

## The Supplier RFQ System

## The Supplier Contract Management System

## The Supplier Requirements Management System via web Portal

The **Supplier RFQ System** and **Supplier Contract Management System** are optional applications that work hand in hand with the Electronic Requisition Approval/Workflow System for XA. The Supplier Contract Management System creates and manages purchase contracts in XA. These applications are tightly integrated via System-Link for use with Infor XA.

The **Supplier Requirements Management System** is a web portal for two-way communication of “requirements to” and “shipments from Suppliers.” It is integrated with XA via System-Link.

### The Supplier RFQ System via the Web Portal or E-Mail

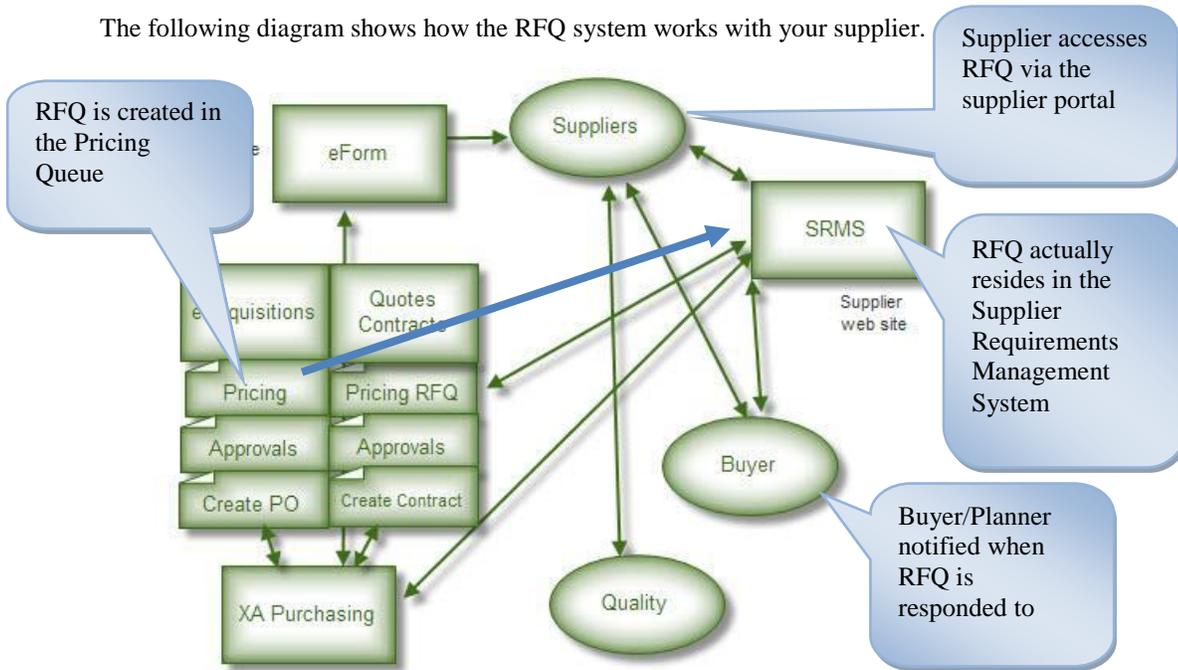
Requisitions appear in the pricing work queue after any required supervisor/manager or purchase type review them. The pricing work queue is located in the purchasing section of the menu. Only personnel with purchasing access will see the purchasing menu option. Any purchase agent can work on any requisition in the pricing queue. For a list of requisition assigned to them, the purchase agent can also work from their My Requisitions “*Assigned To Me*” work queue.

The RFQ form may be customized to your needs. This may be a simple RFQ form you use that suppliers attach their quotes to, or a complete quotation form. The amount of additional setup time is, of course, dependent on how complex your RFQ is.

There are two methods of communicating your RFQ:

1. Supplier Portal – A supplier portal is provided and suppliers can update your RFQ directly by logging into the website to see all their requirements or by link directly to the RFQ.
2. Email – An RFQ is created and the form emailed to the supplier.

The following diagram shows how the RFQ system works with your supplier.



**It takes just a few easy steps to begin sending an RFQ to your suppliers using the Supplier Web Portal:**

- Register your regular suppliers.
- Create one or more RFQ in the pricing queue.
- If an RFQ is created for a supplier who is not registered for the website, temporary access will be created and the supplier can access just the RFQ via a web link.
- The system will notify your suppliers that an RFQ is available for them to work on.
- The supplier accesses the RFQ through the portal or directly via the web link. The buyer/planner is notified when the supplier responds.
- The supplier marks the RFQ as completed. The buyer/planner is notified.
- When all RFQ are completed, or at any time the buyer/planner can accept a completed RFQ, the system copies the information into the requisition.
- The buyer/planner can send rejection notices (not automated) to the suppliers they did not choose.
- The buyer/planner can send an Accept notice (not automated) to the supplier they did choose.

**Create an RFQ for the supplier portal**

In the pricing queue (only in the pricing queue), a special task bar is shown where suppliers can be selected for RFQ.

The screenshot displays the Supplier Web Portal interface. At the top, there are navigation buttons: 'Location' (set to MKA-GR), 'Create RFQ/Web', 'Create RFQ/Email', and 'Supplier Search'. Below these are search filters for 'XA: YY' and 'Contacts' (selected). A table lists suppliers with columns for Supplier ID, Company, Contact, City, State, and Phone. Two suppliers are listed: RADIO SHACK and 21ST CENTURY ELECTRONICS. A 'Pricing Queue' section is visible below the table, showing a list of requisitions with details like 'REQ000132', 'MKA-Howell', 'MRO', 'General', 'OFFICE MAX', and a total value of \$1,302.33. A 'Selected Suppliers List' is also shown. Callouts point to various features: 'Registered' points to the supplier status, 'Temporary' points to a status icon, 'Create portal RFQ' points to the 'Create RFQ/Web' button, 'Drop down full text search' points to the search filter, 'Pop up search window' points to the search icon, and 'Selected Requisition' points to a requisition entry.

- Select the location you are working with. The location is defaulted from your profile. The location controls the supplier list if you have multiple XA environments.
- Select the supplier you want to send an RFQ to.
- Contact Address Books
  - A contact address book may be available (contact management is not a part of Web/Req, but Web/Req will interface to its address book)
- Select one or more requisitions to create an RFQ. An RFQ will be created for each supplier selected for each requisition selected.
- Click on the Create RFQ/Web button. A completion message will be shown.
- An indicator shows the number of RFQ associated to a requisition. Use the down arrow on the requisition line to view the RFQ list.

The screenshot displays the MK&Associates web application interface. At the top, there are navigation buttons: "Location", "Create RFQ/Web", "Create RFQ/Email", and "Supplier Search". The "Location" dropdown is set to "MKA-GR". Below this, there are radio buttons for "Contacts" (selected) and "XA Suppliers". A red callout box points to a "Completion message" button. To the right, there are search filters for "XA #", "XA Company", and "XA Registered", along with a search box and a "By Company" / "By Contact" toggle.

Below the navigation area, there is a table with columns: "Supplier #", "Company", "Contact", "City", "State", and "Phone". The table contains two rows of data:

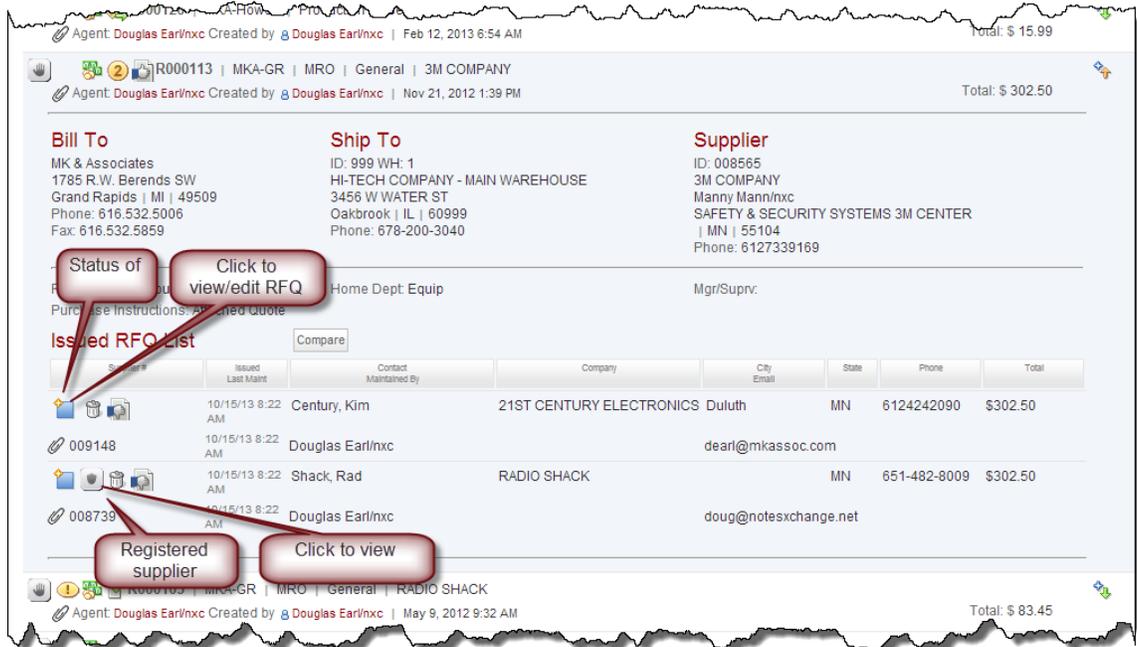
Supplier #	Company	Contact	City	State	Phone
008739	RADIO SHACK	Shack, Rad		MN	651-482-8009
009148	21ST CENTURY ELECTRONICS	Century, Kim	Duluth	MN	6124242090

Below the table, there is a "Pricing Queue" section. A red callout box points to an "RFQ added" message. The pricing queue shows a list of requisitions with their details and total amounts:

Requisition ID	Location	Department	Category	Agent	Created By	Created Date	Total
REQ000132	MKA-Howell	MRO	General	Douglas Earl/nxc	Douglas Earl/nxc	Jun 24, 2013 12:43 PM	\$ 1,302.33
R000127	MKA-Howell	Production	General	Douglas Earl/nxc	Douglas Earl/nxc	Feb 12, 2013 9:05 AM	\$ 16.00
R000126	MKA-Howell	Production	General	Douglas Earl/nxc	Douglas Earl/nxc	Feb 12, 2013 6:54 AM	\$ 15.99
R000113	MKA-GR	MRO	General	Douglas Earl/nxc	Douglas Earl/nxc	Nov 21, 2012 1:39 PM	\$ 302.50
R000105	MKA-GR	MRO	General	Douglas Earl/nxc	Douglas Earl/nxc	Nov 21, 2012 1:39 PM	\$ 82.45

- View/Edit RFQ – You can view and edit the RFQ at any time. You may want to add a quick comment specific to the supplier or add an attachment. Each time you edit the RFQ, the status is set to New and the supplier is notified a change has been made. So if the supplier has responded to the RFQ or you have rejected the RFQ, the status is reset so the supplier can edit/complete the RFQ again.

(If the supplier is temporary, a new RFQ must be created if the RFQ has been closed because the security has been removed.) Click the status icon to open the RFQ.



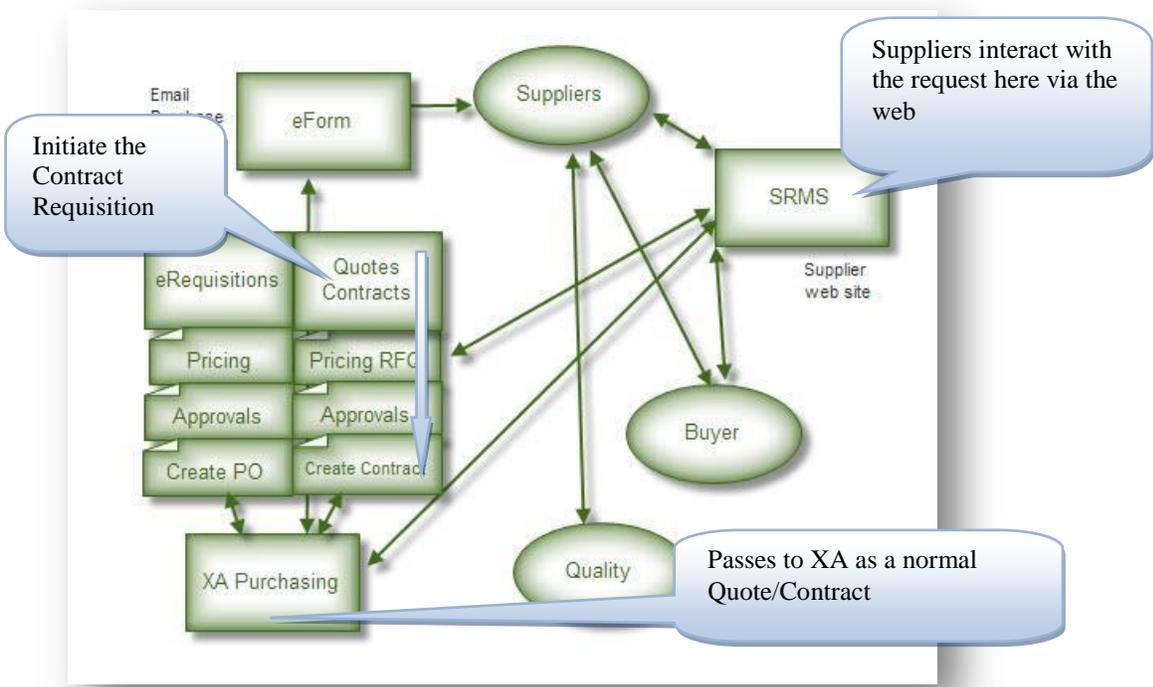
- Supplier – Supplier is marked as registered, primary contact or nothing (temporary). Click on the icon to view/edit the supplier record.
- Delete – You may delete the RFQ at any time. The supplier will receive an email notification that the RFQ has been removed.
- Reject – You may send a notification to the supplier at any time that the RFQ has been rejected and to not continue working on it.

## The Supplier Contract Management System and RFQs

**For direct materials**, rather than just creating discrete purchase orders, planners/buyers may negotiate with a supplier for a contract price over a period of time. The requisition/quote process can be standardized in the “e-Requisition” System and the user can create a quote/contract directly in XA Purchasing at the end of the process. Contracts are usually handled by planners/buyers and the requisition/quote form may be very complex.

The following diagram describes the Procurement process as a whole. The sections we will be focusing on are:

1. Quotes/Contracts (where the quotation information is created)
  - a. Pricing RFQ (creating RFQ requests for multiple suppliers)
  - b. Approvals (when the RFQ results are sent for approval)
  - c. Create Contract (interface to XA Purchasing to create the Quote and Contract)
  - d. XA Purchasing (where the quote and contract are maintained)
  
2. SRMS—Supplier Requirements Management System (where the supplier responds to the RFQ via the web)



## System Integration & Features

It is assumed that at least some employees will need to have access to both the regular MRO type requisitioning and the Supplier Contract Management. Therefore the system is integrated, but security is separate so that those who do not need access to the contract management side do not even see that it is there.

Every company has a different and unique quoting process. The quotation form is customized to the information you require for your Quote/RFQ process.

## My Contracts

The “My Contracts” queue shows all contracts created by or assigned to you. Open by clicking on the number. Additional information is available by expanding the line using the down arrow. Any of the information shown is searchable using the search entry at the top of the screen.

To create a new form, click on New Contract.

The screenshot shows a web application interface for 'My Contract Requisitions'. The top navigation bar includes 'Requisitions', 'New Contract Requisition', and 'My Requisitions', along with a search field. A left-hand menu lists various sections: 'My Contract Reqs', 'Work w/Contract Reqs', 'My RFQ', 'Parts', 'Receivings', 'Suppliers', and 'Views'. The 'Views' section is expanded to show 'Active' contracts, with counts for 'My Contracts' (3), 'Assigned To Me' (1), and 'My Held Contracts' (0). The main content area displays a table of contract requisitions. The table has columns for contract ID, agent, creation date, and total amount. The first entry is 'Contract Pricing' for ID 122003, created by Douglas Earl on May 2, 2012, with a total of \$16,525.1. The second and third entries are 'Contract Approved' for IDs 132002 and 132001, both created by Aaron Approver on June 17, 2013, with a total of \$50.00 each. The interface includes pagination controls and a 'Show: 5 | 10 | 25 | 50 | 100 entries' option at the bottom of the list.

## Supplier Quotation Form

Every company needs different information regarding their RFQ process and so the requisition and RFQ can be customized to your needs. Some standard information is required for compliance with XA Purchasing and Web/Req, but all other information is tailored to your requirements.

Requisitions



MK & Associates Component Part Quotation Form

Note: It is imperative that ALL information in this section is completed. If an item does not apply, write N/A. If you are unsure, contact ASI. Any information left blank will delay getting your information to the proper decision maker.

Part Number	test	Supplier Quote #		Date Issued	
Part Name	test	ASI Inquiry #	122003	Date Received	Jul 9, 2013
Eng. Dwg No.		Finished Weight		Est. Annual Volume	1,000

Supplier: RADIO SHACK  
 Supplier Code: 001382

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**Raw Material**

Name/Code	Description/Dimensions	INPUT		OUTPUT		Unit Cost		Extended Cost		Reason	Country
		UM KG	UM KG	Loss	NEW	OLD	NEW	OLD	DIFF		
Plastic	Test2	0.2345	0.1452	0.0893	0.1453	1.4520	0.0341	0.3405	(0.3064)	Design Change	USA
Steel	Test	0.1451	0.1420	0.0031	0.1452	0.1453	0.0211	0.0211	(0.0000)	Design Change	USA
Oil	Test3	0.1000	0.1000	0.0000	0.5000	0.5000	0.0500	0.0500	0.0000		USA
<b>Sub Total A</b>								<b>0.1051</b>	<b>0.4116</b>	<b>(0.3064)</b>	

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**Components**

Part #	Part Name	Supplier	Qty	Unit Cost		Extended Cost		Reason	Country
				NEW	OLD	NEW	OLD		
test	test	test	6	1.4500	1.4500	8.7000	8.7000	0.0000	USA
<b>Sub Total B</b>						<b>8.7000</b>	<b>8.7000</b>	<b>0.0000</b>	

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**Process Costs**

Process	Machinery	INPUT		OUTPUT		Extended Cost		Reason	Country
		Manpower	per hr	NEW	OLD	DIFF			
<b>Sub Total C</b>						<b>0.0000</b>	<b>0.0000</b>	<b>0.0000</b>	

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**Local Content Calculation**

Service Parts	Production Cost (A+B+C)	\$8.8051	\$9.1116	(\$0.3064)
(If left blank, ASI assumes 100% local)	S.G.A. & P.	\$1.3700	\$1.3600	\$0.0100
ASI Assumes MP Price.	Packaging (expendable)	\$2.5000	\$2.4000	\$0.1000
If different, separate quote form required				

## Create RFQ

Create RFQ and send notice to supplier

Select suppliers

Select one or more requisitions

Supplier #	Company	Contact	City	State	Phone
001382	RADIO SHACK	Shack, Radio		ND	7012283682
008605	IBM PC COMPANY	White, Ronnie doug@notesxchange.net		TX	512-838-5154

Contract Requisition Price Q

Requisition	Total
Aaron Approver/nxc Agent: Aaron Approver/nxc Created by Kim Veltis 123007   MKA-GR   Test2   IBM PC COMPANY	\$ 50.56
Aaron Approver/nxc Agent: Aaron Approver/nxc Created by Michelle Manager   May 24, 2012 122009   Grand Haven   12345   SALVATION ARMY	\$ 16.0922

The RFQ is created and notifications are sent to the supplier or contact. The RFQ is shown in the list under the contract requisition. The Contract Requisition now shows the number of RFQ created and their status.

Remove an RFQ by clicking on the delete icon on the RFQ line. The RFQ is removed from the supplier website and a notification is sent to the supplier or contact.

Edit the RFQ by clicking on the status icon. The RFQ edit will be the same as the contract requisition.

The screenshot displays a software interface for managing RFQs. At the top, it shows the user 'Michelle Manager/nxc' and the agent 'Michelle Manager/nxc Created by Douglas C Earl/mka'. The main section is divided into three columns: 'Quote/Contract', 'Part', and 'Supplier'. Below this is an 'Issued RFQ List' table with columns for Supplier #, Issued Last Maint, Contact Maintained By, Company, City Email, State, Phone, and Total. The table lists two RFQs: one for 'RADIO SHACK' in ND and one for 'IBM PC COMPANY' in TX. Callouts provide instructions: '# of RFQ' points to the top left; 'Contract Requisition information' points to the top right; 'RFQ List' points to the table header; 'Click to access RFQ' points to a status icon; 'Click to access supplier' points to a name; and 'Remove RFQ' points to a trash icon.

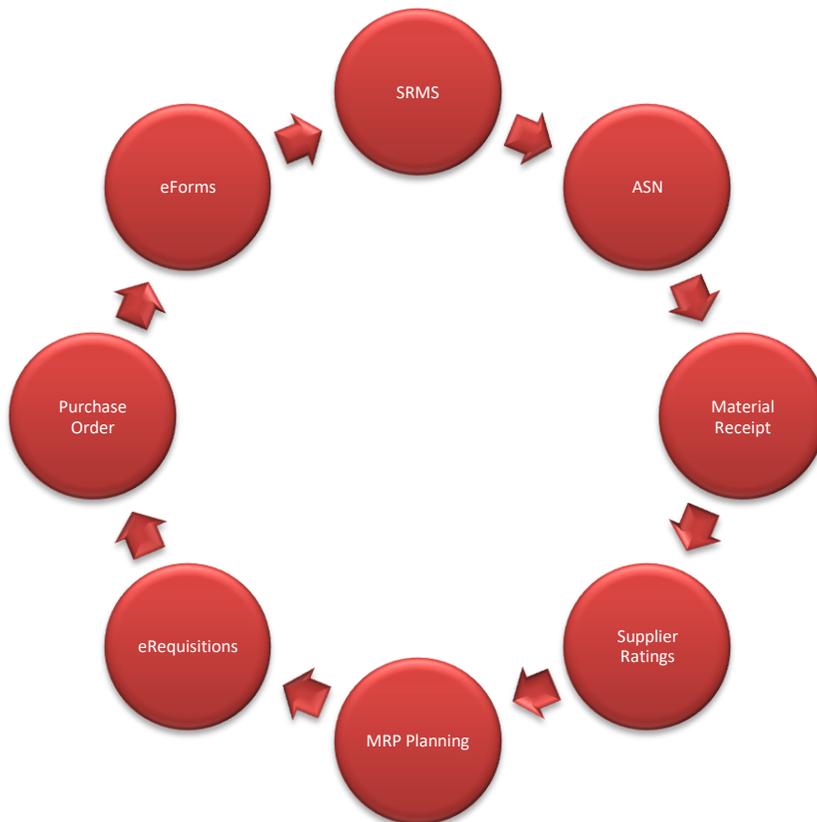
An RFQ can be accepted any time after it has been completed, regardless of the status of other RFQ. The RFQ will have a status of Accepted, but the supplier will not be notified automatically. Use the *Notify* button on the RFQ line to send an Accept notification to the supplier. Only RFQ that have been accepted will have a *Notify* button.

The buyer may mark the rest of the RFQ associated to the contract as Rejected at any time. When an RFQ is rejected, the rejected icon is shown and a notification is sent to the supplier automatically. RFQ are not marked as rejected automatically.

The Accept button will not appear unless the supplier has indicated that the RFQ is complete. The supplier may update the RFQ multiple times by using the Save button. Once the Completed checkmark icon is clicked, the supplier electronic signature is assigned and the RFQ is no longer editable by the supplier.

## The Supplier Requirements Management System (SRMS) via Portal

### Supplier Requirements Cycle



Extend your XA ERP system to communicate with customers and suppliers **via the web**, and do so with an easy-to-maintain and administer system that securely presents the information you want customers and/or suppliers to see automatically. The Supplier Requirements Management System (SRMS) takes care of the expensive and time-consuming job of managing information between your XA ERP system and your customers and suppliers by using email and the Internet.

Consider this: your company has invested significant money in your email system, ERP system, and connection to the Internet. Now you can leverage that investment into a business advantage for you and your customers.

## **SRMS—Integrating Your System and Suppliers via the Internet**

**The Supplier Requirements Management System takes your purchasing requirements directly from your XA Purchasing system and presents them on the web for your suppliers. Notifications are sent for new or changed requirements. Easy and integrated.**

Close the procurement loop by providing your major suppliers the ability to see and respond to all your requirements in one place. Requirements are listed in different views, by due date, part, and PO. Suppliers can also export information to be used in their own ERP systems.

Suppliers create Advance Shipment Notices to tell you how they plan to satisfy your requirements and when shipment will be made. Suppliers can “stage” shipments and then commit to the shipment at a later time.

Shipments are received into your XA system just as you do today. Optionally, if you use MKA Release Accounting or the MKA ASN receiving program, the ASN can be communicated back to INFOR XA completing the material requirements loop.

Based on your XA data, PPM, late shipments, scrap and other supplier ratings can be calculated and presented to the supplier in a timely manner. Quality forms and supplier ratings are an option with the SRMS system. Because “quality ratings” are highly customized per company, this feature is optionally implemented after the base SRMS system is up and running and your company defines its specific needs for “supplier ratings.”

Your XA planning system assists in determining your requirements for the existing and future work load. The SRMS system will make those planned orders available to suppliers for planning horizons up to one year. If you are using XA Order Points to generate automatic requisitions for parts that fall below order point, use the Electronic Requisition System to manage those requisitions and move them through an automated approval and procurement process.

## Major Features of the Supplier Requirement Management System (SRMS)

The primary purpose of SRMS is to present purchase order requirements (including blankets) and planned orders to the supplier via the web.

Suppliers can then respond to requirements by entering Advance Shipment Notices that are communicated back to the Buyer.

Optionally, Quality and other information can be included but is not required to use the system. E-mailing the supplier a copy of the purchase order using Web/Forms is also optional.

### Features

- Register supplier contacts easily from a Supplier Address book replicated from INFOR XA. Simply enter the supplier name, email address, and password. The supplier can begin using the website within the hour when requirements are replicated into the system.
- Replicate data from XA and other data sources on a scheduled basis. XA data and other databases are not directly exposed to the web. Data changes are made available to the web on a timely basis.
- Requirements are provided for view, sorted in different ways. The status of the PO item is updated from XA. The supplier can track the requirement from New Requirement to Received to Completed.
- The Advanced Shipment Notice form allows the PO/Item/Release to be selected from different views of the requirements. Multiple containers or shipments can be associated to a single ASN number to build shipment information.
- MRP planned orders are made available. Each planned order is available by day as well as totals by Week, Month, 6-months, and 1 Year.
- Administrative tools are available including:
  - View and control web user access to the web site
  - Web site and server performance
  - Error, e-mail, and other server activity logs