STEP 1: Create either a LOCAL or standard FRAMEWORK requisition. **RFQs cannot be generated from a Limit Framework requisition. After you have completed the RFQ process, you can trash the line and create a second line if a Limit Framework is necessary.**

STEP 2: In Header note section, state that an RFQ is in process so the Account Manager will not approve the requisition. **If header section is not visible, click Expand Header button to display.**
Create an RFQ - Requisition Creation

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

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

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

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

STEP 5: **Valuation Price column:** Enter $1.00.
Create an RFQ - Requisition Creation

<table>
<thead>
<tr>
<th>GR</th>
<th>Matl Group</th>
<th>PC</th>
<th>PGr</th>
<th>Des.Vendor</th>
<th>Mi</th>
<th>Deliv. Date</th>
<th>POrg</th>
<th>Stor. Loc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Goods, Supp</td>
<td></td>
<td>RFQ</td>
<td>700015</td>
<td></td>
<td>12/23/2013</td>
<td>7540</td>
<td>Purchasing</td>
</tr>
<tr>
<td>☐</td>
<td>CPO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

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

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

**STEP 13:** Hit **ENTER** on your keyboard to generate the **Item Tabs** section.
STEP 14: Enter GL and account information in the Account Assignment tab for each line item.

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

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

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

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

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

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

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

**STEP 6:** Click the **green check** button.
STEP 7: Enter the **Coll. No.** This will be your initials followed by the requisition number. Hit **Enter** on your keyboard.

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

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

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

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

**STEP 12:** Click **Header Texts**.

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

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

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

STEP 16:  
A. Type in vendor number and hit Enter on your keyboard.
B. If vendor is not in SAP, enter a generic vendor number in the Vendor field and type in their Name/Address information. Hit Enter on your keyboard.
C. Click Save.
   (A PDF of the RFQ will generate.)
STEP 16:  D. Print or Save this RFQ and close PDF. This is what you will send to the vendors along with your specifications (if any). Do this for all vendors you wish to solicit.

E. Click Exit button in the Create RFQ screen to get back to the menu screen.
Create an RFQ - Maintain Quote

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

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

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

**If there is a “no Bid,” enter $1.00.**

**STEP 4:** Click **Save**.

**Repeat steps 1 - 4 until all RFQ responses have been entered.**
Create an RFQ - Price Comparisons

**STEP 1:** In the SAP Portal or GUI, enter transaction code **ME49**.

**STEP 2:** In the **Collective RFQ** field, enter the Collective number.

**STEP 3:** Click **Execute**.

**STEP 4:** Double click in the area where the bid is.
Create an RFQ - Price Comparisons

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

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

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

**STEP 6:** Click **Save**.

**STEP 7:** Follow **STEPS 4-6** for all other vendors.
Create an RFQ - Review & Revise RFQ

**REVIEW**

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

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

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

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

**REVISE**

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

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

**STEP 3:** Click **Save**.
Create an RFQ - Update Requisition & Finish

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

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

![Purchase Requisition](image)

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

![Display Purchase Req.](image)

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

STEP 5: Attach all RFQ documents to the requisition. If unsure how to attach documents to a requisition, see **Attaching Documents Section**.
Create an RFQ - Update Requisition & Finish

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

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

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

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

1. **STEP 1:** Enter transaction code **ME42** (change RFQ).
2. **STEP 2:** Enter RFQ number.
3. **STEP 3:** Select **Overview**.
4. **STEP 4:** Select **More** (double arrow to the right of **Header Details** button).
5. **STEP 5:** Select **Messages**.
Reprint an RFQ

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

![Change RFQ :: Output](image)

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

**STEP 8:** Select **Repeat Output**.

![Repeat output](image)

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

**STEP 10:** Click **Back** button until you get to the Main Menu. RFQ PDF should appear.
Create an RFQ - Generic Vendor Numbers

<table>
<thead>
<tr>
<th>Vendor Number</th>
<th>Ownership Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>700005</td>
<td>Native American, Female Owned</td>
</tr>
<tr>
<td>700006</td>
<td>Native American, Male Owned</td>
</tr>
<tr>
<td>700007</td>
<td>Asian, Female Owned</td>
</tr>
<tr>
<td>700008</td>
<td>Asian, Male Owned</td>
</tr>
<tr>
<td>700009</td>
<td>Black, Female Owned</td>
</tr>
<tr>
<td>700010</td>
<td>Black, Male Owned</td>
</tr>
<tr>
<td>700011</td>
<td>Hispanic, Female Owned</td>
</tr>
<tr>
<td>700012</td>
<td>Hispanic, Male Owned</td>
</tr>
<tr>
<td>700013</td>
<td>Women Owned</td>
</tr>
<tr>
<td>700015</td>
<td>Not a HUB</td>
</tr>
</tbody>
</table>