

# Request for Quote System

SYSPRO 8

Reference Guide

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# Request for Quote System

## Exploring

### Where it fits in?

The **Request for Quote System** feature forms part of the procurement process and extends collaboration to your suppliers by automating the quote process and servicing of the RFQ by the supplier.

Suppliers are invited to bid or quote for products (stocked and non-stocked) as well as specific services. Once the potential supplier's quotation is received, it is either accepted (a purchase order can be created and submitted to the supplier) or rejected.

### Navigation

The programs related to this feature are accessed from the **Program List** pane of the SYSPRO menu:

- *Program List > Purchase Orders*

## Terminology

### Request for quote (RFQ)

A request for quote is a query presented to obtain pricing, delivery information and terms and conditions from potential suppliers. The business requirement is defined beforehand and the potential suppliers are provided with the complete specifications, required quantities and delivery schedule.

The RFQ has a closing date that is only extended if the requirements change.

# Starting

## Security

You can secure this feature by implementing a number of controls against the programs that are affected by this feature.

- You can restrict operator access to *activities* within a program (configured using the **Operator Maintenance** program).
- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).
- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **eSignature Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.
- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).
- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.

# Using

## Affected Programs

The following indicates areas in the product that may be affected by implementing this feature:

### **Request for Quote Review**

This is a new review program that lets you create RFQs per requisition line.

### **Request for Quote Maintenance**

This is a new program that lets you maintain the created RFQ and list of suppliers for bidding.

### **RFQ Supplier Portal**

This is a new program that lets the supplier submit quotes per applicable RFQ line.

### **Request for Quote Query**

This is a new program that lets you query RFQs and RFQ detail lines..

### **Request for Quote**

This is a new program that lets you browse RFQs.

### **Browse on Requisition Users**

The following columns have been added to the list view:

- Create RFQ
- RFQ User

### **Requisition Users**

The following fields have been added to the **User Maintenance** pane:

- Create RFQ
- Route to user to create RFQ

### **Requisition Query**

The following fields have been added on the **Originator Information** pane:

- Create RFQ
- User to route to for P/order creation

The following column has been added to the **Detail Lines** list view:

- RFQ

The following requisition status may be displayed in the **Status** column on the **Detail Lines** list view:

- RFQ created

## Requisition Entry

The following option has been added to the **Multiple Lines** option on the toolbar and the **Requisitions** list view:

- Approve for RFQ

The following requisition status code may be displayed in the **Status** column on the **Requisitions** list view:

- RFQ created
- Approved for RFQ

## Requisition Entry Maintenance

The following verification has been added to the program.

- You can't maintain a requisition and/or requisition line with a status of `RFQ Created (Q)`.
- You can still maintain a requisition and/or requisition line with a status of `Approved for RFQ (r)`.

## Purchase Order Query

The following columns have been added to the **Detail Lines** list view:

- RFQ reference
- RFQ user

## Requisition Purge

The following fields have been added to the **Purge options** section:

- Created and not approved yet
- Approved and submitted for bidding
- Completed
- Rejected

## Requisition Create Purchase Orders

The following field has been added to the **Requisition Line Details** pane:

- RFQ value for consideration

## AP Period End

This program has been updated to check whether a temporary supplier has any outstanding RFQs before the supplier can be deleted.

## Process

The following steps outline the RFQ process:

1. Create a requisition with all requisition lines using the **Requisition Entry** program.
2. Use the **Approve for RFQ** button in the **Requisition Entry** program to approve the entire requisition or selected requisition lines for RFQs.
3. Create the RFQ using the **Request for Quote Review** program and select the suppliers you want to invite for quoting.
4. Use the **Request for Quote Maintenance** program to maintain the RFQ expiry date, add and delete suppliers and attachments.
5. End and print the RFQ using the **Request for Quote Maintenance** program to send notifications to the selected suppliers, inviting them to submit quotations.
6. Suppliers receive the RFQ via email and use the **RFQ Supplier Portal** program to submit their quotations.
7. View RFQ details and accept or reject quotations using the **Request for Quote Maintenance** program.



Once all requisition lines have accepted quotations, the requisition status changes to *Approved*.

8. Use the **Requisition Create Purchase Orders** program to create the purchase order from the requisition.

## Status Codes

### RFQ statuses

The following are possible status codes for a request for quote:

Status	Code	Description
RFQ created		The RFQ has been created using the <b>Request for Quote Review</b> program. The following can be maintained in the <b>Request for Quote Maintenance</b> program: <ul style="list-style-type: none"> <li>▪ RFQ description</li> <li>▪ RFQ expiry date</li> <li>▪ Quantity</li> <li>▪ Add and delete suppliers</li> </ul>
RFQ Submitted for Bidding	P	This status is applied to the RFQ header and detail lines when the RFQ is ended and/or printed using the <b>Request for Quote Maintenance</b> program.  The RFQ detail can't be maintained anymore. Suppliers can submit their quotes, whereafter these can be <i>Accepted</i> , <i>Rejected</i> or set to <i>No reply</i> .
RFQ Completed	C	This is applied once all RFQ lines have been actioned and set to accepted, rejected or no reply. The requisition lines are updated with the selected supplier and the price quoted.  Once this status is applied to the RFQ header and detail lines, the requisition lines are set to the status of <i>Approved</i> .
RFQ Cancelled	*	This status is applied to the RFQ header (not the detail lines) when the RFQ is cancelled.

## Hints and Tips

- If RFQs are only required for requisitions above a certain amount, the amount is displayed at the **RFQ value for consideration** field of the **Requisition Create Purchase Orders** program.





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