MM_ME41

Create a Request for Quotation (RFQ)
Overview

The procedures described in this document cover instructions for the creation of a Request For Quotation (RFQ). All purchases need a quotation from a vendor(s). A RFQ is a SAP document that records the request for a quotation from the participating vendors. There are three ways one can create a Request For Quotation:

A. **Manually:** Enter the data for the items to be quoted. It is expected that this method would be used if no requisition or other reference is available.
B. **Copying:** Create a RFQ by copying an existing RFQ.
C. **With Reference:** Create a RFQ with reference to a purchase requisition or a contract. It is anticipated that this method would be mostly used for specific types of purchases.

OBJECTIVE(S):
- To create a Request For Quotation
I. Create a RFQ MANUALLY

Access Create Request For Quotation

1. Select Logistics > Materials Management > Purchasing > RFQ/Quotation > Request for Quotation > Create from the menu tree.

NOTE: Entering the technical name for the transaction in the Command field can shortcut using the menu tree. Here you could enter <ME41> to go the same screen.
2. The **Create RFQ: Initial Screen** appears:

![Create RFQ: Initial Screen](image)

**Create RFQ: Initial Screen**

1. The cursor starts on the **RFQ type** field. The **RFQ type** field identifies the different types of RFQ’s in SAP. If the **RFQ type** is not known, use the Matchcode icon to see a list of options available.

   🕵️ For training purposes, enter `<AN>` in the **RFQ type** field.
2. Press [Tab] to move to the Language key field. The Language key field denotes the language in which you display and enter texts. The field defaults to ‘EN’ for standard RFQ’s.

For training purposes, enter <EN> in the Language key field. ‘EN’ represents English as the language.

3. Press [Tab] to move to the RFQ date field. The RFQ date field represents the date the RFQ was created. The field defaults to today’s date.

For training purposes, do not change the RFQ date.
4. Press [Tab] to move to the **Quotation deadline** field. The **Quotation deadline** field represents the due date for vendor quotations.

For training purposes, enter *<a date that is two weeks after the RFQ date>* in the **Quotation deadline** field.

5. Press [Tab] to move to the **RFQ** field. The **RFQ** field represents a number that uniquely identifies a Request For Quotation.

For training purposes, leave the **RFQ** field blank. (Note: we are creating an **RFQ** in this exercise; therefore, we currently do not have a **RFQ** number.)
6. Press [Tab] to move to the Purch. organization field. The Purch. organization field denotes the code of the organization that is requesting a quotation. The field defaults to “1”, LACCD’s code.

For training purposes, leave the Purch. organization field as <1>.

7. Press [Tab] to move to the Purchasing group field. The Purchasing group field is for the number that identifies the buyer. The number will default to the code assigned to the user. This should be the code of the purchasing person responsible for processing the RFQ.

For training purposes, enter <DO> in the Purchasing group field.
8. **[Tab]** down until you reach the **Delivery date** field. The **Delivery date** field is the date on which the goods are to be delivered. The System will default to the current date, but you should enter the date on which the material is required.

   ![Image with Delivery date field highlighted]

   For training purposes, enter *<a date approx. 2 weeks past today’s date>* in the **Delivery date** fields.

9. Press **[Tab]** to move to the **Plant** field. The **Plant** field represents the campus location.

10. Click on the Matchcode icon beside the **Plant** field.

11. A screen consisting of a list of possible values for the **Plant** field appears.

12. Select the *<Plnt code>* for the correct campus from the list.
13. Click \textbf{(Enter)} to continue to the next screen.

14. \textbf{[Tab]} down until you reach the \textbf{Material group} field. The \textbf{Material group} field is the commodity group that identifies the material being purchased. If the material group is not known, use the Matchcode icon to see a list of options available.

\begin{itemize}
\item For training purposes, enter \textless 01\textgreater{} in the \textbf{Material group} field.
\end{itemize}

15. Press \textbf{(Enter)} to continue to the next screen.
Create RFQ : Header Data screen

1. The cursor will start at the Coll. No. field. **The Coll. No. field** represents the number that will be used to uniquely identify the RFQ. All RFQ documents can be tied to this number. This is where a new requisition number will be created.

   🌐 For training purposes, enter <1> in the Coll. No. field.

2. Press (Enter) to advance to the Create RFQ : Item Overview screen.
Create RFQ: Item Overview screen

1. The Create RFQ: Item Overview screen appears:

2. Click the Item column. The Item column is defined by the system and holds the number that uniquely identifies a line item within a purchase order.

3. Click the Material column. Leave the Material column blank for this process.