



# Purchase Management

WR Ltd – ERP Cloud Solution  
User Training – Purchase Management



# AGENDA

- ① PURCHASE MANAGEMENT FOOTPRINT
- ② RFQ - SINGLE SOURCE
- ③ RFQ - CALL FOR TENDER
- ④ SUPPLIER PRICELIST



**1**

# **Purchase Management Footprint**

# PURCHASE MANAGEMENT FOOTPRINT



Placing purchase order to suppliers, purchasing workflow & approval, supplier management.

## Purchase Management Footprint

Purchase Planning	Purchase Process	Optimization
<ul style="list-style-type: none"><li>▪ Business Requirements</li><li>▪ Supplier &amp; Supply Market Analysis</li><li>▪ Identification of Cost Drivers</li><li>▪ Negotiation tactics</li><li>▪ eSourcing and eProcurement</li></ul>	<ul style="list-style-type: none"><li>▪ RFI</li><li>▪ Vendor Selection</li><li>▪ RFQ</li><li>▪ Price comparison</li><li>▪ Purchase Order</li><li>▪ Receipt Order</li><li>▪ Invoice match</li></ul>	<ul style="list-style-type: none"><li>▪ Product &amp; Service Profile</li><li>▪ Approval Levels</li><li>▪ Frame Agreement/ Contractual Issues</li><li>▪ Reception Process</li><li>▪ Supplier Management Strategy</li><li>▪ Supplier Evaluation &amp; ranking</li><li>▪ Service Level Agreements (SLA)</li></ul>



**2**

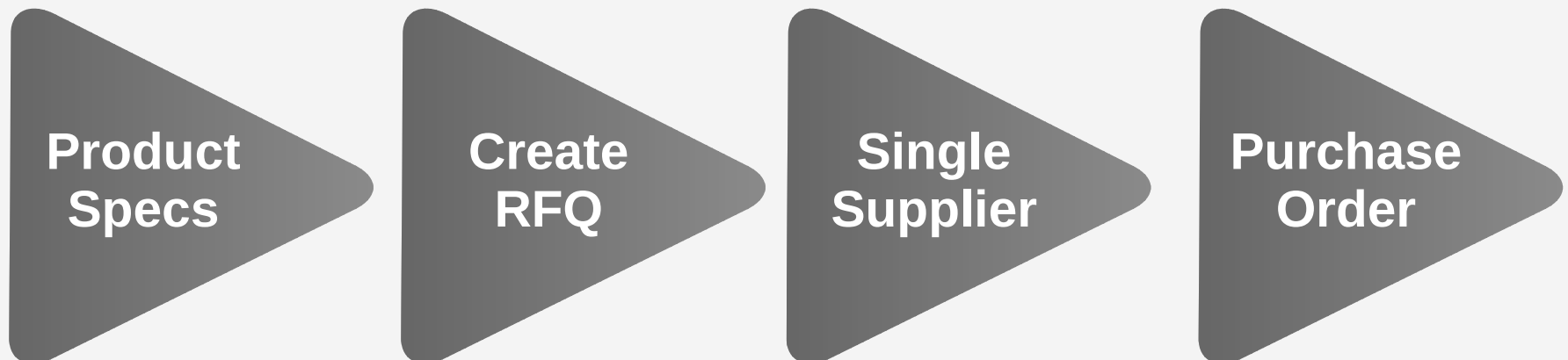
**RFQ**  
**Single Source**



# REQUEST FOR QUOTATION

## How to create RFQ? Scenario (A) – Single Source

RFQ can be created and issued directly to single supplier based on previous experience with the product/ service and past performance with a particular supplier, with the above scenario the process is usually as follow:

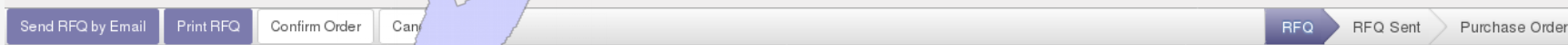
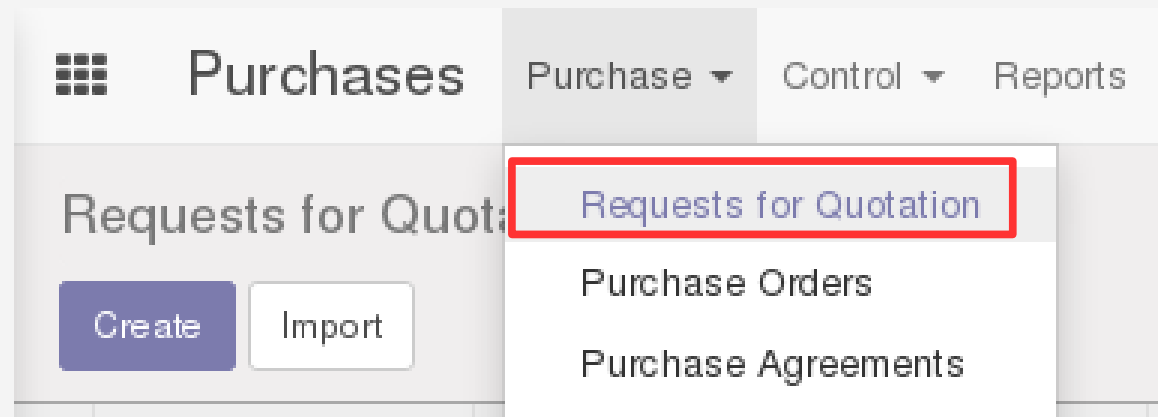




# RFQ - SCENARIO (A)

In **Purchase** application → **Purchase** → **Request for Quotation** → **Create**

Fill in the RFQ form by selecting **Vendor** → under **Products** tab → **Add an item** → select products



**Request for Quotation**  
**New**

Vendor: ASUSTeK  Order Date: 08/12/2019 03:02:08

Vendor Reference:

Purchase Agreement:

Products | Deliveries & Invoices

Product	Description	Scheduled Date	Quantity	Product Unit of Measure	Unit Price	Taxes	Subtotal
+ [RAM-SR5] RAM SR5	[RAM-SR5] RAM SR5	08/13/2019 03:02:08	10.000	Unit(s)	80.00		800.00



**3**

**RFQ**

**Call for Tender**





# REQUEST FOR QUOTATION

## How to create RFQ? Scenario (B) – Call for Tender

Call for Tender to request offers from multiple vendors to obtain multiple proposals, evaluate and select the best offer, confirm order and issue Purchase Order.

Product  
Specs

Call for  
Tender

Create  
RFQ

Multiple  
Suppliers

Product  
Specs



# TENDER - SCENARIO (B)

In **Purchase** application → **Purchase** → **Purchase Agreements** →

Create

Select **Call for Tender** in **Agreement Type** → under **Products** tab → select products & quantity →







# RFQ - SCENARIO (B)

After confirming your tender, you will be able to send RFQ to multiple suppliers (new RFQs/Orders appeared in the top right corner)

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Click on  → and Create new RFQ → select Vendor, the system will auto-fill the RFQ with the product(s) from your Call for Tender. The various RFQs and orders linked to the Call for Tenders will be under the  where you can select and confirm the best offer. Once you're done with your Call for Tender don't forget to close it.

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**Note:** You can configure different type of Purchase Agreement Framework or Blanket Agreement, Tender ..etc Purchase → Configuration → Purchase Agreement Types



**4**

# **Supplier Pricelist**



# SUPPLIER PRICELIST

## How to create Supplier/ Vendor?

In Purchase application → Purchase → Vendors →

Create

Import Vendors' Pricelists →  
in **Purchase** application →  
**Configuration** → under  
**Purchase Order** → **Vendor**  
**Price** → select **Allow using**  
**and importing vendor**  
**pricelists**



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To import go to **Purchase** application → **Purchase** → **Vendor**  
**Pricelists** (*Import template is available in Excel format.*)

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**Thank you**

