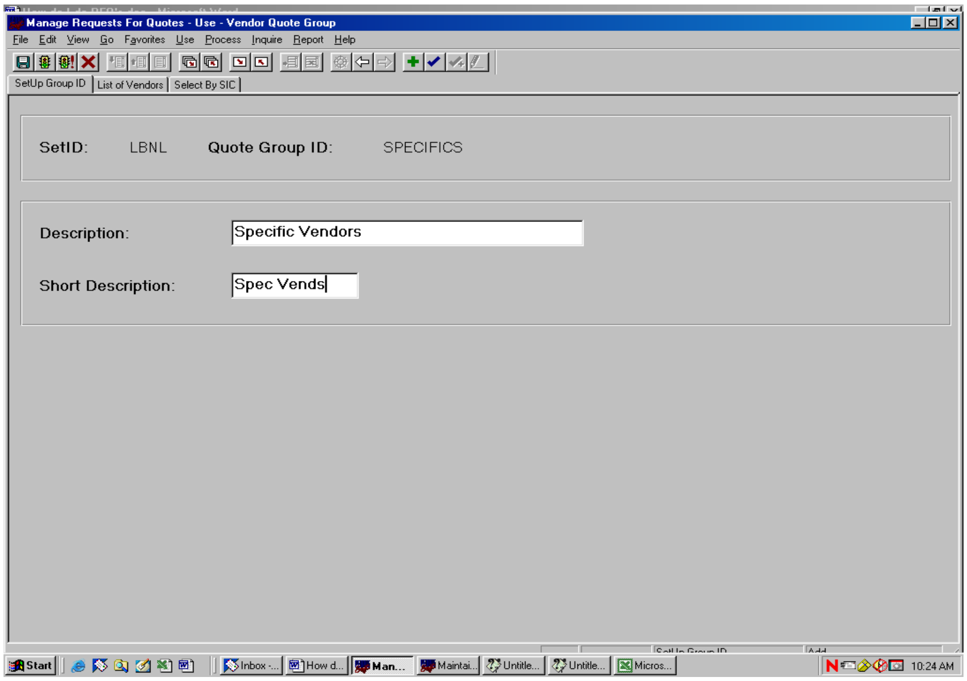
- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Request for Quotes
- ⇒ Set Up Quote Group
- ⇒ Add

The Add – Vendor Quote Group panel displays.

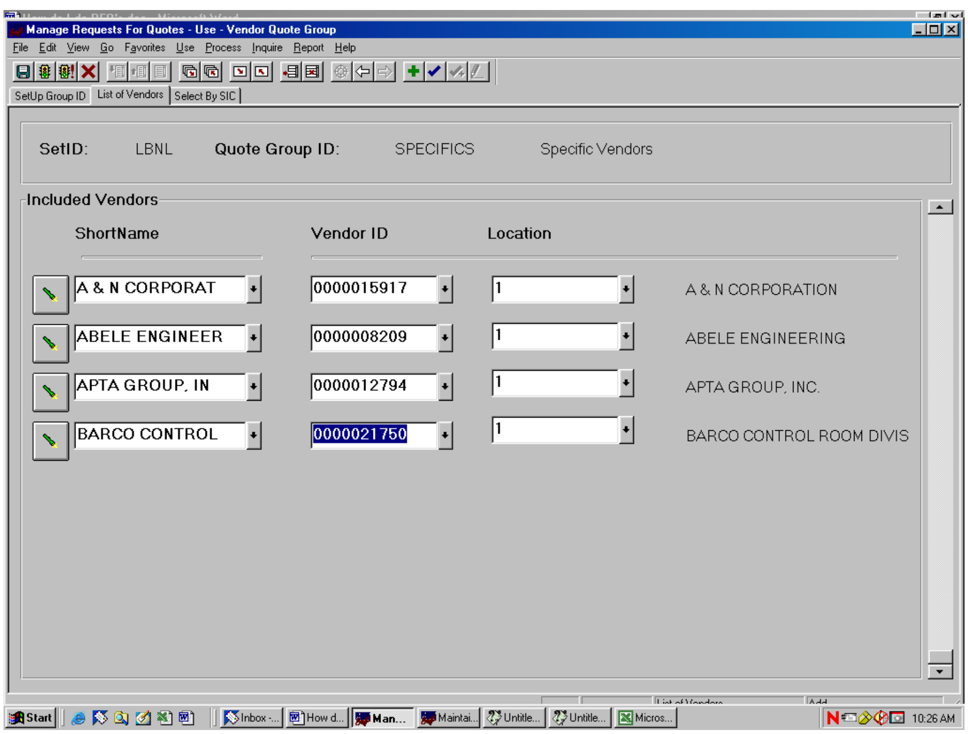


The business unit of LBNL will default in the field and you will be required to create a **Quote Group ID** unique to this group of vendors.

How do I create an RFQ (Request for Quote's)?



Upon completion of the information required, go to the **List of Vendors** tab.



Add the name of all the vendors you want in this quote group, after entering each name click the F7 key or the Add Row button, and continue until you've entered all the vendors required.

Once you've completed these panels, click the **Save** button.

How do I create an RFQ (Request for Quote's)?

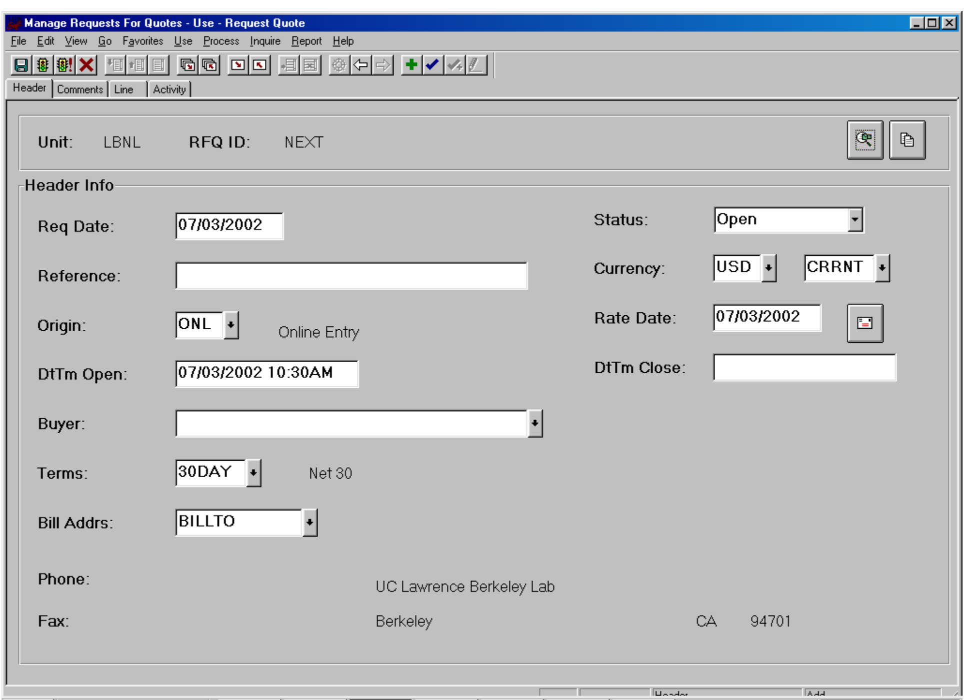
Defining a RFQ Header

The Header panel provides information that applies to the entire RFQ. Some of this information defaults from your Business Unit and Operator ID.

⇒ Go
⇒ Administer Procurement
⇒ Manage Request for Quotes
⇒ Request Quote
⇒ Header
⇒ Add

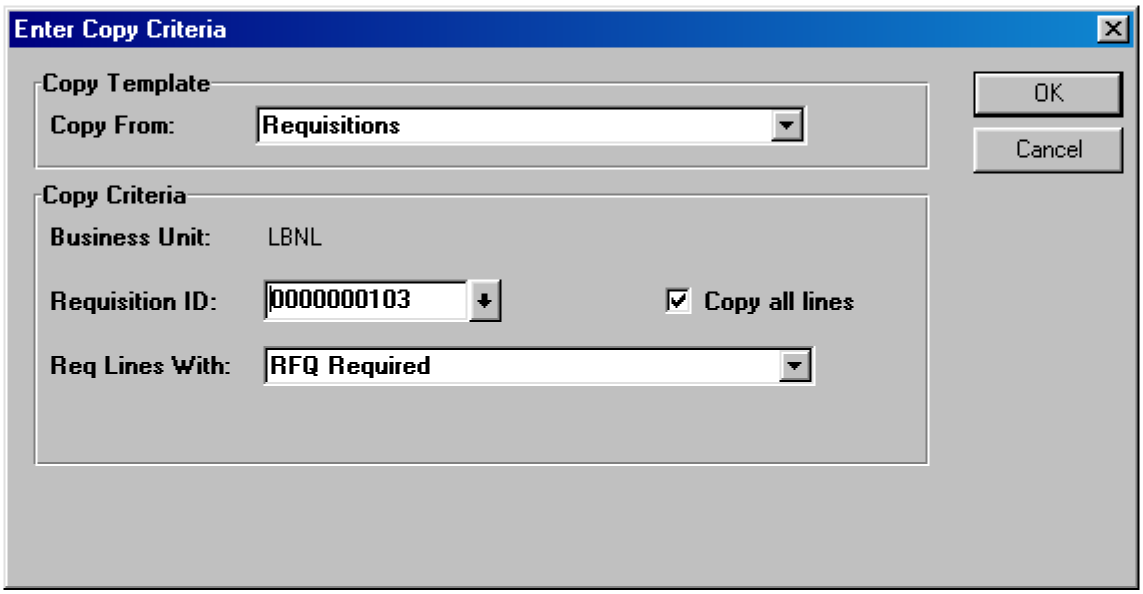
The Add- Request Quote panel displays.

The business unit of LBNL will default into the field and let the **RFQ ID** default to **NEXT**.



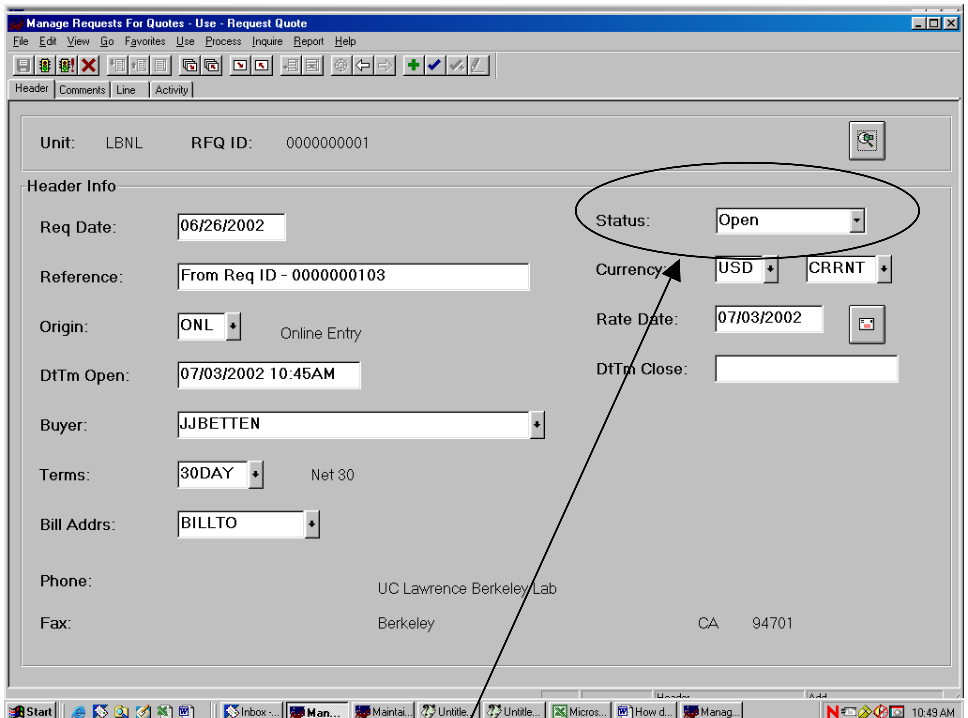
How do I create an RFQ (Request for Quote's)?

The buyer will have the option to either create a new RFQ or copy a requisition. When copying from a requisition, push the **Copy From Template** button, The Copy Criteria panel displays.



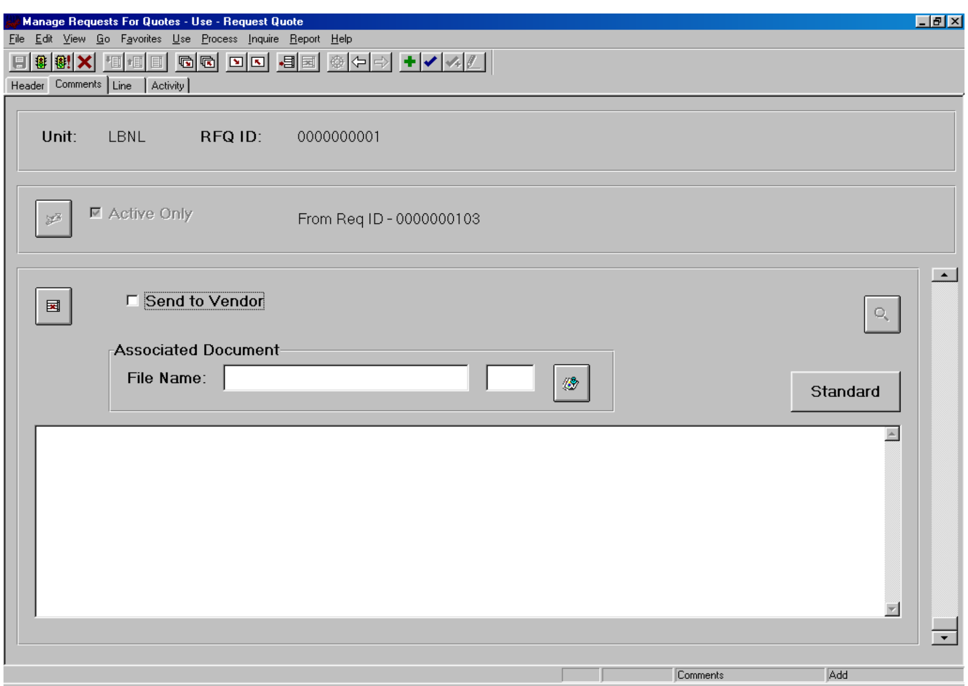
The link between the requisition and the RFQ will be shown on the RFQ.

Once completed the copy the Header panel will look like this.



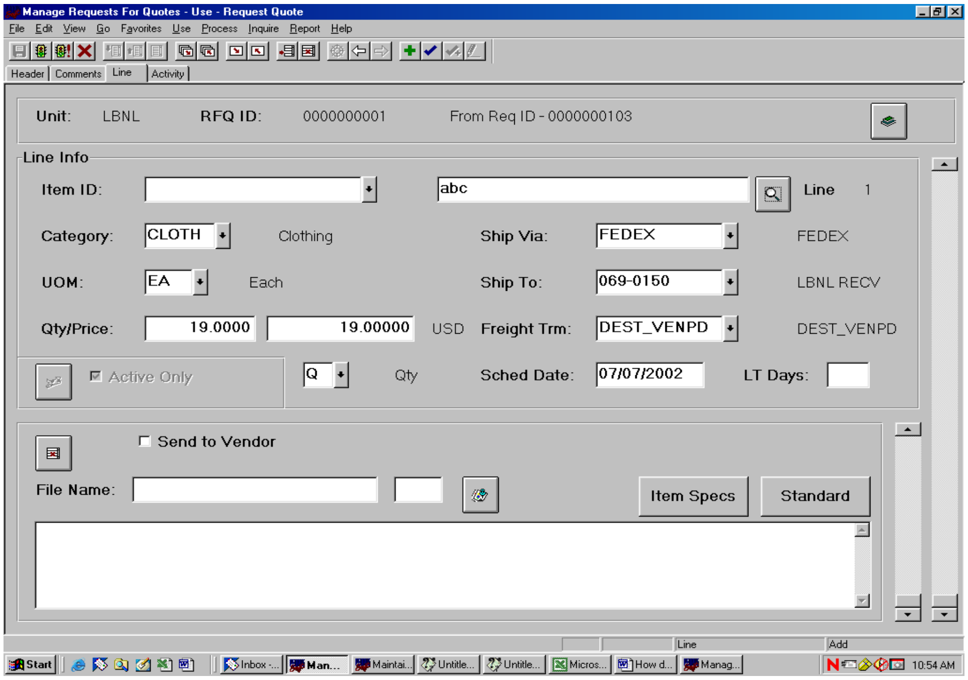
Change the Status of the RFQ to **Approve**.

You will be able to add comments to the RFQ in the comments panel.



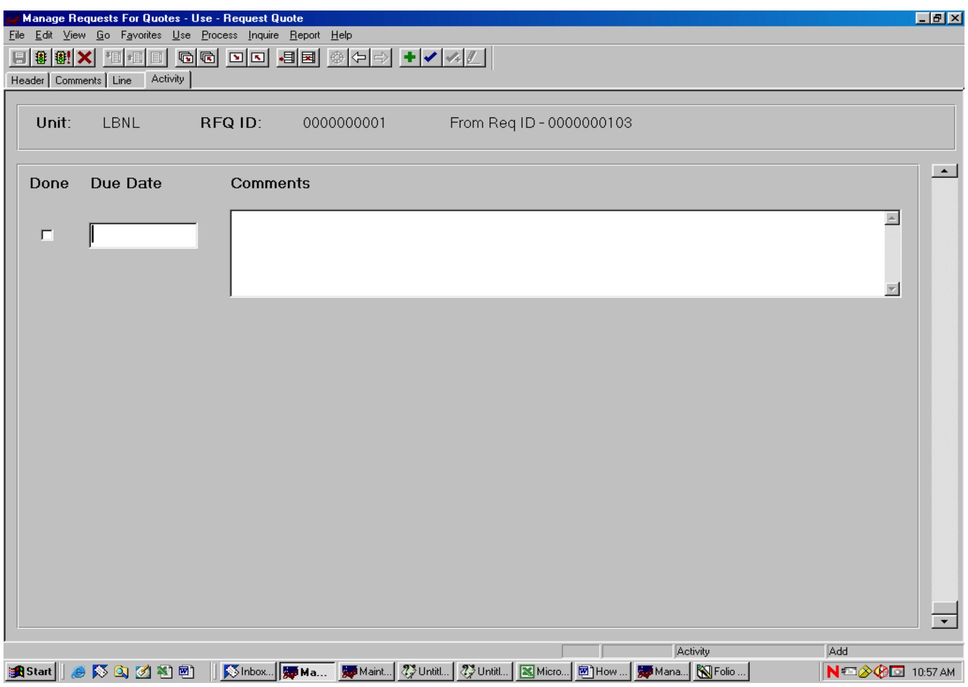
How do I create an RFQ (Request for Quote's)?

On the Line Panel you will be able to view the lines that were brought over from the original requisition.



You can edit any of this information on this panel.

Track activities related to an RFQ by entering them on the Activity panel.



Once the information has been completed, click the **Save**  button.

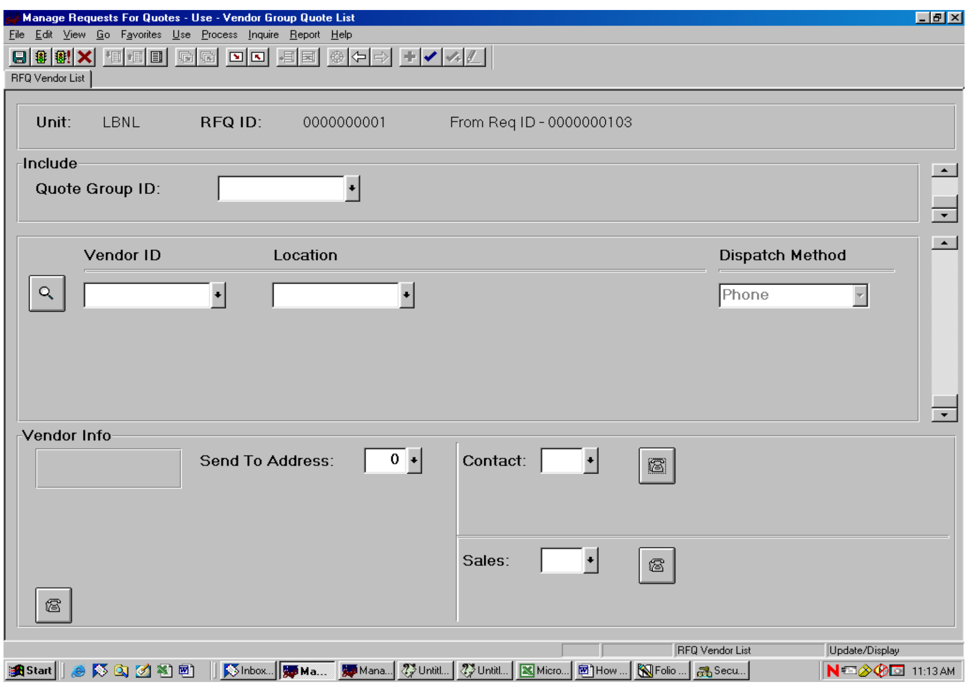
How do I create an RFQ (Request for Quote's)?

Defining the Vendor List for an RFQ

You can choose the vendors for the RFQ from either the Vendor Group Quote List or the Item Supplier Quote List. You can also use both panel groups to create your final vendor list. If you use Vendor Quote Groups, you can add and delete as needed to create your final vendor list for an RFQ. Vendor Quote Groups are most useful if you have a group of vendors you normally choose from for the purchase of specific commodities.

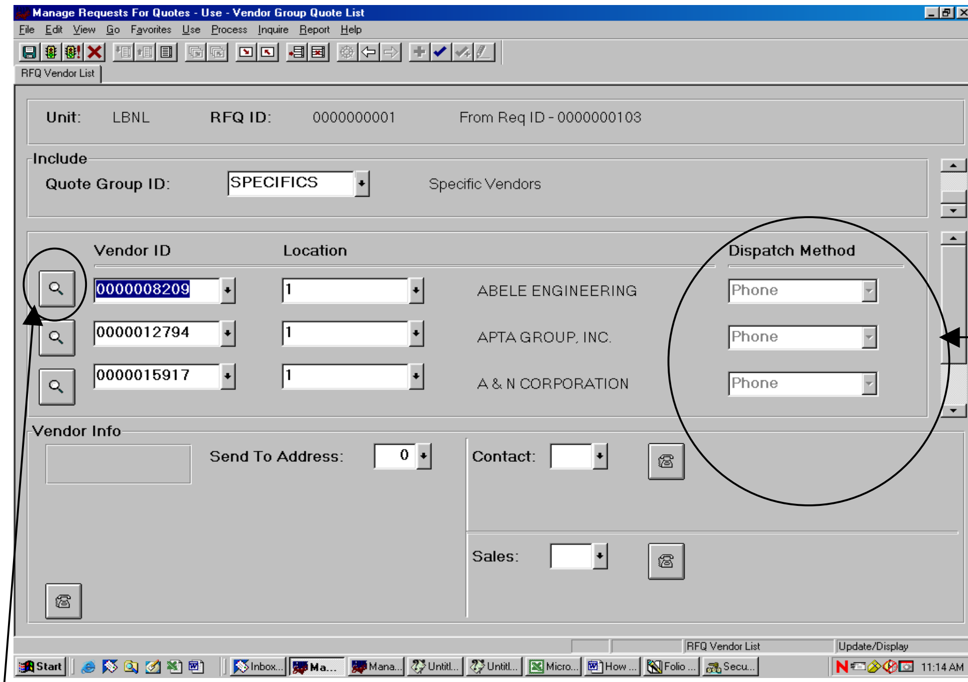
⇒ Go
⇒ Administer Procurement
⇒ Manage Request for Quotes
⇒ Use
⇒ Vendor Group Quote List

The Vendor Group Quote List panel displays.



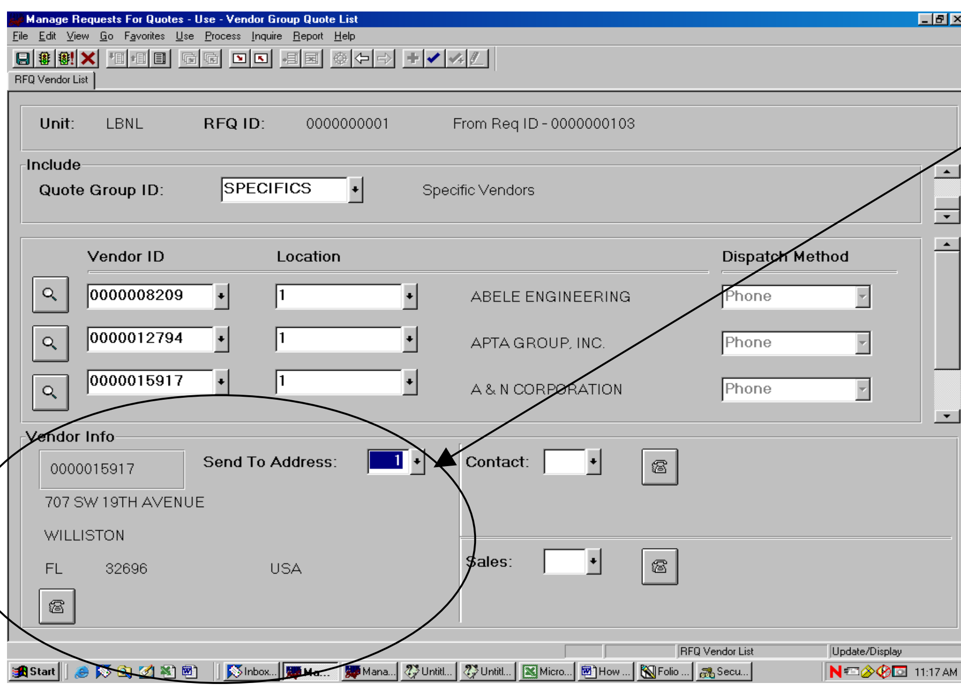
How do I create an RFQ (Request for Quote's)?

To begin your vendor list, you can select one (or more) Vendor Quote Groups. The system loads the vendors of the group(s) you specify, and this group becomes all or part of the vendor list for the RFQ. You can add to or delete from this RFQ vendor list without affecting the Quote Group from which you loaded them.



The dispatch method will default from the business unit. Should the vendor have a specific dispatch method, the field will be open for editing.

If you click on the Mag Class icon you will be able to view specific detail information on that vendor.



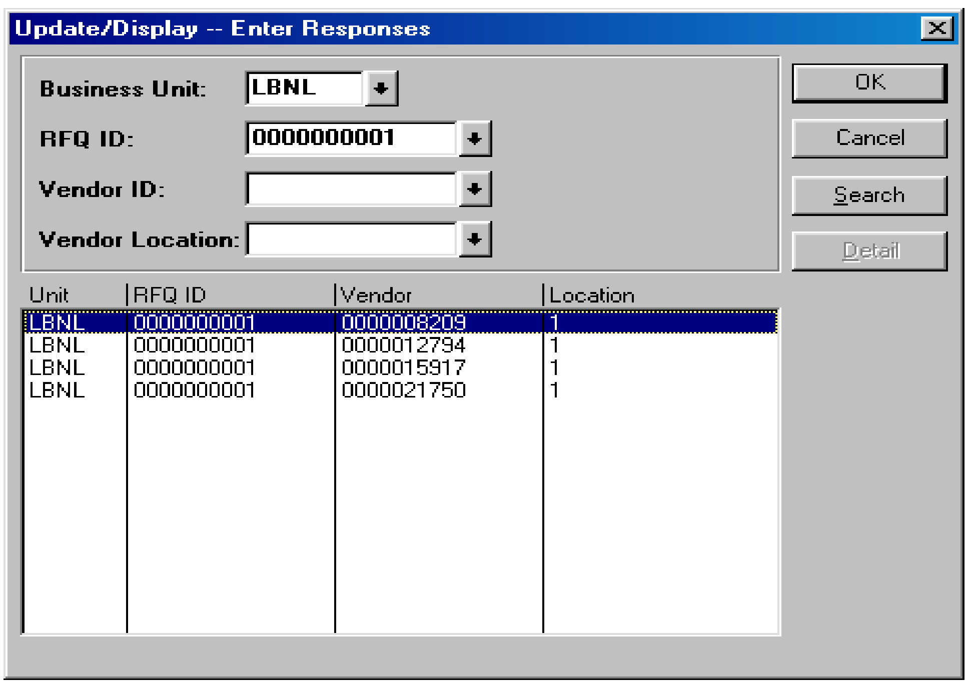
Upon completion of selecting your quote vendors click the **Save** button.

Entering RFQ Responses

As you receive vendors' responses to your RFQ's use the Enter Responses panel group to enter them into the database for analysis, and eventually award Purchase Orders or Contracts based on that analysis. Select the RFQ to which the vendor responded. Select from the displayed list of vendors to whom the RFQ was dispatched.

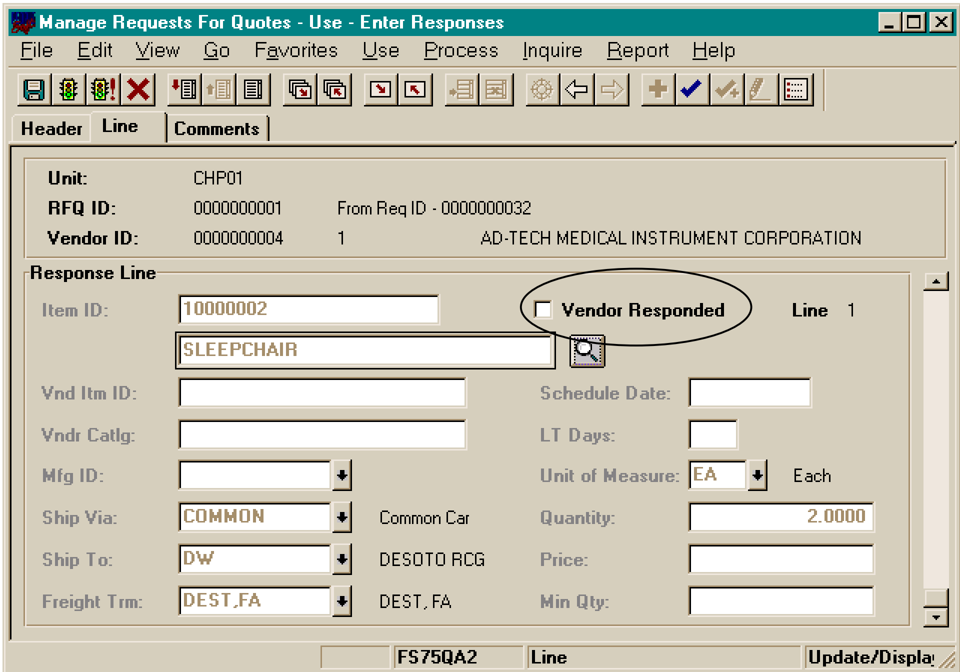
⇒ Go
⇒ Administer Procurement
⇒ Manage Request for Quotes
⇒ Use
⇒ Enter Responses
⇒ Header
⇒ Update/Display

The Enter Responses Header panel displays.



When you've selected the RFQ number and click on the Search button, only those Vendors that were assigned to the RFQ.

Complete the entire panel including the response method. Go to the Line tab and enter the information about pricing and delivery.



Check the **Vendor Responded** box, this action will open the fields for data. Complete the panel with all necessary information.

NOTE: Because the original requisition was created into a purchase order through the PO Build process, this information is for record only.

Upon receipt of this information, the buyer will determine which vendor should be awarded the purchase and update the purchase order already created in the system.

Once all the information is entered click the **Save**  button.