Vendor (Bidder) Assignment

1. Click on the first **Item** row.

2. Click on the Vendor address icon and the **Create RFQ: Vendor Address** screen appears:

3. The cursor will be in the **Vendor** field. Click on the Matchcode icon.
4. The following screen will appear:

```
Search form  PostalCode  City  Name  Vendor
```

5. Use this screen to limit your search. (For instance, if you know the city where a particular vendor lives but you forgot the vendor’s name then enter the **City** in the corresponding field.)

6. Click on the **(Enter) icon.**

```
Search form  PostalCode  City  Name  Vendor
```

7. Choose a Vendor by clicking onto a particular Vendor. Click on the **icon.**

8. Once the **Create RFQ: Vendor Address** screen appears, click on the **icon.**
9. The data is saved and the message “RFQ created under the number 6000000008” occurs on the status bar.

10. Click (Exit) to return to the main menu.
TWO DIFFERENT METHODS OF REFERENCING/COPYING A RFQ

A. Create a RFQ with REFERENCE TO A PURCHASING DOCUMENT

Access Create RFQ: Initial Screen

1. The Create RFQ: Initial Screen appears

2. Enter the Quotation Deadline, Purch. Organization, and Purchasing group.
3. Click on the Reference to Purchase Requisition icon.

**NOTE:**

The button allows for a RFQ to be created with reference to a purchase requisition once all prerequisite information has been furnished in the initial screen. Information from the referenced requisition will default into the RFQ. However, if necessary, the information can be overridden.

4. The **Selection of Purchase Requisitions** box appears:

5. From this box, you can use search functions to select the requisition that you want to be copied.

For training purposes, enter **<10000318>** in the Purch. Req. field.

6. Click on the (Enter) icon.
B. Create a RFQ by Copying Another RFQ

Access Create RFQ: Initial Screen

1. The Create RFQ: Initial Screen appears

2. Enter the Quotation deadline, Purch. Organization, & Purchasing group.

3. Select RFQ>>Copy from the Toolbar:

4. The Copy Document screen appears:
For training purposes, enter <6000000009> in the Ref. Document field.

5. Click the (Enter) icon.
Once the purchase document is selected through one of the above methods (A or B), the screen as shown below will be displayed:

1. Enter a value into the **Coll. No.** field.
   😥 For training purposes, enter `<1>` in the **Coll. No.** field.

2. Click the **(Enter)** icon and the **Create RFQ : Selection List** screen will appear:
3. Click onto the line items that you want to have in the RFQ. If the requisition has multiple line items and you want to have all line items in the RFQ, you must highlight all line items.

4. Click on the **Adopt Details** icon and the following screen appears:

5. If the user wants to change information (e.g. Short text, Matt. Group), then the user can only change those items that are not grayed out.

   - For training purposes, do not change anything.

6. Click on the **(Save)** icon to save the RFQ.

   ![Create RFQ: Selection List: Purchase Requisitions](image)

   ![Create RFQ: Item 00001](image)

   **Note:** The user can select the black arrow to enter data for the next line item (if applicable).

Section Complete