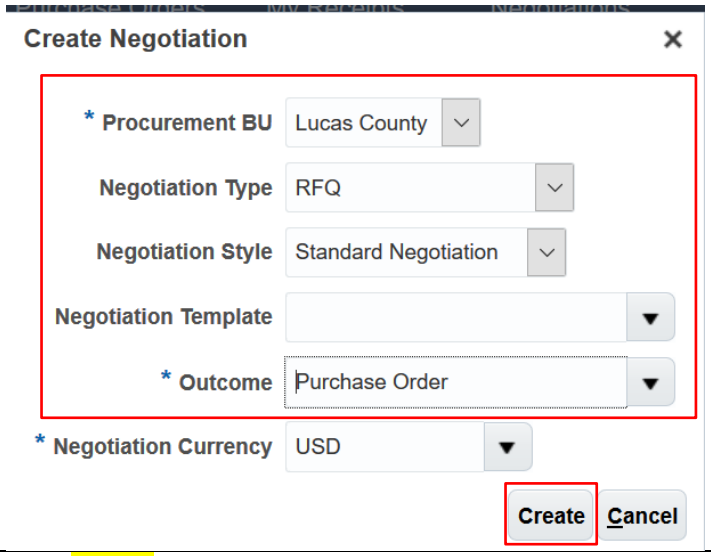
Creating a Negotiation Template

Audience: Buyer

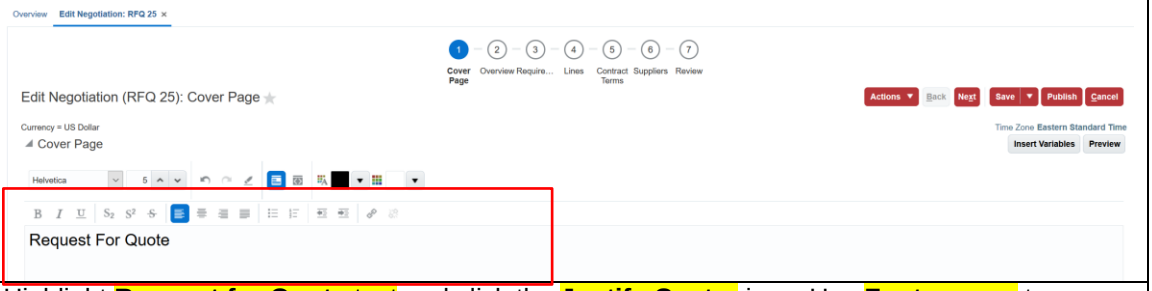
Purpose: Your negotiation document specifies the details of the negotiation for potential suppliers. While being developed, your document can be stored as a draft until you are ready to publish it. There are several ways you can create the negotiation document. There are also tools to help simplify the 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.

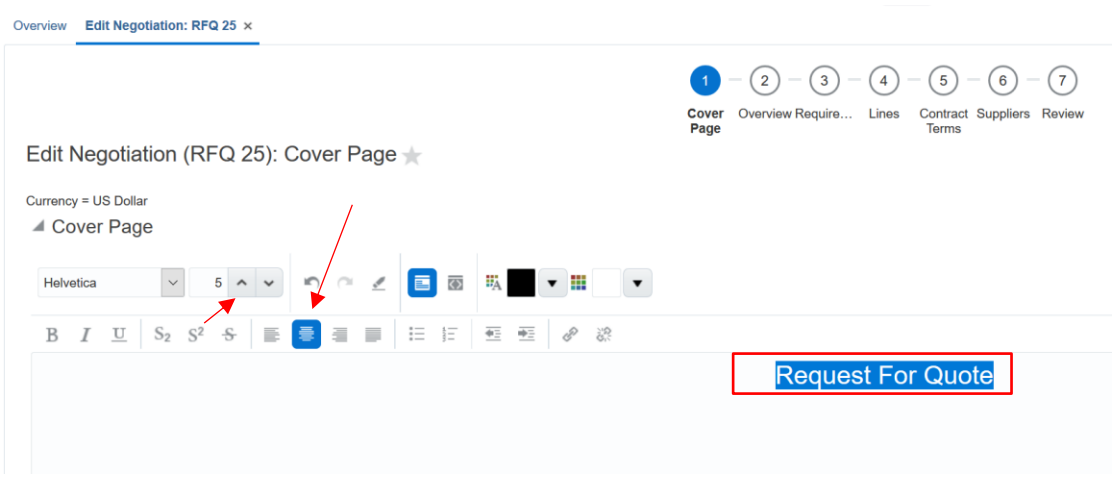
This job aid will assist you in creating a Request for Quotes negotiation template.

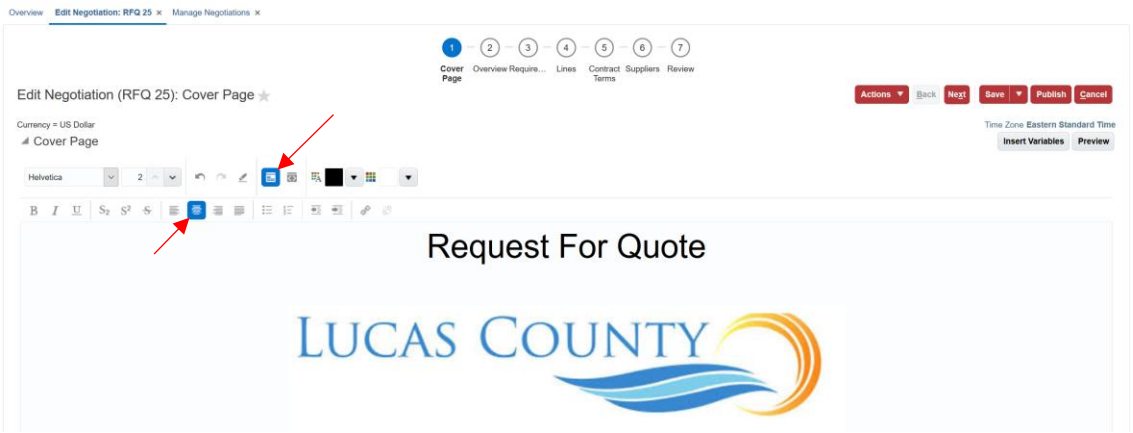
Step	Action
1	Log into Oracle. **Home Page -> Procurement > Negotiations**
2	From **Negotiations**, click the **Task** icon, and select **Create Negotiations**.
3	Enter values for the following fields: **Procurement BU**: Lucas County **Negotiation Type**: RFQ **Negotiation Style**: Standard Negotiation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

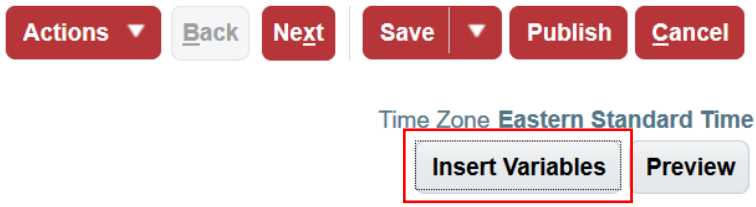
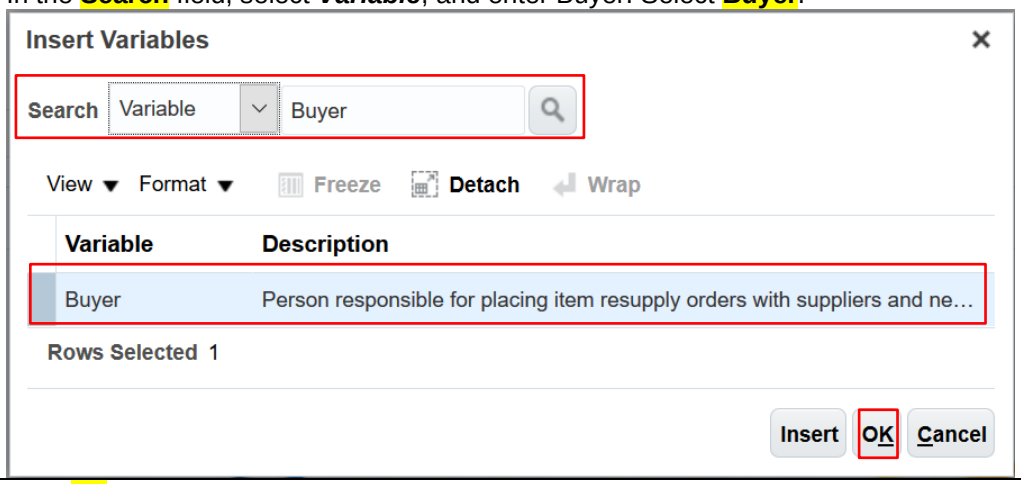
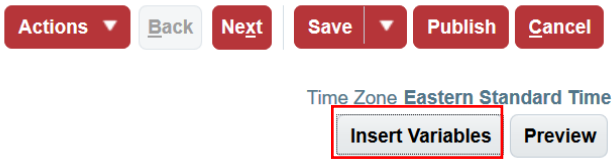


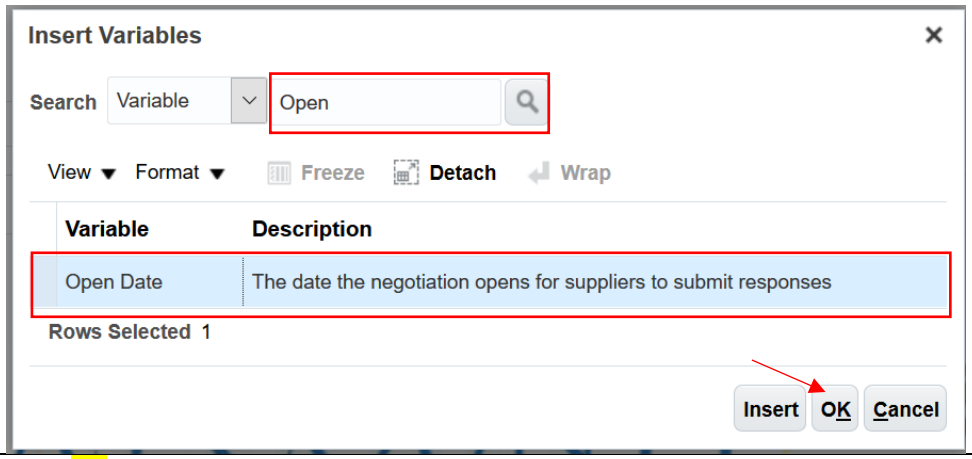
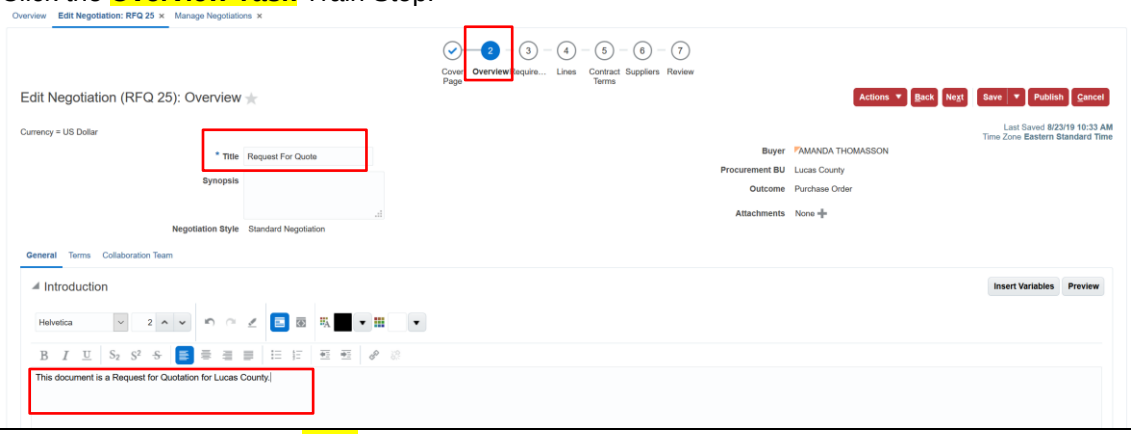
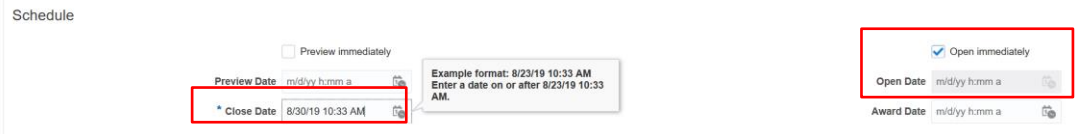
4	Click **Create**.
5	In the **Cover Page** area enter text "Request For Quote". You can further format any text you enter here.
6	Highlight **Request for Quote** text and click the **Justify Center** icon. Use **Font arrows** to increase font size.
7	Use the **enter** key on your keyboard for spacing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

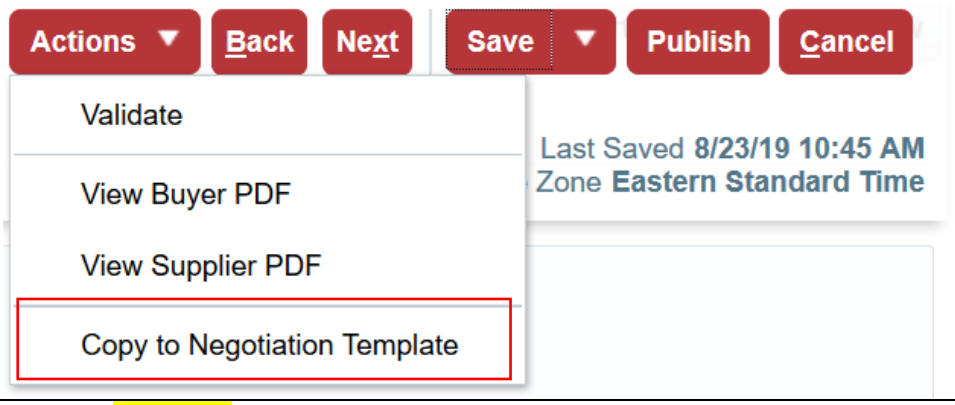
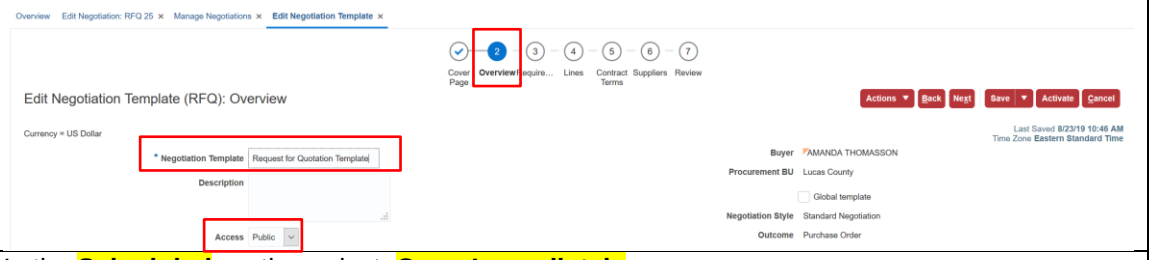
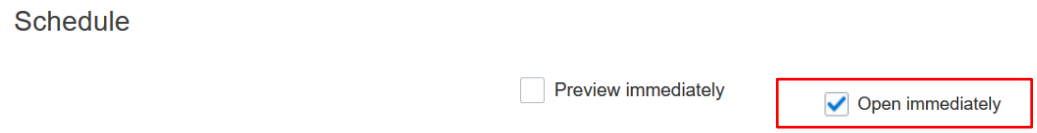


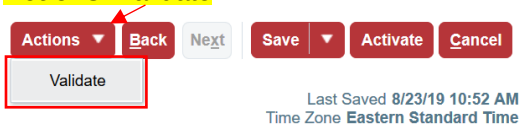
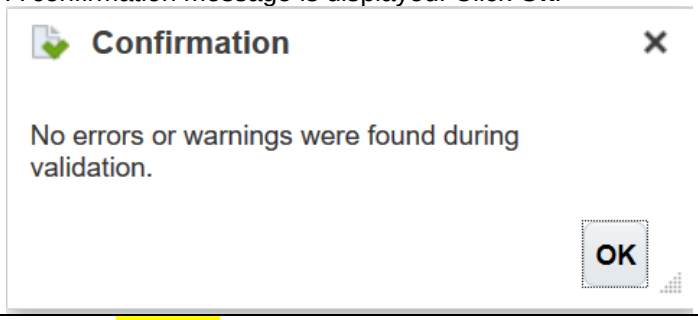
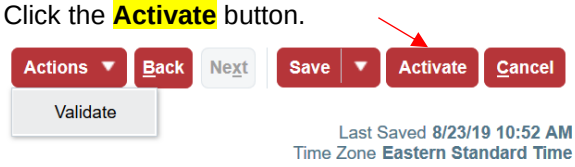
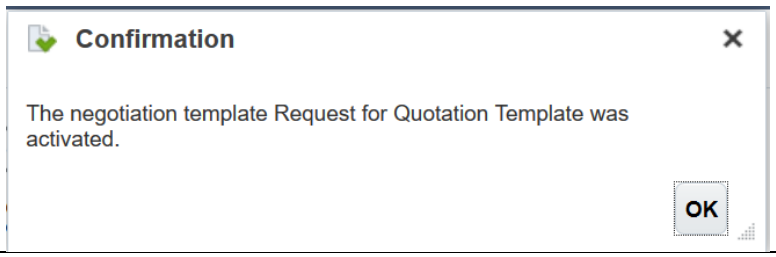




8	Type **Request for Quotation for Goods or Services** and click the **Justify Center** icon.
9	Type **Immediate Response Requested** and click the **Justify Center** icon.
10	Type **Buyer.**
11	Click **Insert Variables**. 
12	In the **Search** field, select ***Variable***, and enter Buyer. Select **Buyer**.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

15	Search for “Open” and select the **Open Date** variable**.** 
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. 
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. 
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	**Access**: **Public**. 
29	In the **Scheduled** section select: **Open Immediately**. 
30	In the Negotiation Controls section leave defaults: **Response Visibility** (Blind) **Negotiation Layout** (Negotiation Layout) **Response Layout** (Response Layout) **Contract Terms Layout** (Contract Terms Layout).
31	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**.

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	**Actions**: Validate. 
39	A confirmation message is displayed. Click **Ok**. 
40	Click the **Activate** button. 
41	A confirmation message is displayed. Click **OK**.