

# 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 restrict operator access to *activities* within a program 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.

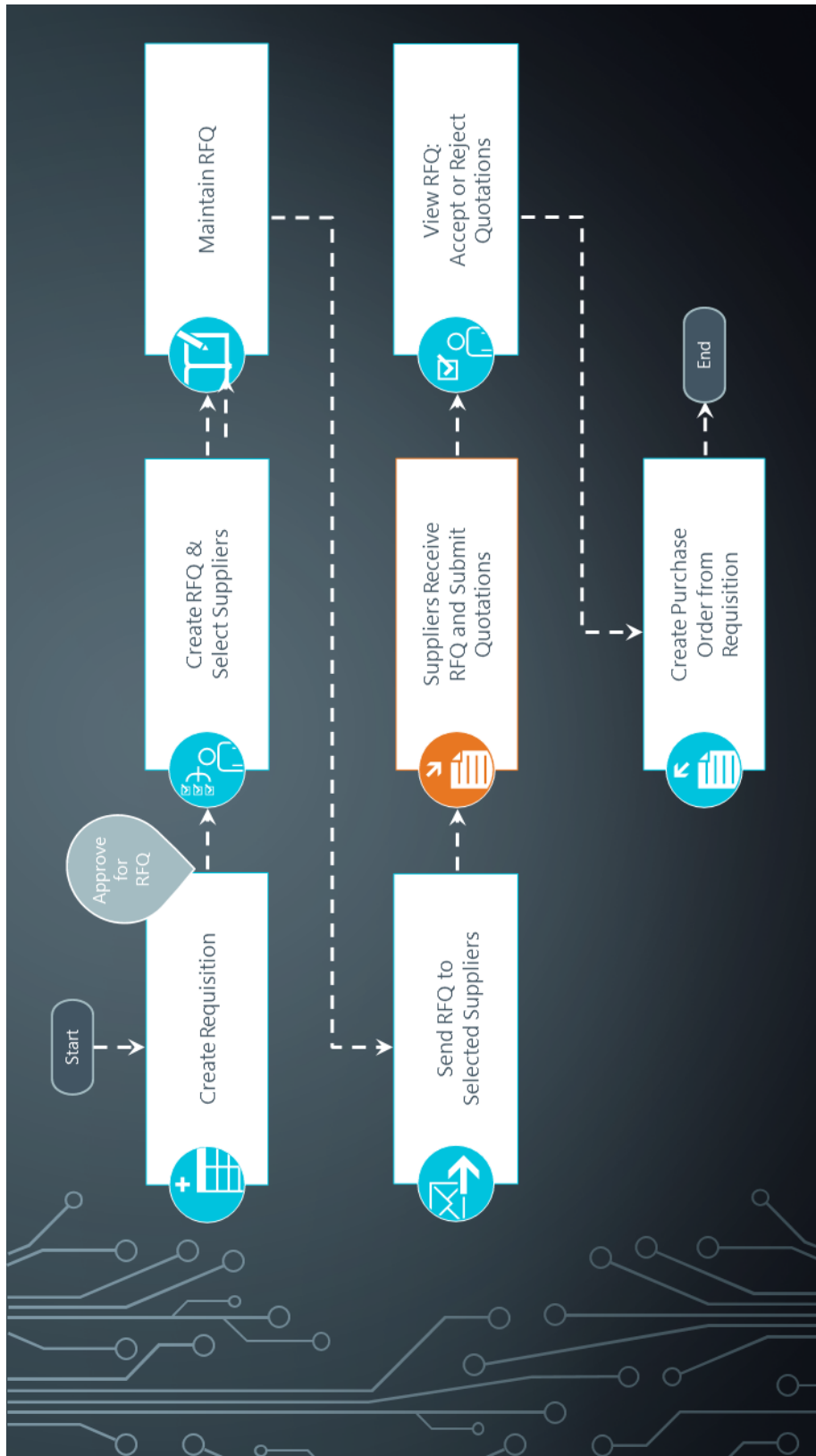
# Using Process

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
<b>BLANK - RFQ CREATED</b>	This status indicates the RFQ has been created.
<b>P - RFQ APPROVED AND SUBMITTED FOR BIDDING</b>	<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"> <li>■ <b>OPEN</b> Suppliers can submit their quotations.</li> <li>■ <b>LINE BIDDING IN PROCESS</b> The RFQs were emailed and suppliers can submit quotes.</li> </ul>
<b>C - RFQ COMPLETED (ALL LINES ACTIONED)</b>	<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"> <li>■ <b>APPROVED</b> A quote has been accepted for every RFQ line. The requisition lines are updated with the selected supplier and price.</li> <li>■ <b>EXPIRED</b> The RFQ closing date has been reached and suppliers can no longer submit quotes.</li> <li>■ <b>COMPLETED</b> The RFQ process is complete.</li> </ul>
<b>* - RFQ CANCELLED</b>	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
<b>BLANK - WAITING FOR QUOTE</b>	<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"> <li>■ <b>WAITING FOR QUOTE</b> The RFQ was submitted, but the quote hasn't been received from the supplier yet.</li> <li>■ <b>QUOTE SUBMITTED</b> The RFQ was submitted and the supplier submitted a quote.</li> <li>■ <b>QUOTE ACCEPTED</b> The RFQ reached the closing date and the supplier's quote was accepted.</li> <li>■ <b>QUOTE REJECTED</b> The RFQ reached the closing date and the supplier's quote was rejected, as another quote was accepted.</li> <li>■ <b>QUOTE REJECTED</b> The RFQ reached the closing date, but the supplier hasn't submitted a quote.</li> </ul> <p>The following sub-statuses are displayed in the <b>Supplier Email</b> list view in the <b>Request for Quote Maintenance</b> program:</p> <ul style="list-style-type: none"> <li>■ <b>WAITING TO BE SENT</b> The RFQ hasn't been emailed to the portal user yet.</li> <li>■ <b>SENDING FAILED</b> The RFQ email couldn't be sent because of errors.</li> <li>■ <b>SENT SUCCESSFULLY</b> The RFQ email, inviting the supplier to submit a quote, was successfully sent to the portal user.</li> </ul>
<b>A - SUPPLIER QUOTE ACCEPTED</b>	This status is applied to the RFQ supplier line once the bid is accepted.
<b>R - SUPPLIER QUOTE REJECTED</b>	This status is applied automatically to remaining RFQ supplier lines once a quote for the RFQ detail line is accepted.



Status	Description
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.



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