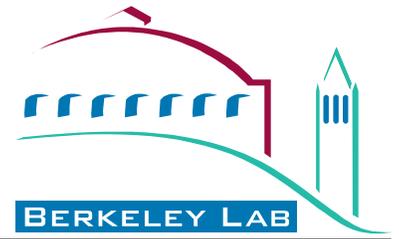
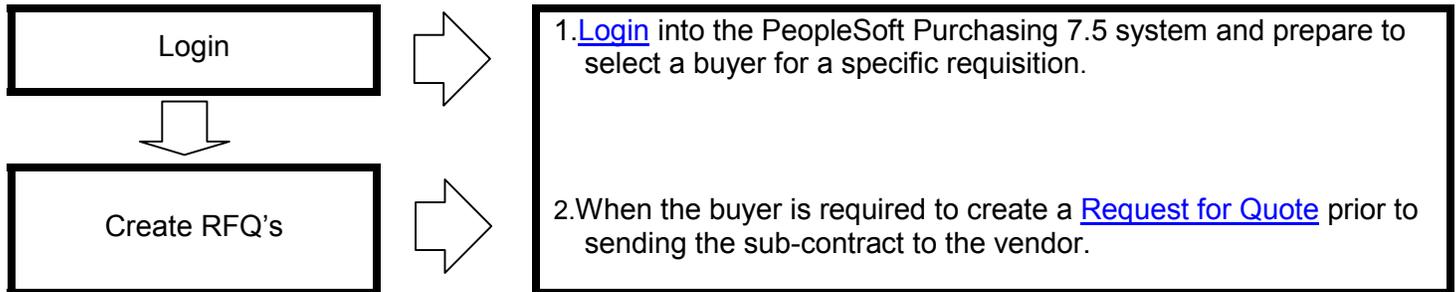


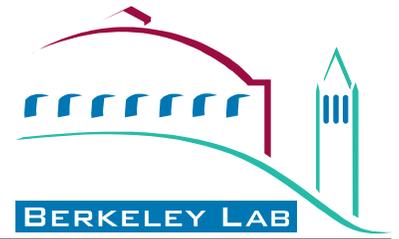
# How do I create an RFQ (Request for Quote's)?



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



# 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"

A screenshot of the "PeopleSoft Signon" dialog box. The title bar reads "PeopleSoft Signon". Inside the dialog, there is a logo for "PEOPLE Soft" on the left and text on the right: "PeopleTools 7.62", "Copyright (c) 1988-1999 PeopleSoft, Inc.", and "All rights reserved.". Below this, it says "Enter Signon Information Below:". There are four input fields: "Connection Type:" with a dropdown menu showing "Oracle"; "Database Name:" with a text box containing "FMSPRD"; "Operator ID:" with a text box containing "JPSPEROS"; and "Password:" with an empty text box. At the bottom, there are three buttons: "OK", "Set Password...", and "Cancel".

# 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.*

A screenshot of a software dialog box titled "Add -- Vendor Quote Group". It has a blue header bar with a close button (X) in the top right corner. The dialog contains two input fields: "SetID:" with a dropdown menu showing "LBNL" and a plus sign, and "Quote Group ID:" with an empty text box. To the right of the input fields are two buttons: "OK" and "Cancel".

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)?



SetID: LBNL    Quote Group ID: SPECIFICS

Description: Specific Vendors

Short Description: Spec Vends

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

SetID: LBNL    Quote Group ID: SPECIFICS    Specific Vendors

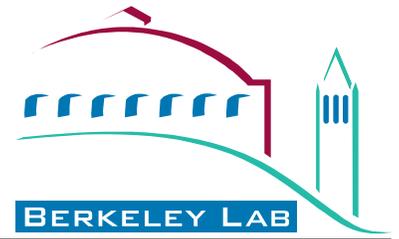
Included Vendors

ShortName	Vendor ID	Location	
A & N CORPORAT	0000015917	1	A & N CORPORATION
ABELE ENGINEER	0000008209	1	ABELE ENGINEERING
APTA GROUP, IN	0000012794	1	APTA GROUP, INC.
BARCO CONTROL	0000021750	1	BARCO CONTROL ROOM DIVIS

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

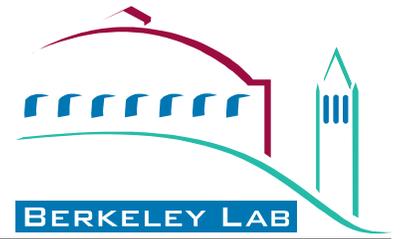
The Add- Request Quote panel displays.

The screenshot shows a dialog box titled "Add -- Request Quote". It has two input fields: "Business Unit" with a dropdown menu showing "LBNL" and a downward arrow, and "RFQ ID" with a text box containing "NEXT". To the right of these fields are two buttons: "OK" and "Cancel".

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

The screenshot shows the "Manage Requests For Quotes - Use - Request Quote" application window. The title bar includes "File Edit View Go Favorites Use Process Inquire Report Help". The window has a menu bar and a toolbar. The main area is divided into sections. At the top, it shows "Unit: LBNL" and "RFQ ID: NEXT". Below this is the "Header Info" section, which contains several fields: "Req Date: 07/03/2002", "Status: Open", "Reference: [empty]", "Currency: USD CRRNT", "Origin: ONL Online Entry", "Rate Date: 07/03/2002", "DtTm Open: 07/03/2002 10:30AM", "DtTm Close: [empty]", "Buyer: [empty]", "Terms: 30DAY Net 30", "Bill Addr: BILLTO", "Phone: UC Lawrence Berkeley Lab", and "Fax: Berkeley CA 94701".

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

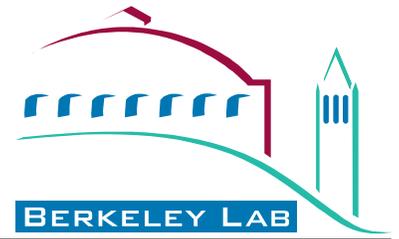


The buyer will have the option to either create a new RFQ or copy a requisition. When copying from a requisition, push the **Copy From Template**  button, The Copy Criteria panel displays.

A screenshot of a software dialog box titled "Enter Copy Criteria". The dialog has a blue title bar with a close button (X) in the top right corner. It contains two main sections: "Copy Template" and "Copy Criteria".  
- In the "Copy Template" section, there is a label "Copy From:" followed by a dropdown menu currently showing "Requisitions".  
- In the "Copy Criteria" section, there are three fields:  
 - "Business Unit:" with the text "LBNL".  
 - "Requisition ID:" with a text box containing "0000000103" and a small downward arrow icon to its right. To the right of this field is a checked checkbox labeled "Copy all lines".  
 - "Req Lines With:" with a dropdown menu currently showing "RFQ Required".  
- On the right side of the dialog, there are two buttons: "OK" and "Cancel".

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

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



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

A screenshot of a software window titled "Manage Requests For Quotes - Use - Request Quote". The window has a menu bar (File, Edit, View, Go, Favorites, Use, Process, Inquire, Report, Help) and a toolbar. Below the toolbar is a tabbed interface with "Header", "Comments", "Line", and "Activity" tabs. The "Header" tab is active, showing a form with the following fields:

- Unit: LBNL RFQ ID: 000000001
- Header Info section:
- Req Date: 06/26/2002
- Reference: From Req ID - 000000103
- Origin: ONL Online Entry
- DTM Open: 07/03/2002 10:45AM
- Buyer: JJBETTEN
- Terms: 30DAY Net 30
- Bill Addr: BILLTO
- Phone: UC Lawrence Berkeley Lab
- Fax: Berkeley CA 94701
- Status: Open (circled in red)
- Currency: USD CRRNT
- Rate Date: 07/03/2002
- DTM Close: (empty)

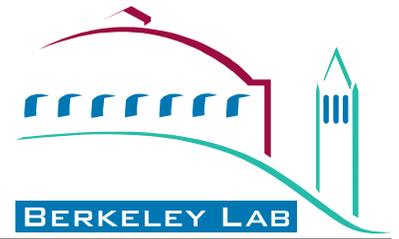
Change the Status of the RFQ to **Approve**.

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

A screenshot of the same software window, but with the "Comments" tab selected. The "Header" tab is still visible at the top. The "Comments" panel contains:

- Unit: LBNL RFQ ID: 000000001
- Active Only checkbox (checked) From Req ID - 000000103
- Send to Vendor checkbox (unchecked)
- Associated Document section:
- File Name: (empty text box)
- Standard button
- A large empty text area for comments.
- Comments and Add buttons at the bottom.

# 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.

Unit: LBNL RFQ ID: 000000001 From Req ID - 000000103

Line Info

Item ID: abc Line 1

Category: CLOTH Clothing Ship Via: FEDEX FEDEX

UOM: EA Each Ship To: 069-0150 LBNL REC V

Qty/Price: 19.0000 19.00000 USD Freight Trm: DEST\_VENPD DEST\_VENPD

Active Only Q Qty Sched Date: 07/07/2002 LT Days:

Send to Vendor

File Name: Item Specs Standard

You can edit any of this information on this panel.

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

Unit: LBNL RFQ ID: 000000001 From Req ID - 000000103

Done	Due Date	Comments
<input type="checkbox"/>		

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

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



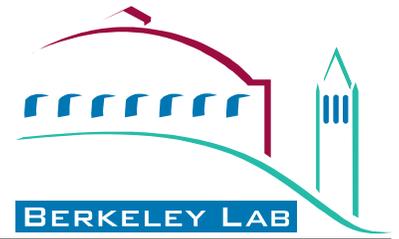
## Defining the Vendor List for an RFQ

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.

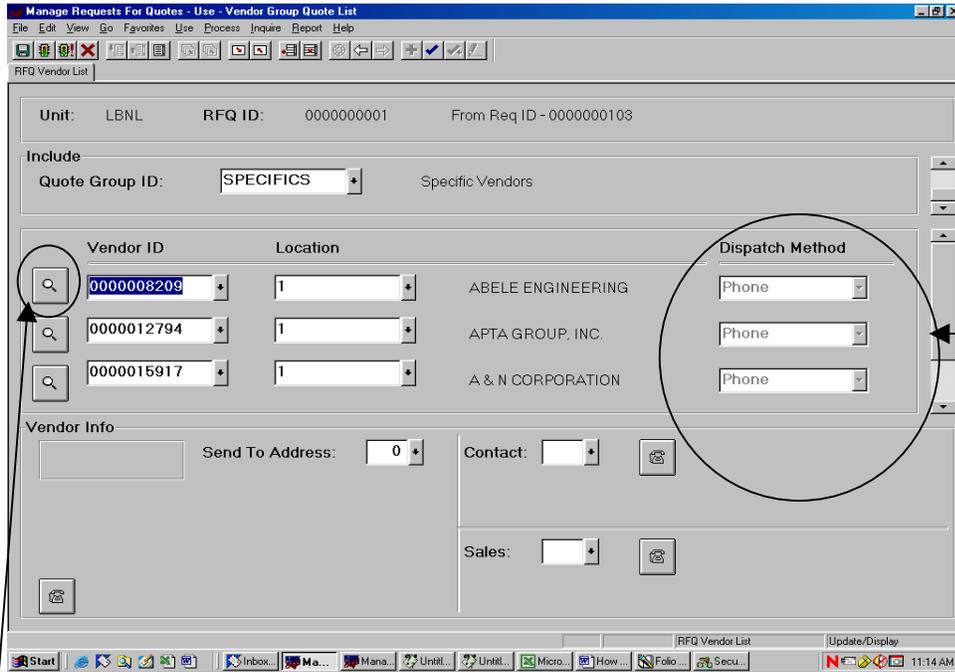
- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Request for Quotes
- ⇒ Use
- ⇒ Vendor Group Quote List

*The Vendor Group Quote List panel displays.*

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

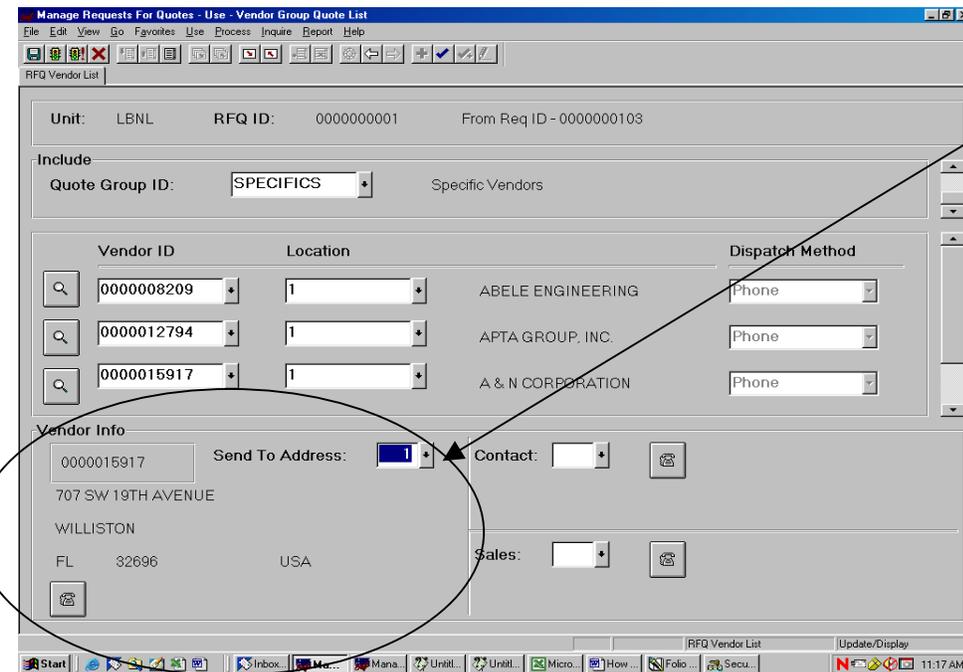


To begin your vendor list, you can select one (or more) Vendor Quote Groups. The system loads the vendors of the group(s) you specify, and this group becomes all or part of the vendor list for the RFQ. You can add to or delete from this RFQ vendor list without affecting the Quote Group from which you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



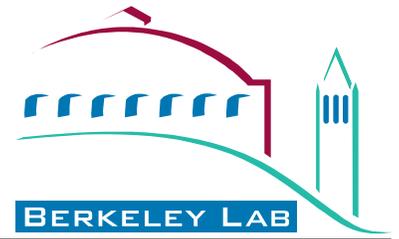
The dispatch method will default from the business unit. Should the vendor have a specific dispatch method, the field will be open for editing.

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



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

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



## 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

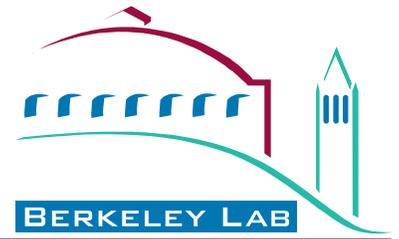
*The Enter Responses Header panel displays.*

Unit	RFQ ID	Vendor	Location
LBNL	000000001	0000008209	1
LBNL	000000001	0000012794	1
LBNL	000000001	0000015917	1
LBNL	000000001	0000021750	1

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.

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

A screenshot of a software window titled "Manage Requests For Quotes - Use - Enter Responses". The window has a menu bar (File, Edit, View, Go, Favorites, Use, Process, Inquire, Report, Help) and a toolbar with various icons. Below the toolbar are tabs for "Header", "Line", and "Comments". The "Header" tab is active, showing fields for Unit (CHP01), RFQ ID (000000001), Vendor ID (000000004), and Vendor Name (AD-TECH MEDICAL INSTRUMENT CORPORATION). The "Line" tab is also active, showing a table with one row for "Line 1". The row contains fields for Item ID (10000002), Item Name (SLEEPCHAIR), Vendor Item ID, Vendor Category, Manufacturer ID, Ship Via (COMMON), Ship To (DW), Freight Term (DEST,FA), Schedule Date, LT Days, Unit of Measure (EA), Quantity (2.0000), Price, and Min Qty. A checkbox labeled "Vendor Responded" is checked and circled in red. At the bottom of the window, there are buttons for "FS75QA2", "Line", and "Update/Displa".

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.