



# University of the Philippines



## **SPCMIS**

**Supplies, Procurement, and Campus Management  
Information System**



# Entering Quotations



# **SPCMIS User Manual**

## *Purchasing*

Author: Riza Nequias  
Creation Date: 03 February 2021  
Last Updated: 08 February 2021  
Document Ref: SPCMIS User Manual – Entering Quotation  
Version: 3.1

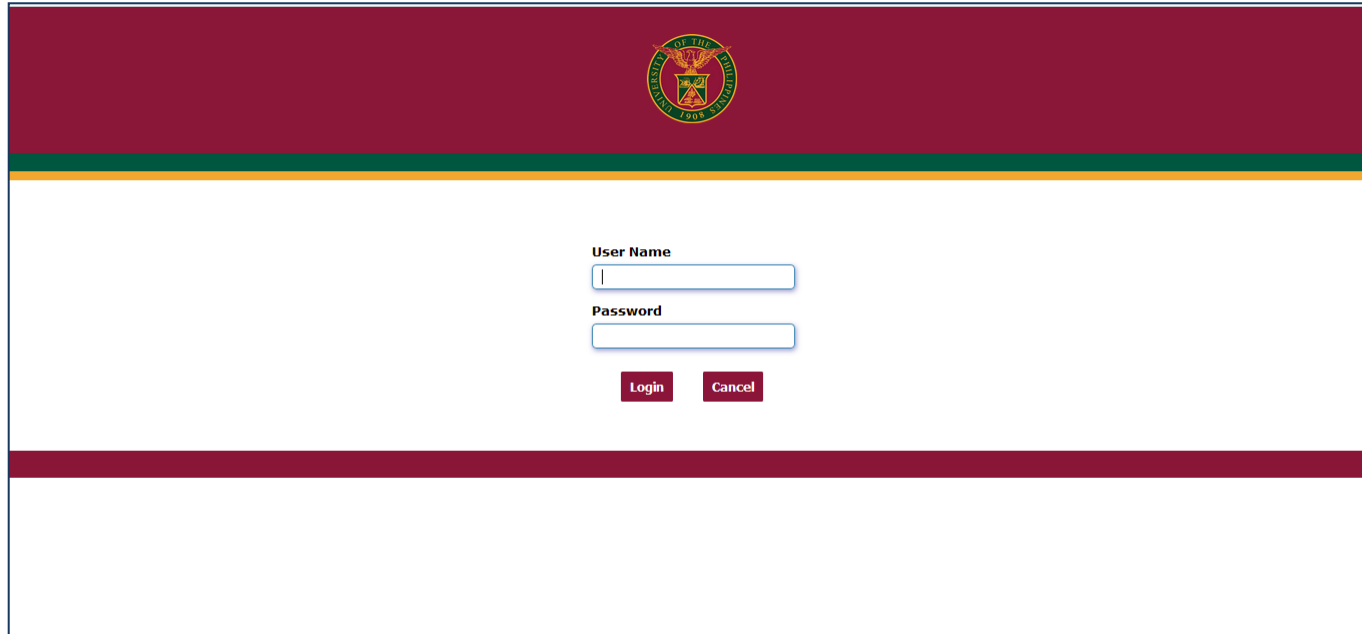
# 1. DOCUMENT CONTROL

## 1.1 Change Record

Date	Author	Version	Change Reference
05 February 2014	Julius Ermitanio & Michael Angelo Soliven	1.0	Initial Issue and Review
29 October 2014	Julius Ermitanio & Michael Angelo Soliven	2.0	Update
01 December 2014	Julius Ermitanio & Michael Angelo Soliven	3.0	Update
08 February 2021	Riza Nequias	3.1	Update <ul style="list-style-type: none"> <li>- Added steps 1 and 2</li> <li>- Changed screenshots</li> <li>- Created a separate manual for the generation of AOQ</li> </ul>

## 2. Description

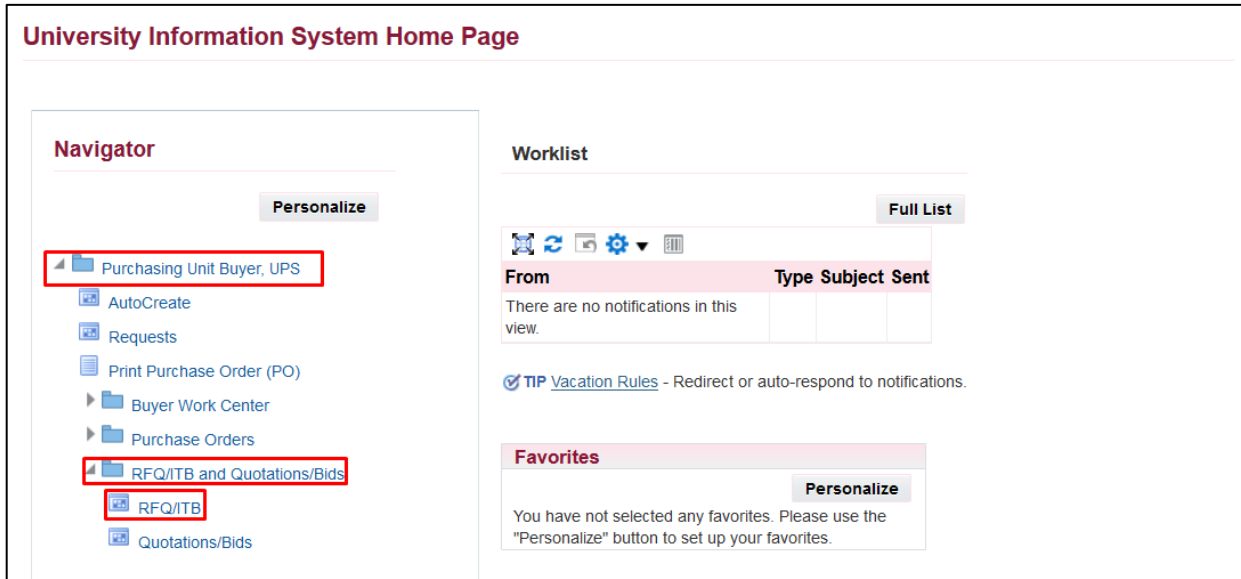
<b>Manual ID</b>	
<b>Manual Name</b>	Entering Quotations
<b>Information System</b>	Supplies, Procurement and Campus Management Information System
<b>Functional Domain</b>	Purchasing Unit Buyer Purchasing SPMO Buyer Purchasing Manager
<b>Purpose</b>	To enter the quotations submitted by the suppliers in the system
<b>Data Requirement</b>	RFQ Number
<b>Dependencies</b>	Request for Quotation (RFQ) was created in the system RFQ status is "Active"
<b>Scenario</b>	After receiving price quotes from suppliers, the buyer will enter the quotations in the system
<b>Author</b>	Riza Nequias



The screenshot shows a login interface. At the top, there is a maroon header bar containing the University of the Philippines seal. Below this is a white area with a login form. The form consists of two text input fields. The first is labeled 'User Name' and the second is labeled 'Password'. Below the input fields are two buttons: 'Login' and 'Cancel'.

**Step 1.** Go to [uis.up.edu.ph](http://uis.up.edu.ph)

**Step 2.** Log-in your credentials (e.g. *username* and *password*)



**Step 3.** On the homepage, select

***Purchasing Unit Buyer, <CU>***

or

***Purchasing SPMO Buyer, <CU>***

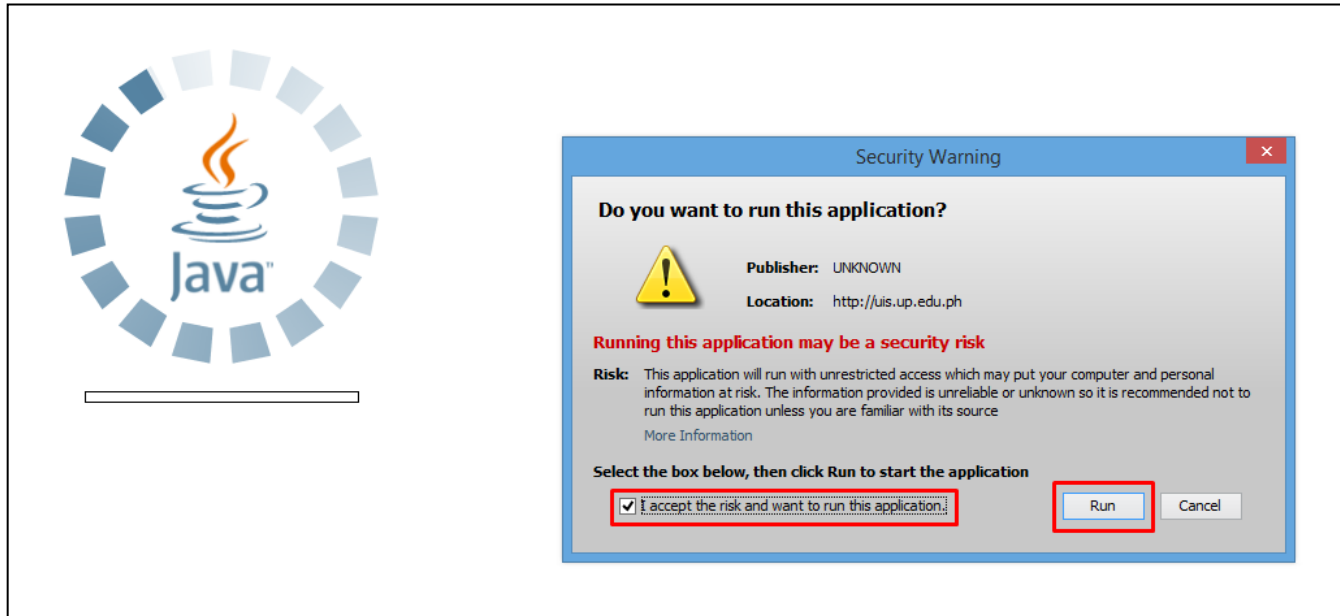
or

***Purchasing Manager, <CU>***

Then navigate to

***RFQ/ITB and Quotations/Bids >***

***RFQ/ITB***



**Step 4.** The Java application will launch with **Security Warning**.

Tick the checkbox and click **Run**.



Operating Unit  ...

Number  Type

Ship-To  Bill-To

Created

Due Date  Status

Description

Reply Via

Quote Approval Required

Close Date

Quote Effectivity  -

Buyer

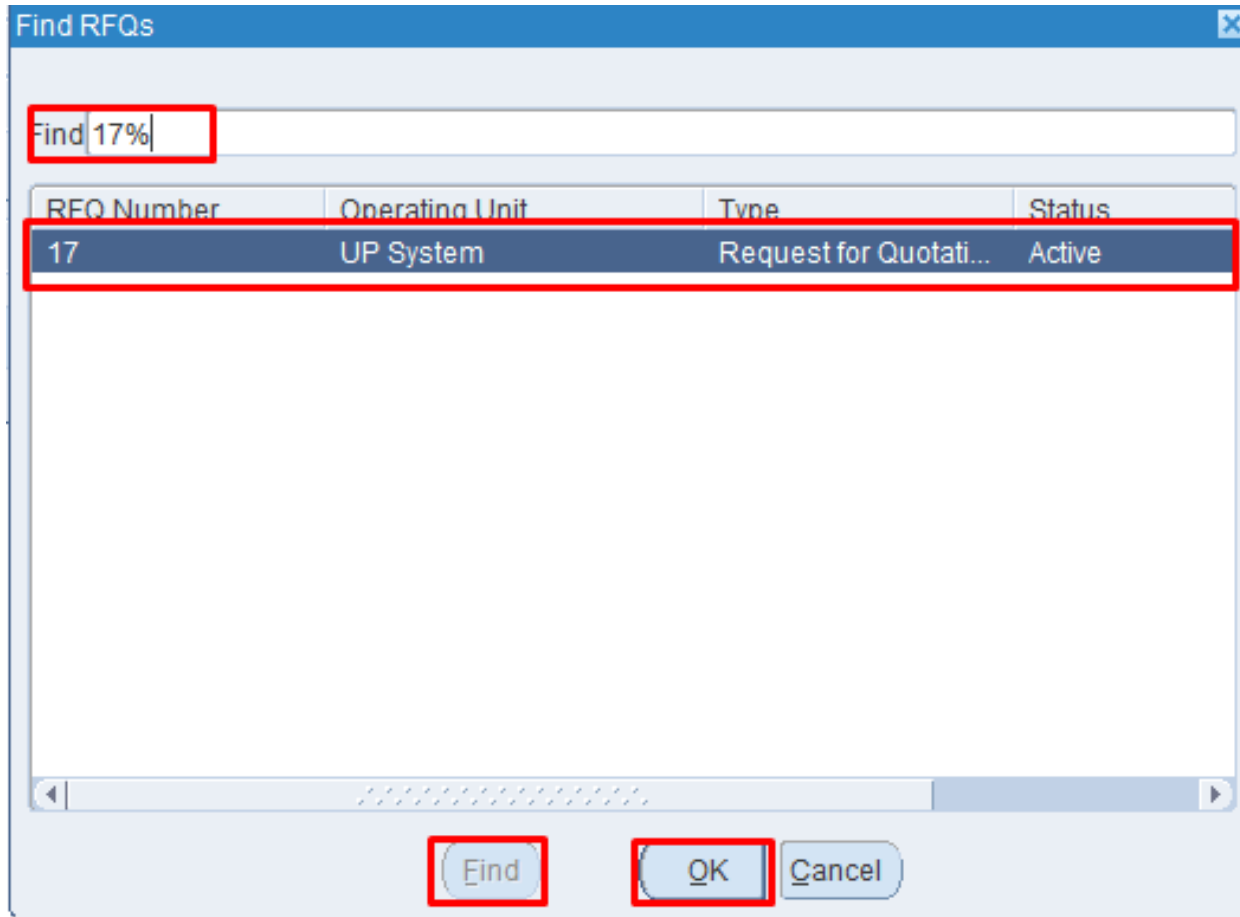
Currency  [  ]

Num	Type	Item	Rev	Category	Description	UOM [ ]
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Item

**Step 5.** On the toolbar click the **Find** icon.

The **Find RFQs** window will open.



**Step 6.** On the **Find** field, search for the RFQ by entering the **RFQ number**.

Click **Find**.

Then click **OK**.

The screenshot shows the 'RFQs - 17' application window. The form contains the following fields:

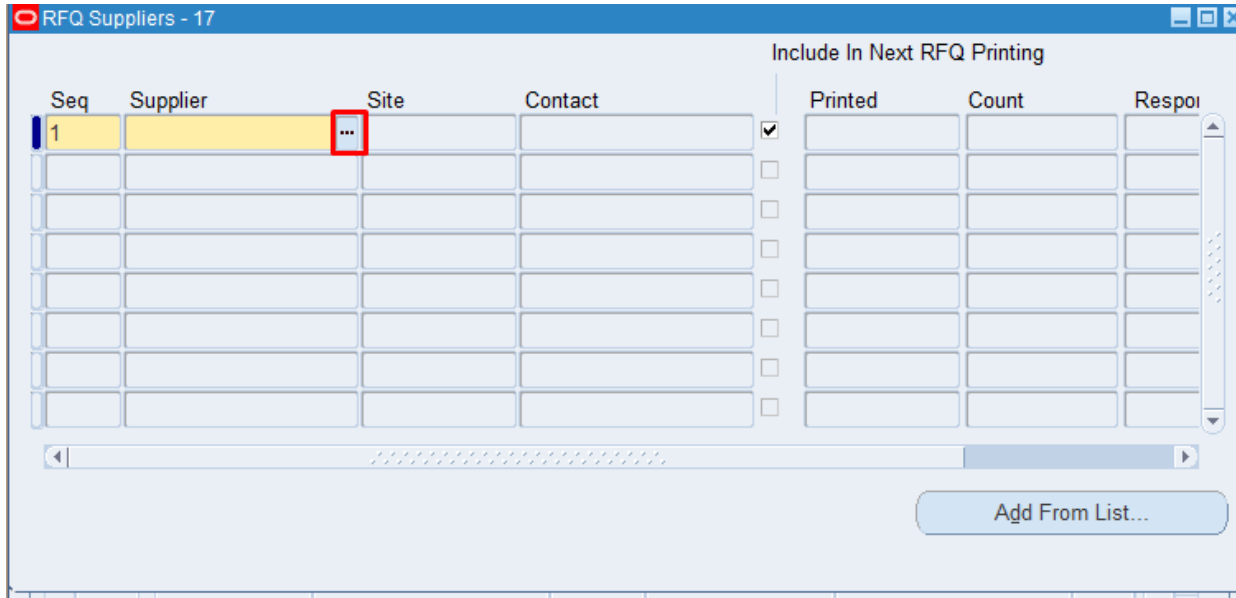
- Operating Unit: UP System
- Number: 17
- Type: Request for Quotati
- Created: 03-FEB-2021
- Ship-To: University of the Ph
- Bill-To: University of the Ph
- Status: Active
- Due Date: 01-MAR-2021
- Reply Via: (empty)
- Description: RFQ for PR 5254 Non-Common Use Items(Q1-2021)- UP ITDC
- Close Date: (empty)
- Buyer: dela Cruz, Mr. Juan Rey
- Quote Approval Required:
- Quote Effectivity: [ ] - [ ]
- Currency: PHP [ 52 ]

Below the form is a table with the following columns: Num, Type, Item, Rev, Category, Description, UOM. The table contains two rows of data:

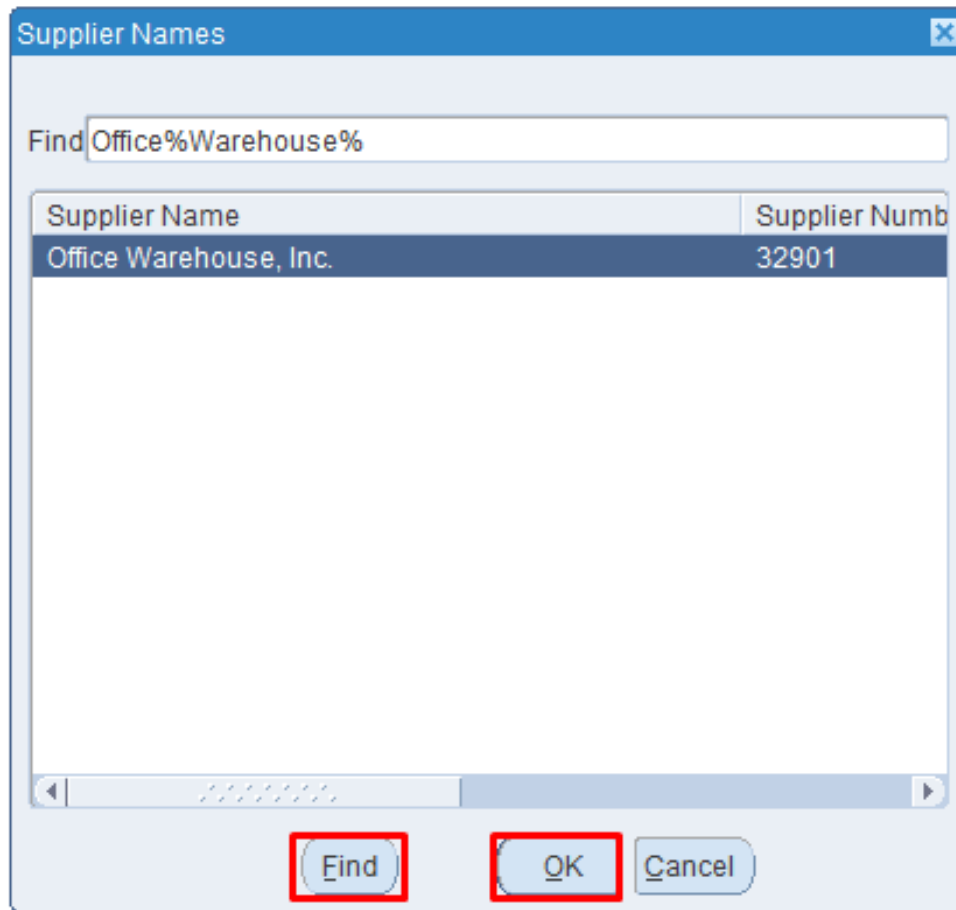
Num	Type	Item	Rev	Category	Description	UOM
1	Goods			NONE.NONE.NON	Computer Table	pc
2	Goods			NONE.NONE.NON	Desktop Computer3.6Gf	pc

At the bottom of the window, there are several buttons: 'Currency...', 'Terms', 'Price Breaks', and 'Suppliers'. The 'Suppliers' button is highlighted with a red border.

**Step 7.** Once the RFQ appears, click **Suppliers**.



**Step 8.** The **RFQ Supplier** window will open. Click the **ellipsis**.



The search for the name of the supplier who provided a price quote.

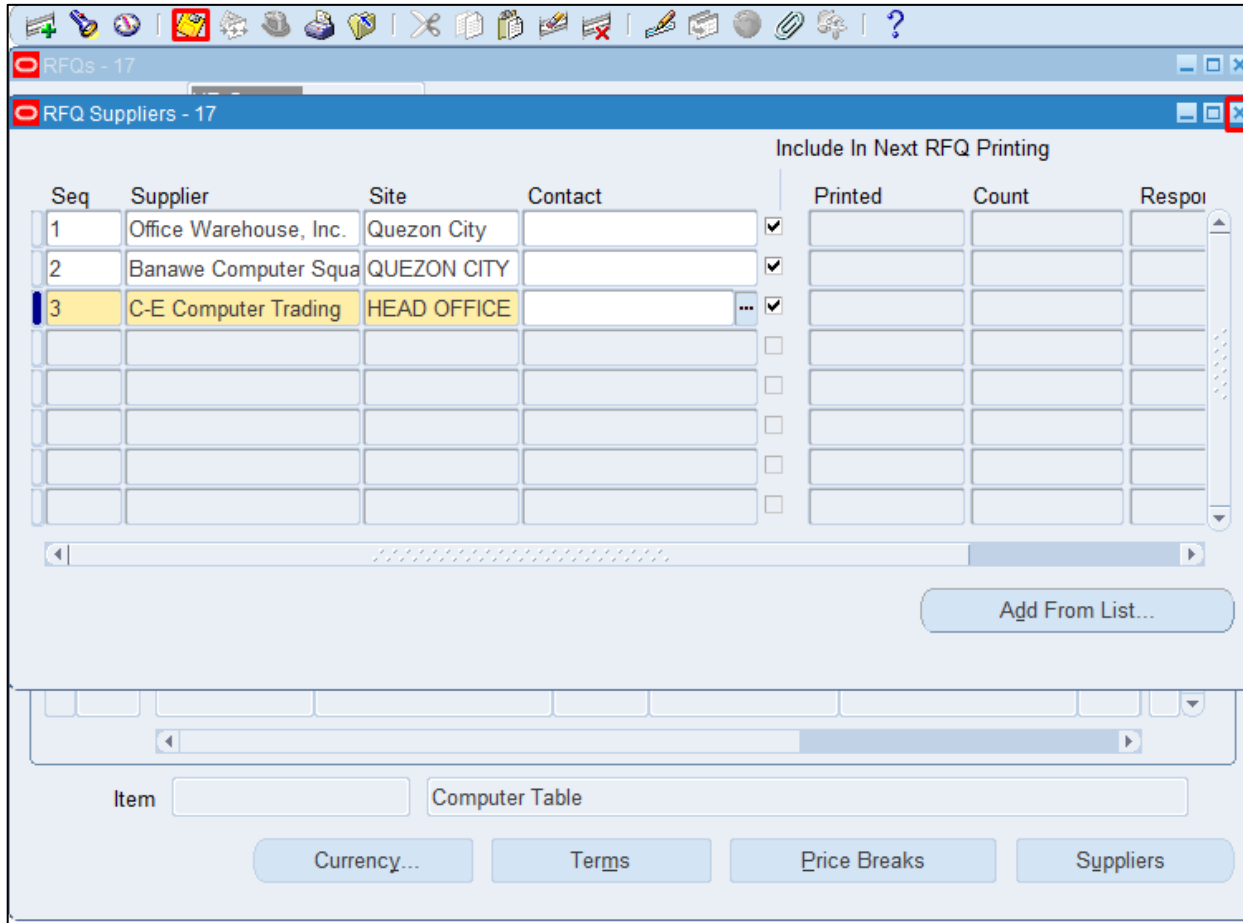
To search for the supplier, enter the supplier name with % to view all possible results.

Example: **%Office%Warehouse%**

Then, click **Find**.

Select the name of the supplier from the list, then click **OK**.

**Note:** If the supplier is not listed, kindly fill-out the Supplier Registration Form provided by the Supplier Manager of your CU.



**Step 9.** Repeat **Step 8** until all suppliers with submitted quotations have been entered.

**Step 10.** Click **Save**.

Then close the window.

The screenshot shows the SPCMIS software interface for entering quotations. The 'Tools' menu is highlighted, and the 'Copy Document' option is selected. The form displays the following details:

- Operating Unit: UP System
- Number: 17
- Type: Request for Quotati
- Created: 03-FEB-2021
- Ship-To: University of the Ph
- Bill-To: University of the Ph
- Status: Active
- Due Date: 01-MAR-2021
- Description: RFQ for PR 5254 Non-Common Use Items(Q1-2021)- UP ITDC
- Buyer: dela Cruz, Mr. Juan Rey
- Quote Approval Required:
- Quote Effectivity: [ ] - [ ]
- Currency: PHP [ 52 ]

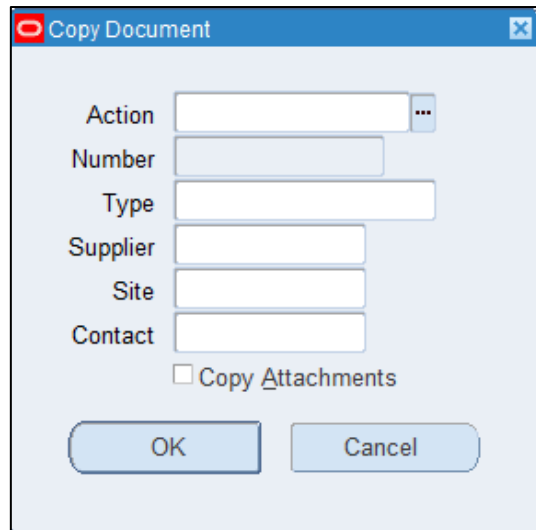
The 'Items' section contains the following table:

Num	Type	Item	Rev	Category	Description	UOM
1	Goods			NONE.NONE.NON	Computer Table	pc
2	Goods			NONE.NONE.NON	Desktop Computer3.6Gt	pc

Below the table, the 'Item' field is populated with 'Computer Table'. At the bottom, there are buttons for 'Currency...', 'Terms', 'Price Breaks', and 'Suppliers'.

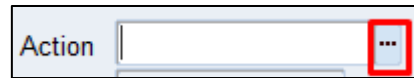
**Step 10.** Next copy the RFQ details to create a quotation document in the system.

To copy, click **Tools** and select **Copy Document**.



The **Copy Document** dialog box contains the following fields and controls:

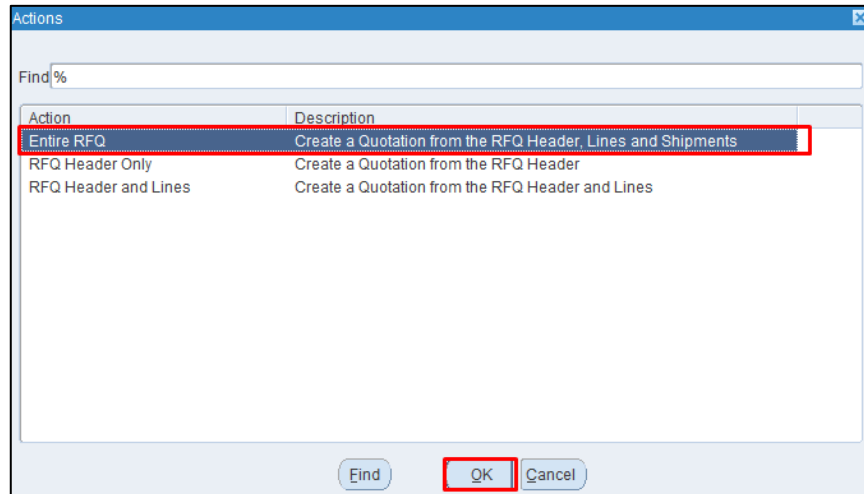
- Action: Text field with an ellipsis button
- Number: Text field
- Type: Text field
- Supplier: Text field
- Site: Text field
- Contact: Text field
- Copy Attachments
- OK button
- Cancel button



A close-up of the **Action** field with a red box highlighting the ellipsis button.

The **Copy Document** window will appear.

**Step 11.** On the **Action** field, click the ellipsis.



The **Actions** dialog box displays a list of actions:

Action	Description
Entire RFQ	Create a Quotation from the RFQ Header, Lines and Shipments
RFQ Header Only	Create a Quotation from the RFQ Header
RFQ Header and Lines	Create a Quotation from the RFQ Header and Lines

Buttons at the bottom: Find, OK, Cancel. The **Entire RFQ** row and the **OK** button are highlighted with red boxes.

Select **Entire RFQ**.

Then click **OK**.



Type  ...

Document Types

Find %

Type Name	Quotation Class Code
Bid	CATALOG
Quotation	CATALOG
Catalog	CATALOG

Find OK Cancel

**Step 12.** On the **Type** field, click the ellipsis.

Select **Quotation**.

Then click **OK**.

Supplier  ...

Suppliers

Find %

Supplier	Site	Contact
Banawe Computer Square	QUEZON CITY	
C-E Computer Trading	HEAD OFFICE	
Office Warehouse, Inc.	Quezon City	

Find OK Cancel

**Step 13.** On the **Supplier** field, click the ellipsis to display the list of suppliers you entered in Steps 8 & 9.

Select the first supplier on the list.

Click **OK**.


Copy Attachments

Copy Document

Action: Entire RFQ  
Number:   
Type: Quotation  
Supplier: Banawe Compute  
Site: QUEZON CITY  
Contact:  ...  
 Copy Attachments

OK Cancel

Note

 A new quotation has been copied from this RFQ. The quotation document number is 58.

OK

**Step 14.** Check the **Copy Attachments** checkbox.

**Step 15.** Click **OK**

**Step 16.** A **Note** will appear that a new quotation has been copied from the RFQ.

Click **OK**.

**IMPORTANT: Please take note of the Quotation Number. Please write the Quotation number in the document or quotation submitted by the supplier.**

**RFQ to Quotation - 58**

Operating Unit:

Number:  Type:  RFQ:

Supplier:  Site:  Contact:

Ship-To:  Bill-To:  Status:

Description:  Supplier Quote:

Approval Required Response Date:

Effectivity:  -  Buyer:

Currency:  [ 52 ]

Items More

Num	Type	Item	Rev	Category	Description	UOM	[ ]
1	Goods			NONE.NONE.NON	Computer Table	pc	...
2	Goods			NONE.NONE.NON	Desktop Computer3.6G	pc	...
							...
							...
							...

Item:

The **RFQ to Quotation** window will appear.

Operating Unit: UP System  
Number: 58  
Supplier: Banawe Computer  
Ship-To: University of the Ph  
Description: RFQ for PR 5254 Non-Common Use Items(Q1-2021)- UP IT  
Type: Quotation  
Site: QUEZON CITY  
Bill-To: University of the Ph  
RFQ: 17  
Contact:   
Status: Active  
Supplier Quote:   
Response Date: 03-FEB-2021  
Buyer: dela Cruz, Mr. Juan Rey  
Currency: PHP [ 52 ]

Num	Type	Item	Rev	Category	Description	UOM	[ ]
1	Goods			NONE.NONE.NON	Computer Table	pc	...
2	Goods			NONE.NONE.NON	Desktop Computer3.6Gt	pc	...
							...
							...
							...

Item: Computer Table  
Buttons: Currency..., Terms, Price Breaks, Approve...

**Step 17.** Update the **Status** to **Active**.

RFQ to Quotation - 58

Operating Unit: UP System

Number: 58      Type: Quotation      RFQ: 17

Supplier: Banawe Computer      Site: QUEZON CITY      Contact:

Ship-To: University of the Ph      Bill-To: University of the Ph      Status: Active

Description: RFQ for PR 5254 Non-Common Use Items(Q1-2021)- UP IT

Approval Required

Effectivity: 03-FEB-2021 - 03-MAY-2021

Supplier Quote:

Response Date: 03-FEB-2021

Buyer: dela Cruz, Mr. Juan Rey

Currency: PHP [ 52 ]

Items    More

Num	Type	Item	Rev	Category	Description	UOM	[ ]
1	Goods			NONE.NONE.NON	Computer Table	pc	...
2	Goods			NONE.NONE.NON	Desktop Computer3.6G	pc	...

Item: Computer Table

Currency...    Terms    Price Breaks    Approve...

Enter the **Effectivity Date**. The date range must be within 3 months.

RFQ to Quotation - 58

Operating Unit: UP System

Number: 58      Type: Quotation      RFQ: 17

Supplier: Banawe Computer      Site: QUEZON CITY      Contact:

Ship-To: University of the Ph      Bill-To: University of the Ph      Status: Active

Description: RFQ for PR 5254 Non-Common Use Items(Q1-2021)- UP IT      Supplier Quote:

Approval Required      Response Date: 03-FEB-2021

Effectivity: 03-FEB-2021 - 03-MAY-2021      Buyer: dela Cruz, Mr. Juan Rey

Currency: PHP      [ 52 ]

Items    More

Num	Type	Item	Rev	Category	Description	UOM	[ ]
1	Goods			NONE.NONE.NON	Computer Table	pc	...
2	Goods			NONE.NONE.NON	Desktop Computer3.6G	pc	...
							...
							...

Item: Computer Table

Currency...    Terms    **Price Breaks**    Approve...

**Step 18.** Select a line item. Then, click **Price Breaks** to enter the price quote given by the supplier.

Num	UOM	Quantity	Price	Org	Ship-To	Discount (%)	Effective From	Effective To
1	pc	20	1200	UPS	University of the	20		

Item: Computer Table

Item: Computer Table

FRM-40400: Transaction complete: 1 records applied and saved.

Record: 1/1

**Step 19.** The **Quotation Price Breaks** window will appear.

Update the **Price** per line then click **Save**.

A confirmation will appear at the bottom of the window.

Then, close the window.



**Quotations - 58**

Operating Unit: UP System

Number: 58      Type: Quotation      RFQ: 17

Supplier: Banawe Computer      Site: QUEZON CITY      Contact:

Ship-To: University of the Ph      Bill-To: University of the Ph      Status: Active

Description: RFQ for PR 5254 Non-Common Use Items(Q1-2021)- UP IT      Supplier Quote:

Approval Required      Response Date: 03-FEB-2021

Effectivity: 03-FEB-2021 - 03-MAY-2021      Buyer: dela Cruz, Mr. Juan Rey

Currency: PHP [ 52 ]

**Items**    More

Num	Type	Item	Rev	Category	Description	UOM	[ ]
1	Goods			NONE.NONE.NON	Computer Table	pc	...
2	Goods			NONE.NONE.NON	Desktop Computer3.6G	pc	...
							...
							...
							...

Item: Computer Table

Currency...    Terms    Price Breaks    Approve...

**Step 20.** Update the succeeding quotation lines by repeating **Steps 18 to 19.**

Quotations - 58

Operating Unit: UP System

Number: 58      Type: Quotation      RFQ: 17

Supplier: Banawe Computer      Site: QUEZON CITY      Contact:

Ship-To: University of the Ph      Bill-To: University of the Ph      Status: Active

Description: RFQ for PR 5254 Non-Common Use Items(Q1-2021)- UP IT      Supplier Quote:

Approval Required      Response Date: 03-FEB-2021

Effectivity: 03-FEB-2021 - 03-MAY-2021      Buyer: dela Cruz, Mr. Juan Rey

Currency: PHP [ 52 ]

Num	Rev	Category	Description	UOM	Price
1		NONE.NONE.NON	Computer Table	pc	1500
2		NONE.NONE.NON	Desktop Computer3.6GHz processor4GB memory1TB HDDDVD RWUSB 2.0/3	pc	35000

Item: Desktop Computer3.6GHz processor4GB memory1TB HDDDVD RWUSB 2.0/3

FRM-40400: Transaction complete: 1 records applied and saved.

Record: 2/2

**Step 21.** Enter quotations from the remaining suppliers by repeating **Steps 10 to 20.**

Then click **Save**.

DISCLAIMER: The screenshots in this document are for illustration purpose only and may not be the same as the final user interface.