

RFQ TO PO

After bids have been received, enter ALL responses.

You will need the vendor number. If you do not have the number in the file, go to:

Navigation: Vendors, Vendor SetUp/Maintenance, Vendor Information, Search by:

Short Vendor Name or

Old FEI Number: Click on look-up icon at “Our Customer Number”, Enter FEI Number at “Old Vendor Number”, Click Search.

Go to Maintain Responses:

Navigation: Purchasing, Request for Quotes, Maintain Responses

Enter RFQ number under “Find an Existing Value” tab.

Verify vendor numbers (vendors that responded to bid) are in the list. If not, you will have to enter the vendor in the RFQ:

Navigation: Purchasing, Request for Quotes, Request Quotes

Change Status to “Open” and click “Save”.

Click on “Dispatch Vendor List”, Click the “add” icon and add vendor number and location:

Request Quotes - Microsoft Internet Explorer

Address: https://corefp.oklaosf.state.ok.us/psp/mrfisi_2/EMPLOYEE/ERP/c/MANAGE_REQUESTS_FOR_QUOTES.PO_RFQ5.GBL

PeopleSoft. Home Worklist Add to Favorites Sign out

New Window Help

RFQ Dispatch Vendor List

Unit: 58000 RFQ ID: 5800000018 From Multiple Sources

Vendor Group Find | View All First 1 of 1 Last

*Quote Group ID:

Vendors Customize | Find | View All | First 2-6 of 19 Last

Sel	*Vendor	*Location	To Dispatch	Short Vendor Name	Name	*Method
<input type="checkbox"/>	0000061370	0002	<input type="checkbox"/>	CONSTRUCTI-004	CONSTRUCTION AGRICULTURAL SUPPLY CO	Print + -
<input type="checkbox"/>	0000063864	0002	<input type="checkbox"/>	GREEN COUN-025	GREEN COUNTRY AG & LAWN EQUIPMENT CO INC	Print + -
<input type="checkbox"/>	0000070687	0001	<input type="checkbox"/>	DIAMOND MO-001	DIAMOND MOWERS INC	Print + -
<input type="checkbox"/>			<input type="checkbox"/>			Print + -

Dispatch Lines Vendor Details Vendor Lookup

OK Cancel Refresh

Done, but with errors on page. Internet

Start SBC... Lisa ... Mai... Peo... Mai... Req... We... Doc... Mai... 9:47 AM

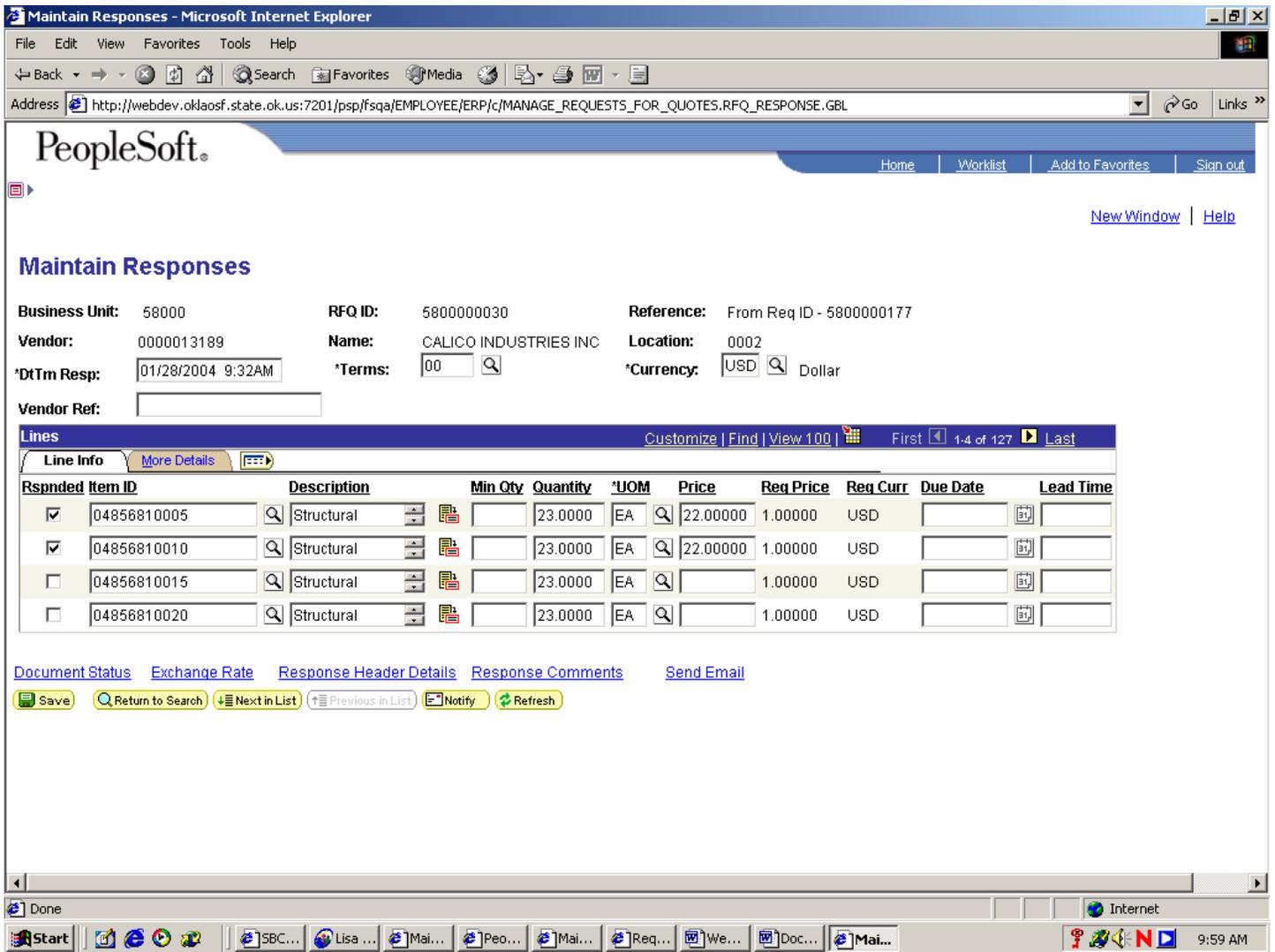
Click OK.

Change Status to "Approved". Click Save.

Go back to "Maintain Responses", Find an Existing Value, enter RFQ.

Click on the vendor for which you wish to enter a response.

Check the "Rspnded" column and enter price. Enter any other information applicable.



Click Save. (You must save after each vendor).

Either click “Next in List” to go to next vendor or if vendors are scattered throughout the list (under Find an Existing Value), click “Return to Search” and click on next applicable vendor.

After all responses have been entered, award quote:

Navigation: Purchasing, Request for Quotes, Award Quotes

It should automatically pull up the Award Quotes for the Quote you are awarding. If not, enter RFQ number in “Find An Existing Value” tab.

Under “Analyze Quote” tab, enter responses either by:

1. Line item;
2. All to one Vendor

If awarding all to one vendor, enter vendor number in “Award List of Items to Vendor”

Click Save.

If awarding by line item, enter quantity awarded for the particular vendor(s) in each line. When awarding by line item, do not save until you have completed the total award (in other words, do not save after each line item or after each vendor).

Analyze Quote [Create PO/Contract](#)

Business Unit: 58000 **RFQ ID:** 5800000030 From Req ID - Currency Code: USD 5800000177

Award List of Items to Vendor:

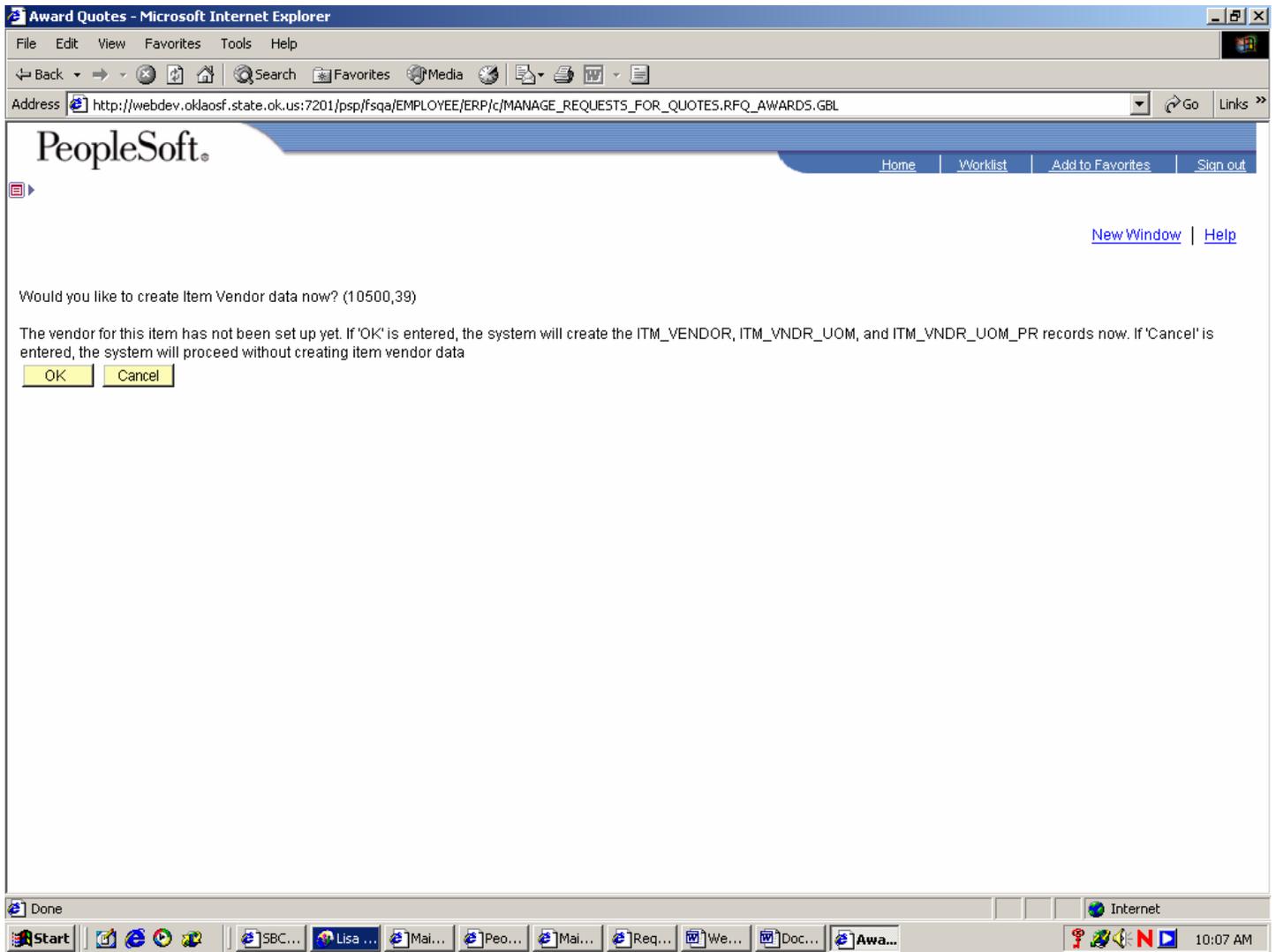
Line	Item	Description	UOM	Quantity	Price	Curr	Due Date	Lead Time	Terms	Freight Trm
1	04856810005	Structural polyethylene mop bucket - w/o casters w/wet floor imprint, color: caution yellow 16 qt. oval 11-9/16" x 13-7/8" x 12-1/4"	EA	23.0000	1.00000	USD		00		FOB DEST

Vendor	Location	Short Vndr Name	Qty Award	UOM	Price	Curr	Quantity	Due Date	Lead Time	Terms	Freight Trm
<input type="checkbox"/>	0000013189 0002	CALICO IND	23	EA	22.00000	USD	23.0000		00	FOB DEST	+ -
<input type="checkbox"/>	0000017468 0002	WW GRAINGE		EA	25.00000	USD	23.0000		00	FOB DEST	+ -

Total Qty Awarded: 0.0000 **Order Qty:** 0.0000

[Document Status](#)

Tab. This will bring up the message regarding creating an item/vendor/uom relationship. If it doesn't, it may already have the relationship created from previous awards.



Click OK.

Go to next line and enter quantity awarded for vendor(s).
Tab. If receive vendor/item/uom message, click OK.

Once you have completed the award, click Save.

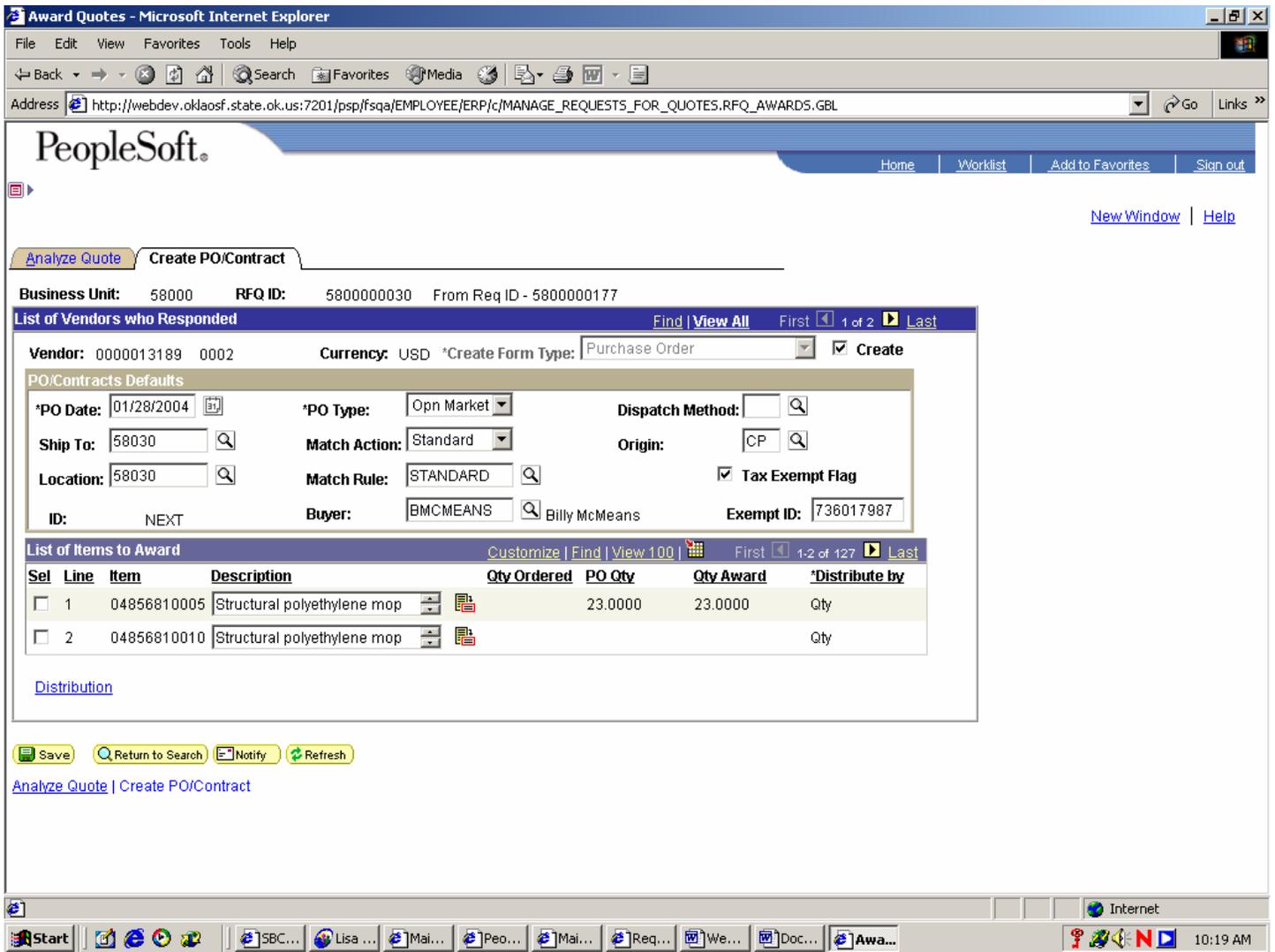
Go to “Create PO/Contract” tab.

All vendors will appear for each line (even if not awarded in the “Analyze Quote” page).

Scroll to awarded vendor – awarded lines will appear under “List of Items to Award” with an awarded amount under “Qty Award”.

“Create Form Type” will be Purchase Order.

Check “Create” box.



Verify Ship To, Location, Origin, and Buyer.

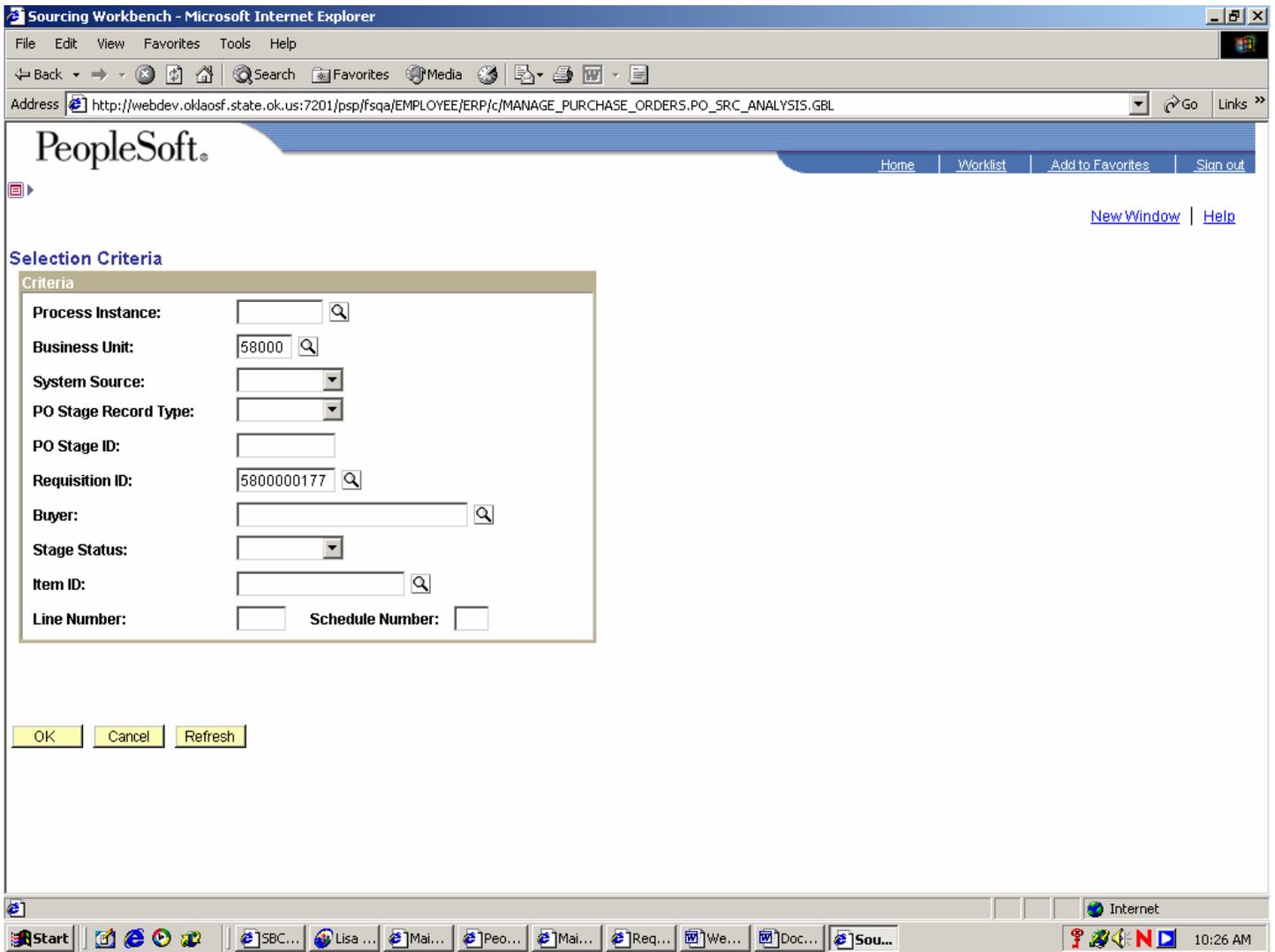
If RFQ was copied from Requisition, you shouldn't have to worry about the Distribution. If it was a Direct RFQ and Distribution information was not entered, you must select the awarded line by checking the "Sel" box and click "Distribution". Enter a valid distribution line. You will have to do this for each awarded line.

Once you have awarded all vendors, click Save. Do NOT save after each vendor.

Go to Sourcing Workbench:

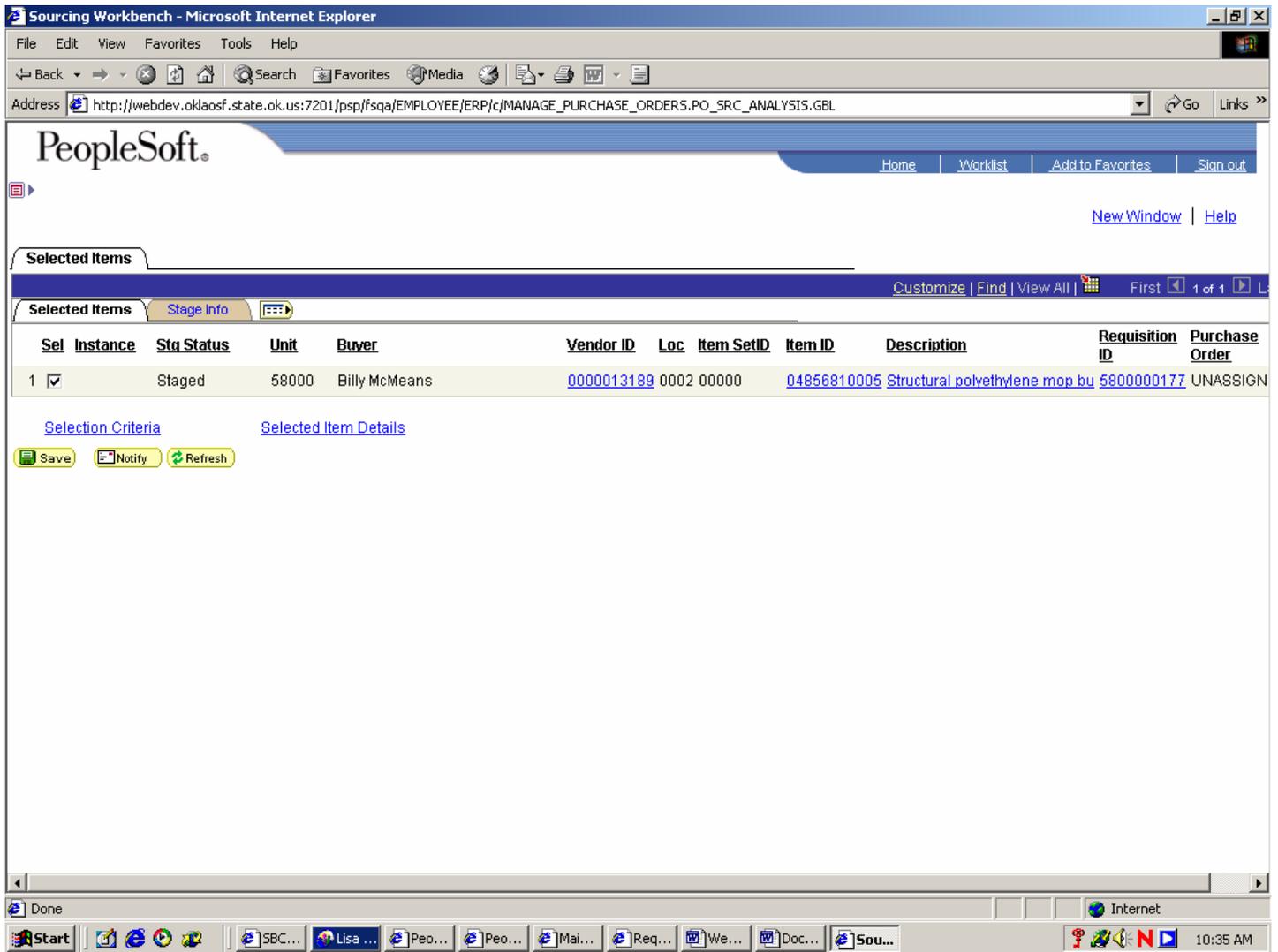
Navigation: Purchasing, Purchase Orders, Build/Source POs, Sourcing Workbench.

Enter Business Unit and Requisition Number



Click OK.

Verify Staging Status is “Staged”.



Go to PO Calc:

Navigation: Purchasing, Purchase Orders, Build/Source POs, PO Calculation

Find an Existing Run Control ID (if none, click on Add a New Value and create ID)

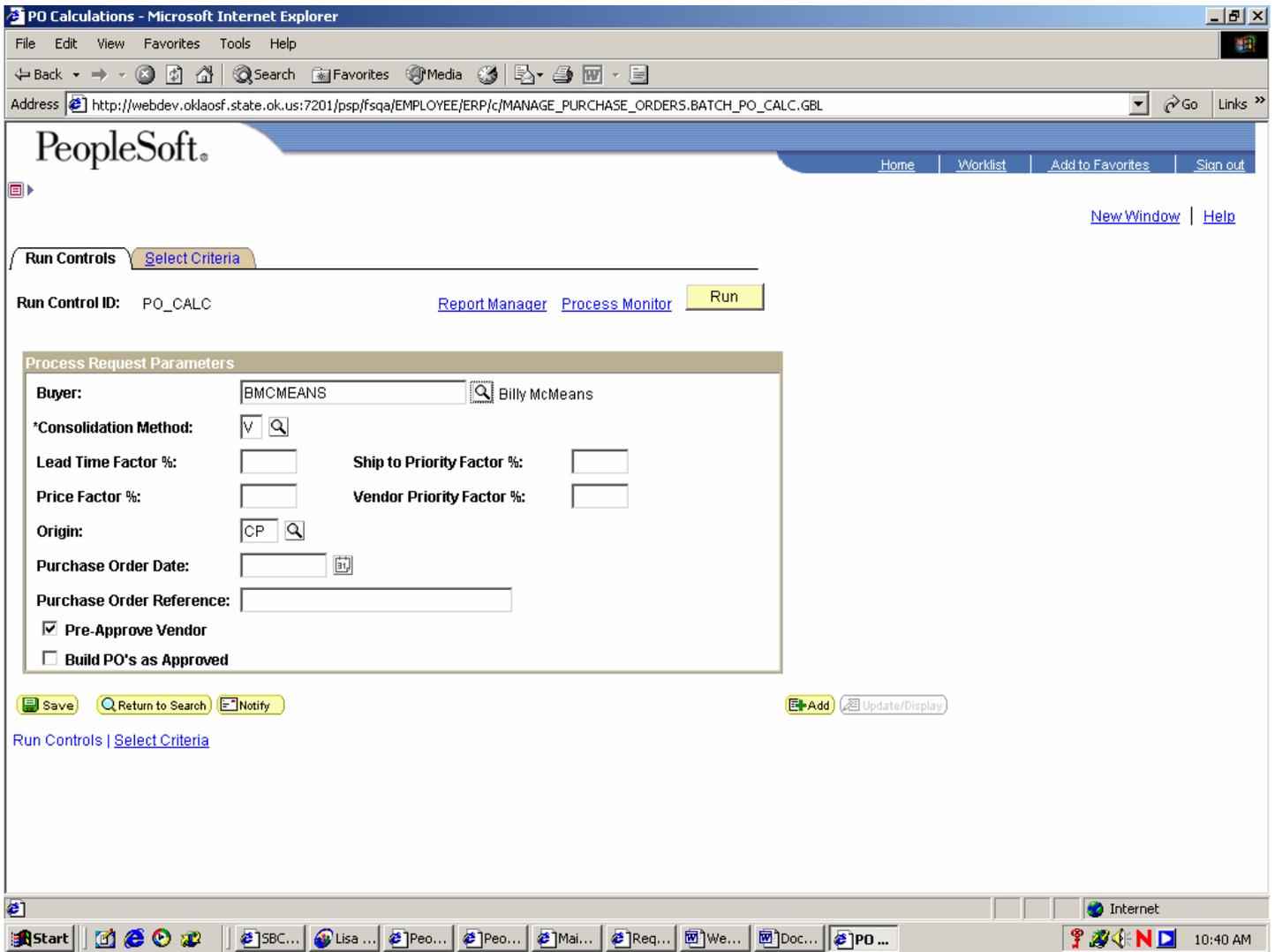
Under “Run Control Tab”

Enter Buyer name as listed in Sourcing Workbench

Enter Consolidation Method “V”

Enter Origin – must be same as in “Create PO/Contract” page.

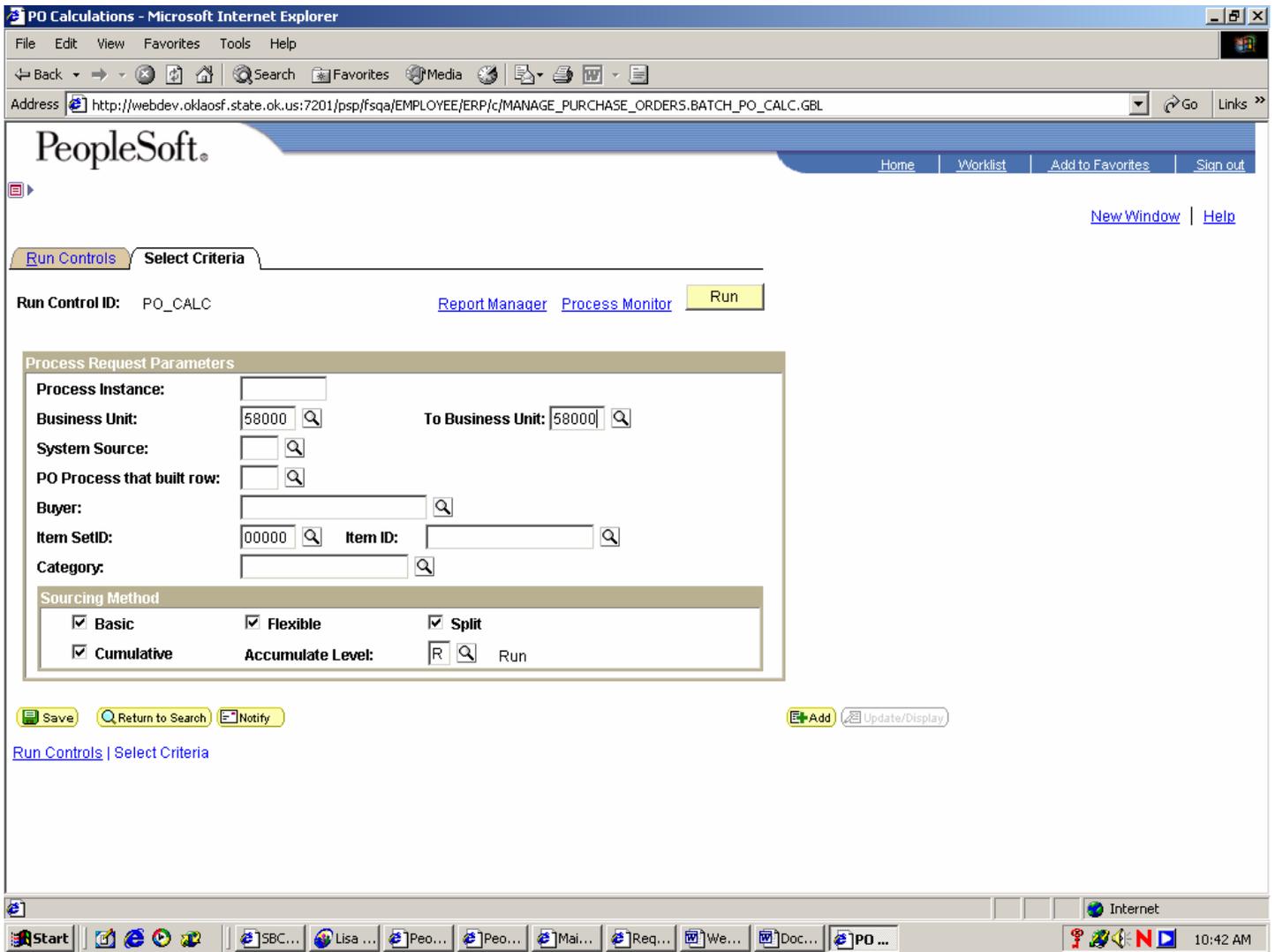
Check box for “Pre-Approve Vendor”



Go to “Select Criteria Tab”

Enter Business Unit “From” and “To”

SetId of “00000” and mark all boxes under “Sourcing Method” and “R” in “Accumulate Level”

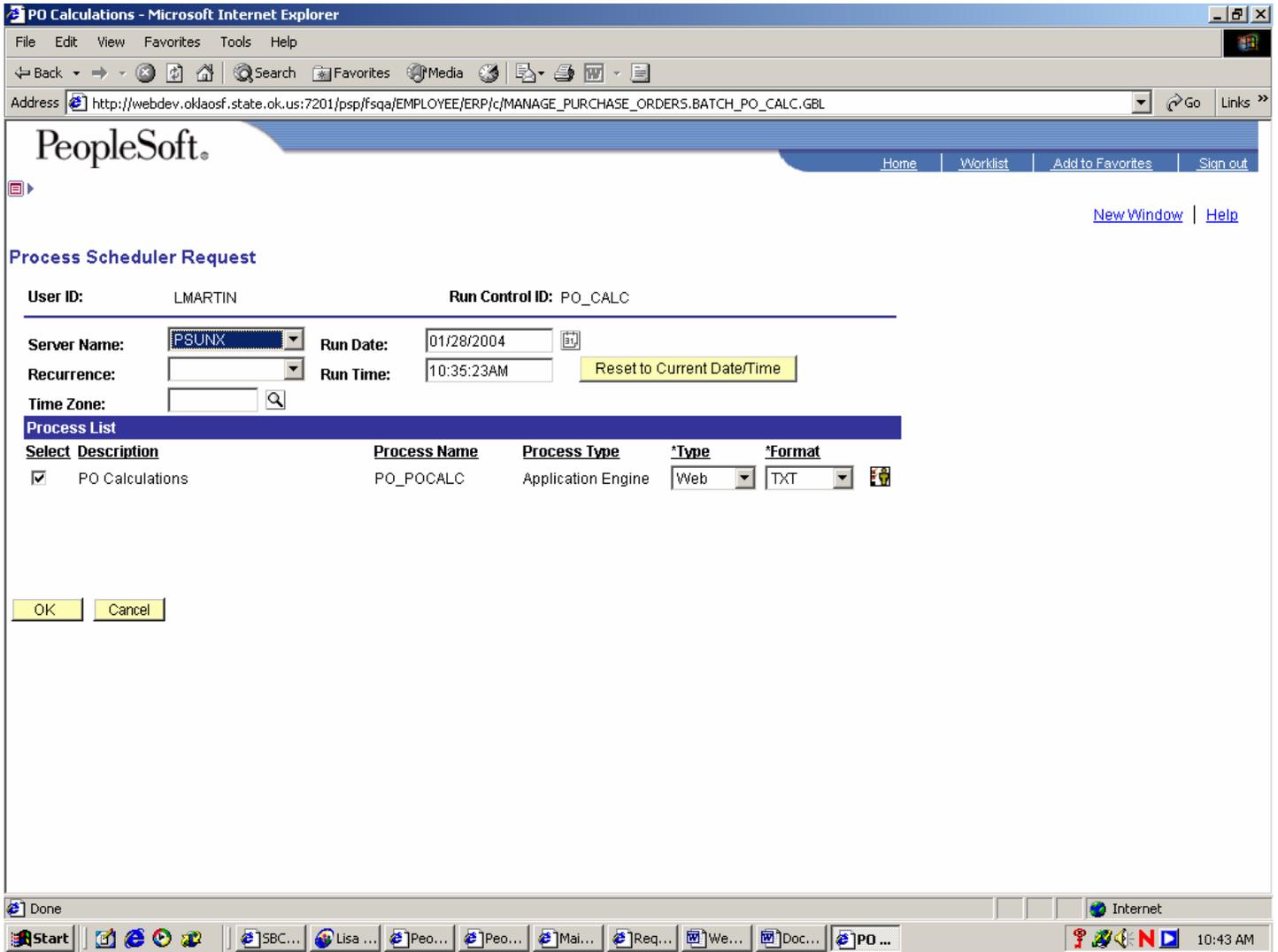


Click Save.

Click Run

Server Name is PSUNX

Select box "PO Calculations" with Type of "Web" and Format of "TXT"



Click OK.

Note Process Instance Number and click on Process Monitor.
Click Refresh until Run Status is "Success"

PO Calculations - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://webdev.oklaosf.state.ok.us:7201/psp/fsqa/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.BATCH_PO_CALC.GBL

PeopleSoft. Home Worklist Add to Favorites Sign out

New Window Help

Process List Server List

View Process Request For

User ID: LMARTIN Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Save On Refresh

Customize Find View All First 1 of 1 Last

Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
225169		Application Engine	PO_POCALC	LMARTIN	01/28/2004 10:35:23AM CST	Success	Details

Go back to PO Calculations

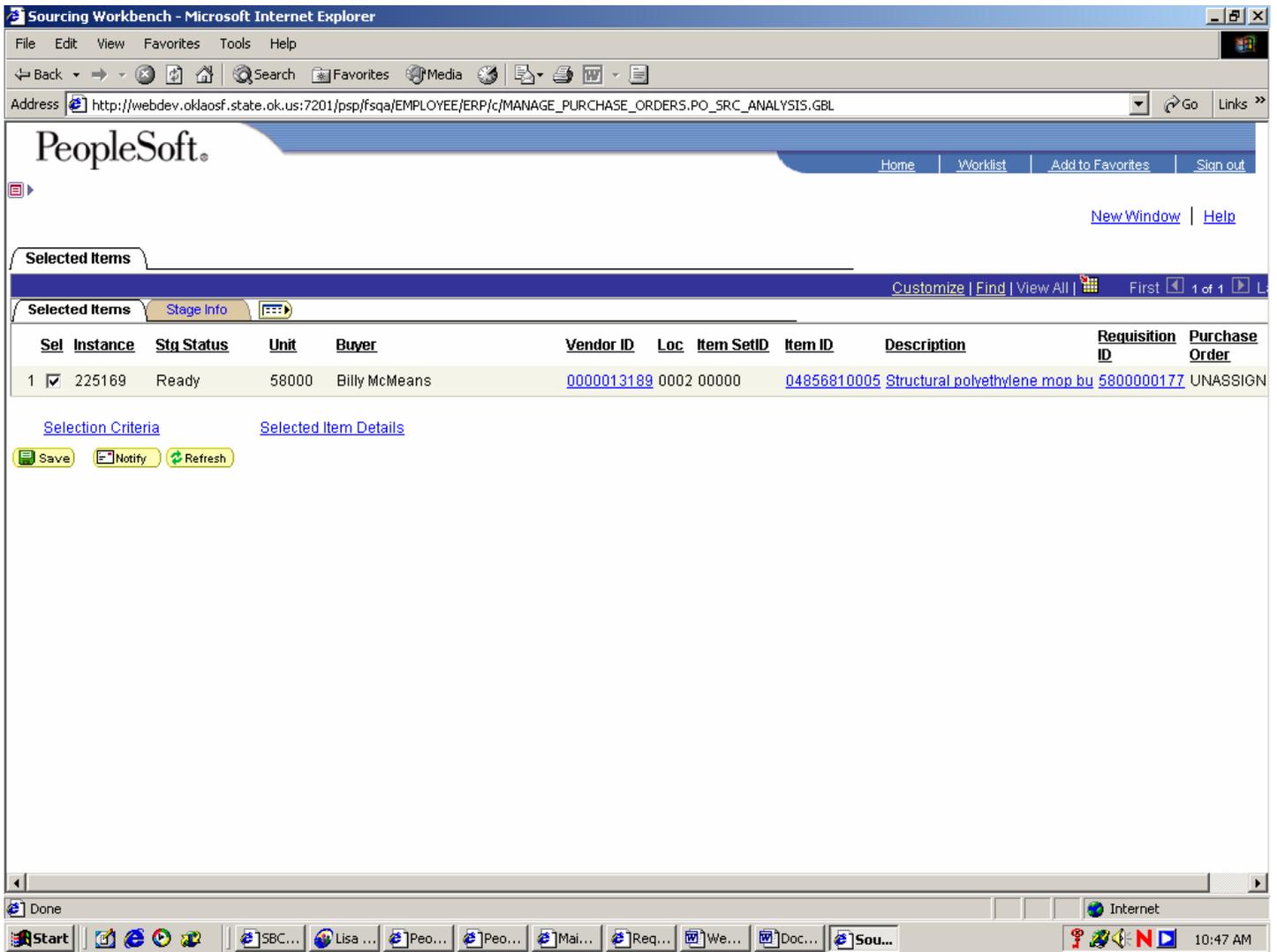
Save Notify

Process List Server List

Process Instance: 225169

Start SBC... Lisa ... Peo... Peo... Mai... Req... We... Doc... PO ... Internet 10:46 AM

Go to Sourcing Workbench (Purchasing, Purchase Orders, Build/Source POs, Sourcing Workbench)
 Verify Stage Status is "Ready"



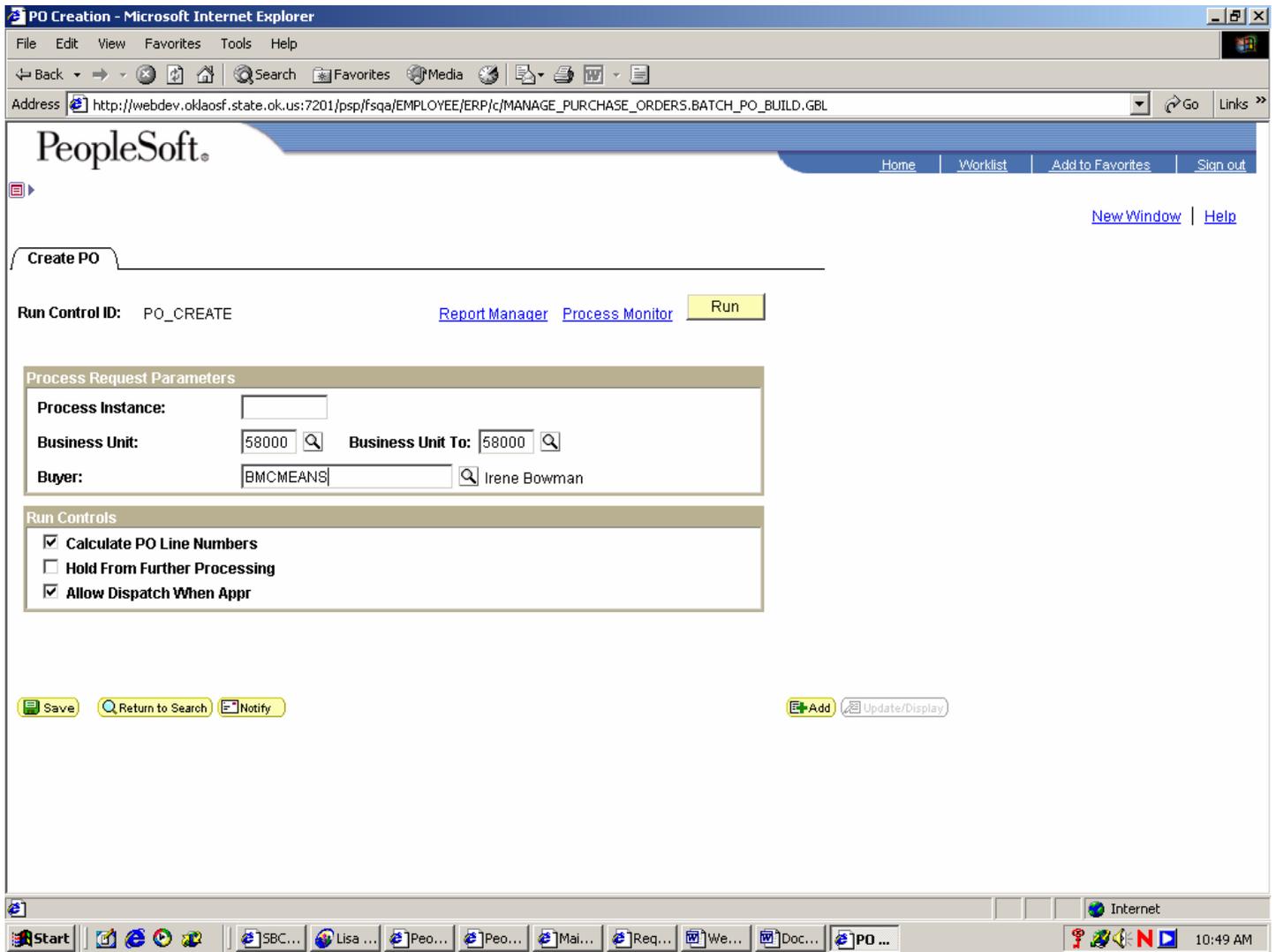
Go to PO Create

Navigation: Purchasing, Purchase Orders, Build/Source POs, PO Creation

Find an Existing Run Control ID, if none, create one under Add a New Value

Enter Business Unit “From” and “To” and Enter Buyer

Check “Calculate PO Line Numbers” and “Allow Dispatch when Appr”



Click Save.

Click Run.

Server Name is PSUNX

Check “Create Purchase Orders” with Type of “Web” and Format of “TXT”

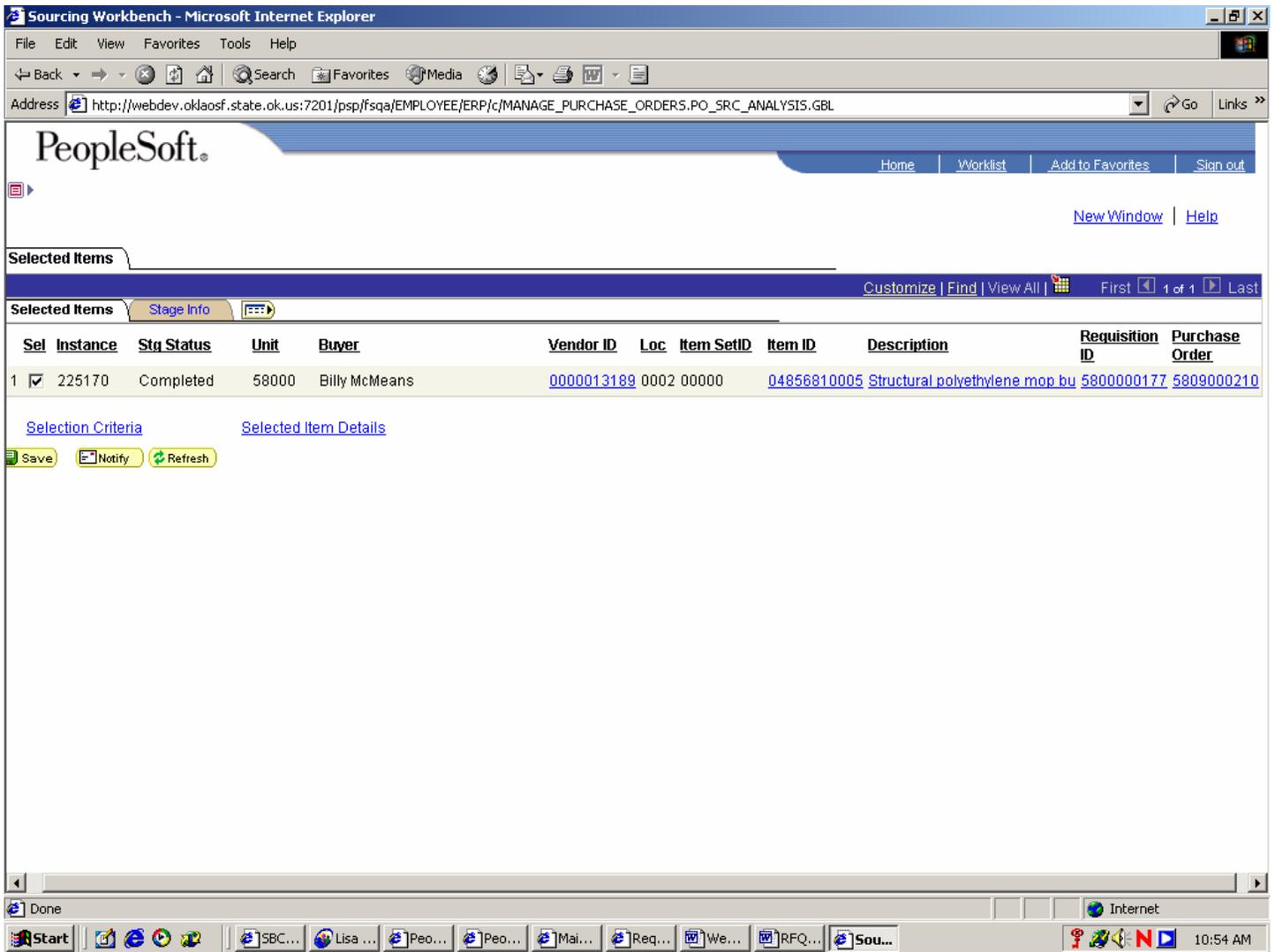
Click OK

Note Process Instance Number and Click on Process Monitor.

Click Refresh until Run Status is “Success”

Go back to Sourcing Workbench (Purchasing, Purchase Orders, Build/Source POs, Sourcing Workbench)

Stage Status should be “Completed”. Scroll to the right and click on PO number (blue hyperlink)



This will take you to your PO for changes and additions.

After changes/additions are made, click save and click the green arrow button to change PO Status from “Open” to “Pend Appr” and Budget Check. Go to Approve Amounts and Approve.



PO Form Schedule

Unit: 58000 PO: 5809000210 *PO Date: 01/28/2004
Vendor: CALICO IND-001 *ID: 0000013189 *Buyer: BMCMEANS
PO Status: Pend Appr Receipt: Not Recvd Budget Status: Valid Doc Tol Status: Valid

Table with columns: Sel Line Item, SS Flag, Line Sole Source Type, Description, Agency Req Nbr, PO Qty, UOM, Category, Amount. Row 1: 1 04856810005, Structural polyethylene mop bucket - w/o casters w/wet floor imprint, color: caution yellow 16 qt. oval 11-9/16" x 13-7/8" x 12-1/4"

Merchandise: 506.00 Adj Amt: 0.00 Total Amount: 506.00 USD Backorder Status: None

*Go to: Header Details Defaults Item Search Header Comments... Line Details Requisitions
Copy From Kit Catalog Line Comments... More ...
Import Agency Req. & Sole Source Info.

Save Return to Search Notify Refresh

PO Form | Schedule