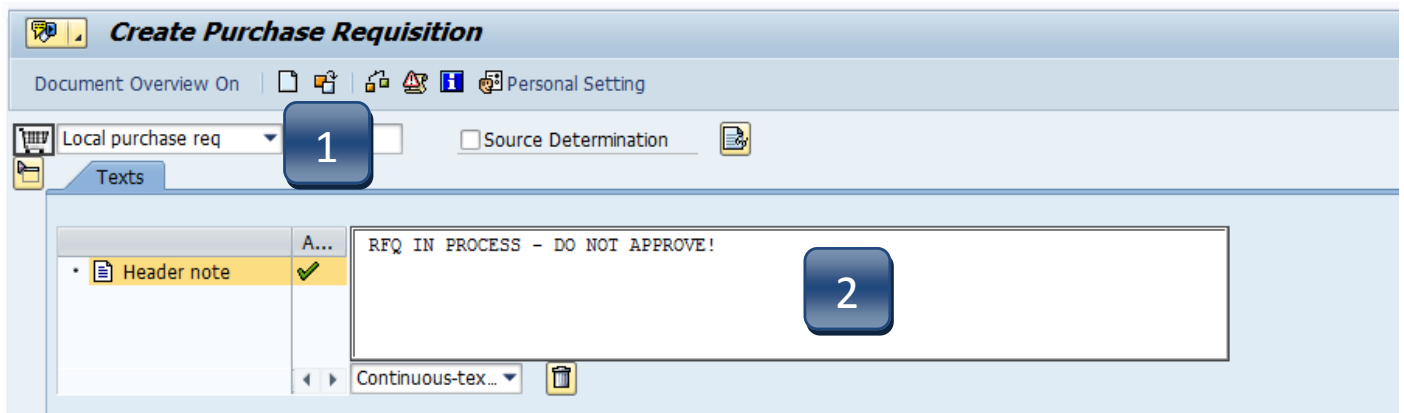


Create an RFQ - Requisition Creation

The entire RFQ process can be completed in the SAP web portal. Some actions can be completed in SAP GUI but other parts require completion in the Portal, as you cannot print the RFQ in GUI.

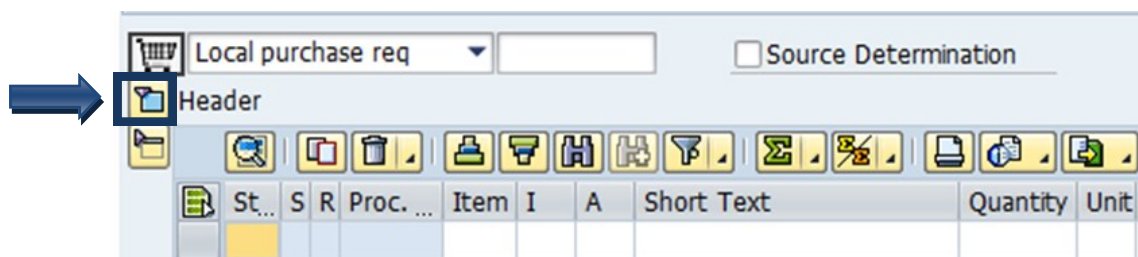
STEP 1: Create either a **LOCAL** or standard **FRAMEWORK** requisition.

****RFQs cannot be generated from a Limit Framework requisition. After you have completed the RFQ process, you can trash the line and create a second line if a Limit Framework is necessary.**



STEP 2: In **Header note** section, state that an RFQ is in process so the Account Manager *will not* approve the requisition.

****If header section is not visible, click **Expand Header** button to display.**



Create an RFQ - Requisition Creation

St...	R	Proc. ...	Item	I	A	Short Text	Quantity	Unit	Val. Pri...	Σ	Total Value
			10		K	2 inch widgets	1,000	EA	1.00		1,000.00

STEP 1: A (Account Assignment Category) column: Depending on your funding, enter **A (Asset)**, **K (Cost Center)**, **F (Internal Order)**, or **S (Statistical Order)** for each line item. (Use down arrow on keyboard to move between lines.)

STEP 2: Short Text column: Enter item short text. (What you are purchasing.)

STEP 3: Quantity column: Enter quantity. (1 if using AU as Unit of Measure.)

STEP 4: Unit of Measure column: Enter unit of measure code. If unknown, use the database search for available options. (Click the button in the lower right corner of the field.)

STEP 5: Valuation Price column: Enter **\$1.00**.

Create an RFQ - Requisition Creation

GR	Matl Group	PC...	PGr	Des.Vendor	Mi...	Deliv. Date	POrg	Stor. Loc.
<input checked="" type="checkbox"/>	Goods, Supp		RFQ	700015		12/23/2013	7540	Purchasing
<input type="checkbox"/>			CPO					
<input type="checkbox"/>			CPO					

6 7 8 9 10 11 12

STEP 6: GR column: Box should be checked for GOODS, unchecked for SERVICES.

STEP 7: Material Group column: Enter **G1** for Goods, Supplies, & Equipment or **S1** for Services. Use the database search for additional options.

STEP 8: PGr column: Change from CPO to **RFQ**.

STEP 9: Desired Vendor column: Enter generic vendor number **700015**

STEP 10: Delivery Date column: Enter date goods will be delivered or services completed. **(mm/dd/yyyy)**

STEP 11: POrg column: Enter **7540** for *each* line.

STEP 12: Storage Location column: Use the database search to select the storage location if you do not know the code for the location.

****If you have more than one line item, move to the next line using the down arrow on your keyboard and repeat STEPS 1-12 as many times as necessary.**

STEP 13: Hit **ENTER** on your keyboard to generate the **Item Tabs** section.

Create an RFQ - Requisition Creation

Item [10] 2 inch widgets

Material Data | Quantities/Dates | Valuation | **Account Assignment** | Source of Supply | Status

AccAssCat Cost cente Distribution Single account a: CoCode Texas Sta

Unloading Point Recipient

G/L Account 730000

CO Area 754

Cost Center 14131500

Fund 20000110 Grant NOT_RELEVANT_FOR

Functional Area 1800

Funds Center 1413150000

Earmarked Funds Commitment Item 730000

14

STEP 14: Enter **GL and account information** in the Account Assignment tab for each line item.

STEP 15: Click **Save**. Make note of the requisition number generated in the bottom left corner of the screen.



Create RFQ



It is *imperative* that the following 16 steps are completed in the **WEB PORTAL**. If this section is executed in *GUI*, your PDF will not generate.

Create RFQ : Initial Screen

Menu Back Exit Cancel System Overview Header Details Copy Document **Reference to PReq**

RFQ Type AN
Language Key EN
RFQ Date 11/18/20
2 Quotation Deadline 12/15/2013

3 Organizational Data
Purch. Organization 754
Purchasing Group RFQ

Default Data for Items
Item Category
Delivery Date
Plant 754
Storage Location
Material Group
Req. Tracking Number

STEP 1: In the **SAP Web Portal**, enter transaction code **ME41**.

STEP 2: Enter **Quotation Deadline** date.
(Date the bids are due.)

STEP 3: Change **Purchasing Group** from CPO to **RFQ**.

STEP 4: Click **Reference to PReq** button.

STEP 5: Enter requisition number in **Purchase Req.** field.

STEP 6: Click the **green check** button.

Selection of Purchase Requisitions

Purchase Req. 10057865 **5**
Requisition Item
Purch. Group RFQ
Document Type
Material
MPN Material
Plant
Item Category
Acct Assgt Cat.
Tracking Number
Supplying Plant
 Assigned
 Stock material
 Open only

6

Create RFQ

STEP 7: Enter the **Coll. No.** This will be your initials followed by the requisition number. Hit **Enter** on your keyboard.

Create RFQ : Header Data

Menu Save Back Exit Cancel System Overview Header T

RFQ Company Code 754 Purchasing Group RFQ
 RFQ Type AN Purch. Organization 754
 Vendor

Administrative Fields

RFQ Date 11/18/20: Item Interval 10 **Coll. No. jnl05786!**
 Language EN Subitem Interv. 1 QuotDdln 12/15/20:
 Validity Start Validity End Apply By
 Warranty Bindg Per.

Terms of Delivery and Payment

Targ. Val.

Reference Data

Your Reference Salesperson
 Our Reference Telephone

STEP 8: Click **Select All Items**.

STEP 9: Click **Adopt + Details**.

Create RFQ : Selection List: Purchase Requisitions

Menu Back Exit Cancel System **Adopt + Details** Adopt **Select All Items** Select All

Pur. Req.	Item	Material	Short Text	Plnt	SLoc	I	A	Cls	Qty	Un C	Deliv. Date	Rel. Date
10057865	10		2 inch widgets	754	JCK	<input type="checkbox"/>	K	<input type="checkbox"/>	1,000.000	EA	12/23/2013	12/23/2013

STEP 10: Click **Next** button until you are back at the **Create RFQ Item Overview** screen.

Create RFQ : Item 00010

Menu Save Back Exit Cancel System **Next** delete Over

Item 10 ItCat.
 Material Mat. Grp G1
 Short Text 2 inch widgets

Quantity and Date

RFQ Quantity 1,000 EA QuotDdln 12/15/20:
 Delivery Date 12/23/20:

Deadline Monitoring

1st Rem./Exped. TrackingNo
 2nd Rem./Exped. V. Mat.
 3rd Rem./Exped.
 No. Exped. 0

Create RFQ

STEP 11: Click **Header Details**. (This option may be located under the **More** button.)

Create RFQ : Item Overview

Menu Save Back Exit Cancel System Select All Items Deselect All Select Start/End of Block Enter Lines Delete **Header Details**

RFQ RFQ Type AN RFQ Date 11/18/20: Vendor QuotDdln 12/15/20:

RFQ Items

Item	I	Material	Short Text	RFQ Quantity	OU	C	Deliv. Date	Mat. Grp	Plnt	S	Loc	D	Tex
10			2 inch widgets	1.000	EA		12/23/2013	G1	754	JCK			

11

STEP 12: Click **Header Texts**.

Create RFQ : Header Data

Menu Save Back Exit Cancel System Overview **Header Texts**

RFQ Company Code 754 Purchasing Group RFQ RFQ Type AN Purch. Organization 754 Vendor

Administrative Fields

RFQ Date 11/18/20: Item Interval 10 Coll. No. JN105786: Language EN Subitem Interv. 1 QuotDdln 12/15/20: Validity Start Validity End Apply By Warranty Bindg Per.

12

STEP 13: Click **Long Text Screen**.

Create RFQ : Header Texts

Menu Save Back Exit Cancel System **Long Text Screen**

Purchasing Doc. Company Code 754 Purchasing Group Vendor Document Type AN Purch. Organization

13

Create RFQ

- STEP 14:**
- A.** Enter any message you want the respondents to know; this will appear on the RFQ.
 - B.** If you use more than one line, enter the **+ sign** in the space next to the subsequent lines.
 - C.** Leave the ***** on the first line.
 - D.** Click the **Back** button until you get to **Item Overview**.

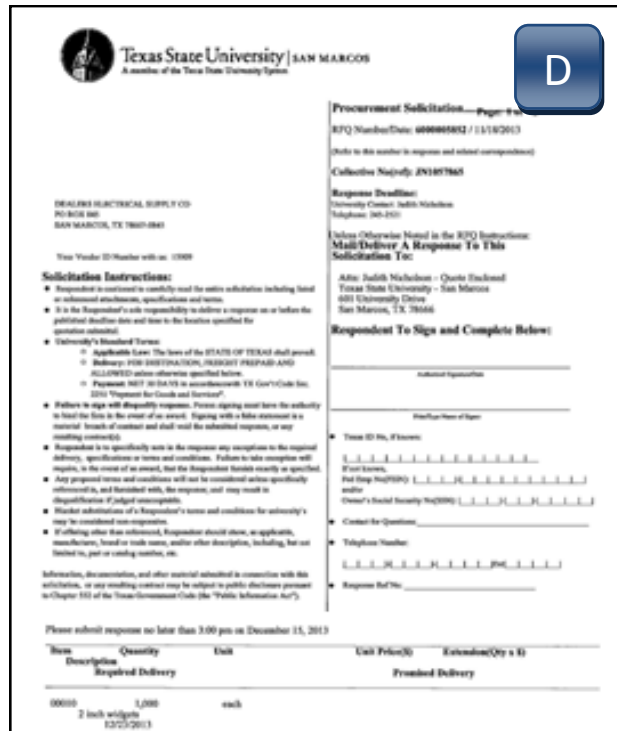
- STEP 15:** Click **Vendor Address**. (This option may be located under the **More** button.)

STEP 16:

- A.** Type in vendor number and hit **Enter** on your keyboard.
- B.** If vendor is *not* in SAP, enter a [generic vendor](#) number in the Vendor field and type in their **Name/Address** information. Hit **Enter** on your keyboard.
- C.** Click **Save**.
(A PDF of the RFQ will generate.)

Create RFQ

- STEP 16:** D. Print or Save this RFQ and close PDF. This is what you will send to the vendors along with your specifications (if any). Do this for all vendors you wish to solicit.
- E. Click Exit button in the Create RFQ screen to get back to the menu screen.



Create RFQ : Vendor Address

Menu | Save | Back | **Exit** | Cancel | System | Overview | Header D

RFQ: [] Company Code: [] Purch. Group: RFQ
 RFQ Date: 11/18/20 RFQ Type: [] Purchasing Org.: 754
 Vendor: 15909

Name

Title: []
 Name: DEALERS ELECTRICAL SUPPLY CO

Search Terms

Search term 1/2: DEALERS ELECTRIC

Street Address

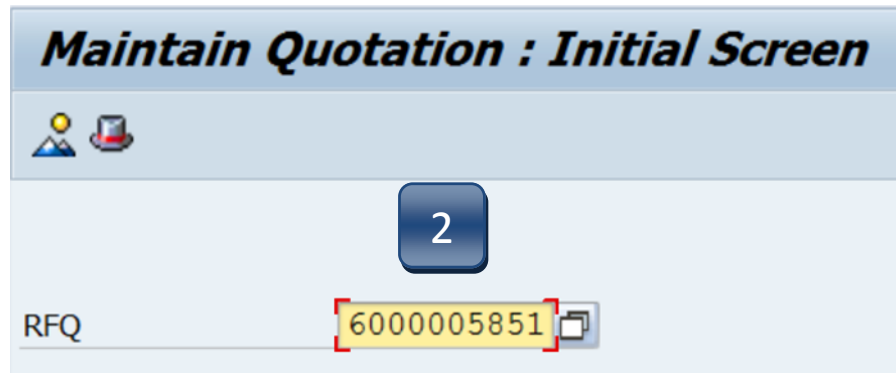
House no./street: PO BOX 845
 City/State/ZIP Code: SAN MARCOS TX 78667-08
 Country: US USA Texas
 Time zone: CST

A blue box with the letter 'E' is overlaid on the 'Exit' button in the top navigation bar.

Create an RFQ - Maintain Quote

STEP 1: In the SAP Portal or GUI, enter transaction code **ME47**.

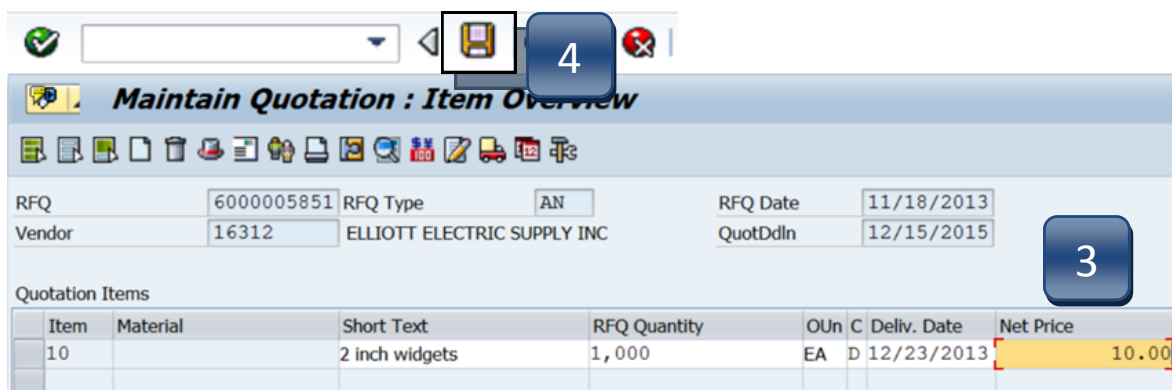
STEP 2: In the **RFQ** field, enter one of the RFQ numbers and hit **Enter** on your keyboard.



STEP 3: Enter the amount of the bid in the **Net Price** column. This will include shipping, if applicable.

****If there is a "no Bid," enter \$1.00.**

STEP 4: Click **Save**.




****Repeat steps 1 - 4 until all RFQ responses have been entered.****

Create an RFQ - Price Comparisons

- STEP 1:** In the SAP Portal or GUI, enter transaction code **ME49**.
- STEP 2:** In the **Collective RFQ** field, enter the Collective number.
- STEP 3:** Click **Execute**.

Price Comparison List

 **3**

Purchasing Organization: 7540

Quotation:

Collective RFQ: **2**

Vendor:

Material:

- STEP 4:** Double click in the area where the bid is.

Price Comparison List in Currency USD

Navigation icons: Quotation, Vendor, Additional Info

Material Mat. Group	Quot.:	6000005854	6000005856	6000005855
Sh. Text	Bidder:	16312	502232	15909
Qty. in Base Unit	Coll. No. :	JN10057866	JN10057866	JN10057866
G1	Val.:	10,000.00	11,250.00	12,500.00
2 inch widgets	Price	10.00	11.25	12.50
1,000 EA	Rank:	89 % 1	100 % 2	111 % 3
Total Quot.	Val.:	10,000.00	11,250.00	12,500.00
	Rank:	89 % 1	100 % 2	111 % 3

Create an RFQ - Price Comparisons

STEP 5: Click the selection box next to **Quot. Comment** field and choose one of the options from the pop-up menu.

****For the vendor that will be awarded, choose one of the OK options.**

****For vendors not awarded, choose one of the rejection reasons from the options and check the **Rej. Ind. Box**.**

STEP 6: Click **Save**.

STEP 7: Follow **STEPS 4-6** for all other vendors.

The screenshot shows the SAP 'Maintain Quotation' interface. A blue box with the number '6' highlights the 'Save' icon in the top toolbar. A blue box with the number '5' highlights the 'Quot. Comment' field, which contains 'OK1'. Below it, another blue box with the number '5' highlights the 'Rej. Ind.' checkbox, which is currently unchecked. A blue arrow points from the 'Rej. Ind.' checkbox to a pop-up menu titled 'Internal Comment on Quotation (1)'. This menu lists various options for internal comments, including rejection reasons (AB1-AB4) and OK options (OK1-OK4). The 'OK1' option is highlighted in yellow in the pop-up menu.

Item: 6000005851 | 10 ItCat. Plant: 7540
Material Mat. Grp: G1 Stor. Loc.: JCKP
Short Text: 2 inch widgets
Quantity and Date: RFQ Quantity: 1,000 EA QuotDdn: 12/15/2013
Delivery Date: D 12/23/2013
Deadline Monitoring: 1st Rem./Exped., 2nd Rem./Exped., 3rd Rem./Exped., No. Exped.: 0
Quotation Data: Net Order Price: 10.00 USD / 1 EA Qty Conv.: 1 EA <-> 1 EA
Quot. Comment: OK1
Rej. Ind.

Internal Comment on Quotation (1)
Restrictions
Qu Internal comment: Descr.
AB1 Rejection for price reasons
AB2 Rejection for quality reasons
AB3 Rejection for delivery reasons
AB4 Reject - See quote header note
OK1 OK on price grounds
OK2 OK on quality grounds
OK3 OK on delivery grounds
OK4 OK - See quote header note
VNB Vendor "No Bid"
VNR Vendor did not respond

Create an RFQ - Review & Revise RFQ

REVIEW

STEP 1: Enter transaction code **ME4S**.

STEP 2: Enter the **Collective number**.

STEP 3: Change **Purchasing Group** from CPO to **RFQ**.

STEP 4: Click **Execute**.
You will then see all of the respondents & their pricing.

RFQs per Collective Number

4

Collective number: jn1057865 (2)

Purchasing organization: 7540

Scope of List: ANFR

Selection Parameters:

Document Type:

Purchasing Group: RFQ (3)

Plant: 7540

RFQs per Collective Number

Print Preview Changes Delivery Schedule Services

RFQ	Type	Vendor	Name	Date
Item	Material		Short Text	Group
D I S	Plnt	Quot. Date	RFQ Quantity Un	Quot.Net Price
6000005851	AN	16312	ELLIOTT ELECTRIC SUPPLY INC	RFQ 11/18/2013
Collective RFQ JN1057865				
00010			2 inch widgets	G1
A	7540	12/15/2013	1,000 EA	10.00 USD 1 EA
6000005852	AN	15909	DEALERS ELECTRICAL SUPPLY CO	RFQ 11/18/2013
Collective RFQ JN1057865				
00010			2 inch widgets	G1
A	7540	12/15/2013	1,000 EA	12.50 USD 1 EA
6000005853	AN	502232	KST ELECTRIC, LTD	RFQ 11/18/2013
Collective RFQ JN1057865				
00010			2 inch widgets	G1
A	7540	12/15/2013	1,000 EA	11.25 USD 1 EA

4

REVISE

STEP 1: Enter transaction code **ME42**.

STEP 2: Enter the RFQ number you wish to revise & hit **enter** on your keyboard. You can enter additional information (payment, shipping terms) in the **Header Detail** option or revise any other data.

STEP 3: Click **Save**.

RFQ: [] (2)

3

Change RFQ - Item Overview

RFQ: 6000005851 RFQ Type: AN

Vendor: 16312 ELLIOTT ELECTRIC SUPPLY INC

RFQ Items

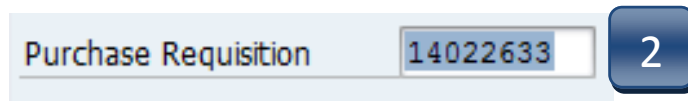
Item	I	Material	Short Text	RFQ C
10			2 inch widgets	

2

Create an RFQ - Update Requisition & Finish

STEP 1: Enter transaction code **ME53**.

STEP 2: Type in requisition number and hit **Enter** on your keyboard.

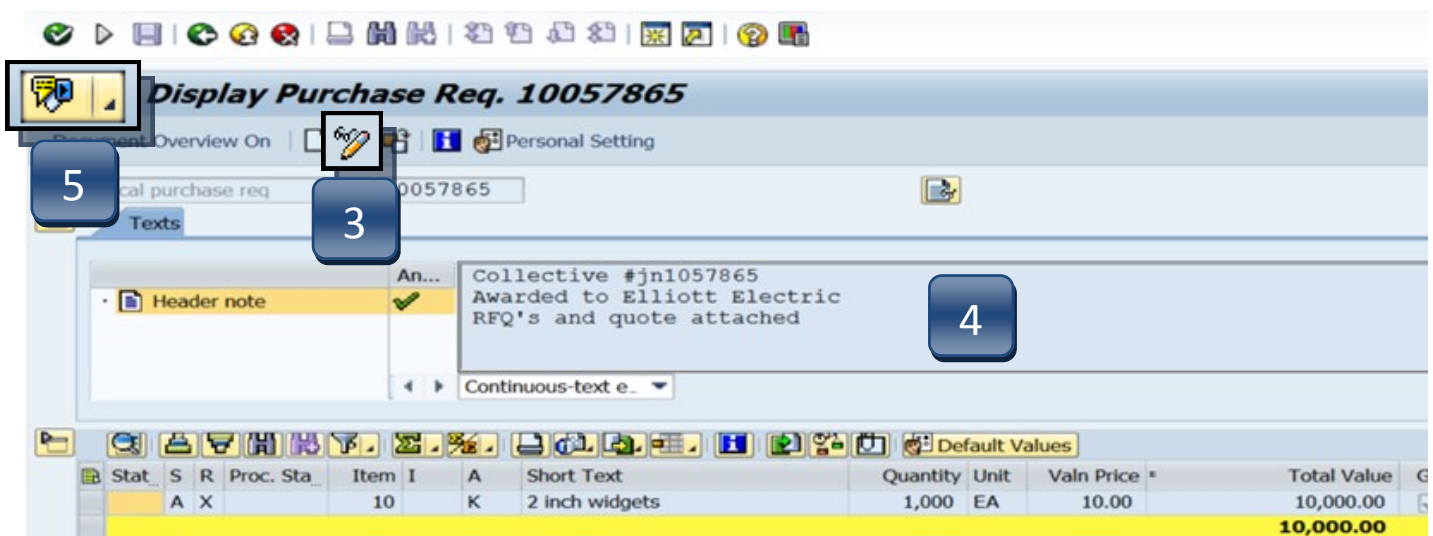


Purchase Requisition 14022633

2

STEP 3: Click **Display/Change** button to open requisition for editing.

STEP 4: In the **Header note** section, enter the **Collective Number, Vendor Awarded**, and that the **RFQs and Quote** are attached.



Display Purchase Req. 10057865

5

3

4

Header note

An... Collective #jn1057865
Awarded to Elliott Electric
RFQ's and quote attached

Stat	S	R	Proc. Sta	Item I	A	Short Text	Quantity	Unit	Valn Price *	Total Value
	A	X		10	K	2 inch widgets	1,000	EA	10.00	10,000.00
										10,000.00

STEP 5: Attach all RFQ documents to the requisition. If unsure how to attach documents to a requisition, see **Attaching Documents Section**.

Create an RFQ - Update Requisition & Finish

STEP 6: Verify that the correct **amount** and **vendor** have been brought forward and that the **PGr** is **CPO**.

The screenshot shows the SAP Purchase Requisition interface for document 10057865. A callout box with the number 8 points to the document title. The 'Texts' tab is active, showing a 'Header note' with the text: 'Collective #jnl057865', 'Awarded to Elliott Electric', and 'RFQ's and quote attached'. Below the text, a table displays summary information:

Stat..	Quantity	Unit	Valn Price	Total Value	GR	Material Group	PCC	PGr	Desired Vendor
	1,000	EA	10.00	10,000.00	<input checked="" type="checkbox"/>	Goods, Supp & E	99	CPO	16312
				10,000.00					

Callout boxes with the number 6 point to the 'Total Value' column and the 'PGr' and 'Desired Vendor' columns.

STEP 7: Add any additional information in the **Text tab**, such as special payments or shipping instructions.

The screenshot shows the 'Item Texts' tab in the SAP interface. A callout box with the number 7 points to the 'Texts' tab. The 'Item Texts' table contains the following entry:

Item Texts	An...
Item text	Special payment or shipping instructions
Item note	

STEP 8: Click **Save**.
Your requisition is now ready for approval by the Account Manager.

Reprint an RFQ

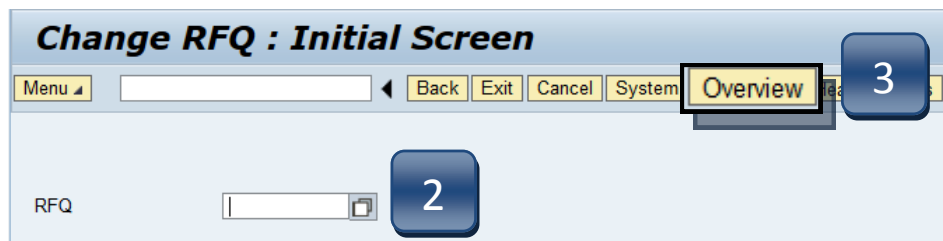


The following 10 steps must be completed in the **WEB PORTAL**.
If this section is executed in *GUI*, your PDF will not generate.

STEP 1: Enter transaction code **ME42** (change RFQ).

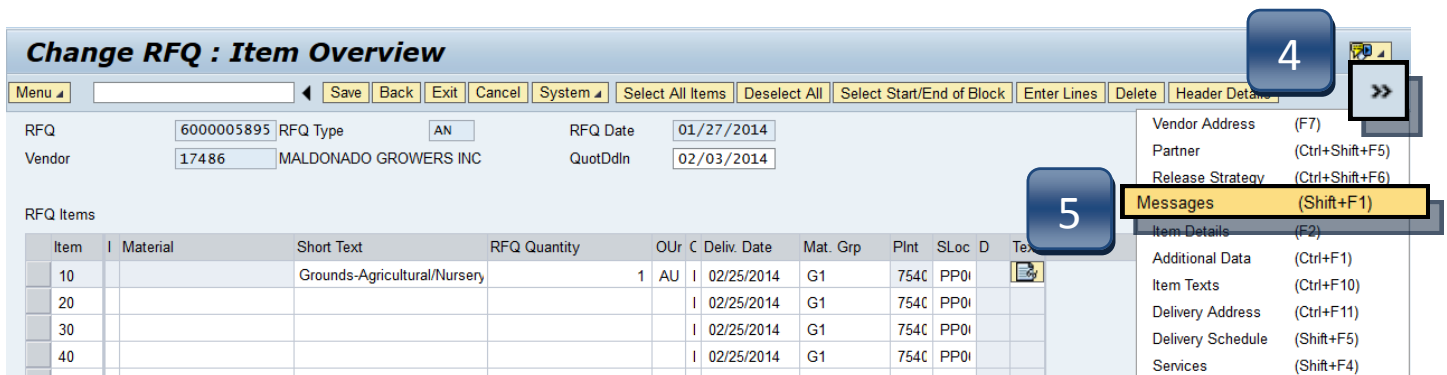
STEP 2: Enter RFQ number.

STEP 3: Select **Overview**.



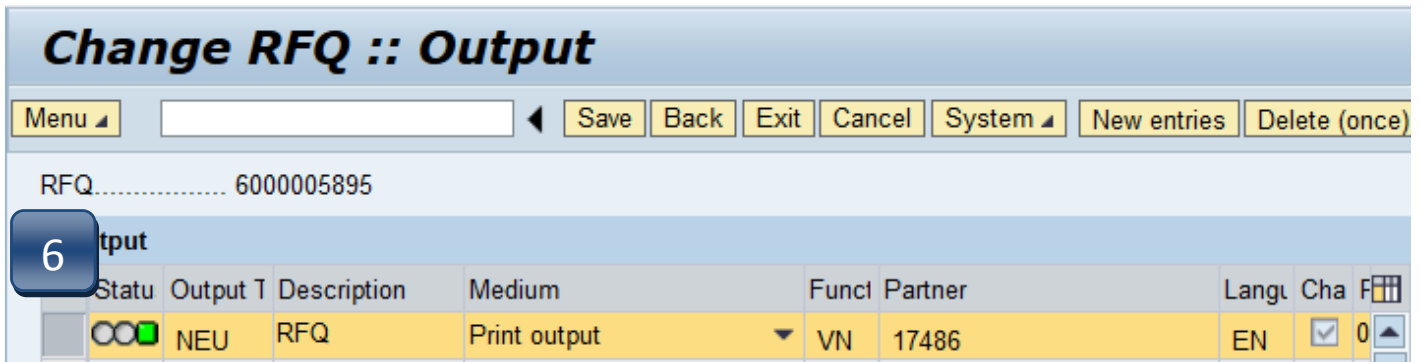
STEP 4: Select **More** (double arrow to the right of **Header Details** button).

STEP 5: Select **Messages**.



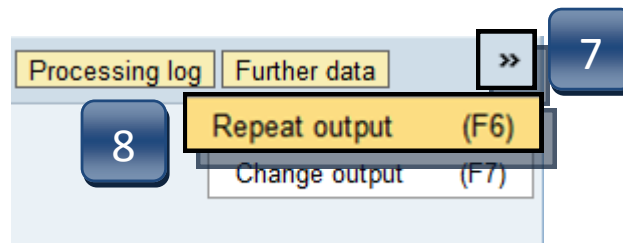
Reprint an RFQ

STEP 6: Highlight the line with the **green light**.



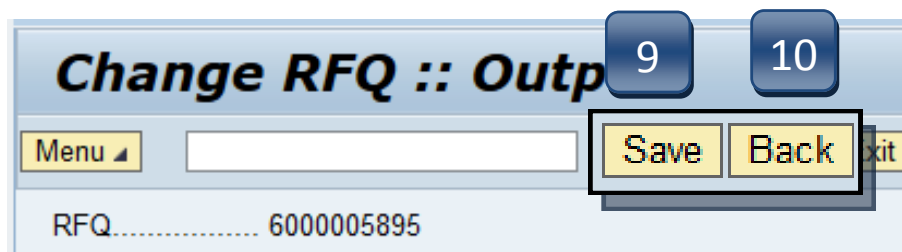
STEP 7: Select **More** (double arrow to the right of **Header Details** button).

STEP 8: Select **Repeat Output**.



STEP 9: Click **Save**. ****Wait 5-6 seconds.**

STEP 10: Click **Back** button until you get to the Main Menu. RFQ PDF should appear.



Create an RFQ - Generic Vendor Numbers

700005	Native American, Female Owned
700006	Native American, Male Owned
700007	Asian, Female Owned
700008	Asian, Male Owned
700009	Black, Female Owned
700010	Black, Male Owned
700011	Hispanic, Female Owned
700012	Hispanic, Male Owned
700013	Women Owned
700015	Not a HUB