

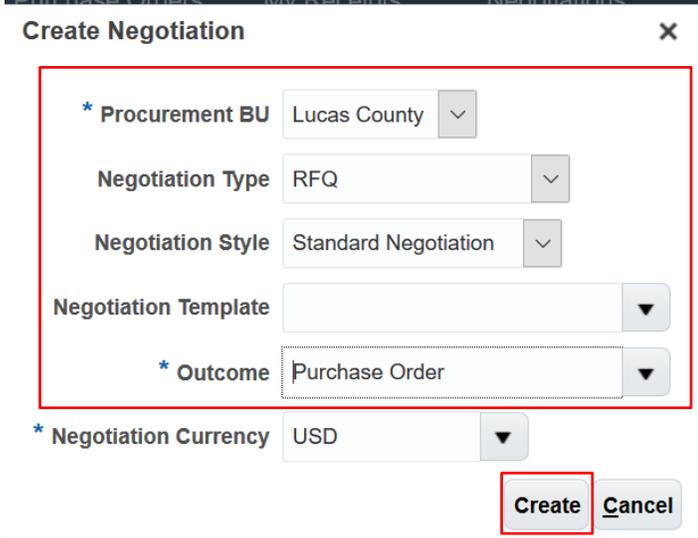
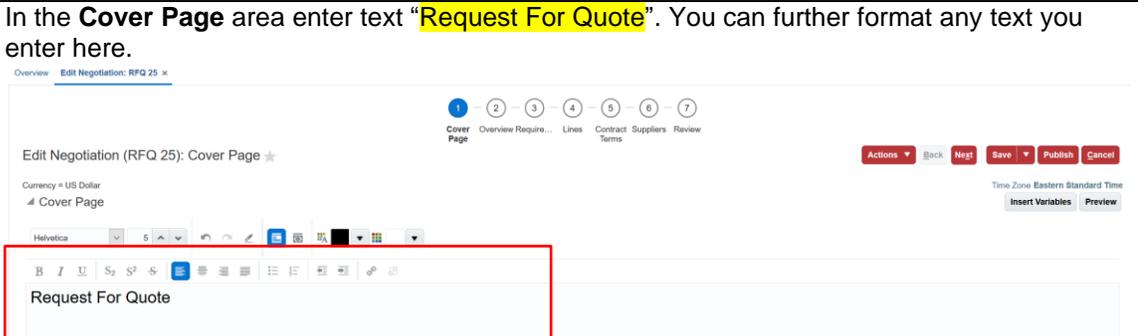
Creating a Negotiation Template

Audience: Buyer

Purpose: Your negotiation document specifies the details of the negotiation for potential suppliers. While being developed, your document can be stored as a draft until you are ready to publish it. There are several ways you can create the negotiation document. There are also tools to help simplify the creation process. You can use a negotiation style to control the look of the document and the features available, and a negotiation template to create a base negotiation document containing much of the line and supplier-related information. Once you have a template defined, you can reuse it without having to reenter negotiation information. You must have access to the Procurement Business Unit for this the template was defined to access it.

This job aid will assist you in creating a Request for Quotes negotiation template.

Step	Action
1	<p>Log into Oracle. Home Page -> Procurement > Negotiations</p> 
2	<p>From Negotiations, click the Task icon, and select Create Negotiations.</p> 
3	<p>Enter values for the following fields: Procurement BU: Lucas County Negotiation Type: RFQ Negotiation Style: Standard Negotiation Outcome: Purchase Order Negotiation Currency: USD.</p>

	
4	Click Create .
5	<p>In the Cover Page area enter text "Request For Quote". You can further format any text you enter here.</p> 
6	<p>Highlight Request for Quote text and click the Justify Center icon. Use Font arrows to increase font size.</p> 
7	Use the enter key on your keyboard for spacing and insert Logo . Click the Justify Center icon.

8	Type Request for Quotation for Goods or Services and click the Justify Center icon.
9	Type Immediate Response Requested and click the Justify Center icon.
10	Type Buyer .
11	<p>Click Insert Variables.</p>
12	<p>In the Search field, select Variable, and enter Buyer. Select Buyer.</p>
13	Click Ok .
14	<p>Click Insert Variables.</p>

15 Search for “Open” and select the **Open Date** variable.

Insert Variables

Search Variable

View Format Freeze Detach Wrap

Variable	Description
Open Date	The date the negotiation opens for suppliers to submit responses

Rows Selected 1

Insert **OK** Cancel

16 Click **Ok**.

17 Click the **Justify Center** button.

18 Highlight the **Open Date** variable and click the **Bold** icon.

19 Click the **Overview Task** Train Stop.

Edit Negotiation (RFQ 25): Overview

Currency = US Dollar

Title Request For Quote

Synopsis

Buyer AMANDA THOMASSON

Procurement BU Lucas County

Outcome Purchase Order

Attachments None

Introduction

This document is a Request for Quotation for Lucas County

20 Enter a description in the **Title** field.

21 Enter a description in the **Introduction** field.

22 Select the **Open Immediately** or enter an **Open** date.

Schedule

Preview immediately

Preview Date m/d/yy h:mm a

Close Date 8/30/19 10:33 AM

Example format: 8/23/19 10:33 AM
Enter a date on or after 8/23/19 10:33 AM.

Open immediately

Open Date m/d/yy h:mm a

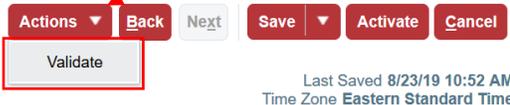
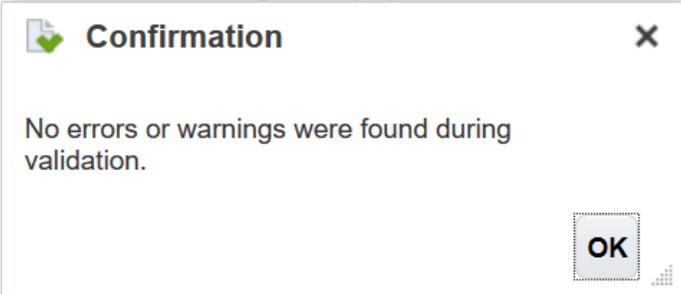
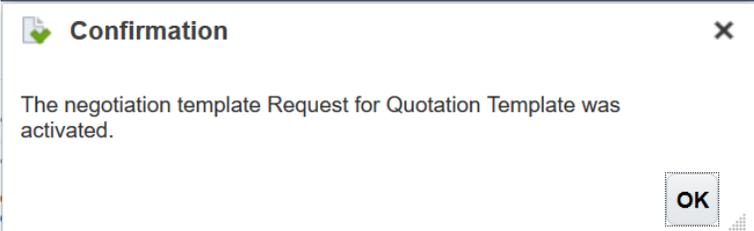
Award Date m/d/yy h:mm a

23 Enter **Close Date**.

24 Click **Save**.

25 Click **Actions: Copy to Negotiation Template**.

26	Click the Overview train stop.
27	In the Negotiation Template field type: Request for Quotation Template .
28	<p>Access: Public.</p>
29	<p>In the Scheduled section select: Open Immediately.</p> <p>Schedule</p> <p><input type="checkbox"/> Preview immediately <input checked="" type="checkbox"/> Open immediately</p>
30	<p>In the Negotiation Controls section leave defaults:</p> <p>Response Visibility (Blind) Negotiation Layout (Negotiation Layout) Response Layout (Response Layout) Contract Terms Layout (Contract Terms Layout).</p> <p>Negotiation Controls</p> <p>Response Visibility: Blind</p> <p>* Negotiation Layout: Negotiation Layout</p> <p>* Response Layout: Response Layout</p> <p>* Contract Terms Layout: ContractTermsProcurement</p>
31	<p>In the Response Rules section: Select Restrict to invited suppliers, Allow suppliers to select lines on which to respond, Allow multiple responses, Allow response revision.</p>

	<p>Response Rules</p> <p>View ▾ Format ▾ Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Rule</th> <th>Display to Suppliers</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Restrict to invited suppliers</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> Allow suppliers to select lines on which to respond</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> Display best price to suppliers</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Require full quantity</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> Allow multiple responses</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> Allow response revision</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Rule	Display to Suppliers	<input checked="" type="checkbox"/> Restrict to invited suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Allow suppliers to select lines on which to respond	<input checked="" type="checkbox"/>	<input type="checkbox"/> Display best price to suppliers		<input type="checkbox"/> Require full quantity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Allow multiple responses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Allow response revision	<input checked="" type="checkbox"/>
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32	Click the Requirements Train Stop: None .														
33	Click the Lines Train Stop: None .														
34	Click the Contract Terms Train Stop: None .														
35	Click the Suppliers Train Stop: None .														
36	Click the Review Train Stop.														
37	Click Save .														
38	<p>Actions: Validate.</p>  <p>Actions ▾ Back Next Save ▾ Activate Cancel</p> <p>Validate</p> <p>Last Saved 8/23/19 10:52 AM Time Zone Eastern Standard Time</p>														
39	<p>A confirmation message is displayed. Click Ok.</p>  <p>Confirmation X</p> <p>No errors or warnings were found during validation.</p> <p>OK</p>														
40	<p>Click the Activate button.</p>  <p>Actions ▾ Back Next Save ▾ Activate Cancel</p> <p>Validate</p> <p>Last Saved 8/23/19 10:52 AM Time Zone Eastern Standard Time</p>														
41	<p>A confirmation message is displayed. Click OK.</p>  <p>Confirmation X</p> <p>The negotiation template Request for Quotation Template was activated.</p> <p>OK</p>														