Manage purchase job RFQs

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What a purchase-job RFQ is

A purchase-job RFQ is a saved request that records what you need from a sub-supplier before you work with the supplier's response. You create the RFQ from the purchase job, send it or record that it was submitted, receive the response, and continue the record into the next purchasing stage.

The record uses these stages for the work covered here:

Stage	Use it when you need to…
Inquiry	Create or manage the RFQ sent to a sub-supplier.
Offer	Work with the supplier response after **Receive Offer**.
Order	Continue with the purchasing order after a valid offer.

The RFQ page covers the request and its handover. The Purchase-job quotations page owns offer-stage work, and the Purchase-job orders page owns order-stage work.

If you need to…	Go to
Find an existing RFQ	Find and open an RFQ
Enter or correct request details	Create and correct an RFQ
Send the request or record submission	Send or record submission and receive the offer
Mark an RFQ closed, regretted, or deleted	Correct or close an RFQ
Resolve a validation message	When an RFQ action fails
Continue with supplier-response work	Purchase-job quotations
Continue with order work	Purchase-job orders

Before you start

An RFQ action is available only when the purchase job, its stage, and the RFQ state satisfy that action's conditions. Have the request details and item rows ready before you begin; a saved RFQ is required for submission and later state actions.

Have or confirm	Why it matters
A saved purchase job	The RFQ action requires a saved purchase job.
Permission to edit the record	**Save**, submission, correction, and closure controls use the record's edit permission.
The sub-supplier	The RFQ submission controls are tied to the sub-supplier response.
The package title	**Package Title** identifies the purchasing package on the record.
The shipment time frame	**Shipment Time Frame** is available before the Order stage and may be required by your company configuration.
The requested items and quantities	The item grid requires an **Item Description** and accepts a quantity from 1 through 999,999.
The request details	**Offer Type** and **Bid Due Date** are required RFQ information when those fields are shown.

The record must be in a stage that exposes the action you need. For example, the RFQ action requires a saved job that is not in the completed or Deleted state; submission
actions require an editable inquiry; and receipt actions require an eligible inquiry or order state. A field marked as configurable is required only where your company configures it.

Find and open an RFQ

The RFQ list is where you identify a saved purchase-job request before opening its record.

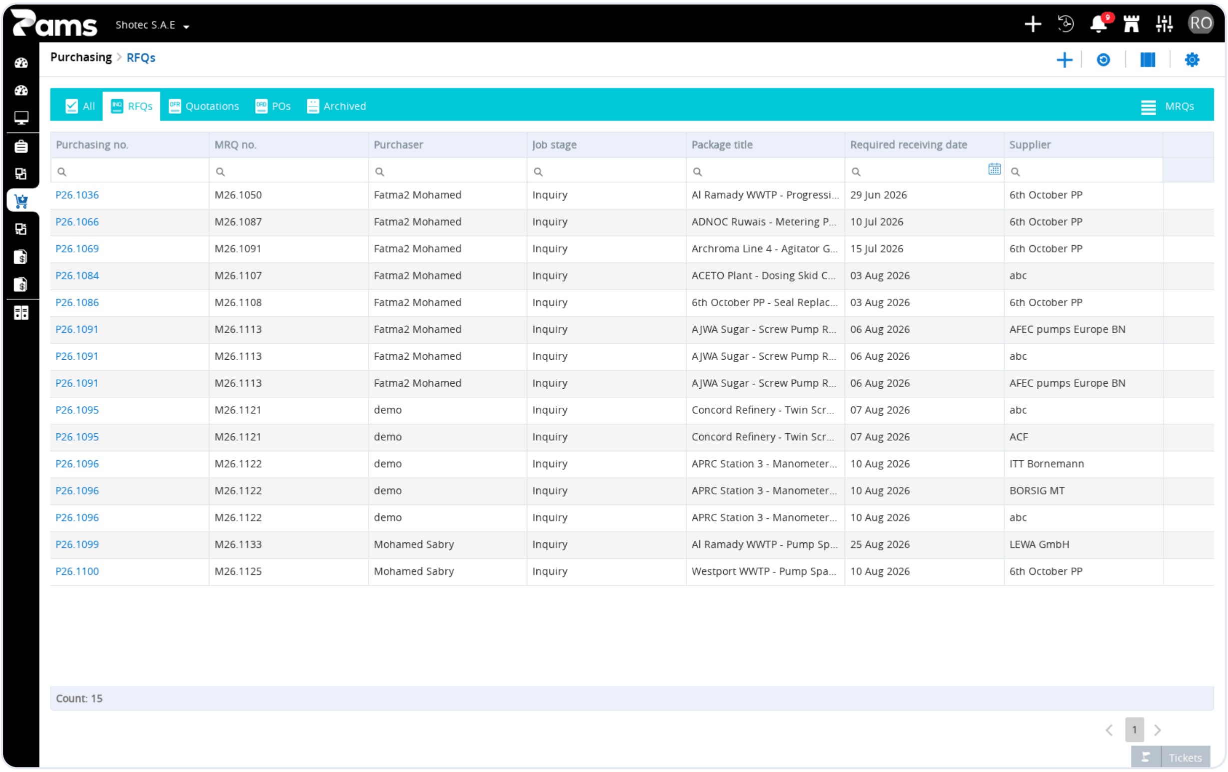
Prerequisites

- You know which saved purchase job you need to work on.

Steps

1. In **Purchasing**, select **RFQs**.

2. In the RFQ list, locate the record using **Purchasing no.**, **MRQ no.**, **Purchaser**, **Job stage**, **Package title**, **Required receiving date**, or **Supplier**.
3. Select the row for the RFQ you need to manage.



The list also provides **All**, **Quotations**, purchase orders, **Archived**, and **MRQs** for choosing the purchasing list that matches the work you need to do. Use **Refresh** to reload the list, **Table Layout** to change the visible list layout, or **Settings** to open the list settings.

Result: The selected RFQ record opens for the next action.

Understand the RFQ record

The RFQ record combines request information, item rows, supplier-response data, and stage actions so that the request and its response stay together.

Information	What you use it for
Package Title	Identify the purchasing package.
Shipment Time Frame	Record the requested shipment period before the Order stage.
Sub-supplier	Identify the supplier connected to the RFQ response.

Information	What you use it for
Offer No., **Offer Type**, and **Offer Date**	Record the supplier's offer details.
Delivery Time and **Delivery Term**	Record the supplier's delivery commitment.
Item Description	Identify the product or package item. This item value is required.
Unit	Record the unit used for the item quantity.
Qty	Record the requested quantity. Values must be from 1 through 999,999.
Regret Reason and **Regret Date**	Complete the regret action when that branch is available.
Cancellation Reason and **Cancellation Date**	Complete the cancellation action when that branch is available.
Reject Date and **Comment**	Complete the rejection or correction dialog when that branch is available.
Received On	Record the received date when the received branch is available.

The record has 96 controls. Some fields are required only where your company configuration makes them required. The item list can also contain columns selected by the saved layout, so work from the headers visible in your list.
The item list includes **Unit** and **Qty** when those columns are shown.

Result: You can match the requested data, the supplier response, and the available stage action before choosing what to do next. Enter or correct the request in the next section.

Create and correct an RFQ

Creating an RFQ records the request that a sub-supplier must answer. Correct the request before submission because later actions depend on the saved item and quantity data.

Prerequisites

- You have opened the purchase job and can edit it.
- You have the package title, request details, item descriptions, units, and quantities.

Steps

1. In the purchase-job record, select **RFQ**.

2. Enter the request name in **Package Title**.
3. Enter the requested period in **Shipment Time Frame** when that field is shown.
4. Add the item description in **Item Description**.
5. Enter the item quantity in **Qty**.
6. Choose how to save the RFQ.

If you need to…	Select
Keep the RFQ open	**Save**
Save the RFQ and leave the record	**Save and Close**

Use the following correction when a value is rejected:

Message	Correction
`This field is required`	Enter the field value before saving.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Enter a quantity from 1 through 999,999.
`Invalid input. Please enter a non-negative value`	Replace the negative value with zero or a positive value.
`Invalid input. The tax rate must be between 0 and 100`	Enter a tax rate from 0 through 100.
`Check mandatory field(s)`	Complete the fields marked as required, then save again.
`Please insert at least one RFQ`	Add an RFQ before continuing the purchasing operation.
`Please insert at least one product`	Add at least one product to the package.
`Package products cannot be empty`	Add a product to the package before saving or continuing.

Result: The RFQ remains open after **Save**, or the record closes after **Save and Close**. Continue to the submission actions when the RFQ has the required supplier and item information, the record is editable, and its current stage exposes the action.

Send or record submission and receive the offer

Submission actions record how the RFQ moves from request preparation to supplier response. Choose the action that matches the RFQ state shown on the record.

Prerequisites

- The RFQ is saved.
- The RFQ has the sub-supplier and item information required by your setup.
- The record is editable and its current stage exposes the action.

Steps

1. Open the action menu beside the RFQ's **Sub-supplier** entry.
2. Choose one action from this table.

If you need to…	Select
Send the RFQ to the supplier	**Send RFQ To Sub-supplier**
Record that the RFQ was submitted without sending it from this action	**Consider RFQ As Submitted To Sub-supplier**
Send the RFQ again	**Re-send RFQ To Sub-supplier**
Return a submitted RFQ to its not-submitted state	**Consider RFQ As Not Submitted**
Record that a supplier response was received	**Receive Offer**

3. If you need to download the request, select **RFQ template**.
4. If you need to print the request, select **Print**.
5. If you selected **Receive Offer**, continue with the offer-stage work in Purchase-job quotations.

Result: The RFQ shows the submission or response state selected for its current stage, or the offer-stage record opens for the next purchasing task.

Correct or close an RFQ

Closing an RFQ records why the request stopped or was reversed. Use the branch that matches the current RFQ state instead of deleting a record that already has supplier activity.

Prerequisites

- The RFQ is saved and editable.
- The RFQ state exposes the correction or closure action.

- You have the reason, date, and comment needed by the dialog.

Steps

1. Open the RFQ action menu beside the current RFQ entry.
2. Select the action that matches the state.

If the RFQ is…	Select
Ready to be cancelled	**Cancel RFQ**
Already cancelled and needs restoring	**Consider RFQ As Not Cancelled**
Ready to be regretted	**Regretted To Offer**
Regretted and ready to restore	**Consider As Not Regretted**
Ready for editing	**Enable Editing**
Eligible for deletion	**Delete RFQ**
An offer that must return to RFQ work	**Back to RFQ**

3. Complete the fields for the selected branch.

If you selected…	Enter…
ready to be regretted	**Regret Reason**, **Regret Date**, and **Comment**
Cancel RFQ	**Cancellation Reason**, **Cancellation Date**, and **Comment**
Rejected Offer	**Reject Date** and **Comment**

The product also reports deletion outcomes that apply to shipment-ready or completed items: `Product package deleted from all inquiries`, `Product package deleted from all offers`, and `Product package deleted from all orders`. The remaining messages describe package deletion from the corresponding purchasing stage.

The RFQ action can also report these completed branches:

Message	Meaning
`Item(s) Regretted`	The RFQ item was regretted.
`Item(s) Cancelled`	The RFQ item was cancelled.
`Item(s) Rejected`	The RFQ item was rejected.
`Item(s) Reactivated`	The RFQ item was reactivated.

Result: The RFQ is cancelled, restored, regretted, rejected, returned to RFQ work, or deleted according to the selected branch. If a message appears, use the matching correction in the next section.

When an RFQ action fails

Use the exact message on screen to identify the correction. The same record can also expose validation for inquiry, offer, order, package, and branch actions.

Message	What to do
`This field is required`	Complete the field marked as required.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Enter a quantity from 1 through 999,999.
`Invalid input. Please enter a non-negative value`	Enter zero or a positive value.
`Invalid input. The tax rate must be between 0 and 100`	Enter a tax rate from 0 through 100.
`Check mandatory field(s)`	Complete the required fields and try the action again.
`Check RFQ mandatory field(s)`	Complete the RFQ fields marked as required and try the action again.
`Required Offer Type`	Complete **Offer Type** before continuing.
`Required Bid Due Date`	Complete **Bid Due Date** before continuing.
`Please insert at least one PO`	Add a purchase order before continuing the order operation.
`Please insert at least one RFQ`	Add an RFQ before continuing the purchasing operation.
`Please insert at least one product`	Add a product to the package.
`Please select one or more items to create a RFQ.`	Select at least one item before creating the RFQ.
`Package must have at least one item`	Add an item to the package.
`Inquiry must have at least one item`	Add an item to the inquiry.
`Offer must have at least one item`	Add an item to the offer.
`Order must have at least one item`	Add an item to the order.

Message	What to do
`No remaining items. All items have been selected`	Continue with the selected items or change the selection.
`This action is only allowed if you belong to that branch`	Use a record belonging to a branch you belong to.
`An error occurred while processing your request`	Check the record and try the action again.
`Forbidden characters detected. Please remove them and try again.`	Remove the forbidden characters from the value.
`Your request was completed successfully`	Continue after the completed operation.
`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	Keep shipment-ready or completed items in the record.
`Product package deleted from all inquiries`	The product package was deleted from inquiries.
`Product package deleted from all offers`	The product package was deleted from offers.
`Product package deleted from all orders`	The product package was deleted from orders.

Out of scope — Libraries and files, contact editing, and payment milestone editing

These messages belong to related operations:

Message	Owning page
`Just '_''‘-''.' And '&' Characters Accepted`	Libraries and files
`You already have a contact with this name`	Contact editing
`Please enter action for each milstone`	Payment milestone editing
`Please enter at least one email`	Email activity

Result: You have either corrected the value named by the message or have the exact message ready when requesting help.

Continue after the RFQ

The RFQ hands the purchasing work to the stage that matches the result. An inquiry can become an offer after supplier-response work; order work continues after the valid offer is converted.

Result	Continue with
`Converted to inquiry successfully`	Return to RFQ inquiry work.
`Converted to offer successfully`	Purchase-job quotations
`Job reactivated successfully`	Continue the reopened RFQ branch.
`Order updated successfully. Undelivered. A draft invoice was deleted`	Continue order work in Purchase-job orders.

The quotation page owns offer validation, conversion, alternatives, revisions, and returns. The order page owns approval, award, receipt, and order-stage work.

Result: You know which purchasing page owns the next stage after the RFQ.