

Manage Surrogate Responses

Audience: Buyers and Suppliers

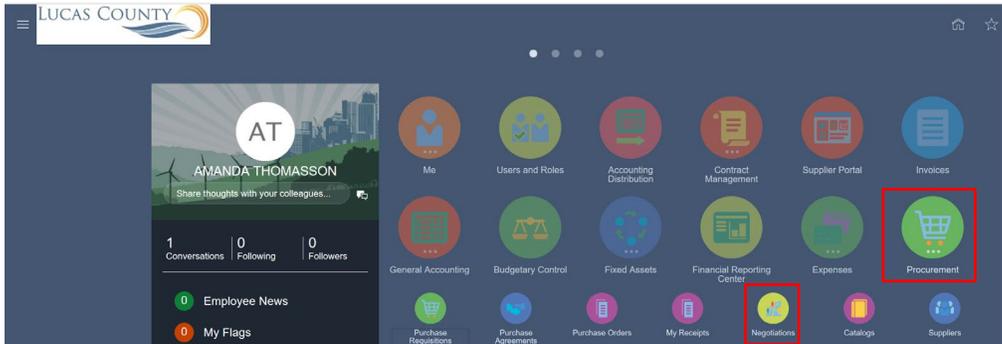
Purpose: A surrogate response is a negotiation response that you enter on behalf of a supplier company. This feature gives the buying organization the ability to capture responses from suppliers who are not able to directly enter their responses online.

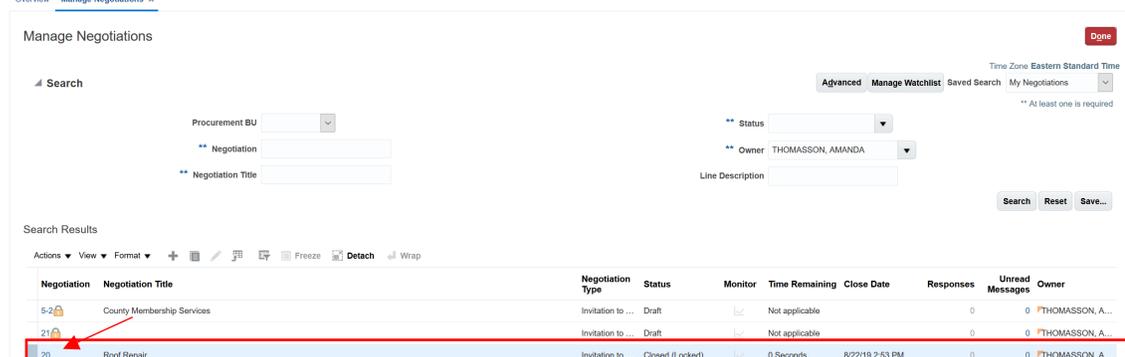
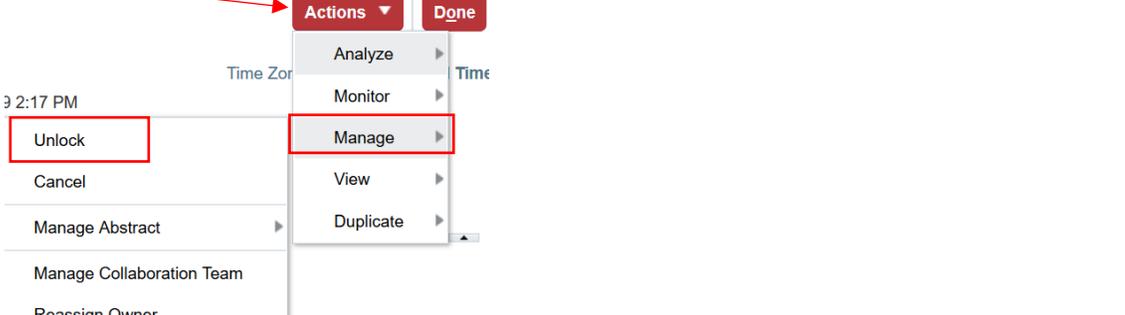
Supplier companies may submit their responses using different communication methods such as faxing or mailing paper documents, emailing PDF documents or spreadsheets. Once the Buyer receives the supplier response, the Buyer can enter this response in the application as a surrogate response. Surrogate responses are handled by the application the same as responses entered by Suppliers with online access. Surrogate responses are used to act on behalf of the supplier to:

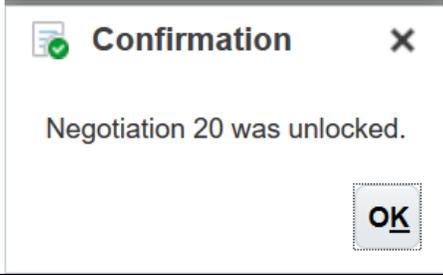
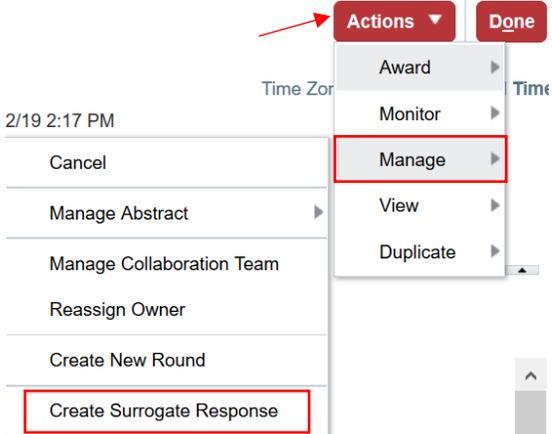
- Create and manage draft responses.
- Acknowledge the supplier's intent to participate in the negotiation.
- Enter the values that comprise the supplier's response, including values for requirements, negotiation lines, line attributes, cost factors or price breaks.
- Acknowledge an amendment to the negotiation.
- Update a response for a new round of responding or as required by a negotiation amendment.

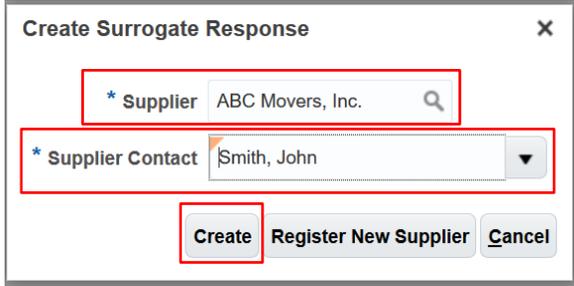
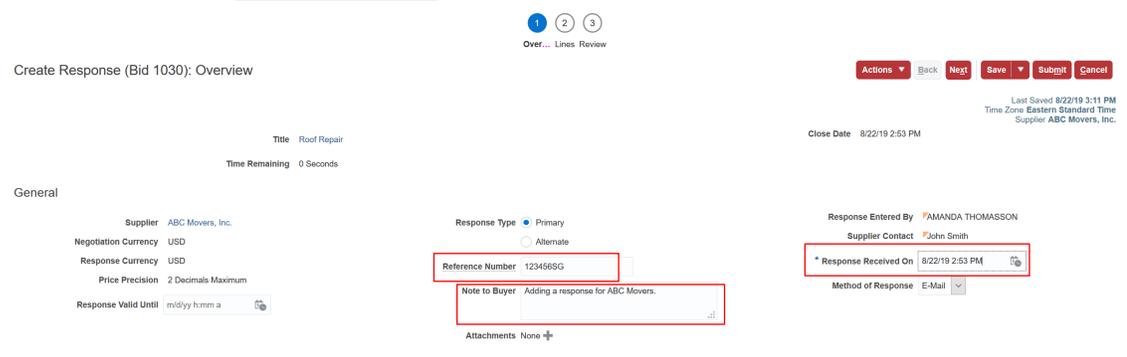
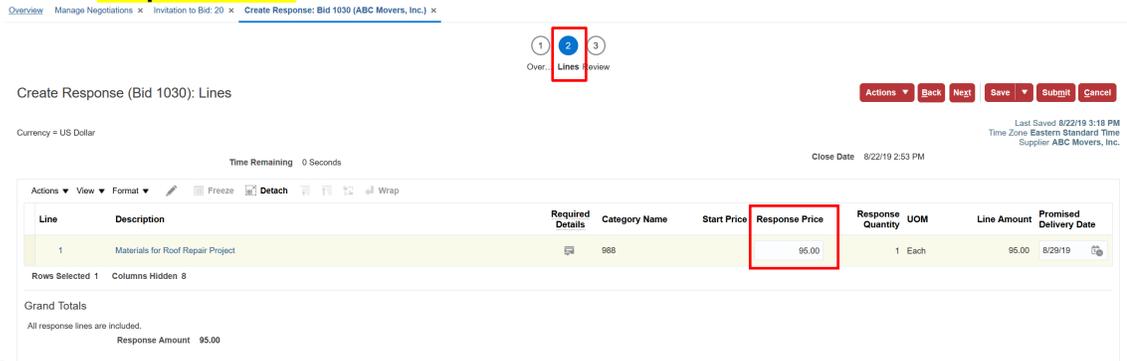
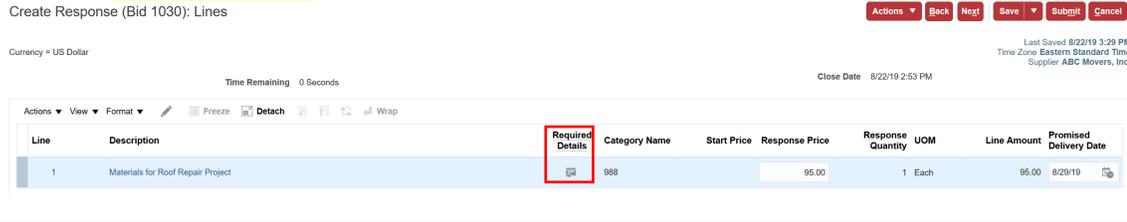
Buyers can enter surrogate responses online or using a spreadsheet. All response rules applicable to a regular response entered by the supplier will also be applicable to a surrogate response. All features and bidding tools (like proxy bidding, mass price reduction) that are available to suppliers entering an online response can also be used when creating a surrogate response. Since the supplier has no online access to the application and therefore cannot receive notifications, Buyers must stay in communication with the supplier about any changes to the negotiation.

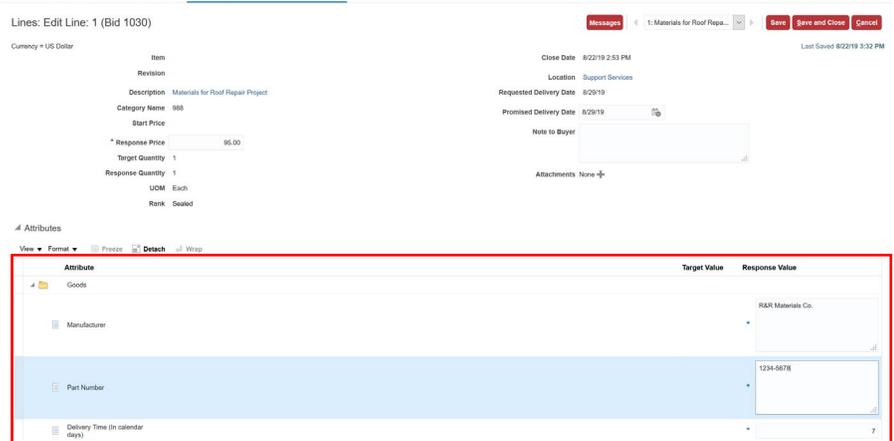
This job aid will assist you with entering a surrogate response.

Step	Action
1	<p>Log into Oracle. Home Page -> Procurement > Negotiations</p>  <p>The screenshot shows the Oracle Home Page for a user named Amanda Thomasson. The page features a grid of application icons. The 'Procurement' icon (a shopping cart) and the 'Negotiations' icon (a scale) are both highlighted with red rectangular boxes. Other visible icons include Me, Users and Roles, Accounting Distribution, Contract Management, Supplier Portal, Invoices, General Accounting, Budgetary Control, Fixed Assets, Financial Reporting Center, Expenses, Purchase Requisitions, Purchase Agreements, Purchase Orders, My Receipts, Catalogs, and Suppliers.</p>

2	<p>From Negotiations click the Task icon and select Manage Negotiations.</p>  <p>Negotiations</p> <ul style="list-style-type: none"> • Create Negotiation • Manage Negotiations • Manage Surrogate Responses • Delete Negotiations • Research Suppliers 																																								
3	<p>Click Search.</p>																																								
4	<p>Select a Negotiation in 'Closed' status that has not been responded to by supplier. Click the Negotiation ID link.</p>  <p>Manage Negotiations</p> <p>Search</p> <p>Procurement BU: [dropdown] ** Negotiation: [input] ** Negotiation Title: [input]</p> <p>** Status: [dropdown] ** Owner: THOMASSON, AMANDA Line Description: [input]</p> <p>Search Results</p> <table border="1"> <thead> <tr> <th>Negotiation</th> <th>Negotiation Title</th> <th>Negotiation Type</th> <th>Status</th> <th>Monitor</th> <th>Time Remaining</th> <th>Close Date</th> <th>Responses</th> <th>Unread Messages</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td>52</td> <td>County Membership Services</td> <td>Invitation to ...</td> <td>Draft</td> <td><input checked="" type="checkbox"/></td> <td>Not applicable</td> <td></td> <td>0</td> <td>0</td> <td>THOMASSON, A...</td> </tr> <tr> <td>21</td> <td>Roof Repair</td> <td>Invitation to ...</td> <td>Draft</td> <td><input checked="" type="checkbox"/></td> <td>Not applicable</td> <td></td> <td>0</td> <td>0</td> <td>THOMASSON, A...</td> </tr> <tr> <td>20</td> <td>Roof Repair</td> <td>Invitation to ...</td> <td>Closed (Locked)</td> <td><input checked="" type="checkbox"/></td> <td>0 Seconds</td> <td>8/22/19 2:53 PM</td> <td>0</td> <td>0</td> <td>THOMASSON, A...</td> </tr> </tbody> </table>	Negotiation	Negotiation Title	Negotiation Type	Status	Monitor	Time Remaining	Close Date	Responses	Unread Messages	Owner	52	County Membership Services	Invitation to ...	Draft	<input checked="" type="checkbox"/>	Not applicable		0	0	THOMASSON, A...	21	Roof Repair	Invitation to ...	Draft	<input checked="" type="checkbox"/>	Not applicable		0	0	THOMASSON, A...	20	Roof Repair	Invitation to ...	Closed (Locked)	<input checked="" type="checkbox"/>	0 Seconds	8/22/19 2:53 PM	0	0	THOMASSON, A...
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5	<p>Click Actions > Manage > Unlock.</p>  <p>Actions > Manage > Unlock</p> <p>Actions: Analyze, Monitor, Manage, View, Duplicate</p> <p>Manage: Unlock, Cancel, Manage Abstract, Manage Collaboration Team, Reassign Owner</p>																																								
6	<p>A warning message is displayed. Click Yes to acknowledge and proceed.</p>  <p>Warning</p> <p>If you unlock this negotiation, buyers will be able to view all responses. Do you want to continue? (PON-2085255)</p> <p>Yes No</p>																																								
7	<p>Confirmation is displayed. Click OK.</p>																																								

	
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9	<p>A warning message is displayed. Click Yes. To acknowledge and proceed.</p> 
10	<p>A confirmation message is displayed. Click OK.</p> 
11	<p>Click Actions > Manage > Create Surrogate Response.</p> 
12	<p>Select a Supplier and Supplier Contact.</p>

	
13	Click Create .
14	<p>Create Response Overview page is displayed. Add a Reference Number, Note to Buyer and a date in the Response Received On fields.</p> 
15	Select the Lines Train Stop.
16	<p>Enter a Response Price.</p> 
17	<p>Click the Required Details icon to enter additional required details.</p> 
18	Enter information for the Attributes as required.

	
19	Click Save and Close .
20	Click the Review Train Stop.
21	Click Submit . 
22	A confirmation is displayed. Click OK . 
23	Click Done .