

**End User Procedure (EUP)**

**Create Request for Quotation**

**ME41**

**Purpose**

Use this procedure to create Requests for Quotations to send to a vendor or a series of vendors for bidding.

**Trigger**

Perform this procedure when transaction ME57 (Assign & Process) shows requisitions that cannot be automatically assigned and are at or over the dollar amount at which bids are required.

**Menu Path**

Use the following menu path(s) to begin this transaction:

- Select **Logistics** → **Material Management** → **Purchasing** → **RFQ/quotation** → **Request for Quotation** → **Create** to go to the *Create RFQ: Initial Screen*

**Transaction Code**

**ME41**

**Helpful Hints**

Review the following:

- The collective number is important to link the RFQ's issued to the different vendors
- SAP treats each issuance to a different vendor as a separate RFQ document
- Create the Collective Number using ZMROLLNO

**Procedure**





1. Start the transaction using the above menu path or transaction code.

**Create RFQ : Initial Screen**



R/O/C/D indicates a field is required, optional, conditional (dependent upon another selection) or the information defaults (based on previously entered information or system configuration)

2. As required, complete/review the following fields:

Field Name	R/O/C/D/I	Description
RFQ type	R	Identifier allowing differentiation between the various kinds of request for quotation (RFQ).  Default is 'AN' for standard RFQ. Select the MATCHCODE  icon for additional entries. <b>Example:</b> AN
Language key	D	Language used is English (EN). <b>Example:</b> EN
RFQ date	R	Date the Request for Quote (RFQ) is created. <b>Example:</b> 08/13/2004
Quotation deadline	R	Date by which a response to a request for quotation must be received.  Must be prior to the requested delivery date specified. <b>Example:</b> 12/31/2004
Purch. organization	R	An organizational unit that procures materials and services, negotiates conditions of purchase with vendors, and bears responsibility for such transactions.  COPA or if your organization has more than one plant, the appropriate organization. <b>Example:</b> COPA
Purchasing group	R	A buyer or group of buyers who are responsible for certain purchasing activities. Internally responsible for procuring a material or a class of materials. <b>Example:</b> 279

3. Select the ENTER  icon.

### Create RFQ : Header Data

4. As required, complete/review the following fields:


Field Name	R/O/C/D/I	Description
Coll. no.	R	Number used to link all RFQs for a specific material or project. <b>Example:</b> CN00000053
Our reference	R	The bid close time. <b>Example:</b> 2:00 p.m.

5. Select the HEADER TEXT  icon.

**Create RFQ : Header Texts**




6. As required, complete the following fields:

Test type	Text
Header text	Used to store any special instructions and conditions to the buyer if no attachments exist. This text will always copy from the RFQ. This text will be printed out in the contract documents that will be send to the vendor.
Header note	Used to store internal notes. This text does not copy from RFQ. This text will not be printed out in the contract documents that will be sent to the vendor.
Shipping instructions	Used to enter any specific shipping instructions to the vendor. This text will always copy from the RFQ. This text will be printed out in the contract that will be sent to the vendor.

Test type	Text
Terms of payment	<p>Used to enter any type of special payments that need to be communicated to vendor. This text will always copy from the RFQ. This text will be printed out in the contract that will be sent to the vendor.</p>  This is not used to establish the standard payment period for an invoice.
Vendor memo (general)	<p>This text copies from the Vendor Master record. This text will be printed out in the contract that will be sent to the vendor.</p>



To get an expanded text field for entry of information:

- 6.1 Select the CHECKBOX  by the appropriate text type.
- 6.2 Select the LONG TEXT  button.
- 6.3 Enter descriptive information.
- 6.4 Select the BACK  icon.
- 6.5 Select the BACK  icon.

**Create RFQ : Item Overview**



RFQ line items are numbered in “10s”. See the **Item** field above.

7. Perform one of the following:

If	Go To
Creating a material line item	<a href="#">Step 8</a>
Creating a service line item	<a href="#">Step 11</a>

8. As required, complete/review the following fields:



Following is a guideline for entry of a material request.

Field Name	R/O/C/D/I	Description
Material	R	A unique number identifying a material. This number is automatically assigned by SAP during the initial creation. <b>Example:</b> 100174
RFQ quantity	R	Total quantity in a Request for Quotation (RFQ). <b>Example:</b> 12
Deliv. date	R	Delivery date requested by the customer (desired delivery date) or date confirmed in the vendor's order acknowledgement or shipping confirmation. <b>Example:</b> 10/01/2004
Plnt	R	The agency organization unit number. <b>Example:</b> 1500

9. Select the ENTER  icon.

**Create RFQ : Item Overview**





**Short text** field, **Order unit** field, and the **Matl group** field information default from material master record.

10. Perform one of the following:


If	Go To
Creating another material line item.	<b>Step 8</b>
Creating a service line item	<b>Step 11</b>
Adding specific line item text	<b>Step 14</b>
Assigning to Vendor	<b>Step 21</b>

11. As required, complete/review the following fields:



The following is a guideline for entry of a service request. If the intent of the purchase is for a service, the first line item must be the service.

Field Name	R/O/C/D/	Description
Short text	R	Text description with limited number of characters. Short text description of the service to be purchased. <b>Example:</b> EQUIPMENT MAINTENANCE
RFQ quantity	R	Total quantity in a Request for Quotation (RFQ). <b>Example:</b> 3
Order unit	R	A unit of measure for a material or service. <b>Example:</b> YR
Deliv. date	R	Delivery date requested by the customer (desired delivery date) or date confirmed in the vendor's order acknowledgement or shipping confirmation. <b>Example:</b> 01/01/2005
Matl group	R	Code identifying an allocated group of materials with the same features. Service material groups begin with a "7", "8" or "9". <b>Example:</b> 80101507
Plnt	R	The agency organization unit number. <b>Example:</b> 1500

12. Select the ENTER  icon.

**Create RFQ : Item Overview**

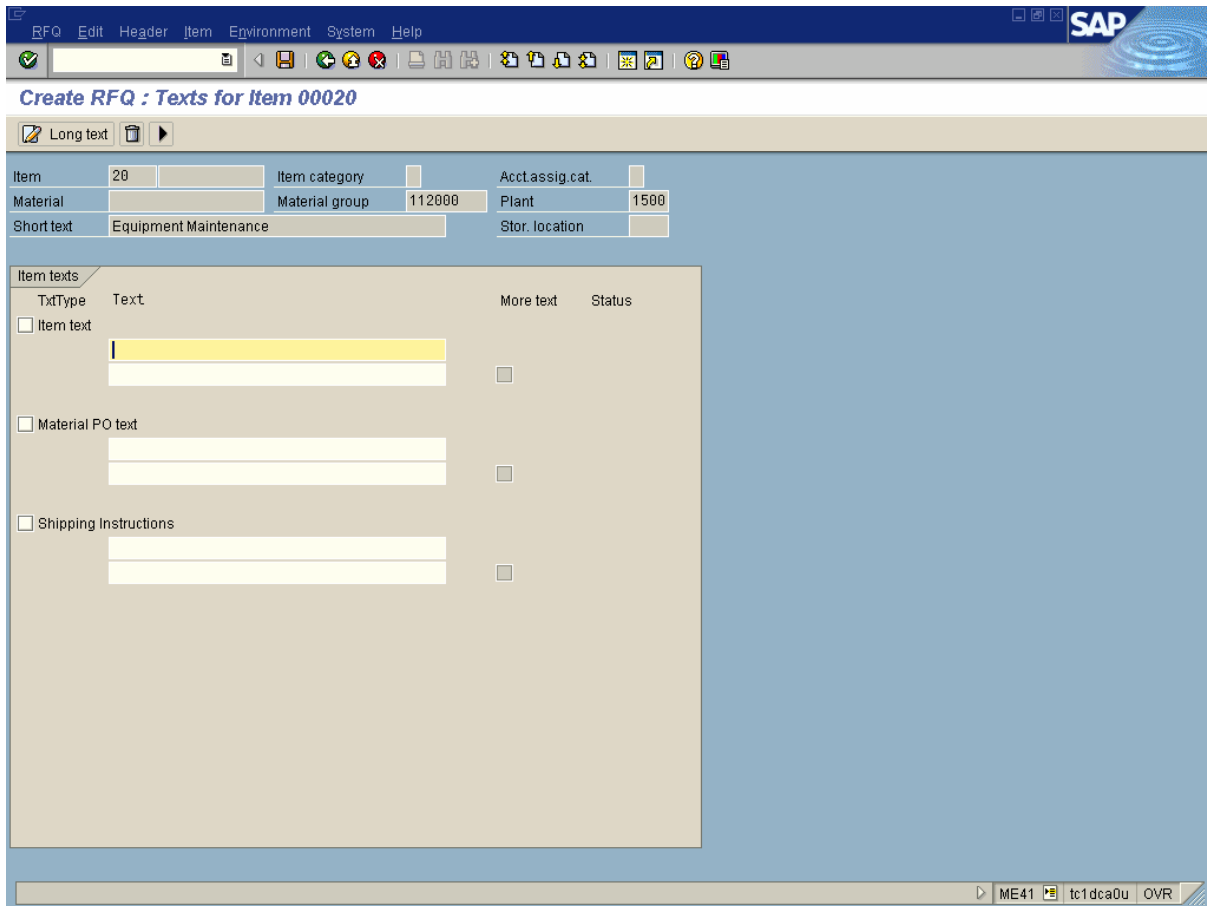
13. Perform one of the following:

If	Go To
Creating a material line item	<a href="#">Step 8</a>
Creating another service line item	<a href="#">Step 11</a>
Adding line item specific text	<a href="#">Step 14</a>
Assigning to Vendor	<a href="#">Step 21</a>

14. Select the appropriate line item.

15. Select the ITEM TEXTS  icon.

**Create RFQ : Texts for Item 00020**

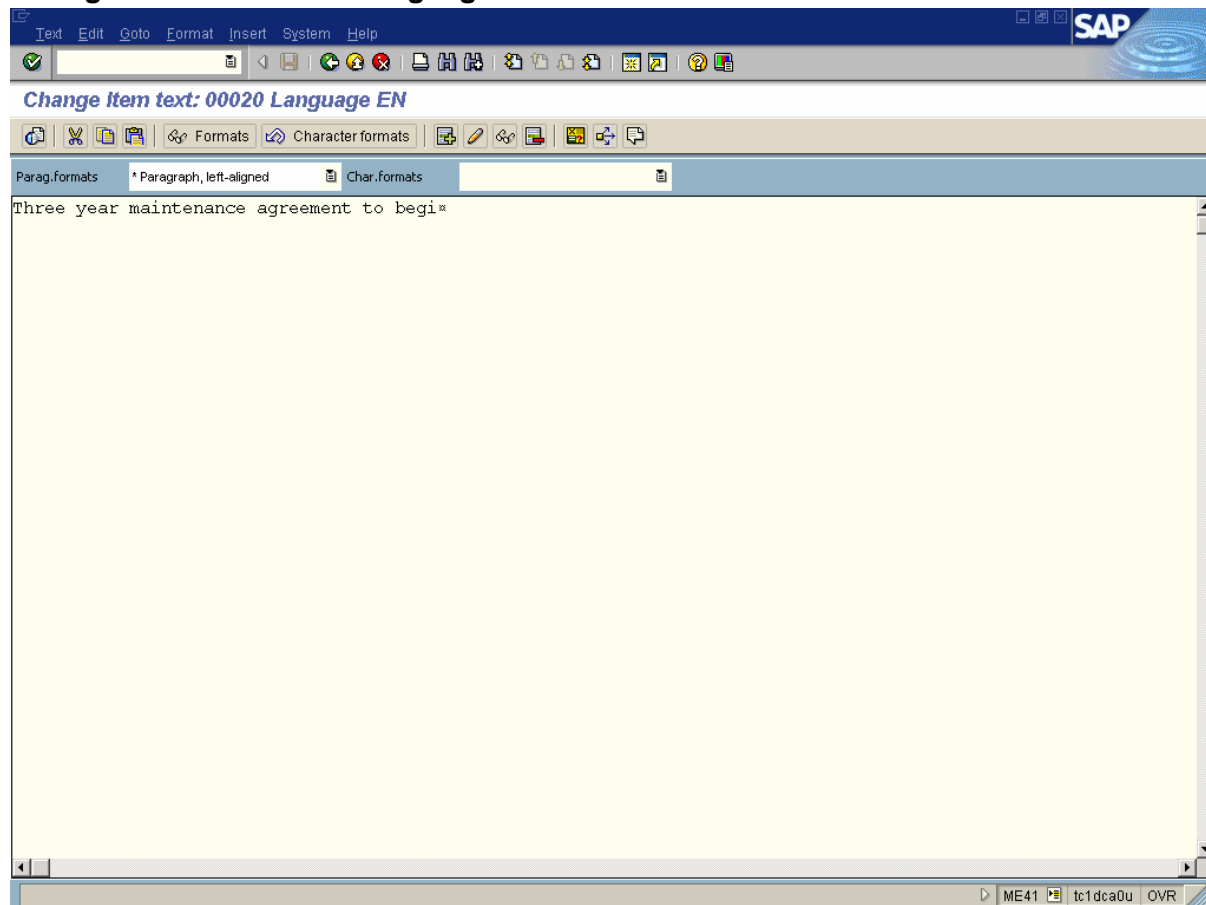


16. As required, complete/review the following fields:

Field Name	R/O/C/D/I	Description
Item text	C	Information related to the specific line item. This text will be copied into a contract and/or purchase order created from the RFQ. <b>Example:</b> Three year maintenance agreement to begin after 90 day warranty expires.
Material PO text	C	This text is copied from the material master record. This text will be copied into every purchase order generated from this contract.
Shipping instructions	C	Information related to the specific line item. This text will be copied into every purchase order generated.

17. Select the CHECKBOX  by the appropriate description.
18. Select the LONG TEXT  button.

### Change Item text: 00020 Language EN



This gives an expanded text field for entry of information pertaining to the line item.

19. Select the BACK  icon.

**Create RFQ : Texts for Item 00020**

The screenshot shows the SAP 'Create RFQ : Texts for Item 00020' window. At the top, there is a menu bar with 'RFQ', 'Edit', 'Header', 'Item', 'Environment', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Create RFQ : Texts for Item 00020' and contains a 'Long text' input field. Below this, there are several data fields: 'Item' (20), 'Item category', 'Acct.assig.cat.', 'Material', 'Material group' (112000), 'Plant' (1500), 'Short text' (Equipment Maintenance), and 'Stor. location'. A section titled 'Item texts' contains a table with columns 'TxType', 'Text', 'More text', and 'Status'. The 'Item text' row is selected, and the 'More text' checkbox is checked. The text entered is 'Three year maintenance agreement to begi'. Below this, there are 'Material PO text' and 'Shipping Instructions' sections, each with a text input field and an unchecked 'More text' checkbox. At the bottom, a status bar shows 'Text changes were transferred' and navigation buttons for 'ME41', 'tc1 dca0u', and 'OVR'.



Notice there is now a check mark in the **More text**  checkbox to indicate there is more information for viewing specific to the line item.

20. Select the BACK  icon.

**Create RFQ : Item Overview**

RFQ  RFQ type  RFQ date 08/13/2004  
 Vendor  Quot dead 08/31/2004

RFQ items

Item	Material	Short text	RFQ quantity	O...	C	Deliv. date	Matl group	Plnt	SLoc	D	T...
10	100174	PAPER,SHREDDER,ST...	12	EA	D	10/01/2004	074000	1500			
20		Equipment Maintenance	3	YR	D	01/01/2005	112000	1500			
30					D						
40					D						
50					D						
60					D						
70					D						
80					D						
90					D						
100					D						
110					D						
120					D						
130					D						
140					D						
150					D						
160					D						
170					D						
180					D						
190					D						
200					D						
210					D						

Item

ME41 tc1dca0u OVR

21. Select the VENDOR ADDRESS  icon.

**Create RFQ : Vendor Address**

22. As required, complete/review the following fields:

Field Name	R/O/C/D/I	Description
Vendor	R	Business partner that provides materials or services each having a unique identification value assigned as it is processed in SAP. The system automatically assigns a number. <b>Example:</b> 100175

23. Select the ENTER  icon.

### Create RFQ : Vendor Address

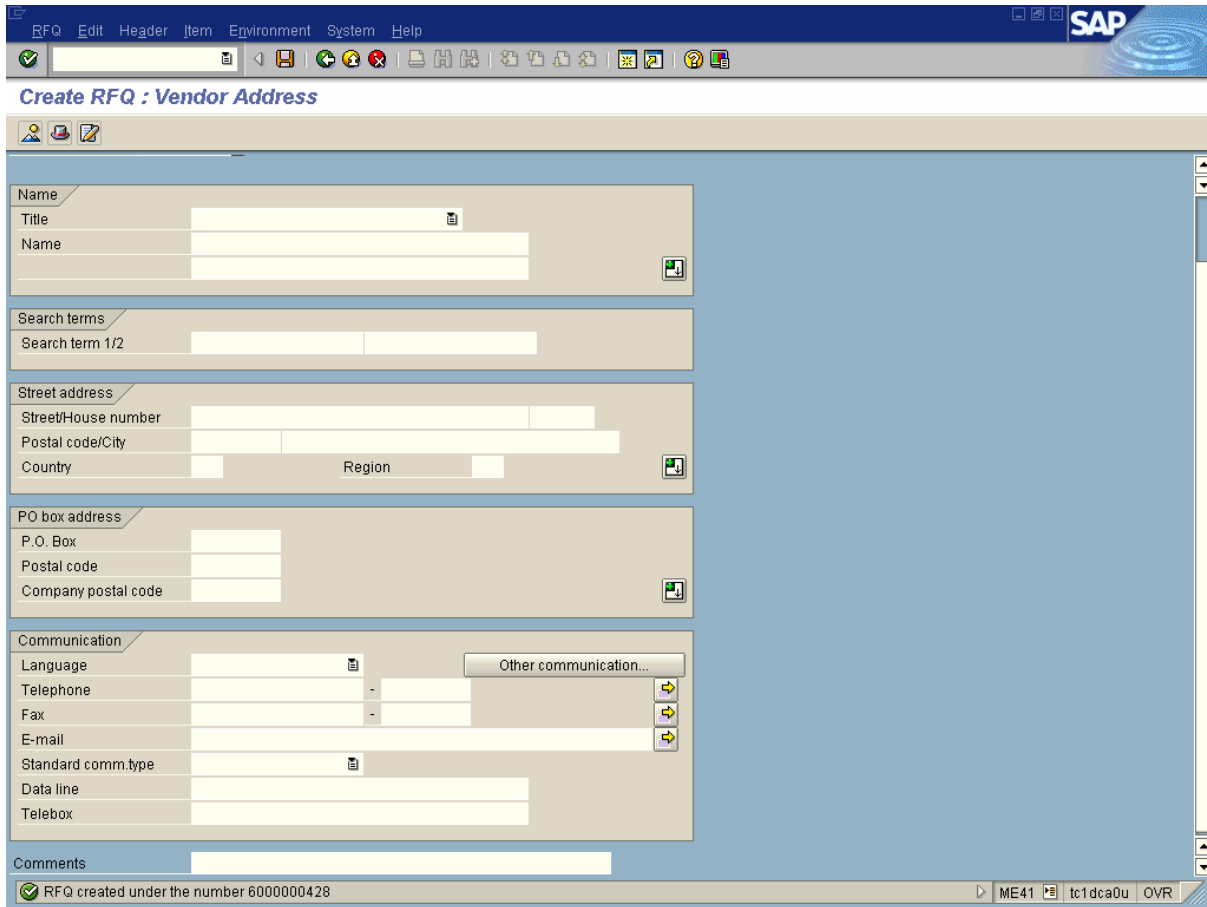



Information defaults from the vendor master record.

24. Select the SAVE icon.



**Create RFQ : Vendor Address**




**24.1** After selecting the SAVE  icon, the system displays the message “RFQ created under the number XXXXXXXXX”.

**24.2** The screen is cleared for adding additional vendors for the RFQ solicitation.

**25.** Perform one of the following:

If	Go To
Adding additional vendors for the RFQ solicitation	<a href="#">Step 22</a>
Exiting the transaction	<a href="#">Step 26</a>
Creating another RFQ	<a href="#">Step 1</a>

**26.** Select the EXIT  icon until the SAP Easy Access screen appears.

27. You have completed this transaction.

#### Result

You have successfully completed the transaction Create Request for Quotation (ME41).

#### Comments

Congratulations!