

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 stocked and non-stocked products. 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.

This feature is designed to be used with the **SYSPRO Supply Chain Portal**, which allows suppliers to submit their quotations online.

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)

Request for Quote refers to the query that is presented to obtain pricing and delivery information as well as 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 can only be changed until it is submitted for bidding.

Starting

Prerequisites

To use this feature, the following module(s) must be installed according to the terms of your software license agreement:

- Purchase Orders
- SYSPRO Supply Chain Portal

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- 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 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.
- 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 *programs* by assigning them to roles and applying access control against the role (configured using the [Role Management](#) program).

Restrictions and Limits

- The RFQ header and closing date can't be edited once the RFQ has been submitted for bidding.

Using Process

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

- *Program List >Purchase Orders > Requisition System*
- *Program List >Purchase Orders > Request for Quote System*

1. Capture the requisition using the **Requisition Entry** program.
2. Select the **Approve for RFQ** button to approve the requisition (or selected requisition lines) for RFQs.
3. From the **Request for Quote Review** program search for requisitions that have been approved for quotes.
4. Select **Create the RFQ** in and select the suppliers you want to invite for quoting using the **Generic Define List of Items** program.

The **RFQ Details** screen is displayed.

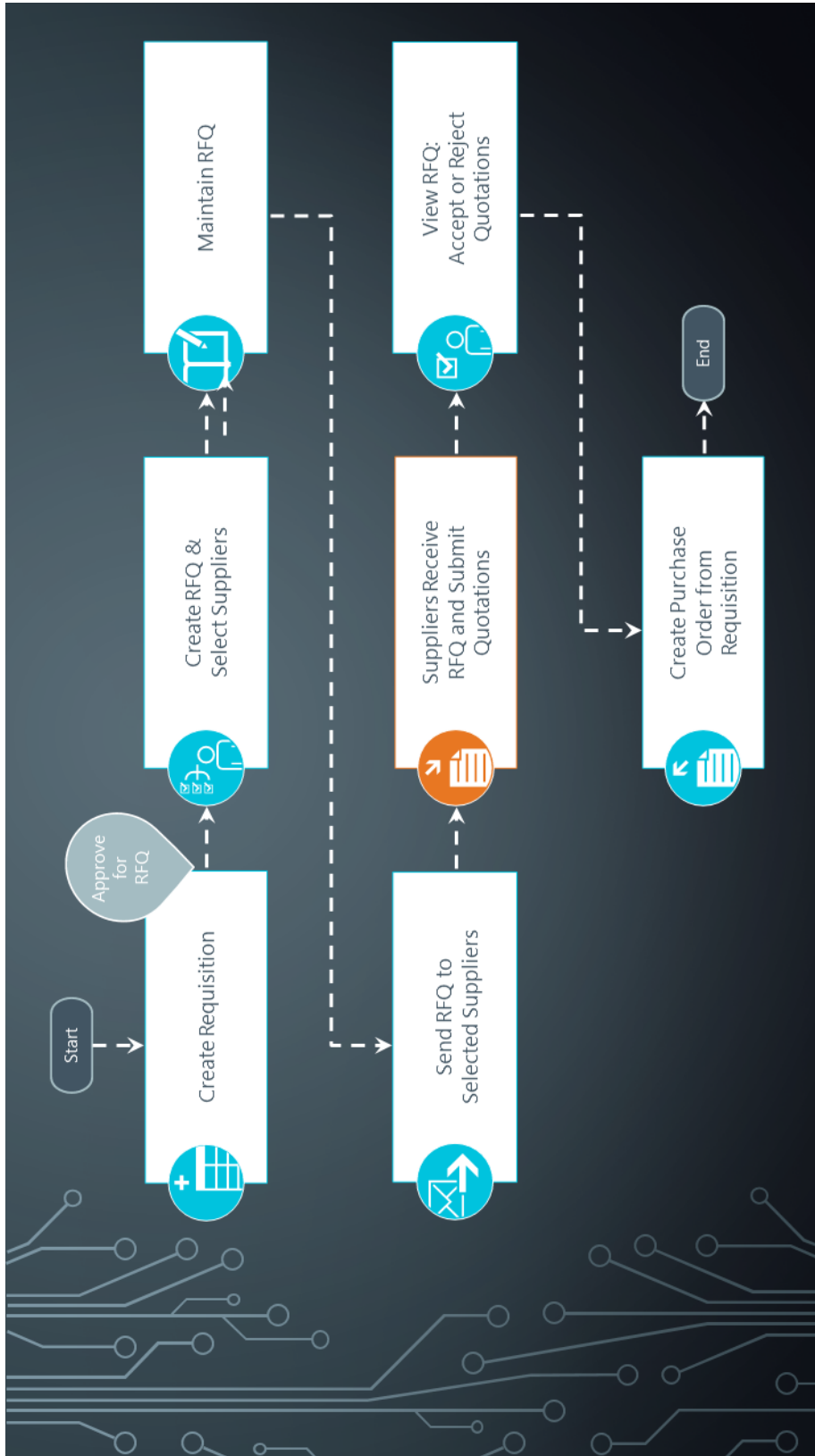
5. From the **Request for Quote Maintenance** program, maintain the RFQ closing date, add and delete suppliers and attachments.
6. End and print or email the RFQ using the **Request for Quote Maintenance** program.
 - When printing the RFQ, an SRS report is generated per supplier, that can be printed and given to suppliers, inviting them to submit quotations.
Manually submitted quotes are captured using the **Supplier Quote Entry** program.
 - When emailing the RFQ, an email notification is sent to selected suppliers, inviting them to submit quotations.
Suppliers will use a link in the email to access the **SYSPRO Supply Chain Portal** to submit their quotations online.

7. From the **Request for Quote Maintenance** program, view RFQ details and accept or reject quotations.

Once a quote is accepted, the requisition line status changes to **APPROVED**. When all requisition lines have an accepted quotation, the requisition status changes to **APPROVED**.

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

The supplier details are automatically populated with the approved RFQ detail.



Status Codes

RFQ statuses

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

Status	Description
BLANK - RFQ CREATED	This status indicates the RFQ has been created.
P - RFQ APPROVED AND SUBMITTED FOR BIDDING	<p>This status is applied to the RFQ header and detail lines when the RFQ is ended and/or printed.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> ■ OPEN Suppliers can submit their quotations. ■ LINE BIDDING IN PROCESS The RFQs were emailed and suppliers can submit quotes.
C - RFQ COMPLETED (ALL LINES ACTIONED)	<p>This status is applied to the RFQ when the closing date is reached .</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> ■ APPROVED A quote has been accepted for every RFQ line. The requisition lines are updated with the selected supplier and price. ■ EXPIRED The RFQ closing date has been reached and suppliers can no longer submit quotes. ■ COMPLETED The RFQ process is complete.
* - RFQ CANCELLED	This status is applied to the RFQ header (not the detail lines) when the RFQ is canceled.

RFQ supplier line statuses

The following are possible status codes for a supplier detail line of the RFQ:

Status	Description
BLANK - WAITING FOR QUOTE	<p>This status indicates that the RFQ has been created.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> WAITING FOR QUOTE The RFQ was submitted, but the quote hasn't been received from the supplier yet. QUOTE SUBMITTED The RFQ was submitted and the supplier submitted a quote. QUOTE ACCEPTED The RFQ reached the closing date and the supplier's quote was accepted. QUOTE REJECTED The RFQ reached the closing date and the supplier's quote was rejected, as another quote was accepted. QUOTE REJECTED The RFQ reached the closing date, but the supplier hasn't submitted a quote. <p>The following sub-statuses are displayed in the Supplier Email list view in the Request for Quote Maintenance program:</p> <ul style="list-style-type: none"> WAITING TO BE SENT The RFQ hasn't been emailed to the portal user yet. SENDING FAILED The RFQ email couldn't be sent because of errors. SENT SUCCESSFULLY The RFQ email, inviting the supplier to submit a quote, was successfully sent to the portal user.
A - SUPPLIER QUOTE ACCEPTED	This status is applied to the RFQ supplier line once the bid is accepted.
R - SUPPLIER QUOTE REJECTED	This status is applied automatically to remaining RFQ supplier lines once a quote for the RFQ detail line is accepted.
N - NO REPLY	This status is applied to the RFQ supplier line when the supplier has been invited to quote, but fails to respond before the RFQ closing date.

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 program that lets you create requests for quotes.

Request for Quote Maintenance

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

Supplier Quote Entry

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.

Browse on Requests for Quotes

This is a new program that lets you browse RFQs.

Browse on Requisition Users

The **Create RFQ** and **RFQ User** columns were added to the list view.

Requisition Users

The **Create RFQ** field was added to the **Authority level** section of the **User Maintenance** pane.

The **Route to user to create RFQ** field was added to the **Routing information** section of the **User Maintenance** pane.

Requisition Query

The **Create RFQ** and **User to route to for P/order creation** fields were added to the **Originator Information** pane.

The **RFQ column** was added to the **Detail Lines** list view.

The **RFQ created** requisition status can be displayed in the **Status** column of the **Detail Lines** list view

Requisition Entry

An **Approve for RFQ** function has been added to both the **Multiple Lines** option and the **Requisitions** toolbar that lets you approve the obtaining of RFQs for applicable requisitions or requisition lines.

In addition, the following new RFQ statuses for requisition lines are visible (when applicable) in the **Requisitions** list view:

- Q - RFQ CREATED
- R - APPROVED FOR RFQ

Displayed requisitions can also be filtered by these statuses from the **Options** pane.

Requisition Entry Maintenance

You can't maintain a requisition (or requisition line) in a status of **Q - RFQ CREATED**. You can maintain a requisition and requisition line with a status of **R - APPROVED FOR RFQ**.

Purchase Order Query

The **RFQ reference** and **RFQ user** columns were added to the **Detail Lines** list view.

Requisition Create Purchase Orders

The **RFQ value for consideration** field was added to the **Requisition Line Details** pane. This displays an amount if you have indicated that RFQs are only required for requisitions above a certain amount.

AP Period End

You can't delete a supplier if there are outstanding RFQs for that supplier.

Request for Quote Review

Exploring

Where it fits in?

This program lets you create RFQs for requisition lines.

Things you can do in this program include:

- View a list of requisitions that have been approved for RFQs.
- Create RFQs from selected requisitions and/or requisition lines.
- Select potential suppliers.
- Capture RFQ detail.

Navigation

This program is accessed from the **Program List** pane of the SYSPRO menu:

- *Program List > Purchase Orders > Request for Quote System > Transaction Processing*

Terminology

Request for Quote (RFQ)

Request for Quote refers to the query that is presented to obtain pricing and delivery information as well as 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 can only be changed until it is submitted for bidding.

Starting

Security Activities

You can restrict operator access to *activities* within a program (configured using the [Operator Maintenance](#) program).

Fields

You can restrict operator access to the *fields* within a program (configured using the [Operator Maintenance](#) program).

eSignatures

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.

RFQ Add Rfq

Controls access to the **Create RFQ** button in the [Request for Quote Review](#) program.

When this eSignature is set as denied, the **Create RFQ** button in the [Request for Quote Review](#) program is disabled.

RFQ Add Rfq e.net

Controls access to the creation of an RFQ in the [Request for Quote Review](#) business object.

Groups

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).

Passwords

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.

Configuring

The following configuration options in SYSPRO may affect processing within this program or feature, including whether certain fields and options are accessible.

Setup Options

The **Setup Options** program lets you configure how SYSPRO behaves across all modules. These settings can affect processing within this program.

Purchase Orders Configuration

Setup Options > Configuration > Distribution > Purchase Orders

- Requisition value for RFQ

Distribution - Purchasing Keys

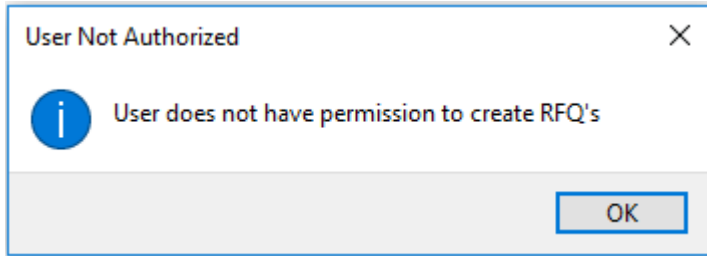
Setup Options > Keys > Distribution - Purchasing

- RFQ reference
 - Key type
 - Case
 - Suppress leading zeros
 - Presentation length
 - Numbering method
 - Next RFQ reference

Solving

Informational messages

User not authorized



Cause

This message is displayed when selecting an RFQ user who hasn't been given permission to process requests for quotes.

Solution

You can either select a different RFQ user or grant the original user permission to maintain RFQs using the [Requisition Users](#) program.

FAQs

How do I get suppliers to submit quotes for a requisition?

You typically create an RFQ for a requisition when you want to invite suppliers to submit quotations for a specific item (stocked or non-stocked). This gives you a chance to compare prices and delivery dates.

1. Capture the requisition using the [Requisition Entry](#) program.
2. Select the **Approve for RFQ** button to approve the requisition (or selected requisition lines) for RFQs.
3. From the [Request for Quote Review](#) program search for requisitions that have been approved for quotes.
4. Select **Create the RFQ** in and select the suppliers you want to invite for quoting using the [Generic Define List of Items](#) program.
The **RFQ Details** screen is displayed.
5. From the [Request for Quote Maintenance](#) program, maintain the RFQ closing date, add and delete suppliers and attachments.
6. End and print or email the RFQ using the [Request for Quote Maintenance](#) program.
 - When printing the RFQ, an SRS report is generated per supplier, that can be printed and given to suppliers, inviting them to submit quotations.
Manually submitted quotes are captured using the [Supplier Quote Entry](#) program.
 - When emailing the RFQ, an email notification is sent to selected suppliers, inviting them to

submit quotations.

Suppliers will use a link in the email to access the [SYSPRO Supply Chain Portal](#) to submit their quotations online.

7. From the [Request for Quote Maintenance](#) program, view RFQ details and accept or reject quotations.

Once a quote is accepted, the requisition line status changes to **APPROVED**. When all requisition lines have an accepted quotation, the requisition status changes to **APPROVED**.

8. Use the [Requisition Create Purchase Orders](#) program to create the purchase order from the requisition.

The supplier details are automatically populated with the approved RFQ detail.

What happens to other quotes when one quote is accepted?

Once you accept a quote on a requisition line, any other quotes for the same requisition line are automatically denied (you accept a quote on a requisition and/or requisition line using the [Request for Quote Maintenance](#) program).

What happens once a quote is accepted?

Once a quote is accepted, the requisition line status changes to **APPROVED**. When all requisition lines have an accepted quotation, the requisition status changes to **APPROVED**. You can then create the purchase order from the requisition.

Using

Status Codes

RFQ statuses

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

Status	Description
BLANK - RFQ CREATED	This status indicates the RFQ has been created.
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RFQ supplier line statuses

The following are possible status codes for a supplier detail line of the RFQ:


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R - SUPPLIER QUOTE REJECTED	This status is applied automatically to remaining RFQ supplier lines once a quote for the RFQ detail line is accepted.
N - NO REPLY	This status is applied to the RFQ supplier line when the supplier has been invited to quote, but fails to respond before the RFQ closing date.

Hints and Tips

- Columns in a list view are sometimes hidden by default. You can reinstate them using the **Field Chooser** option from the context-sensitive menu (displayed by right-clicking a header column header in the list view). Select and drag the required column to a position in the list view header.
- Press **CTRL+F1** within a list view or form to view a complete list of functions available.

Referencing

Menu and Toolbar

Field	Description
Start Review	<p>Select this to accept your Review Criteria selections and display the data accordingly.</p> <p>This option is enabled when you initially access the program but, thereafter, is only re-enabled when you select the Change Criteria option.</p>
Change Criteria	<p>Select this to change the previously selected review criteria.</p> <div style="border: 1px solid #0070c0; padding: 5px; margin-top: 10px;">  This function is only enabled after you select the Start Review function. </div>

RFQ Review Criteria

Field	Description
RFQ user	This lets you select the RFQ user who created the requisition for which you want to add an RFQ.
RFQ user name	This indicates the name of the selected RFQ user.
Requisition selection	Indicate the requisitions for which you want to create RFQs.
Due date selection	Indicate the due dates on requisitions for which you want to create RFQs.
Stock codes selection	Indicate the stock codes on requisitions for which you want to create RFQs.
Warehouse selection	Indicate the requisition warehouse for which you want to create RFQs.
Originator section	Indicate the requisition originators for which you want to create RFQs.

RFQ Review

Field	Description
Create RFQ	<p>This lets you create RFQs from requisitions that are selected in the list view.</p> <p>The Generic Define List of Items program is displayed from which you can select suppliers and create a list of suppliers for future use.</p> <p>Once you've selected the suppliers, the RFQ Details pane is displayed from which you can capture the RFQ reference number, description and closing date.</p>

Field	Description
Select	<p>This lets you select requisitions in the list view. A tick in the Selected column indicates that the entry is selected.</p> <p>NONE Select this to deselect all entries in the list view.</p> <p>ALL Select this to select all entries in the list view.</p>
Selected	Select this to indicate for which requisitions you want to create RFQs.
Requisition	This indicates the requisition number.
Requisition line	This indicates the requisition line number.
Stock code	This indicates the stock code on the requisition line.
Stock code description	This indicates the description of the stock code, for which suppliers will be invited to quote.
Warehouse	This indicates the warehouse for which the requisition was created and for which you are processing the RFQ.
Quantity	This indicates the quantity of stock required on the requisition and for which suppliers will quote.
Due date	This indicates the requisition due date.

RFQ Details

This pane is displayed once you have selected the suppliers.

Field	Description
Create RFQ	This lets you create the RFQ once you have captured the RFQ details.
RFQ reference	This lets you enter an RFQ reference number.
RFQ description	This lets you enter a description for the RFQ reference number.
Closing date	<p>This lets you enter a closing date for an RFQ using the date picker.</p> <p>Suppliers won't be allowed to submit quotes after the closing date, but you can edit this date if you didn't receive enough quotes.</p>

Request for Quote Maintenance

Exploring

Where it fits in?

This program lets you maintain RFQs and list of suppliers for bidding.

Things you can do in this program include:

- Add specifications and images to RFQs.
- Add and delete suppliers.
- Email or print RFQs for potential suppliers (the email contains a link to the [SYSPRO Supply Chain Portal](#) from which quotations can be submitted).
- Resend RFQ emails to remind suppliers to submit quotes.
- Accept or reject quotes once they are submitted.
- Cancel the RFQ.

Navigation

This program is accessed from the [Program List](#) pane of the SYSPRO menu:

- *Program List > Purchase Orders > Request for Quote System > Transaction Processing*

Terminology

Request for Quote (RFQ)

Request for Quote refers to the query that is presented to obtain pricing and delivery information as well as 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 can only be changed until it is submitted for bidding.

Starting

Prerequisites

- The contact person at the supplier must be set up as a **SYSPRO Supply Chain Portal** user using the **Portal User Management** program. If this isn't set up, the RFQ can't be emailed to any suppliers, as at least one contact person per supplier has to be selected when emailing the RFQ.

Security Activities

You can restrict operator access to *activities* within a program (configured using the **Operator Maintenance** program).

PO RFQ Allow configuration of portal email template

Controls the configuration of the email template for RFQ emails sent to suppliers, inviting them to submit quotes via the **SYSPRO Supply Chain Portal**.

Fields

You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).

eSignatures

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.

RFQ Change Rfq Line

Controls access to the following functions of the **Request for Quote Maintenance** program, if the RFQ being maintained is in a status of **BLANK - RFQ CREATED**:

- Quantity changes on RFQ line
- Supplier addition to RFQ line
- Supplier deletion from RFQ line

RFQ Change Rfq Line e.net

Controls access to the following functions of the **Request for Quote Maintenance** business object, if the RFQ being maintained is in a status of **BLANK - RFQ CREATED**:

- Quantity changes on RFQ line
- Supplier addition to RFQ line
- Supplier deletion from RFQ line

RFQ Change Rfq Status

Controls access to the following functions of the **Request for Quote Maintenance** program:

- RFQ status changes
- RFQ approval for bidding
- RFQ cancellations
- RFQ completion

RFQ Change Rfq Status e.net

Controls access to the following functions of the [Request for Quote Maintenance](#) business object:

- RFQ status changes
- RFQ approval for bidding
- RFQ cancellations
- RFQ completion

RFQ Change Supplier Line Status

Controls access to the maintenance of a supplier status in the [Request for Quote Maintenance](#) program.

When this eSignature is set as denied, the **Save** button on the **RFQ Suppliers for line: xx** pane is disabled.

RFQ Change Supplier Line Status e.net

Controls access to the maintenance of a supplier status in the [Request for Quote Maintenance](#) business object.

Groups

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).

Passwords

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.

Configuring

The following configuration options in SYSPRO may affect processing within this program or feature, including whether certain fields and options are accessible.

Setup Options

The [Setup Options](#) program lets you configure how SYSPRO behaves across all modules. These settings can affect processing within this program.

Company General

Setup Options > Company > General

- Supply chain portal
 - Supply chain portal URL
- Email/SMTP settings
 - Method when emailing
 - Use system-wide SMTP details
 - SMTP server IP address
 - Outgoing email address
 - Username
 - Password
 - Server port
 - Use SSL

Purchase Orders Configuration

Setup Options > Configuration > Distribution > Purchase Orders

- Requisition value for RFQ

Distribution - Purchasing Keys

Setup Options > Keys > Distribution - Purchasing

- RFQ reference
 - Key type
 - Case
 - Suppress leading zeros
 - Presentation length
 - Numbering method
 - Next RFQ reference

Solving

Warning messages

Select suppliers

Select suppliers



Please check at least one of each supplier

Synopsis

This message is displayed on the **Supplier Email list** window when you select to email RFQs to suppliers.

Solution

You must select at least one portal user per supplier from the list of users displayed. This ensures that each supplier receives the RFQ at the same time to guarantee equal bidding opportunities.

Informational messages

Cannot change suppliers

Message



Cannot change 'SupplierAction', RFQ Reference '123' has reached its expiry date '20190831'

Synopsis

This message is displayed when trying to add a supplier to an RFQ that has already been closed.

Solution

You can't change the suppliers on a closed RFQ.

FAQs

How do you accept a quotation submitted by a supplier?

1. Access the [Request for Quote Maintenance](#) program.
2. Enter the RFQ number at the **RFQ reference** field.
3. Select the relevant supplier line from the **RFQ Suppliers for Line** pane.
4. From the toolbar, select **Accept Supplier Quote**.
5. Select **Save**.

The status of the RFQ line is updated to **QUOTE ACCEPTED**. The status of other quotes are automatically updated to **QUOTE REJECTED**.

Why can't I select to email only certain suppliers?

When emailing the RFQ for the first time and the RFQ line status is displayed as **WAITING TO BE SENT**, you must select at least one portal user per supplier from the list of users displayed. This ensures that each supplier receives the RFQ at the same time to guarantee equal bidding opportunities.

When you resend RFQs, the RFQ line status is also displayed as **WAITING TO BE SENT**. You can filter the suppliers to which you want to resend the RFQ by using the **Supplier selection** criteria.

Once the RFQs are emailed, the line status will be updated to **SENT SUCCESSFULLY** or **SENDING FAILED**.

Can I change the RFQ once it is ended and sent to suppliers?

No, the details of an RFQ can't be updated once it is ended and sent out to suppliers.

Can I change the closing date of an RFQ?

You can only change the closing date if the RFQ header has the status **BLANK - RFQ CREATED**.

To prevent fraud the closing date of an RFQ can't be changed after the RFQ is ended and submitted to suppliers for bidding.

Why can't I accept the quote from a supplier?

You can only accept a quote once the RFQ is closed.

This is done to give every supplier a chance to submit a quote and prevent fraudulent activities.

Using

Status Codes

RFQ statuses

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

Status	Description
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The following are possible status codes for a supplier detail line of the RFQ:

Status	Description
BLANK - WAITING FOR QUOTE	<p>This status indicates that the RFQ has been created.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> WAITING FOR QUOTE The RFQ was submitted, but the quote hasn't been received from the supplier yet. QUOTE SUBMITTED The RFQ was submitted and the supplier submitted a quote. QUOTE ACCEPTED The RFQ reached the closing date and the supplier's quote was accepted. QUOTE REJECTED The RFQ reached the closing date and the supplier's quote was rejected, as another quote was accepted. QUOTE REJECTED The RFQ reached the closing date, but the supplier hasn't submitted a quote. <p>The following sub-statuses are displayed in the Supplier Email list view in the Request for Quote Maintenance program:</p> <ul style="list-style-type: none"> WAITING TO BE SENT The RFQ hasn't been emailed to the portal user yet. SENDING FAILED The RFQ email couldn't be sent because of errors. SENT SUCCESSFULLY The RFQ email, inviting the supplier to submit a quote, was successfully sent to the portal user.
A - SUPPLIER QUOTE ACCEPTED	This status is applied to the RFQ supplier line once the bid is accepted.
R - SUPPLIER QUOTE REJECTED	This status is applied automatically to remaining RFQ supplier lines once a quote for the RFQ detail line is accepted.
N - NO REPLY	This status is applied to the RFQ supplier line when the supplier has been invited to quote, but fails to respond before the RFQ closing date.



Hints and Tips

- Columns in a list view are sometimes hidden by default. You can reinstate them using the **Field Chooser** option from the context-sensitive menu (displayed by right-clicking a header column header in the list view). Select and drag the required column to a position in the list view header.


- Fields on a pane are sometimes removed by default. You can reinstate them using the **Field Selector** option from the context-sensitive menu (displayed by right-clicking any field in the pane). Select and drag the required fields onto the pane. The captions for fields are also sometimes hidden. You can select the **Show Captions** option from the context-sensitive menu to see a list of them. Click on the relevant caption to reinstate it to the form. If the **Show Captions** option is grayed out, it means no captions are hidden for that form.
- Press **CTRL+F1** within a list view or form to view a complete list of functions available.

Referencing



Menu and Toolbar

Field	Description
RFQ reference	This lets you search for and select the RFQ.
Notes	This lets you add notes to the RFQ header using the Admin Notepad Editor (Rich Text) program.  Notes that are attached to the RFQ header relate to all RFQ lines.
Attachments	This lets you add attachments to the RFQ header. These are typically files containing images, specifications and/or measurements.  Attachments that are attached to the RFQ header relate to all RFQ lines.
Configure Email Template	This lets you configure the email template using the Send Email program. You will configure the template for the email that is sent to suppliers, inviting them to submit quotes for RFQs.
Cancel RFQ	This cancels the RFQ and updates the RFQ status to * - RFQ CANCELLED.
End RFQ	This ends the RFQ process.

RFQ Header


Field	Description
RFQ reference	This indicates the RFQ number.
Description	This indicates the description for the RFQ.
Status	This indicates the current status of the RFQ.
User	This indicates the requisition user who captured the requisition and created the RFQ.
Date created	This indicates when the RFQ was captured.
Closing date	This indicates the date by which quotations must be submitted.  To prevent fraud the closing date of an RFQ can't be changed after the RFQ is ended and submitted to suppliers for bidding.



RFQ Lines

Field	Description
Cancel line	This cancels the RFQ line, but doesn't update the status of the RFQ.
Line	This indicates the RFQ line number.
Status	This indicates the current status of the RFQ line.
Requisition	This indicates the requisition number for which RFQs are invited.
Requisition line	This indicates the requisition line number for which quotations will be submitted.
Stock code	This indicates the stock code for which RFQs will be submitted.
Warehouse	This indicates the warehouse that requests the quotations from suppliers.
Quantity	This indicates the stock quantity that is required.
Notepad	<p>This lets you add notes to the RFQ line using the Admin Notepad Editor (Rich Text) program.</p> <div style="border: 1px solid #0070c0; border-radius: 10px; padding: 10px; margin-top: 10px;">  Notes that are attached to the RFQ line only relate to the selected RFQ line. </div>
Attachments	<p>This lets you add attachments to the RFQ line. These are typically files containing images, specifications and/or measurements.</p> <div style="border: 1px solid #0070c0; border-radius: 10px; padding: 10px; margin-top: 10px;">  Attachments that are attached to the RFQ line only relate to the selected RFQ line. </div>

RFQ Suppliers for Line

This pane indicates the suppliers per requisition line.

Field	Description
Save	This saves the details you entered or changed.
Delete Supplier	<p>This lets you delete the selected supplier from the RFQ line.</p> <p>Once you delete a supplier you will have to save the RFQ before you can end it.</p>
Accept Supplier Quote	<p>This lets you accept the selected quote for the RFQ line.</p> <p>When you have accepted a quote, the other quotes for the requisition line are rejected.</p> <div style="border: 1px solid #0070c0; border-radius: 10px; padding: 10px; margin-top: 10px;">  A quote can only be accepted after the RFQ is closed. </div>

Field	Description
Supplier	This indicates the code for each supplier who will be invited to submit their quotations. You can add more suppliers by selecting a new line below the last row in the grid.
Status	This indicates the current status of the RFQ supplier line. The status is initially blank, but is updated to BLANK - WAITING FOR QUOTE once the RFQ is printed and/or emailed to the supplier. When the quote is accepted or rejected, the status is displayed as A - SUPPLIER QUOTE ACCEPTED or R - SUPPLIER QUOTE REJECTED . If the supplier hasn't submitted a quote before the closing date, the status is reflected as N - NO REPLY .
Lead time	This indicates the time required by the supplier to deliver the requested stock.
Supplier price	This indicates the price quoted by the supplier for the requisition line.
Currency	This displays the supplier currency in which they quoted.
Notepad	Select Edit to add notes to the RFQ line using the Admin Notepad Editor (Rich Text) program. <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 10px; margin-top: 10px;">  Notes that are attached to the RFQ line only relate to the selected RFQ line. </div>
Attachments	Select Edit to add attachments to the RFQ line. These are typically files containing images, specifications and/or measurements. <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 10px; margin-top: 10px;">  Attachments that are attached to the RFQ line only relate to the selected RFQ line. </div>

Attachments for RFQ

This pane displays the attachments on the RFQ header and is displayed when you select the **Attachments** option from the toolbar.

This pane also displays attachments made on RFQ lines and is displayed when selecting the **Show** link at the **Attachments** field of the list view.



The date and time when the file was last modified indicates whether there were any changes made after the RFQ was received, accepted or closed.

Field	Description
Save Attachments	This lets you save the attachments you have added to the RFQ or RFQ line.
Delete	This lets you delete the attachment from the RFQ.

Field	Description
Name	This indicates the name of the attached file.
Extension	This indicates the type of file that is attached.
File size	This indicates the size of the attached file.
Date modified	This indicates the date the attachment was last modified.
Time modified	This indicates the time the attachment was last modified.
File Browse	
Add file	This lets you add a file as an attachment to the RFQ or RFQ line.
Browse for a file	This lets you browse for the file you want to attach.

End RFQ

This pane is displayed when you select the **End RFQ** option from the toolbar.

Field	Description
Print	<p>This lets you print an RFQ for every supplier selected on the RFQ, inviting them to submit quotations.</p> <p>RFQs are usually printed for safekeeping or for suppliers who prefer printed RFQs.</p> <p>Once printed, the RFQ status is updated to P - RFQ APPROVED AND SUBMITTED FOR BIDDING.</p>
Email	<p>This lets you email the RFQ details to suppliers, inviting them to submit quotations. The Supplier Email List window is displayed, letting you select the suppliers you want to notify by email of the RFQ.</p> <p>Once emailed, the RFQ status is updated to P - RFQ APPROVED AND SUBMITTED FOR BIDDING.</p>
Continue RFQ	This returns to the previous screen where you can maintain the RFQ details and the suppliers you want to invite to quote.
End RFQ	<p>This saves your changes to the RFQ header and returns to the previous window.</p> <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 10px; margin-top: 10px;">  RFQ details can still be changed after the RFQ is ended. </div>
Supplier information	
Supplier selection	<p>Select the suppliers for whom you want to print or email the RFQ.</p> <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 10px; margin-top: 10px;">  The Supplier information fields are only available once the RFQ has been submitted and you're maintaining the RFQ after submission. </div>

Supplier Email List

This pane is displayed when you select the **Email** option from within the **End RFQ** window.

Field	Description
Send email	<p>This sends the RFQ email to suppliers, inviting them to submit their quotes.</p> <p>Once the email is sent, the RFQ header status is updated to P - RFQ APPROVED AND SUBMITTED FOR BIDDING.</p>
Selected	<p>This lets you select the suppliers to which you want to send the RFQ via email.</p> <p>When emailing the RFQ for the first time, you must select at least one portal user per supplier from the list of users displayed.</p>
Portal user name	This indicates the user name of the Supply chain portal user.
Email address	This indicates the email address of the contact person for the supplier.
Supplier	This indicates the supplier code to which the RFQ is emailed.
Supplier name	This indicates the name of the supplier to whom the RFQ is emailed.
Status	This indicates the status of the RFQ line (i.e. whether the RFQ was successfully sent to the supplier).

Supplier Quote Entry

Exploring

Where it fits in?

This program lets a supplier (or SYSPRO user) submit quotations for RFQs. Quotations are submitted per requisition and/or per requisition line.

Things that can be done in this program include:

- A supplier can submit a quotation for an RFQ.
- A SYSPRO user can manually capture quotation details (e.g. the supplier sends them via email).

Navigation

This program is accessed from the [Program List](#) pane of the SYSPRO menu:

- *Program List > Purchase Orders > Request for Quote System > Transaction Processing*

Terminology

Request for Quote (RFQ)

Request for Quote refers to the query that is presented to obtain pricing and delivery information as well as 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 can only be changed until it is submitted for bidding.

Starting

Security Activities

You can restrict operator access to *activities* within a program (configured using the [Operator Maintenance](#) program).

Fields

You can restrict operator access to the *fields* within a program (configured using the [Operator Maintenance](#) program).

eSignatures

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.

RFQ Quote Entered

Controls access to the **Save** button in the [Supplier Quote Entry](#) program.

RFQ Quote Entered e.net

Controls access to the **Save** function of the [Supplier Quote Entry](#) business object.

Groups

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).

Passwords

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.

Configuring

The following configuration options in SYSPRO may affect processing within this program or feature, including whether certain fields and options are accessible.

Setup Options

The **Setup Options** program lets you configure how SYSPRO behaves across all modules. These settings can affect processing within this program.

Purchase Orders Configuration

Setup Options > Configuration > Distribution > Purchase Orders

- Requisition value for RFQ

Distribution - Purchasing Keys

Setup Options > Keys > Distribution - Purchasing

- RFQ reference
 - Key type
 - Case
 - Suppress leading zeros
 - Presentation length
 - Numbering method
 - Next RFQ reference

Using

Status Codes

RFQ statuses

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

Status	Description
BLANK - RFQ CREATED	This status indicates the RFQ has been created.
P - RFQ APPROVED AND SUBMITTED FOR BIDDING	<p>This status is applied to the RFQ header and detail lines when the RFQ is ended and/or printed.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> OPEN Suppliers can submit their quotations. LINE BIDDING IN PROCESS The RFQs were emailed and suppliers can submit quotes.
C - RFQ COMPLETED (ALL LINES ACTIONED)	<p>This status is applied to the RFQ when the closing date is reached .</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> APPROVED A quote has been accepted for every RFQ line. The requisition lines are updated with the selected supplier and price. EXPIRED The RFQ closing date has been reached and suppliers can no longer submit quotes. COMPLETED The RFQ process is complete.
* - RFQ CANCELLED	This status is applied to the RFQ header (not the detail lines) when the RFQ is canceled.

RFQ supplier line statuses

The following are possible status codes for a supplier detail line of the RFQ:




Status	Description
BLANK - WAITING FOR QUOTE	<p>This status indicates that the RFQ has been created.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> WAITING FOR QUOTE The RFQ was submitted, but the quote hasn't been received from the supplier yet. QUOTE SUBMITTED The RFQ was submitted and the supplier submitted a quote. QUOTE ACCEPTED The RFQ reached the closing date and the supplier's quote was accepted. QUOTE REJECTED The RFQ reached the closing date and the supplier's quote was rejected, as another quote was accepted. QUOTE REJECTED The RFQ reached the closing date, but the supplier hasn't submitted a quote. <p>The following sub-statuses are displayed in the Supplier Email list view in the Request for Quote Maintenance program:</p> <ul style="list-style-type: none"> WAITING TO BE SENT The RFQ hasn't been emailed to the portal user yet. SENDING FAILED The RFQ email couldn't be sent because of errors. SENT SUCCESSFULLY The RFQ email, inviting the supplier to submit a quote, was successfully sent to the portal user.
A - SUPPLIER QUOTE ACCEPTED	This status is applied to the RFQ supplier line once the bid is accepted.
R - SUPPLIER QUOTE REJECTED	This status is applied automatically to remaining RFQ supplier lines once a quote for the RFQ detail line is accepted.
N - NO REPLY	This status is applied to the RFQ supplier line when the supplier has been invited to quote, but fails to respond before the RFQ closing date.

Hints and Tips

- Columns in a list view are sometimes hidden by default. You can reinstate them using the **Field Chooser** option from the context-sensitive menu (displayed by right-clicking a header column header in the list view). Select and drag the required column to a position in the list view header.
- Press **CTRL+F1** within a list view or form to view a complete list of functions available.



Referencing

Supplier RFQs

Field	Description
Supplier	This lets you search for and select the supplier code. This is typically used by SYSPRO users to capture a quotation received by hand or email. For external suppliers, this indicates the relevant supplier code and can't be changed.
RFQ reference	This indicates the RFQ number.
RFQ description	This indicates the description for the RFQ.
Closing date	This indicates the date when the RFQ closes. <div style="border: 1px solid #0070c0; border-radius: 5px; padding: 5px; margin-top: 10px;">  All suppliers must submit their quotes on or before the closing date. </div>
Status	This indicates the current status of the RFQ.
RFQ notes	Select View to open and view RFQ header notes using the Admin Notepad Editor (Rich Text) program. <div style="border: 1px solid #0070c0; border-radius: 5px; padding: 5px; margin-top: 10px;">  Notes that are attached to the RFQ header relate to all RFQ lines. </div>
RFQ attachments	Select View to open and view RFQ attachments, which are typically files containing images, specifications and/or measurements. <div style="border: 1px solid #0070c0; border-radius: 5px; padding: 5px; margin-top: 10px;">  Attachments that are attached to the RFQ header relate to all RFQ lines. </div>

RFQ Detail Lines

Field	Description
Save	This saves the details you entered or changed.
Stock code	This indicates the stock code for which the quote was requested.
Description	This indicates the description of the stock code for which the quote was requested.
Quantity	This indicates the quantity of the item being quoted by the supplier.
Unit of measure	This indicates the unit of measure held against the item.

Field	Description
Line notes	<p>Select View to open and view the notes for this RFQ line, using the Admin Notepad Editor (Rich Text) program.</p> <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 5px; margin-top: 10px;">  Notes that are attached to the RFQ line only relate to the selected RFQ line. </div>
Line attachments	<p>Select Show to open and view attachments for this RFQ line. These are typically files containing images, specifications and/or measurements.</p> <div style="border: 1px solid #0070C0; border-radius: 5px; padding: 5px; margin-top: 10px;">  Attachments that are attached to the RFQ line only relate to the selected RFQ line. </div>
Unit price	<p>This lets you capture the unit price of the item. The supplier currency is displayed in brackets.</p>
Lead time (days)	<p>This lets you capture how long it takes for delivery of the item, from the time of accepting the quote.</p>
Notepad	<p>Select Edit to modify the RFQ line notes using the Admin Notepad Editor (Rich Text) program.</p>
Attachments	<p>Select Edit to modify the attachments for the RFQ line.</p>

Request for Quote Query

Exploring

Where it fits in?

This program lets you query RFQ header and detail lines.

Things you can do in this program include:

- View RFQ detail.
- View supplier prices and lead times.

Navigation

This program is accessed from the [Program List](#) pane of the SYSPRO menu:

- *Program List > Purchase Orders > Request for Quote System > Transaction Processing*

Terminology

Request for Quote (RFQ)

Request for Quote refers to the query that is presented to obtain pricing and delivery information as well as 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 can only be changed until it is submitted for bidding.

Starting

Security Activities

You can restrict operator access to *activities* within a program (configured using the **Operator Maintenance** program).

Fields

You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).

eSignatures

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.

Groups

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).

Passwords

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.

Configuring

The following configuration options in SYSPRO may affect processing within this program or feature, including whether certain fields and options are accessible.

Setup Options

The **Setup Options** program lets you configure how SYSPRO behaves across all modules. These settings can affect processing within this program.

Purchase Orders Configuration

Setup Options > Configuration > Distribution > Purchase Orders

- Requisition value for RFQ

Distribution - Purchasing Keys

Setup Options > Keys > Distribution - Purchasing



- RFQ reference
 - Key type
 - Case
 - Suppress leading zeros
 - Presentation length
 - Numbering method
 - Next RFQ reference

Using

Status Codes

RFQ statuses

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

Status	Description
BLANK - RFQ CREATED	This status indicates the RFQ has been created.
P - RFQ APPROVED AND SUBMITTED FOR BIDDING	<p>This status is applied to the RFQ header and detail lines when the RFQ is ended and/or printed.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> OPEN Suppliers can submit their quotations. LINE BIDDING IN PROCESS The RFQs were emailed and suppliers can submit quotes.
C - RFQ COMPLETED (ALL LINES ACTIONED)	<p>This status is applied to the RFQ when the closing date is reached .</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> APPROVED A quote has been accepted for every RFQ line. The requisition lines are updated with the selected supplier and price. EXPIRED The RFQ closing date has been reached and suppliers can no longer submit quotes. COMPLETED The RFQ process is complete.
* - RFQ CANCELLED	This status is applied to the RFQ header (not the detail lines) when the RFQ is canceled.

RFQ supplier line statuses

The following are possible status codes for a supplier detail line of the RFQ:

Status	Description
BLANK - WAITING FOR QUOTE	<p>This status indicates that the RFQ has been created.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> ■ WAITING FOR QUOTE The RFQ was submitted, but the quote hasn't been received from the supplier yet. ■ QUOTE SUBMITTED The RFQ was submitted and the supplier submitted a quote. ■ QUOTE ACCEPTED The RFQ reached the closing date and the supplier's quote was accepted. ■ QUOTE REJECTED The RFQ reached the closing date and the supplier's quote was rejected, as another quote was accepted. ■ QUOTE REJECTED The RFQ reached the closing date, but the supplier hasn't submitted a quote. <p>The following sub-statuses are displayed in the Supplier Email list view in the Request for Quote Maintenance program:</p> <ul style="list-style-type: none"> ■ WAITING TO BE SENT The RFQ hasn't been emailed to the portal user yet. ■ SENDING FAILED The RFQ email couldn't be sent because of errors. ■ SENT SUCCESSFULLY The RFQ email, inviting the supplier to submit a quote, was successfully sent to the portal user.
A - SUPPLIER QUOTE ACCEPTED	This status is applied to the RFQ supplier line once the bid is accepted.
R - SUPPLIER QUOTE REJECTED	This status is applied automatically to remaining RFQ supplier lines once a quote for the RFQ detail line is accepted.
N - NO REPLY	This status is applied to the RFQ supplier line when the supplier has been invited to quote, but fails to respond before the RFQ closing date.

Hints and Tips

- Columns in a list view are sometimes hidden by default. You can reinstate them using the **Field Chooser** option from the context-sensitive menu (displayed by right-clicking a header column header in the list view). Select and drag the required column to a position in the list view header.

- Fields on a pane are sometimes removed by default. You can reinstate them using the **Field Selector** option from the context-sensitive menu (displayed by right-clicking any field in the pane). Select and drag the required fields onto the pane. The captions for fields are also sometimes hidden. You can select the **Show Captions** option from the context-sensitive menu to see a list of them. Click on the relevant caption to reinstate it to the form. If the **Show Captions** option is grayed out, it means no captions are hidden for that form.
- Press **CTRL+F1** within a list view or form to view a complete list of functions available.

Referencing

Menu and Toolbar

Field	Description
RFQ reference	This lets you search for and select the RFQ reference number.
Attachments	Select this to view files attached to the RFQ header and/or RFQ detail lines. These attachments are typically images, measurements, drawings and/or other product specifications.
Notepad	Select this to view notes attached to the RFQ header and/or RFQ detail lines.

RFQ Header

Field	Description
RFQ reference	This indicates the RFQ number.
Description	This indicates the description of the RFQ.
Status	This indicates the current status of the RFQ.
User	This indicates the requisition user, who captured the requisition and created the RFQ.
Creation date	This indicates the date the RFQ was captured.
Closing date	This indicates the date when the RFQ closes. All quotes have to be submitted on or before this date.
Company ID	This indicates the ID of the SYSPRO company you are currently working with.

RFQ Lines

Field	Description
RFQ line	This indicates the RFQ line number.
Status	This indicates the current status of the RFQ line.
Requisition	This indicates the requisition number for which RFQs were created.
Requisition line	This indicates the requisition line number for which RFQs were created.
Stock code	This indicates the stock code for which RFQs were created.
Stock code description	This indicates the description of the stock code, i.e. the products for which RFQs were created.

Field	Description
Warehouse	This indicates the warehouse that requests quotations from suppliers.
Warehouse description	This indicates the description of the warehouse.
Quantity	This indicates the required stock quantity on the RFQ.
Uom	This indicates the unit of measure that is recorded against the stock code.
Attachments	Select Show to open and view files attached to the RFQ line when the RFQ was created.
Drawing number	This indicates the drawing number for ECC drawings. Select the drawing number to view the drawing details using Browse on Drawing Register program.
Notepad	Select Show to open and view notes for the RFQ line using the Admin Notepad Editor (Rich Text) program.

RFQ Line Suppliers

Field	Description
Supplier	This indicates the code of the supplier who has been invited to submit a quotation.
Supplier name	This indicates the name of the supplier who has been invited to submit a quotation.
Price	This indicates the price the supplier has submitted.
Currency	This indicates the supplier currency for the submitted quote.
Lead time	This indicates the time required by the supplier to deliver the requested stock.
Status	This indicates the current status of the RFQ supplier line.
Next entry	This indicates the next transaction number that will be saved against the supplier if they make changes to the quotation.
Attachments	Select Show to open and view files the supplier attached to the RFQ line quotation.
Notepad	Select Show to open and view supplier notes for the RFQ line using the Admin Notepad Editor (Rich Text) program.
Transactions	Select Show to view the supplier transactions saved against the RFQ line.

Browse on Requests for Quotes

Exploring

Where it fits in?

This program lets you browse RFQs.

Things you can do in this program include:

- View RFQ header details.
- View RFQ line details.
- View details of ECC drawings.

Navigation

This program is accessed from the [Program List](#) pane of the SYSPRO menu:

- *Program List > Purchase Orders > Request for Quote System > Browses*

Terminology

Request for Quote (RFQ)

Request for Quote refers to the query that is presented to obtain pricing and delivery information as well as 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 can only be changed until it is submitted for bidding.

Starting

Security Activities

You can restrict operator access to *activities* within a program (configured using the [Operator Maintenance](#) program).

Fields

You can restrict operator access to the *fields* within a program (configured using the [Operator Maintenance](#) program).

eSignatures

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.

Groups

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).

Passwords

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

Status Codes

RFQ statuses

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

Status	Description
BLANK - RFQ CREATED	This status indicates the RFQ has been created.
P - RFQ APPROVED AND SUBMITTED FOR BIDDING	<p>This status is applied to the RFQ header and detail lines when the RFQ is ended and/or printed.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> OPEN Suppliers can submit their quotations. LINE BIDDING IN PROCESS The RFQs were emailed and suppliers can submit quotes.
C - RFQ COMPLETED (ALL LINES ACTIONED)	<p>This status is applied to the RFQ when the closing date is reached .</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> APPROVED A quote has been accepted for every RFQ line. The requisition lines are updated with the selected supplier and price. EXPIRED The RFQ closing date has been reached and suppliers can no longer submit quotes. COMPLETED The RFQ process is complete.
* - RFQ CANCELLED	This status is applied to the RFQ header (not the detail lines) when the RFQ is canceled.


RFQ supplier line statuses

The following are possible status codes for a supplier detail line of the RFQ:

Status	Description
BLANK - WAITING FOR QUOTE	<p>This status indicates that the RFQ has been created.</p> <p>The following sub-statuses may be displayed in list views:</p> <ul style="list-style-type: none"> ■ WAITING FOR QUOTE The RFQ was submitted, but the quote hasn't been received from the supplier yet. ■ QUOTE SUBMITTED The RFQ was submitted and the supplier submitted a quote. ■ QUOTE ACCEPTED The RFQ reached the closing date and the supplier's quote was accepted. ■ QUOTE REJECTED The RFQ reached the closing date and the supplier's quote was rejected, as another quote was accepted. ■ QUOTE REJECTED The RFQ reached the closing date, but the supplier hasn't submitted a quote. <p>The following sub-statuses are displayed in the Supplier Email list view in the Request for Quote Maintenance program:</p> <ul style="list-style-type: none"> ■ WAITING TO BE SENT The RFQ hasn't been emailed to the portal user yet. ■ SENDING FAILED The RFQ email couldn't be sent because of errors. ■ SENT SUCCESSFULLY The RFQ email, inviting the supplier to submit a quote, was successfully sent to the portal user.
A - SUPPLIER QUOTE ACCEPTED	This status is applied to the RFQ supplier line once the bid is accepted.
R - SUPPLIER QUOTE REJECTED	This status is applied automatically to remaining RFQ supplier lines once a quote for the RFQ detail line is accepted.
N - NO REPLY	This status is applied to the RFQ supplier line when the supplier has been invited to quote, but fails to respond before the RFQ closing date.

Referencing

Requests for Quote

Field	Description
RFQ reference	This indicates the RFQ number. Select the reference number to view the RFQ line detail.
RFQ description	This indicates the description for the RFQ.
Status	This indicates the current status of the RFQ header.
User	This indicates the requisition user who captured the requisition and created the RFQ.
Creation date	This indicates the date when the RFQ was captured.
Closing date	This indicates the date when the RFQ closes. <div style="border: 1px solid #0070c0; border-radius: 5px; padding: 5px; display: inline-block;">  All quotes must be submitted on or before this date. </div>
Document Format	This field is currently not in use.
Company ID	This indicates SYSPRO company in which you are currently working.

SYSPRO Supply Chain Portal

Exploring

Where it fits in?

The **SYSPRO Supply Chain Portal** allows users beyond a SYSPRO site to connect, interact and transact using the **SYSPRO Avanti** HTML5 user interface.

Adding Portal users to your SYSPRO configuration provides external user access to specific functionality (using a dedicated user interface and menu system) based on the portal features available.

Features currently available from the **SYSPRO Supply Chain Portal**:

- Request for Quote System:

This lets you collaborate with your suppliers by automating the quote process and enabling suppliers to action an RFQ.

Navigation

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

- Program List > Administration > Security*

Terminology

Portal User

Portal users are users who have access to the **SYSPRO Supply Chain Portal**.

They differ from regular SYSPRO operators and are configured and licensed separately based on a named-user license model.

When your system is licensed for a number of **Portal Seats**, an administrator can use the **Portal User Management** program to create and maintain portal users.

FOR EXAMPLE:

If you have a license for 1000 `Portal Seats` then you can create and maintain up to 1000 **Portal Users**, each of which can use the **SYSPRO Supply Chain Portal** at the same time.

This has no effect on any other SYSPRO user licenses.

When creating a portal user, you assign an email address as the unique identifier against which the portal user will access the portal.



A unique operator code is generated against which all transaction journals are recorded. This generated operator code is not shown to portal users, but can be viewed from within the **Portal User Management** program and when viewing journals and other logs of using regular SYSPRO functions.



Portal Seat

This is a system-wide number of named-users that can be included in your SYSPRO license.

You can create portal users up to the number of licensed **Portal Seats**.

Each portal user is a single person who has access to the [SYSPRO Supply Chain Portal](#).

Starting

Prerequisites

Installing

This feature is installed using the **SYSPRO Installer**.

Licensing

In order to use the **SYSPRO Supply Chain Portal** you must purchase and configure one or more **Portal Seats** according to the terms of your software license agreement.

In addition, each of the functions available from the **SYSPRO Supply Chain Portal** will require an appropriate SYSPRO module to be licensed.

Currently, the following module license requirements apply:

Request for Quote System

- Purchase Orders

Technology

The following technology prerequisites are applicable to using this feature:

- Microsoft .NET Framework 4.6
- SYSPRO 8 Service Upgrade Manager
- SYSPRO 8 Avanti Initialization Service
- Internet Information Services(IIS) 7.0 Core Web Engine Feature
- Internet Information Services(IIS) 7.0 World Wide Web Publishing Feature

Setup Options

To use this feature, the following setup option(s) must be enabled:

System Setup

SYSPRO Ribbon bar > Setup > General Setup

EMAIL/SMTP SETTINGS

- SMTP server IP address
- Outgoing email address
- Username
- Password
- Server port
- Use SSL



SMTP settings are required for the **Forgot Password** functionality.

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- 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 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.
- 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 *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

Restrictions and Limits

- **Multi-Factor Authentication** and **Single Sign-on** are not currently supported for the **SYSPRO Supply Chain Portal** (i.e. an operator who is configured to use **Multi-Factor Authentication** or **Single Sign-on** won't be able to login to this platform).
- **Portal** operators cannot belong to a SYSPRO Administrative operator group.
- Currently, the **SYSPRO Supply Chain Portal** can only be installed for a single company.
- The ability to customize the logo and background image of the **SYSPRO Supply Chain Portal** is not yet available, but will be included in a later release of **SYSPRO 8**.
- Although technically possible, we don't recommend you duplicate an email address of a portal user amongst non-portal users.

For this reason the **Portal User Management** program prevents you from entering a duplicate email address amongst all operators (of any type).

Solving

FAQs

Portal operators

How do I create a Portal operator?

The following indicates the steps required to create a Portal user that can use the **SYSPRO Supply Chain Portal**:

1. Open the **Portal User Management** program.
2. Select the **Add Portal User** option.
The **Add Portal User** window is displayed.
3. To create a **Portal** user you need to use an operator template. Therefore, select the required template from the list displayed in the **Templates** pane.
4. Ensure that the following settings are configured for the operator:
 - **Email**
This must be unique amongst all operators.
 - **Name**
 - **Supplier**
When you save the operator record, this supplier code is used as the **PORTAL SUPPLIER** in the **Operator Maintenance** program.
 - **Default company**
This must be specified to ensure that only a single company can be used to login to the portal.
 - **Initial Password**
This is auto-populated and based on the email address entered in the **Email** field, but can be changed as required.
5. Enter any remaining information that you require for the portal operator.
6. Save the portal operator.
7. Activate the new portal operator by highlighting the operator entry and selecting the **Activate Users** option from the toolbar.

How do I create a Template operator?

The following describes how to create an operator **Template**. This is required so that you can create Portal users in the [Portal User Management](#) program.

1. Open the [Operator Maintenance](#) program.



Reset your toolbar to ensure that all the latest options are visible.

2. From the **Edit** menu, select **Maintain templates**.
3. Enter the template code in the **Template** field on the toolbar and press **TAB**.
4. Enter the following mandatory fields in the **Operator Details** pane:
 - Operator name
 - Operator group
5. From the **E.net** pane:
 - a. Specify the **FUNCTIONAL ROLE** as **03-Supplier**.
 - b. Specify the **USAGE FOR E.NET BUSINESS OBJECTS** as **No access**.
 - c. Specify the **CUSTOMER SELECTION** as **Selection**.
6. Enter any other information you may require for the operator template, or accept the defaults provided.
7. Save the operator template.

How is the login password generated for portal operators?

When first creating a portal operator, the password is generated using the email address.

You notify the portal user of the login credentials and advise them to change this password (using the **Change Password** option) when they first access the [SYSPRO Supply Chain Portal](#).

How do I disable a portal operator from accessing the portal?

From within the [Portal User Management](#) program, select the **Disable** option against the operator and enter a reason at the **Reason Code** field.

How do I delete a portal operator?

From within the [Portal User Management](#) program, select the **Delete** option against the operator and enter a reason at the **Reason Code** field.

Can a regular SYSPRO operator login to the SYSPRO Supply Chain Portal?

Only portal users created within the [Portal User Management](#) program can access the [SYSPRO Supply Chain Portal](#).

Portal users are designed to have limited access to portal-specific functions, whereas regular SYSPRO operators have access to a much wider range of functionality.

General

Where do I find the URL for the SYSPRO Supply Chain Portal?

Once you have installed the [SYSPRO Supply Chain Portal](#) you can view the URL link from the following location of the machine to which the software is installed:

`\\inetpub\wwwroot\SYSPROSupplyChainPortal_ "companyID"\index.html`

However, the URL used for the [SYSPRO Supply Chain Portal](#) is:

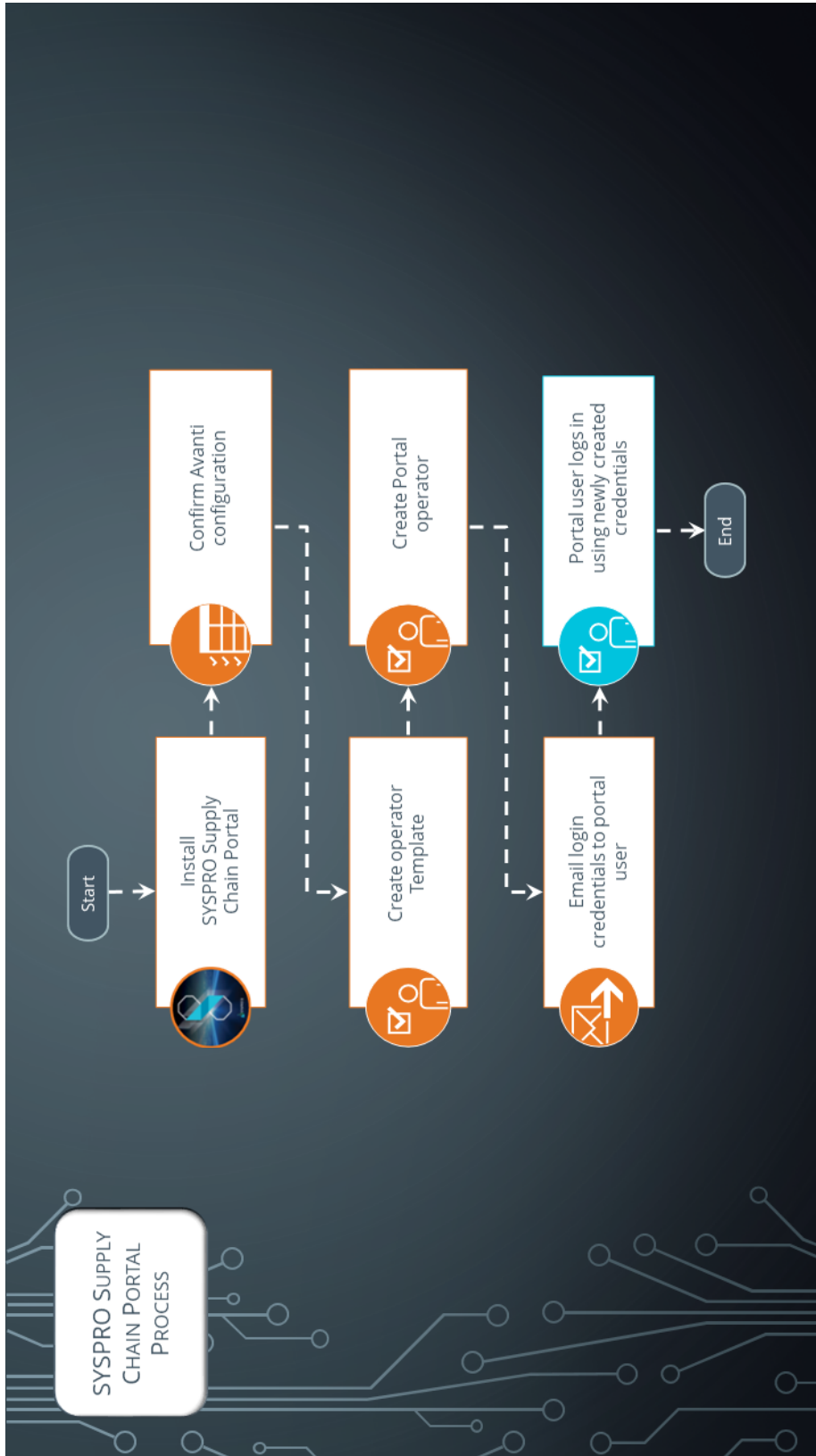
`http://localhost/SYSPROSupplyChainPortal_ "CompanyID"`, as configured within the [System Setup](#) program..

How do I customize the logo and background image of the portal?

This functionality is planned for a later release.



Using



Process

The following depicts the process required to create a **Portal** operator that can use the **SYSPRO Supply Chain Portal**:



Before proceeding, ensure that you update the **System Setup** program with your new license details that includes the applicable **Portal Seats**.

1. Install the **SYSPRO Supply Chain Portal** using the **SYSPRO Installer** application.
2. Ensure that the **AVANTI EXTERNAL PORTAL ADDRESS** is entered correctly in the **System Setup** program.

FOR EXAMPLE:

[http://localhost/SYSPROSupplyChainPortal_\"CompanyID\"](http://localhost/SYSPROSupplyChainPortal_\)

3. The following describes how to create an operator **Template**. This is required so that you can create Portal users in the **Portal User Management** program.
 - a. Open the **Operator Maintenance** program.



Reset your toolbar to ensure that all the latest options are visible.

- b. From the **Edit** menu, select **Maintain templates**.
 - c. Enter the template code in the **Template** field on the toolbar and press **TAB**.
 - d. Enter the following mandatory fields in the **Operator Details** pane:
 - Operator name
 - Operator group
 - e. From the **E.net** pane:
 - a. Specify the **FUNCTIONAL ROLE** as **03-Supplier**.
 - b. Specify the **USAGE FOR E.NET BUSINESS OBJECTS** as **No access**.
 - c. Specify the **CUSTOMER SELECTION** as **Selection**.
 - f. Enter any other information you may require for the operator template, or accept the defaults provided.
 - g. Save the operator template.
4. Create a **Portal** operator:
 - a. Open the **Portal User Management** program.
 - b. Select the **Add Portal User** option.
The **Add Portal User** window is displayed.
 - c. To create a **Portal** user you need to use an operator template. Therefore, select the required template from the list displayed in the **Templates** pane.
 - d. Ensure that the following settings are configured for the operator:

- Email
This must be unique amongst all operators.
 - Name
 - Supplier
When you save the operator record, this supplier code is used as the **PORTAL SUPPLIER** in the **Operator Maintenance** program.
 - Default company
This must be specified to ensure that only a single company can be used to login to the portal.
 - Initial Password
This is auto-populated and based on the email address entered in the **Email** field, but can be changed as required.
- e. Enter any remaining information that you require for the portal operator.
 - f. Save the portal operator.
 - g. Activate the new portal operator by highlighting the operator entry and selecting the **Activate Users** option from the toolbar.
5. Email the following credentials and information to the required portal user:
 - **SYSPRO Supply Chain Portal** URL
 - Username (i.e. email address)
 - Password

Ensure to advise portal users to change their password using the **Change Password** option when they first login to the **SYSPRO Supply Chain Portal**.



Specific to the **Request for Quote System** feature:

All suppliers are given the same URL, however access is controlled in the background where users can only see quotes pertaining to their supplier.

Once you have created RFQs in the core SYSPRO product and sent the supplier the credentials required to access the **SYSPRO Supply Chain Portal**, the supplier can then use the portal to receive and review the RFQs, as well as submit quotations.

Affected Programs

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

Portal User Management

Program List > Administration > Security

This is a new program that lets administrators create and manage **Portal** operators.

Things you can do in this program:

- Create **Portal** operators
- Disable **Portal** operators
- Remove **Portal** operators
- Activate disabled or removed **Portal** operators
- Delete **Portal** operators



All **Portal** operators count towards the license check, even if their status is **Disabled**. However, if the operator status is **Removed**, then it is not counted in the number of seats used.

Portal operators flagged as **Removed** are retained for historical purposes to identify operator details when viewing audits and logs.

Operator Maintenance

SYSPRO Ribbon bar > Setup > Operators

The program includes the following operator fields that are related to this feature:



Reset your toolbar to ensure that all the latest options are visible.

- **Operator type**

Portal indicates that the operator is a named user (used only for the **SYSPRO Supply Chain Portal**)

- **Operator status**

This indicates the current status of the operator (as recorded in the `OperatorStatus` column of the `AdmOperator` table of your SYSPRO database):

ACTIVE

This indicates that the Portal user is active and can log into the **SYSPRO Supply Chain Portal**.

DISABLED

This indicates the Portal user was disabled using the **Portal User Management** and cannot log into the **SYSPRO Supply Chain Portal**.

REMOVED

This indicates the Portal user was removed using the **Portal User Management** program and cannot log into the **SYSPRO Supply Chain Portal**.

- **Portal supplier**

This indicates the supplier code that must be assigned to the portal user when logging into the **SYSPRO Supply Chain Portal**.

- **Portal customer**

This indicates the customer code that must be assigned to the portal user when logging into the **SYSPRO Supply Chain Portal**.



This field is currently not in use and will only become relevant with a later release of SYSPRO.

Company Maintenance

SYSPRO Ribbon bar > Setup > General Setup

The program includes a record of how many **Portal seats** are included with your configured license (under the **System Settings** section).

System Setup

SYSPRO Ribbon bar > Setup > General Setup

The program includes a record of how many **Portal seats** are included with your configured license (under the **License setup** section).

System Audit Query

Program List > Administration > Security

The program includes auditing and logging capabilities for all operators that are configured as **Portal** operators.

Hints and Tips

- Template operator codes are prefixed with `__Template_` and their operator type records as **Template**.
- We recommend you use **Google Chrome** as your browser.
- Depending on how your security is configured, you'll need to give either the **Portal** operator or its operator group access to the **Supplier Quote Entry** program, so that they can use it in the **SYSPRO Supply Chain Portal**.
- If a portal user selects the **Change Password** option on the landing page of the **SYSPRO Supply Chain Portal**, the operator password in SYSPRO is updated to the new password defined by the portal user.



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