

Generating a Quotation Request from a Purchase Requisition
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The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

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Generating a Quotation Request from a Purchase Requisition

Generating a Quotation Request from a Purchase Requisition Overview

Once a Purchase Requisition is created, you can generate a Quotation Request. From this request, you receive price quotes from different suppliers to identify the supplier offering the best price that meets your specifications.

Order Type: OQ

Description: Quote for Commodity Purchase =< \$9999

Navigation: Purchasing – Agencies > Quotation Requests – Agency > Commodity Quotation Request – Agency > Gen Comm Quote (OQ) from [type] Req [(document type)]

Order Type: OF

Description: Quote => \$10,000

Navigation: Processed by AS Materiel Division, State Purchasing Bureau

Order Type: Z1

Description: Quote for Services

Navigation: Purchasing – Agencies > Quotation Requests – Agency > Service Quotation Request – Agency > Gen Service Quote (Z1) from [type] Req [(document type)]

Order Type: ZQ

Description: Quote for Stock

Navigation: Inventory Purchasing - Statewide > Stock Quotation Request > Gen Stock Quote (ZQ) from Req

This lesson uses the Z1 order type.

Generating a Quotation Request from a Purchase Requisition Lesson

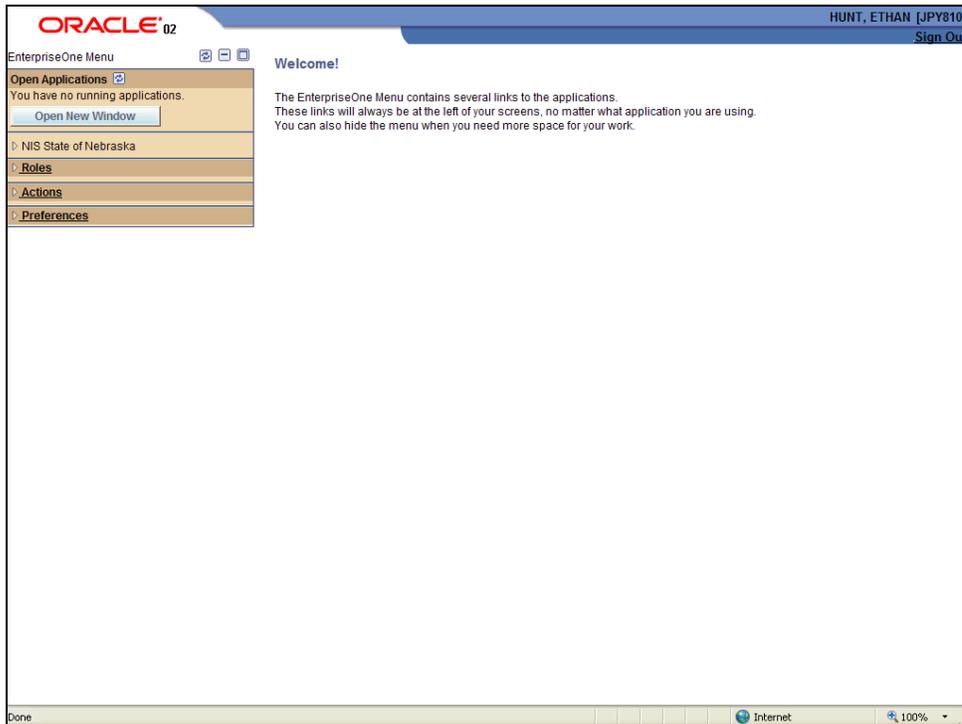
Procedure

In this lesson you will learn how to generate a Quotation Request (Z1) from a Purchase Requisition (O3).

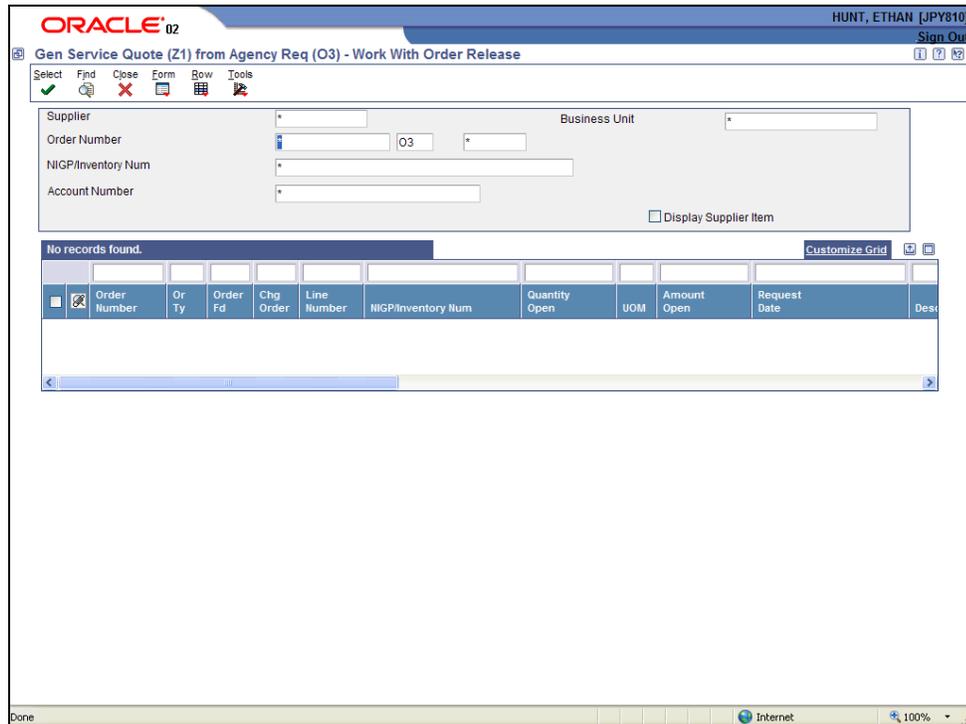
Note: . For the specific menu path when you enter a purchase requisition refer to the Overview. Be sure to use the appropriate menu path for your Order Type.

Training Guide

Generating a Quotation Request from a Purchase Requisition



Step	Action
1.	<p>Warning: The menu path for this lesson uses Quotation Request (Z1) from a Purchase Requisition (O3). <u>For the specific menu path when you enter a purchase requisition refer to the Overview section.</u> Be sure to use the appropriate menu path for your Order Type.</p> <p>Click the NIS State of Nebraska link.</p> <p>NIS State of Nebraska</p>
2.	<p>Click the Purchasing - Agencies link.</p> <p>Purchasing - Agencies</p>
3.	<p>Click the Quotation Requests - Agency link.</p> <p>Quotation Requests - Agency</p>
4.	<p>Click the Service Quotation Request - Agency link.</p> <p>Service Quotation Request - Agency</p>
5.	<p>Click the Gen Service Quote (Z1) from Agency Req (O3) link.</p> <p>Gen Service Quote (Z1) from Agency Req (O3)</p>



Step	Action
6.	Enter the requisition number in the Order Number field (and order type if not defaulted), to minimize the search.
7.	Click the Find button. 
8.	Choose the row(s) in the grid reflecting the detail lines from which you want to generate a quotation request by clicking the corresponding check box. It is possible to choose detail lines from multiple requisitions to generate a single quotation request. 
9.	Click the Select button. 

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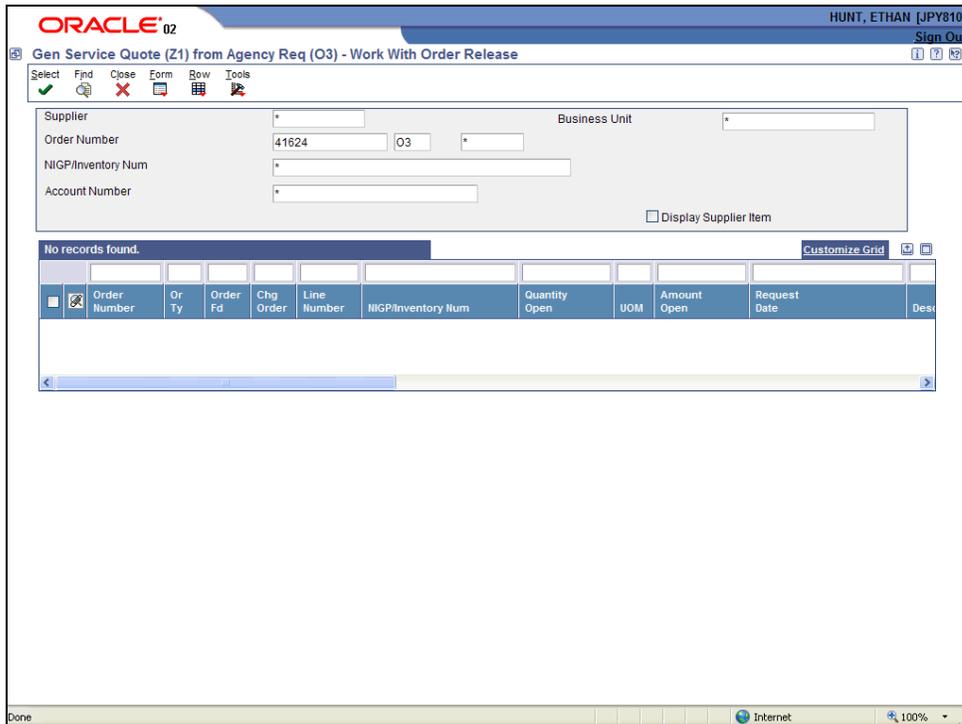


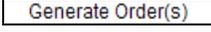
Step	Action
10.	<p>Verify the following fields in the Header:</p> <p>Business Unit - A valid Business Unit for your agency paying for the commodity or service.</p> <p>Supplier - Review this value and determine correct supplier number.</p> <p>Buyer - You can populate the address book record for the individual in your agency who will be responsible for the contract.</p> <p>Ship To - This reflects a delivery location for your agency.</p> <p>If you need to make any changes to these field you can do so at this time.</p>
11.	<p>Review the following fields on the Release Information tab:</p> <p>Release Qty - The quantity from the Requisition will populate - change this quantity only if it is determined a need to increase or decrease the field.</p> <p>Release Amt - Do not change this field. If you change the Release Qty field this field will populate automatically.</p>
12.	<p>Review the following fields on the Detail Information tab:</p> <p>NIGP/Inventory Num - If the incorrect NIGP number was previously entered it can be changed here.</p> <p>Note: If you change the number in the NIGP/Inventory Number field here, you will also need to go through Revise to correct the 3 - Digit NIGP and NIGP Sub fields.</p> <p>Account Number - This must be a valid Account Number for your agency.</p>

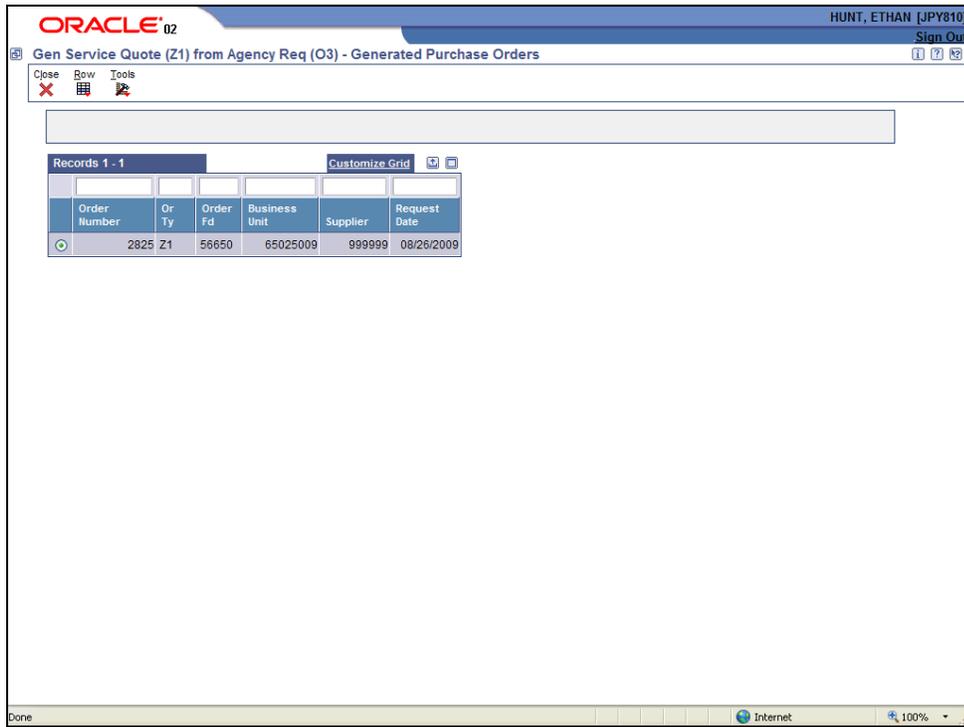
Step	Action
13.	<p>Click the OK button.</p> 
14.	<p>If multiple rows were chosen, the Order Release window refreshes with the next item.</p> <p>If there are multiple lines repeat the previous steps for each detail line that you wish to include on the Quotation Request.</p>
15.	<p>If you want to review the newly generated quotation request before the document number is assigned complete the steps below. Reviewing the newly generated quotation request is optional.</p> <p>Click Form, Review Order(s) Choose the row you wish to review. Click Row, Details to view the detail lines. Click Cancel Click Cancel</p>

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Generating a Quotation Request from a Purchase Requisition



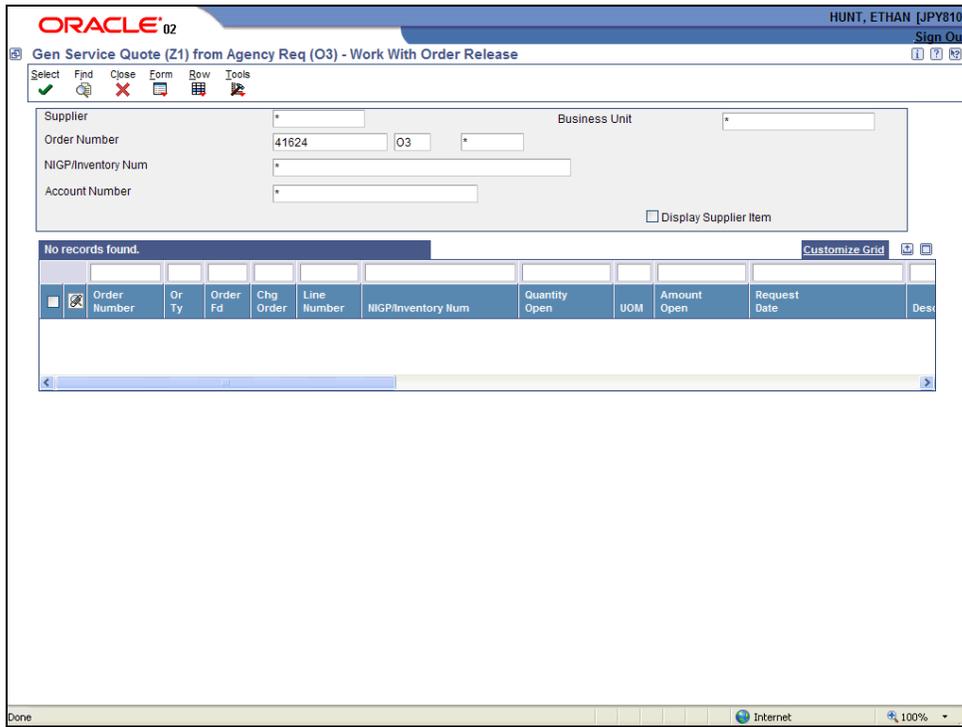
Step	Action
16.	Click the Form button. 
17.	Click the Generate Order(s) menu. 
18.	The document number generated will be displayed in the Order Number field. You will want to make note of this number for future reference.



Step	Action
19.	Click the Close button. 

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Step	Action
20.	Click the Close button. 
21.	You have successfully completed this lesson. End of Procedure.