

PeopleSoft

Purchasing (PO4): Request for Quotes (RFQs)

Version 1.1 | Updated December 11, 2014



PREPARED BY THE SDCOE CUSTOMER RESOURCE CENTER

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Part I: Overview



About This Guide

This guide was created by the SDCOE Customer Resource Center for staff responsible for managing the quote and proposal process for large procurement activities using PeopleSoft Purchasing. It covers how to use PeopleSoft to enter an RFQ, dispatch a quote, enter RFQ responses, analyze RFQs and award quotes, and create a PO from an RFQ.

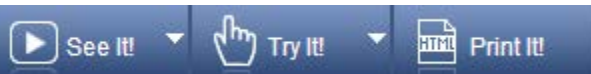
Depending on your organization, there may be a requirement to ask suppliers to provide a quote to you. The supplier will identify their costs and business practices that might help you decide if you want to do business with them. To expedite and track this procedure, PeopleSoft Purchasing provides the Request for Quote (RFQ) functionality as part of the purchasing application.

You may establish one request for quote and send it to as many suppliers as needed. You can send a request for quote to a supplier that is not yet approved, but they must be approved before you can award the RFQ to that supplier. To simplify selecting suppliers, you can establish groups of suppliers specific to particular items, locations, or other criteria under a single Supplier Quote Group and send your RFQ to the entire group or a subset of the group. Once you create the request for quote and select the suppliers you wish to send it to, you can dispatch it to each supplier using the dispatch method you or they prefer. This lesson describes how to manage RFQs and explains the basic flow for an RFQ.

For additional copies of this guide, please go to <http://crc.sdcoe.net/resources/peoplesoft/guides>.

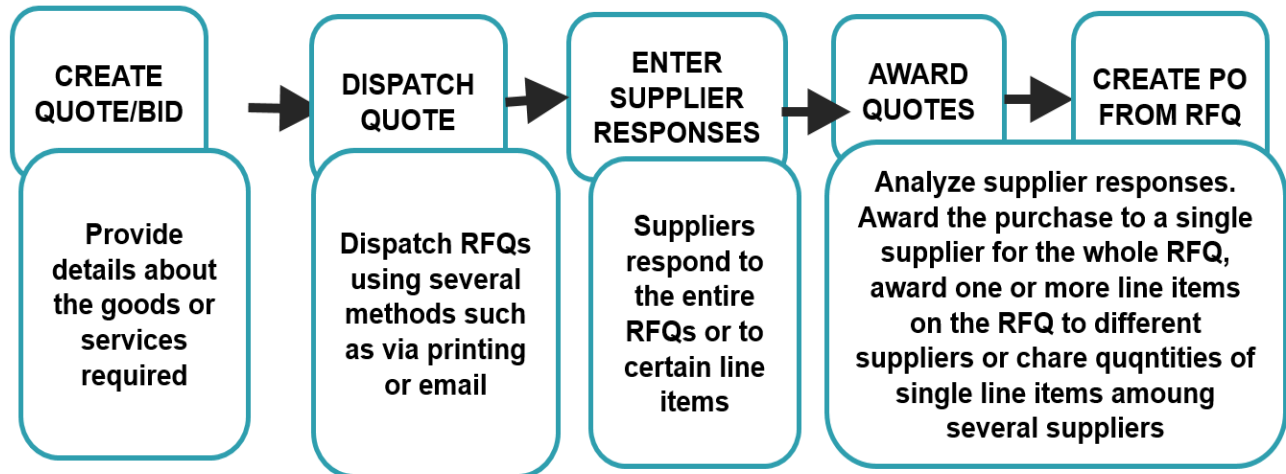
ONLINE TUTORIALS AVAILABLE

Would you like to try to enter an RFQ in a simulated environment? We have online tutorials for that! Go to <http://crc.sdcoe.net/resources/peoplesoft/tutorials> to access topics that you can access in See It!, Try It!, and Print It! modes.





RFQ Process Flow





Sample RFQ

Request for Quotation

[Dispatch via Print](#)

Cardiff School District
1888 Montgomery Ave.
Cardiff-by-the-Sea CA 92007
United States

Supplier: D00128
DELL MARKETING L.P.
C/O DELL USA L.P.
P.O. BOX 910916
PASADENA, CA 91110-0916

Request Quote ID.	Date	Buyer	Page
00700-0000000001	04/14/2014		1
Payment Terms	DateTime Quote Open	Closing	
Due Now	04/14/2014 17:03:51		

Ship To: 1888 Montgomery Ave.
Cardiff-by-the-Sea CA 92007
United States

Bill To: 1888 Montgomery Ave.
Cardiff-by-the-Sea CA 92007
United States

Line	Item	Description	Mfg ID	Mfg Item ID	Quantity	UOM	Need Date
1		computers			3.0000	EA	04/30/2014

Freight Terms: ORIGIN **Ship Via:** COMMON



Part II: Request for Quotes (RFQs)



Manage Supplier Quote Group

This section explains how you can setup a quote group of suppliers before creating your Quote.

Navigation: Main Menu > Purchasing > Request for Quotes > Manage Supplier Quote Group

1. Navigate to **Main Menu > Purchasing > Request for Quotes > Manage Supplier Quote Group**.
2. To create a new one, click on the **Add a New Value** tab. The SetID field defaults to your 5-digit district number. Enter your desired Quote Group ID. The field is limited to 10 characters. *Example: Computers*. Click **Add**.

Supplier Quote Group

Find an Existing Value **Add a New Value**

SetID: 00700 🔍

Quote Group ID: COMPUTERS

Add



4. In the Group ID Setup area, complete the following fields:
 - **Description:** Enter the desired Group ID description. This field is limited to 30 characters.
 - **Short Description:** Displays the first 10 characters from the description field. This can be modified if desired.
5. In the Suppliers area, add your Suppliers by entering the appropriate information such as the Short Supplier Name or Supplier ID. You can use the magnifying glass to lookup for existing suppliers.
6. Click on the Add a new row button to add more than one Suppliers.

Manage Supplier Quote Group

Group ID Setup

SetID 00700 Quote Group ID COMPUTERS
Description Computers Short Description Computers

Suppliers Personalize | Find | View All | [?] | [] First 1-3 of 3 Last

Supplier Lookup	*Short Supplier Name	*Supplier ID	*Location	Supplier Name		
	APPLE INC.-001	A00003	MAIN	APPLE INC.		
	CDW GOVERN-0C	C00059	MAIN	CDW GOVERNMENT, INC.		
	DELL MARKE-001	D00128	MAIN	DELL MARKETING L.P.		

Click the plus sign to add another supplier →

7. Click **Save**.

Create Quote/Bid

For large purchases, buyers generally request quotes from several suppliers. Examples of these requests can range from capital projects to a predefined requirement for inventory or supply purchases.

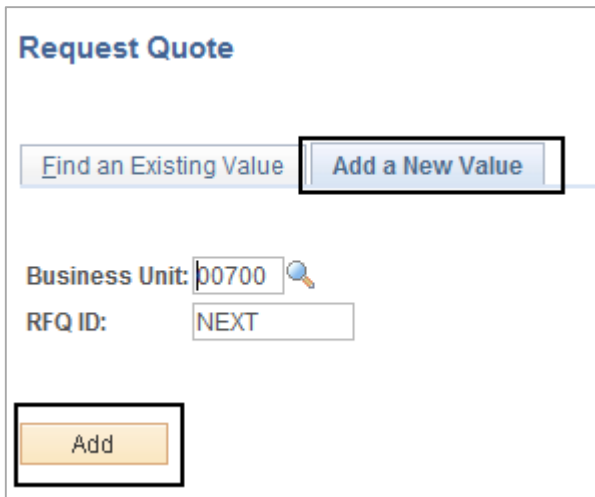
Requests for Quotes (RFQs) typically provide details about the goods or services required by your district. An RFQ also consists of any formal or informal item or service specifications. In addition, parameters such as the payment terms, shipping terms, lead times, and shipping schedules are also included.

After an RFQ is added to the system, you must define the suppliers who are going to receive the RFQ when it is dispatched. Buyers usually send an RFQ to a predefined list of suppliers. The responses from suppliers are entered in PeopleSoft Purchasing. After the RFQs are sent to the suppliers and the suppliers respond, the buyer can make informed decisions about the purchase of the goods or services. The buyer then awards the quote to one or more suppliers and processes the purchase orders or contracts.


The purpose of this section is to show you how to create and dispatch Quote/Bid using the RFQ page.

Navigation: Main Menu > Purchasing > Request for Quotes > Add/Update RFQs

1. Navigate to **Main Menu > Purchasing > Request for Quotes > Add/Update RFQs**.
2. Click on the **Add a New Value** tab. The Business Unit field defaults to your 5-digit district number. Leave NEXT in the RFQ ID field. Click **Add**.



Request Quote

Business Unit: 

RFQ ID:



3. In the Request Quotes page header area, complete the following fields:

Request Quotes

Business Unit 00700 RFQ ID NEXT

Request Date 04/14/2014 *Status Approved

*Currency USD *Origin ONL

Reference

*Date Time Opened 04/14/2014 2:03PM

Date Time Closed

[View Printable Version](#)

- **Request Date:** Defaults to current date.
- **Status:** This will default to *Approved*. NOTE: All districts will be setup with no workflow in processing RFQs.
- **Date Time Opened:** Defaults to current date but can be modified to future date. This is a required field when creating the RFQ.
- **Date Time Closed:** Optional. Enter the desired date. This will be required for public bidding process.
- **Reference:** Optional. Enter your Bid Title. *Example: Computer Hardware*

Manually enter the items (lines).

Follow Steps 4-6 to manually enter the item(s). Or go to Step 7 to get the information from a requisition or copy from another RFQ. Then skip to Step 8.

4. In the Lines area, Line info tab, complete the following fields:

Lines

Line Info More Details Item Information

Sel	Line	Item ID	*Description	Category	*UOM	Quantity	Price	Line Comments
<input checked="" type="checkbox"/>	1							

*Go to Copy From Dispatch History Catalog Exchange Rate Dispatch Supplier List

Header Comments Send Email Item Suppliers Header Details ... More ...

Save Notify Refresh Add Update/Dis

- **Item ID:** Enter or look up the Item Id. **NOTE:** This field is only for districts that use the Inventory module.
- **Description:** Enter the item description.
- **Category:** Enter the appropriate code.
- **UOM:** Enter the unit of measure.
- **Quantity:** Enter the desired quantity.
- **Price:** Enter the suggested price or leave this field blank.

5. Click on the **More Details** tab. Enter the due date when you need the items.

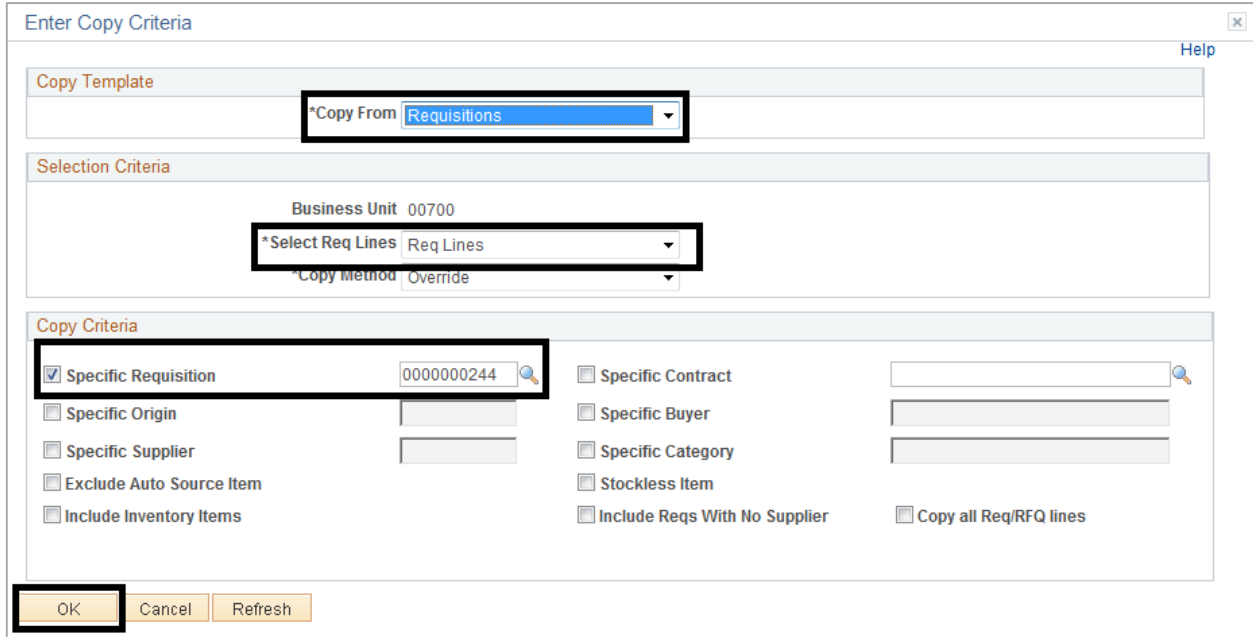
6. Click on the **Item Information** tab to enter the Manufacturer ID and Manufacturer's Item ID, if necessary.

7. To add more than one item, click on the Add a new row button (+ sign), and then repeat Steps 4-6.

Or, get the information from a requisition or copy from another RFQ.

Follow Step 8 to get the information from a requisition or copy from another RFQ.

- Click on the **Copy From** link. You will get the **Enter Copy Criteria** page. Enter the “copy from” information, then click **OK**. Then select lines to copy. Click **OK**.



- **Copy Template section:** Copy From field – you can select to copy from a Requisition or RFQs.
- **Selection Criteria:** Select Req Lines – select Req Lines.
- **Copy Criteria:** Select checkbox for Specific requisition. Enter the requisition ID or use the look up glass to select the requisition ID.

Dispatch Supplier List

- Click on **Dispatch Supplier List** link.

Manually enter the Supplier.

Follow Step 10 to manually enter the Supplier. Or go to Step 11 to select from your Quote Group ID. Then skip to Step 13.

- In the RFQ Dispatch Supplier List page, enter or look up the **Supplier**. To add more than one Supplier, click on the Add a new row button (+ sign).

RFQ Dispatch Supplier List Help

Business Unit 00700 RFQ ID 000000001

Supplier Group Find | View All First 1 of 1 Last

*Quote Group ID

Suppliers Personalize | Find | View All First 1-3 of 3 Last

Select	*Supplier ID	*Location	To Dispatch	Short Supplier Name	Supplier Name	Method
<input type="checkbox"/>	A00081	MAIN	<input type="checkbox"/>	APPLE CARL-001	APPLE INC.	Print
<input type="checkbox"/>	D00128	MAIN	<input type="checkbox"/>	DELL MARKE-001	DELL MARKETING L.P.	Print
<input type="checkbox"/>	C00059	MAIN	<input type="checkbox"/>	CDW GOVERN-001	CDW GOVERNMENT, INC.	Print

Dispatch Lines Supplier Details Supplier Lookup

OK Cancel Refresh

Or, select your Quote Group ID.

Follow Step 11 to get the information from a Quote Group ID.

- Enter or lookup the desired Quote Group ID. The Suppliers from your Quote Group ID will be listed in the Suppliers area. Add or delete suppliers as needed. To add more suppliers, click on the Add a new row button (+ sign). To delete suppliers, click on the Delete a row button (- sign).
- To dispatch RFQ from this page, select the checkbox for a Supplier under the **Select** and **To Dispatch** columns. This will only allow to dispatch the RFQ for the selected Supplier. Click **OK**.

Suppliers Personalize | Find | View All First 1-3 of 3 Last


Select	*Supplier ID	*Location	To Dispatch	Short Supplier Name	Supplier Name	Method
<input checked="" type="checkbox"/>	D00128	MAIN	<input checked="" type="checkbox"/>	DELL MARKE-001	DELL MARKETING L.P.	Print
<input type="checkbox"/>	C00059	MAIN	<input type="checkbox"/>	CDW GOVERN-001	CDW GOVERNMENT, INC.	Print
<input type="checkbox"/>	A00003	MAIN	<input type="checkbox"/>	APPLE INC.-001	APPLE INC.	Print

Dispatch Lines Supplier Details Supplier Lookup

OK Cancel Refresh

- Click **Save**. The system will assign the **RFQ ID**.

- Click on the **Dispatch** icon. This will only dispatch the RFQ for the selected supplier.



View Printable Version

*Date Time Opened 04/14/2014 2:03PM

Date Time Closed

- Click **OK** in the Dispatch Options window.

- You will get a message:

- Click **Yes** to wait for confirmation that the RFQ Dispatch process has completed.
- Click **No** and the system will give you the process instance number to check on the process monitor.



17. To access the RFQ document, navigate to **Main Menu > Reporting Tools > Report Manager**.
18. Click on the **Administration** tab. Look for the process instance number. Click on the link under the Description column to view the RFQ.

Sample RFQ:

Cardiff School District
1888 Montgomery Ave.
Cardiff-by-the-Sea CA 92007
United States

Supplier: D00128
DELL MARKETING L.P.
C/O DELL USA L.P.
P.O. BOX 910916
PASADENA, CA 91110-0916

Request for Quotation

[Dispatch via Print](#)

Request Quote ID.	Date	Buyer	Page
00700-0000000001	04/14/2014		1

Payment Terms	Date	Time	Quote Open	Closing
Due Now	04/14/2014	17:03:51		

Ship To: 1888 Montgomery Ave.
Cardiff-by-the-Sea CA 92007
United States

Bill To: 1888 Montgomery Ave.
Cardiff-by-the-Sea CA 92007
United States

Line	Item	Description	Mfg ID	Mfg Item ID	Quantity	UOM	Need Date
1		computers			3.0000	EA	04/30/2014

Freight Terms: ORIGIN **Ship Via:** COMMON

Dispatch Quote

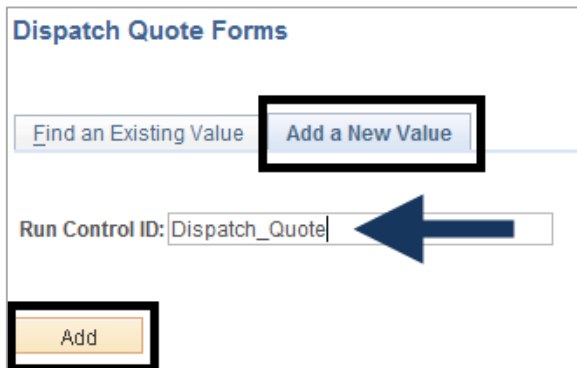
After an RFQ is entered into the system, you have determined which suppliers will receive the entire RFQ or parts of the RFQ, and the RFQ is approved, you are ready to dispatch it. You can dispatch RFQs using several methods. These include fax, email and printing.

Consider this scenario: You have entered an RFQ into your PeopleSoft Purchasing system and have decided on the supplier. You need to dispatch a quote that you have approved. Your goal is to dispatch the quote to your supplier by e-mail, print, and fax.

The purpose of this section is to show you how to dispatch Quotes by running a process.

Navigation: Main Menu > Purchasing > Request for Quotes > Dispatch Quotes

1. Navigate to **Main Menu > Purchasing > Request for Quotes > Dispatch Quotes**.
2. Click the **Add a New Value** tab. Enter the desired **Run Control ID** (like *Dispatch_Quote*), and click **Add**.
Note: Do this step for the first time only. Otherwise, skip to Step 3.



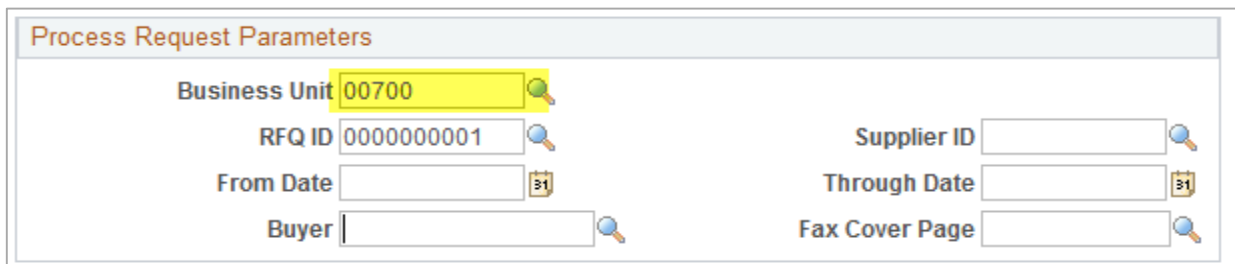
Dispatch Quote Forms

Find an Existing Value **Add a New Value**

Run Control ID: Dispatch_Quote

Add

3. If you have previously created one, click the **Find an Existing Value** tab. Click **Search**. Click on the *Run Control ID* you have created for this page.
4. In the Process Request Parameters area, enter the desired parameters:



Process Request Parameters

Business Unit 00700

RFQ ID 0000000001

Supplier ID

From Date

Through Date

Buyer

Fax Cover Page

- **Business Unit:** Enter your district number. This field is required.
- **RFQ ID:** Enter the RFQ ID. Leave this field blank if you will dispatch more than one RFQ.
- **Supplier ID:** Enter or select Supplier ID using the look up icon. Select a Supplier if dispatching more than one RFQ for this supplier.
- **From Date and Through Date:** Enter the dates when dispatching RFQs within a date range.
- **Buyer:** Enter Buyer ID. Select this field if dispatching by Buyer ID.
- **Fax Cover Page:** Use this field when dispatching RFQs via fax.

- In the **Statuses to Include** area, the checkbox options for the different statuses are disabled when dispatching only one RFQ. This field will be active to check or uncheck if more than one RFQ will be dispatched. Select the appropriate status.
- Click **Save** to add the Run Control ID you created and save your parameters.
- Click **Run**.
- In the Process Scheduler Request window, select the **RFQ Dispatch/Print** process, then click **OK**.

Process Scheduler Request

User ID: TRN001 Run Control ID: Dispatch_Quote

Server Name: Run Date: 05/28/2014

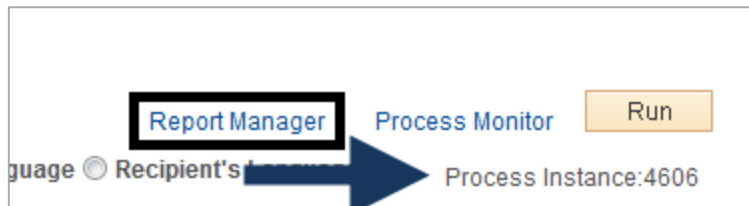
Recurrence: Run Time: 4:17:56PM

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	RFQ Dispatch/Print	PORFQ01	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Email	PO_RFQ_EMAIL	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	RFQ dispatch & E-mail	RFQDISP	PSJob	(None)	(None)	Distribution

- You will get a process instance number (*like 4606*). Take note of this number. Click the **Report Manager** link.



- Go to the **Administration** tab.
- Look for the Process Instance number. If the status displays as *Posted*, click on the description link *RFQ Dispatch/Print* to open the PDF. See sample on p. 4 or p. 12.

Enter Supplier Responses

After RFQs are dispatched to selected suppliers, the suppliers respond to the entire RFQs or to certain line items included on an RFQ. These responses must be entered and tracked in PeopleSoft Purchasing for further analysis, purchase order creation, or contract creation. This process simplifies decision making when you are determining the best supplier to award the quote.

Consider this scenario: As a Buyer, you have received responses from three suppliers to whom you sent RFQs. Your goal is to enter those quotes in Purchasing.

The purpose of this section is to show you how to enter Supplier responses in the system.

Navigation: Main Menu > Purchasing > Request for Quotes > Add/Update Supplier Responses

1. Navigate to **Main Menu > Purchasing > Request for Quotes > Add/Update Supplier Responses**.
2. In the Search Criteria area, the Business Unit field defaults to your district number. Enter additional search criteria to narrow down your list or leave the fields blank. Click **Search**.

Enter Responses

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit:	=	<input type="text" value="00700"/>	
RFQ ID:	begins with	<input type="text"/>	
Supplier ID:	begins with	<input type="text"/>	
Supplier Location:	begins with	<input type="text"/>	
Supplier Name:	begins with	<input type="text"/>	

Search
Clear
Basic Search
Save Search Criteria

Search Results

View All First 1-3 of 3 Last

Business Unit	RFQ ID	Supplier ID	Supplier Location	Supplier Name
00700	0000000001	A00081	MAIN	APPLE CARL-001
00700	0000000001	C00059	MAIN	CDW GOVERN-001
00700	0000000001	D00128	MAIN	DELL MARKE-001

The Search results grid will display data based on your entered criteria.

3. Click on the desired **Supplier**. You will go to the Maintain Responses page.



4. In the **Lines area > Line Info tab**, enter values for the following columns/fields based on the Supplier's response:

Maintain Responses

Business Unit 00700 RFQ ID 000000001
*Supplier ID A00081 Supplier Name APPLE INC.
Supplier Location MAIN RFQ Reference
*Terms 00 Due Now Supplier Reference Quote
*Currency USD Dollar *Response Date Time 04/14/2014 2:36PM

Select All Clear All

Lines Personalize | Find | View All | First

Line Info | More Details

Supplier Responded	Item ID	Description	Minimum Quantity	Quantity	*UOM	Price	Req Price	Req Currency	Due Date	Lead Time
<input checked="" type="checkbox"/>		computers	3.0000	3.0000	EA	500.00000			04/30/2014	7

- **Supplier Responded:** Check this option. Select to indicate that the supplier has responded and that the RFQ is ready to be analyzed and awarded. This check box will be unavailable when the RFQ is awarded.
 - **Minimum Quantity:** Enter supplier minimum quantity requirement. If supplier minimum quantity is greater than your quote quantity. You will have to replace your quantity with the supplier's required quantity.
 - **Price:** Enter the supplier quoted price.
 - **Lead Time** (in days): Enter lead time.
5. Click on the **More Details** tab to enter additional information such as the Supplier Item ID.
6. Click on **Response Comments** link. Enter comments from the Supplier. Click **OK**.
7. Click on **Response Header Details** link. Select the response method used by Supplier. Click **OK**.
8. Click **Save**.
- To go to the other Suppliers and enter their response, click on the **Previous in list** or **Next in list**.
 - You can also click **Return to Search** to go back to the search page.

Award Quotes

After you enter supplier responses to RFQs in PeopleSoft Purchasing, you can perform online analysis of those responses and award the purchase accordingly. You can award the purchase to a single supplier for the whole RFQ, award one or more line items on the RFQ to different suppliers, or share quantities of single line items among several suppliers.

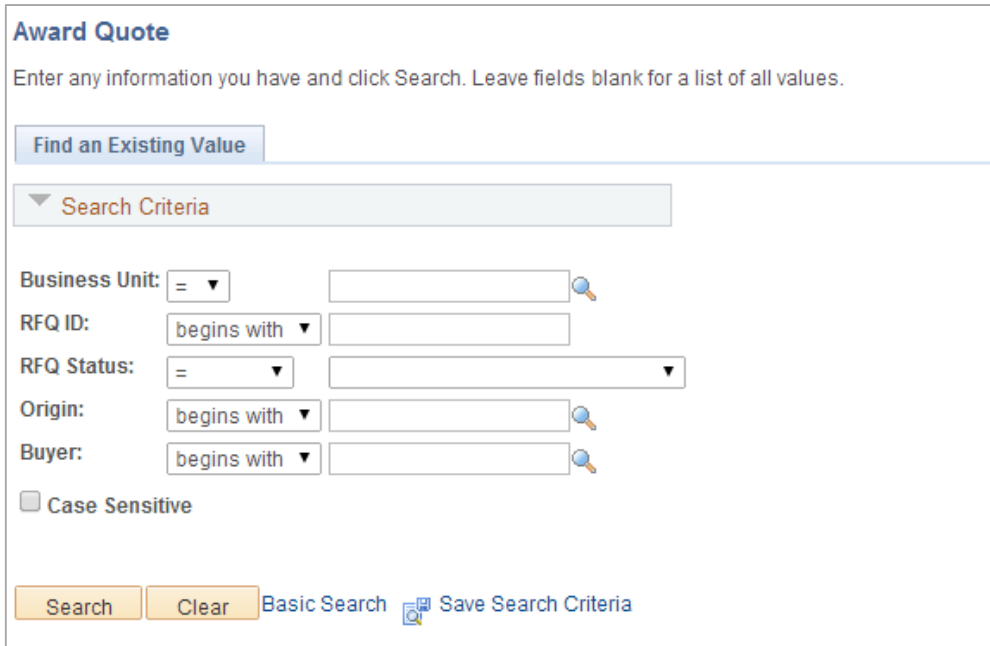
After you have awarded a supplier a purchase from an RFQ or specific items on an RFQ, you can create a purchase order or contract for those items.

In this topic, you will analyze RFQs that you have sent to a supplier. Later you will create a PO from the RFQ.

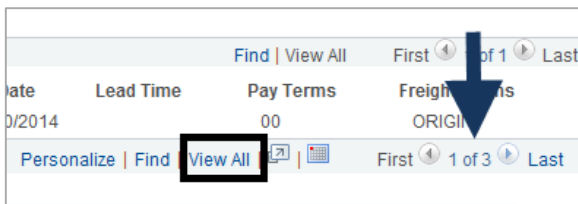
The purpose of this section is to show you how to analyze and award quotes.

Navigation: Main Menu > Purchasing > Request for Quotes > Award Quotes

1. Navigate to **Main Menu > Purchasing > Request for Quotes > Award Quotes**.
2. In the Search Criteria area, the Business Unit field will default to your district number. Enter additional search criteria to narrow down your list or leave the fields blank. Click **Search**.



3. If there is only one existing RFQ ID, you will get the Analyze Quote page.
4. Take note that if there is more than one supplier who responded, you need to click **View All** link to see all Suppliers.



5. You can award quotes to more than one supplier and split the quantity among the suppliers.



- 6. Enter the quantity in the **Qty Award** field for the selected Supplier. Take note of the Minimum Quantity that you can order from the Supplier.

Business Unit 00700 RFQ ID 000000001 Currency Code USD

Award Item List to Supplier

List of Items to Award Find | View All First 1 of 1 Last

Line	Item ID	Description	UOM	Quantity	Price	Due Date	Lead Time	Pay Terms	Freight Terms
1		computers	EA	3.0000	USD	04/30/2014		00	ORIGIN

List of Suppliers who Responded Personalize | Find | View 1 First 1-3 of 3 Last

Supplier ID	Location	Supplier Name	Qty Award	UOM	Price	Currency	Quantity	Due Date	Lead Time	Terms	Freight Terms
A00081	MAIN	APPLE CARL	<input type="text"/>	EA	500.00000	USD	3.0000	04/30/2014	7	00	ORIGIN
C00059	MAIN	CDW GOVERN	<input type="text"/>	EA	450.00000	USD	3.0000	04/30/2014	10	00	ORIGIN
D00128	MAIN	DELL MARKE	<input type="text"/>	EA	450.00000	USD	3.0000	04/30/2014	15	00	ORIGIN

Total Qty Awarded 0.0000 Order Qty 0.0000

Document Status

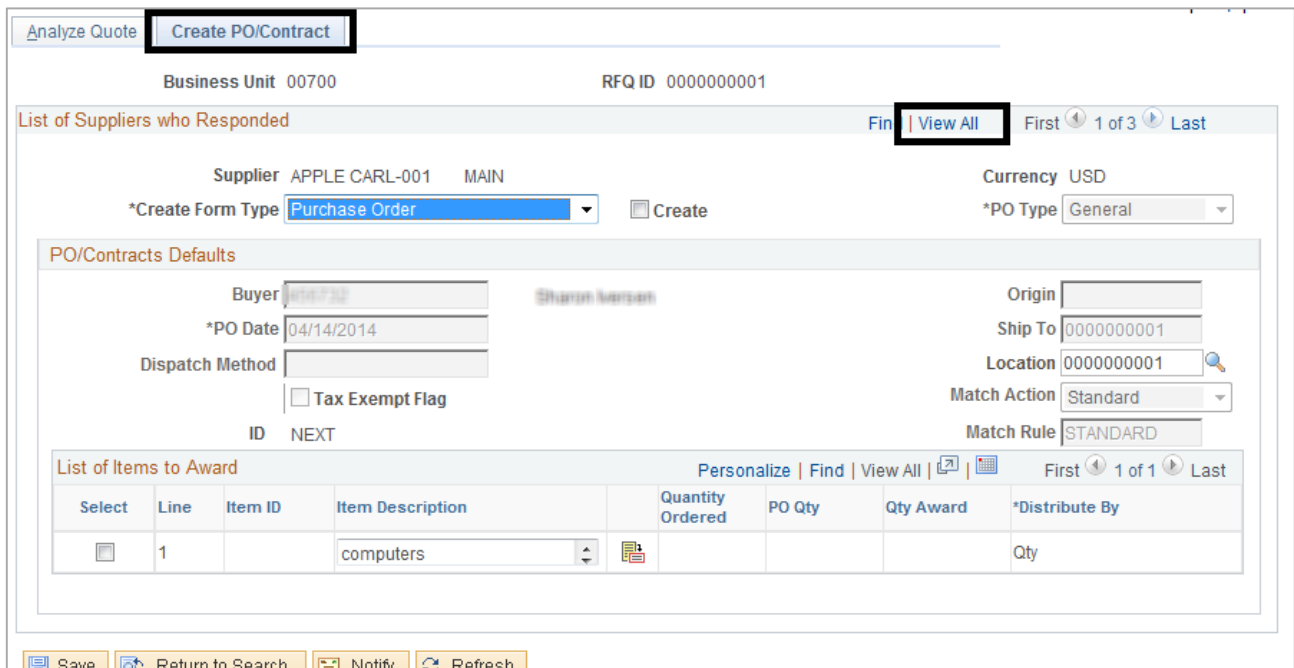
- 7. Click **Save**.

Create a PO from RFQ

The purpose of this section is to show you how to create a PO from the RFQs.

Navigation: Main Menu > Purchasing > Request for Quotes > Award Quotes

1. Navigate to **Main Menu > Purchasing > Request for Quotes > Award Quotes**.
2. In the Search Criteria area, the Business Unit field will default to your district number. Enter additional search criteria to narrow down your list or leave the fields blank. Click **Search**.
3. If there is only existing RFQ ID, you will get the Analyze Quote page.
4. Click on **Create PO/Contract** tab. Click on **View All** link to see all suppliers who responded.



Analyze Quote **Create PO/Contract**

Business Unit 00700 RFQ ID 0000000001

List of Suppliers who Responded [View All](#) First 1 of 3 Last

Supplier APPLE CARL-001 MAIN Currency USD
 *Create Form Type Purchase Order Create *PO Type General

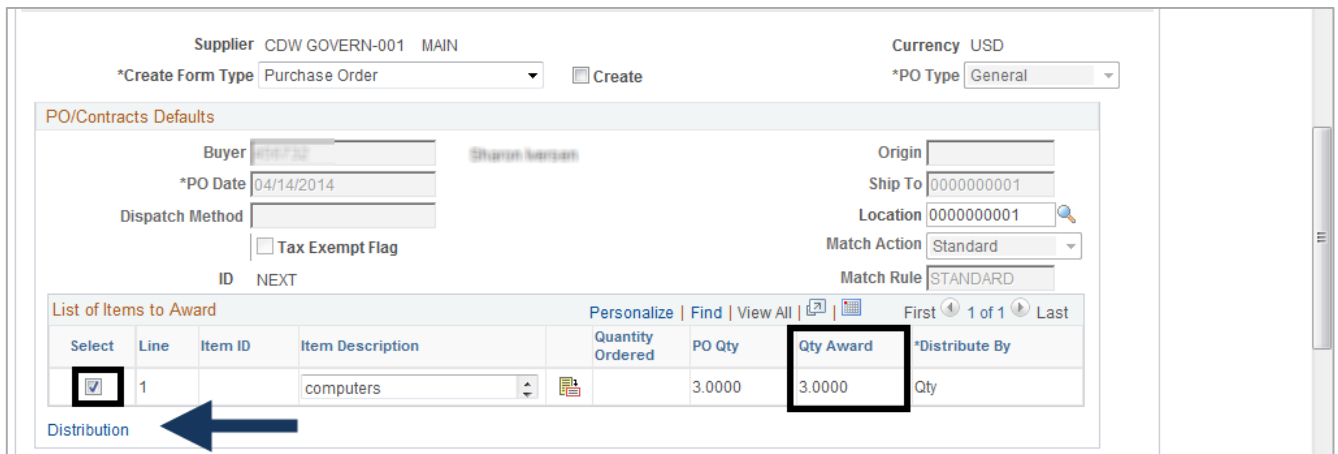
PO/Contracts Defaults
 Buyer [00700] Sharon Jensen Origin []
 *PO Date 04/14/2014 Ship To 0000000001
 Dispatch Method [] Location 0000000001
 Tax Exempt Flag Match Action Standard
 ID NEXT Match Rule STANDARD

List of Items to Award Personalize Find View All First 1 of 1 Last

Select	Line	Item ID	Item Description	Quantity Ordered	PO Qty	Qty Award	*Distribute By
<input type="checkbox"/>	1		computers				Qty

Save Return to Search Notify Refresh

5. Go to the Supplier to whom you awarded the quote. Select the checkbox for the line item that you want to create the PO. A distribution link will display below it. Click the **Distribution** link.



Supplier CDW GOVERN-001 MAIN Currency USD
 *Create Form Type Purchase Order Create *PO Type General

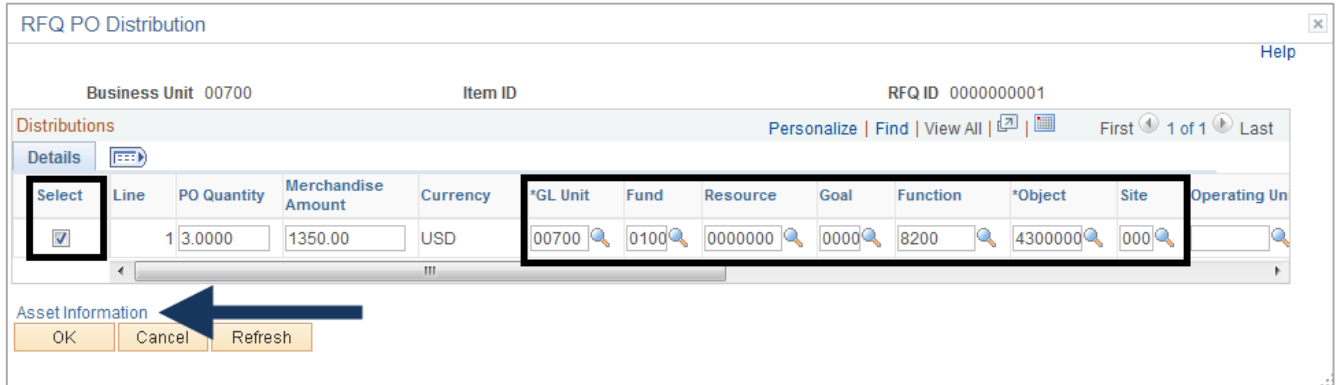
PO/Contracts Defaults
 Buyer [00700] Sharon Jensen Origin []
 *PO Date 04/14/2014 Ship To 0000000001
 Dispatch Method [] Location 0000000001
 Tax Exempt Flag Match Action Standard
 ID NEXT Match Rule STANDARD

List of Items to Award Personalize Find View All First 1 of 1 Last

Select	Line	Item ID	Item Description	Quantity Ordered	PO Qty	Qty Award	*Distribute By
<input checked="" type="checkbox"/>	1		computers		3.0000	3.0000	Qty

Distribution

- In the RFQ PO Distribution, enter your distribution or chart string. To add more than one account, scroll to the right and click the **Add a new row button (+ sign)**.




RFQ PO Distribution

Business Unit 00700 Item ID RFQ ID 0000000001

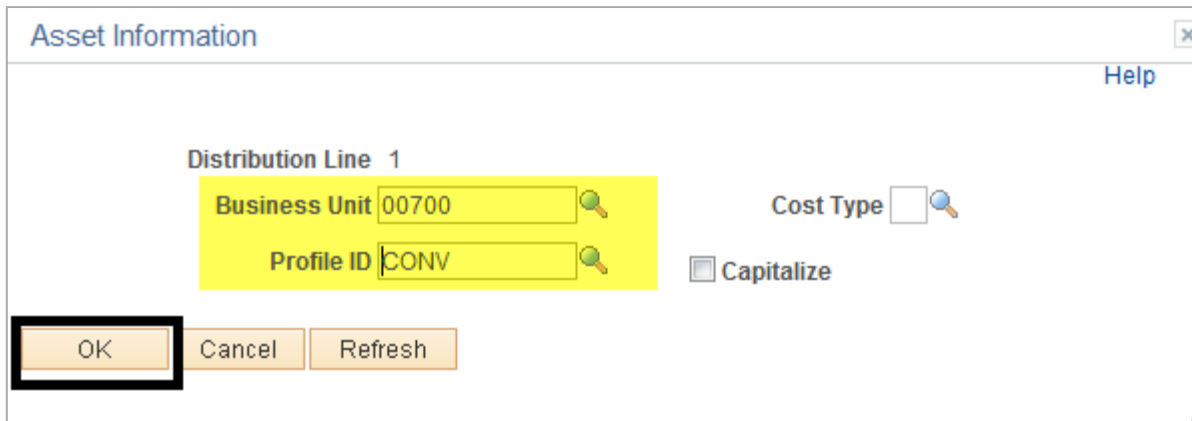
Distributions Personalize | Find | View All | First 1 of 1 Last

Select	Line	PO Quantity	Merchandise Amount	Currency	*GL Unit	Fund	Resource	Goal	Function	*Object	Site	Operating Un
<input checked="" type="checkbox"/>	1	3.0000	1350.00	USD	00700	0100	0000000	0000	8200	4300000	000	

Asset Information 

OK Cancel Refresh

- For asset items, click the **Asset information** link (shown in the screenshot above). Enter your district number in the Business Unit field and select **CONV** from the **Profile ID**. Click **OK**.



Asset Information

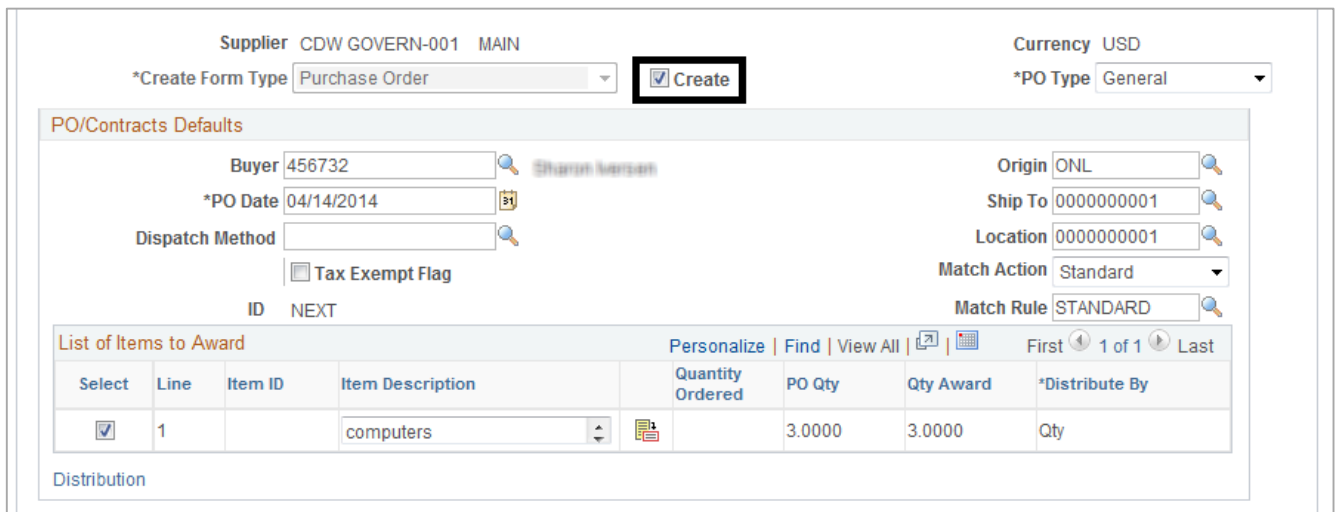
Distribution Line 1

Business Unit 00700 Cost Type

Profile ID CONV Capitalize

OK Cancel Refresh

- Click **OK**.
- Click the **Create** checkbox to create a PO.



Supplier CDW GOVERN-001 MAIN Currency USD

*Create Form Type Purchase Order Create *PO Type General

PO/Contracts Defaults

Buyer 456732 Sharon Jensen Origin ONL

*PO Date 04/14/2014 Ship To 0000000001

Dispatch Method Location 0000000001

Tax Exempt Flag Match Action Standard

ID NEXT Match Rule STANDARD

List of Items to Award Personalize | Find | View All | First 1 of 1 Last

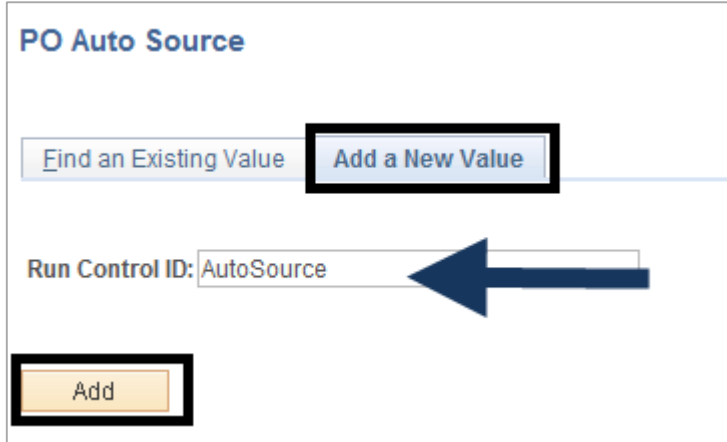
Select	Line	Item ID	Item Description	Quantity Ordered	PO Qty	Qty Award	*Distribute By
<input checked="" type="checkbox"/>	1		computers		3.0000	3.0000	Qty

Distribution

- Scroll down to the bottom of the page and click **Save**.

11. Navigate to **Main Menu > Purchasing > Purchase Orders > Stage/Source Requests > PO Auto Sourcing**.

12. Click on **Add a New Value** tab. Enter your **Run Control ID** (*like AutoSource*). Click **Add**.



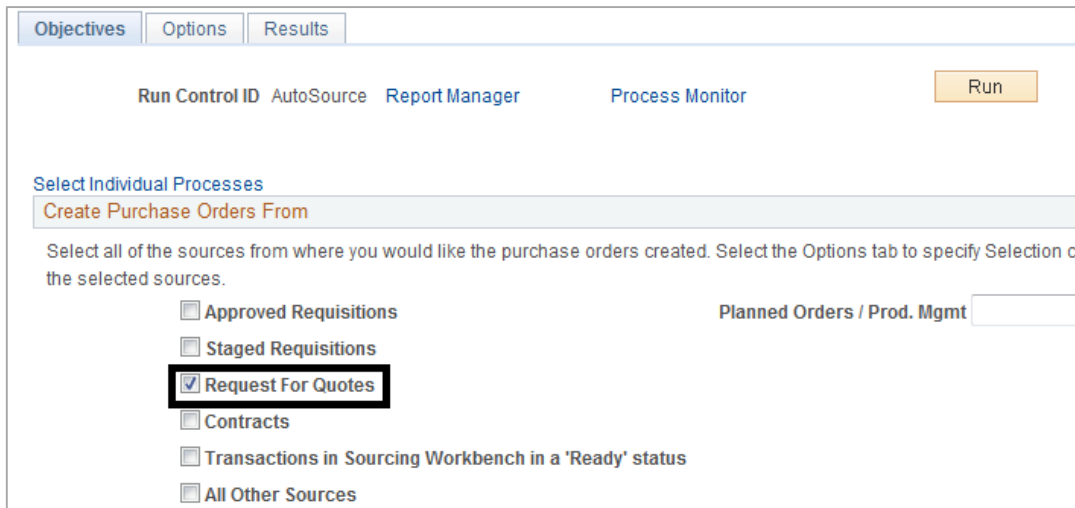
PO Auto Source

Find an Existing Value **Add a New Value**

Run Control ID: AutoSource

Add

13. Select the **Request for Quotes** checkbox.



Objectives Options Results

Run Control ID AutoSource Report Manager Process Monitor Run

Select Individual Processes

Create Purchase Orders From

Select all of the sources from where you would like the purchase orders created. Select the Options tab to specify Selection of the selected sources.

Approved Requisitions Planned Orders / Prod. Mgmt

Staged Requisitions

Request For Quotes

Contracts

Transactions in Sourcing Workbench in a 'Ready' status

All Other Sources

14. Go to the **Options** tab.



15. Expand the **Purchase Order Options** section by clicking on the right facing arrow.

Purchase Order Options

*Consolidation Method Business Unit, Supplier

Origin ONL

Purchase Order Date 04/14/2014

Purchase Order Reference Computers

Pre-Approve Supplier

Build POs as Approved

Calculate PO Line Numbers

Hold From Further Processing

Allow Dispatch When Appr

- Enter **Purchase Order Date**.
 - Enter your **PO Reference**.
 - **Pre-Approve Supplier** must be checked.
 - **Build POs as Approved** and **Allow Dispatch When Appr** may or may not be selected depending on your district business process.
16. Click **Run**. You will get the Process Scheduler Request window. The process list **Automatic Purchasing Sourcing** must be selected. Click **OK**.
17. The Process Instance number will be assigned. To monitor if the process has been completed, click on **Process Monitor** link. Look at the Process Instance number and the Distribution Status should say *Posted*.
18. To view the PO that was created from this process, navigate to **Main Menu > Purchasing > Purchase Orders > Add/Update POs**.
19. Go to the **Find an Existing Value** tab. Enter your search criteria such as the Supplier. Click **Search**. Click on the PO you have created.
20. In the Maintain Purchase Order page, under the Lines area, go to the RFQ tab, you will see the RFQ ID.
21. Complete processing the PO:
- To Budget check PO, click on the **Budget Check** icon. If it returns with a valid budget status, you are ready to dispatch the PO.
 - To Dispatch PO, click on **Dispatch**. In the Dispatch Options, select Print BU comments and PO item description. Click OK. Click NO when you are asked if you want to wait for the PO to change its status to Dispatched. Take note of the process instance number generated to this PO.
 - To access the PO in pdf, navigate to **Main Menu > Reporting Tools > Report Manager**. Click on **Administration** tab. Look for your process instance. Single PO Dispatch/Print link is available if process has been posted successfully.